



April 2016

Mastering the Email RFP



Why Do We Hate RFPs?

1. They take up too much time that could be better spent on one's day job
2. They create, or further exasperate, tensions within the organization, particularly between marketing and IT
3. They never, ever end on time. Rather they drag out over months
4. It's impossible to discern actual differences between the various participants—everyone can do everything (apparently)
5. No one really knows what they should be putting into the requirements
6. No one really knows where the market is in terms of pricing—what's a fair deal these days?

Seven Tips for Mastering Your Email RFP

1. Determine Your Timetable. Then Add 50%.
2. Give the incumbent a fair shot.
3. Your Problem is Your Own. So is Your Solution.
4. Know What You Don't Know.
5. Get Input From Every Possible Stakeholder.
6. Get the Price Right.
7. Don't Let an ESPs Descriptions Fool You.

Determine Your Timetable. Then Add 50%.



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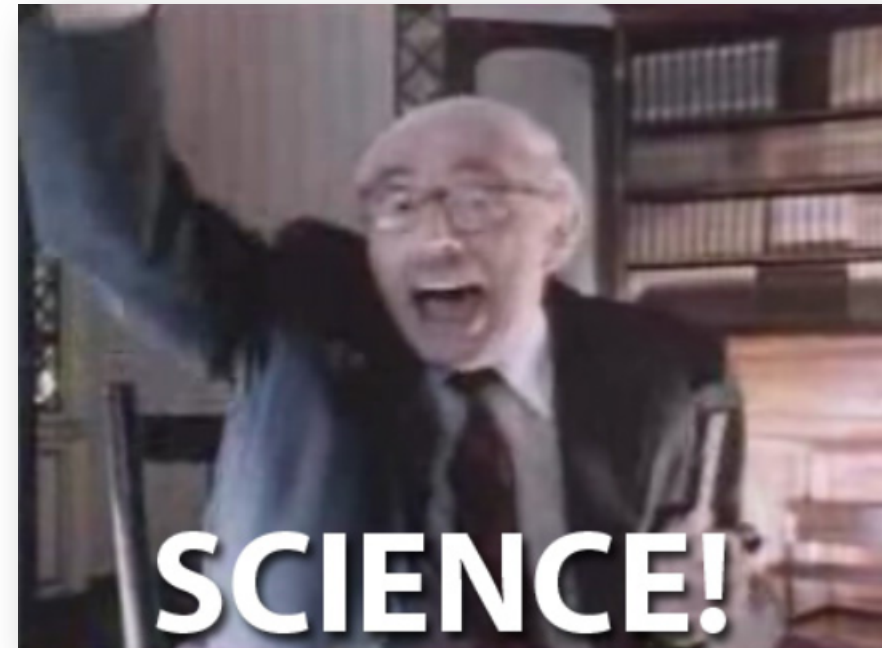


Give the Incumbent a Fair Shot



Your Problems Are Your Own So Is Your Solution

Not to get technical...
but according to
chemistry, alcohol
is a solution



Your Problems Are Your Own So Is Your Solution

5. Multichannel	
5.1	Does your system support manual and triggered multichannel marketing (e.g. email, mobile, app push, social, display, website)? (Y/N) If yes, describe capabilities (e.g. multi-step triggers, segmentation, etc.) and include the channels supported.
5.2	Does your system coordinate automated messaging within channels and across channels (e.g. multi-wave touch campaigns)? (Y/N) If yes, explain and provide screenshots of your systems multi-wave, multichannel UI. Can campaigns be set up and deployed without your assistance/professional services? (Y/N)
5.3	Does your system provide channel-based optimization based on previous user engagement (i.e. does it send campaign to subscriber in the most relevant/effective channel, whether email, mobile, or display)? (Y/N) If no, explain.
5.4	Does your system have the ability to (i) use code redemptions as a dynamic content element and (ii) insert multiple code redemptions into one message? (Y/N) If yes, explain if it's a standard or custom feature and include channels supported.
5.5	Does your system have the ability to (i) schedule and push social messages (e.g. FB posts, Tweets, Pins, Google+, etc.), and (ii) access/integrate consumer data, shared within social systems, to drive coordinated multichannel marketing programs? (Y/N) If yes, describe.
5.6	Does your system have the ability to deploy and report on push messaging (i) from a client's existing application, (ii) by segment, and/or (iii) in batch to all app subscribers? (Y/N)
5.7	Does your system have the ability to push email marketing offers in an optimized format into a client's mobile application based on device type (Y/N)
5.8	Does your system have the ability to support geo-targeting for mobile app messaging and alternating email content based on the subscriber's location? (Y/N)
5.9	Does your system have the ability to send SMS marketing messages, in batch and on a triggered basis? (Y/N) If no, explain.

Your Problems Are Your Own So Is Your Solution

1. GOVERNANCE AND DATABASE MANAGEMENT

Client currently utilizes multiple email platforms, split between promotional, newsletters, triggered and transactional emails. Newsletters will continue to use its own ESP partner and it is possible that transactional emails will continue to be handled by CDS (Salesforce). Email subscribers can be subscribed to newsletters only, promotional emails (1st and 3rd party) only, or both. And they can unsubscribe from one and not the other. Subscribers deemed inactive for one brand are re-activated when they subscribe to any other brand.

The process to manage contact frequency across all types of email is at present virtually non-existent. Each mailing is its own list, so in theory a subscriber could get 5+ emails in one day from this combination of email types across several brands as there is no ability to look up at send who has received other emails—suppression files must be uploaded several days prior to a campaign send. Please describe if and how your platform can do the following:

- Automate the email suppression process for promotional emails so that:
 - Rules can be set up regarding touch frequency that include all emails, including, triggered, transactional and newsletters.
 - Customers who have complained within a specific time-frame via any channel are suppressed
- Create a complete contact history for all email subscribers that includes all promotional, triggered, newsletters and transactional emails.
- Adjust governance rules on the fly based on subscriber engagement at the brand and portfolio level (i.e. 5 email limit lifted if all previous emails opened and clicked on).

USE CASE 2: VALUE OF AN EMAIL ADDRESS

Client knows that email campaigns are driving traffic to retail locations, but they are unable to quantify the overall impact of campaigns on sales. Please demonstrate how your platform can do the following:

1. Determine the value of an email address by source over time and help client better understand the connection between email campaigns and online and offline sales. (don't open emails or open and don't act, but buy consistently after receiving an email)
2. Go beyond last click attribution, and ultimately provide some level of digital media mix optimization.
3. Aggregate individual subscriber spending across all concepts

4. REAL-TIME DATA FEED MONITORING

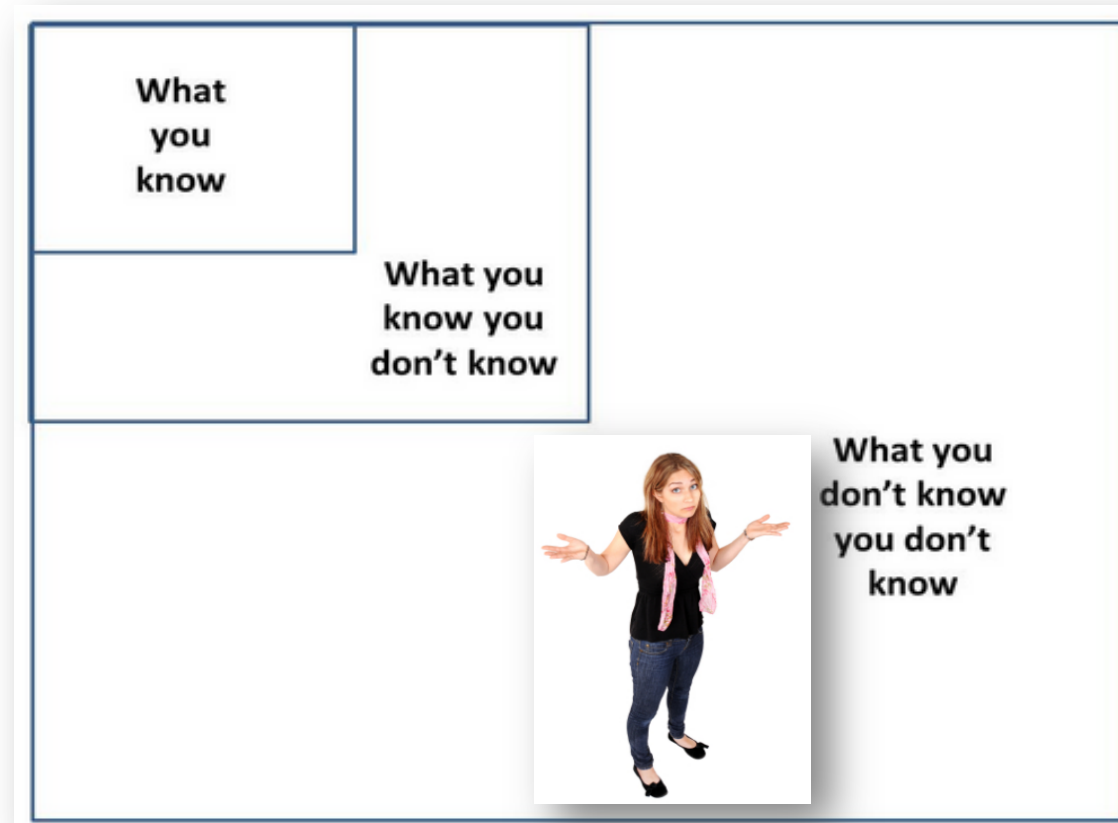
Client has over 300 sources of data that can trigger or inform an automated email across all of the store brands. Up-to-the-minute sales information, subscriber status, and recently activity such as browsing behavior are some of the sources of real-time data the client would like to leverage. Please describe how your platform can address the following requirements:

1. Monitor performance and trigger automated real-time alerts when there are deviations in counts from daily feeds from other sources to vendor--when performance falls above or below a standard deviation.

Scenarios:

 - a. Web site pop-ups: 5% of visits to the site receive a pop-up email subscription box with a % off offer in exchange for an email subscription. Client has determined over time how many emails to new subscribers this will trigger from the ESP and feed back to Client. If through real-time monitoring, this number falls above or below a standard deviation, client would like to receive an automatic alert.
 - b. Price just reduced triggers: How would you monitor a daily feed of clearance items browsed or abandoned in a cart or put into a registry, and react in real-time if the feed was stopped or delayed?
2. Building API calls between the Client, 3rd party sources and your platform. What functions (if not all of them) are available in your platform via an API call? Additionally please explain the format and type of that API, i.e. SOAP, JSON, REST, etc.

Know What You Don't Know



Get Input From Every Possible Stakeholder



Get Input From Every Possible Stakeholder

Client ESP Selection Requirements		0 - Does not meet requirement 1-Sub-par 3-No better than current solution 5-Exceeds requirement	0 - Does not meet requirement 1-Sub-par 3-No better than current solution 5-Exceeds requirement	0 - Does not meet requirement 1-Sub-par 3-No better than current solution 5-Exceeds requirement								
Number	Requirements	Vendor 1 Responses	V1 Scores	Vendor 2 Responses	V2 Scores	Vendor 3 Responses	V3 Score					
12.32	How many employees are in deliverability services?	Vendor 1 has a strong team of 7 to support client deliverability. Additionally, we have teams in Europe and Asia.		3 dedicated and an extension of the account team who is also trained in this space		Vendor 3's worldwide deliverability team is comprised of 13 deliverability professionals.						
SECTIONS		Weighting	Vendor 1	Weighted	Vendor 2	Weighted	Vendor 3	Weighted	Vendor 4	Weighted	Vendor 5	Weighted
1. Mandatory Requirements												
2. Company Information												
3. Services & Education		10	27	270	29	290	45	450	43	430	33	330
4. Functional Capability Specific Requirements		15	72	1080	126	1890	127	1905	140	2100	116	1740
5. Multichannel Requirements		10	39	390	49	490	45	450	49	490	35	350
6. Reporting, Segmentation & Testing		15	75	1125	102	1530	106	1590	118	1770	94	1410
7. Triggered and Automated Messaging Requirements		15	24	360	31	465	36	540	34	510	40	600
8. Non-Functional Capability Specific Requirements		10	41	410	58	580	57	570	61	610	63	630
9. Architecture Requirements		5	41	205	65	325	63	315	53	265	47	235
10. Security & Continuity		5	62	310	90	450	75	375	76	380	66	330
Sub Total		85	381	4150	550	6020	554	6195	574	6555	494	5625
Use Case #1		3	1	3	5	15	5	15	3	9	5	15
Use Case #2		3	0	0	3	9	5	15	3	9	1	3
Use Case #3		3	1	3	3	9	5	15	3	9	3	9
Use Case #4		3	1	3	3	9	3	9	3	9	1	3
Use Case #5		3	1	3	1	3	3	9	3	9	3	9
Total		100	385	4162	565	6065	575	6258	589	6600	507	5664
	anticipate as dedicated, and which are pooled?	Center, allowing Vendor 1 to offer a cost-effective client engagement model tailored to our customer's needs. The team of resources assigned work closely with you on an on-going basis, so that they learn your business and needs to provide you the most effective support. Vendor 1 will work with Client to determine the appropriate mix of resources and required level of engagement of each resource.		resources, we have a pool of resources that we can draw from to accommodate spikes in demand. The blended, dedicated team for Client will include team members from the following disciplines: Client Success (team lead), Email Production, Email Strategy, Analyst, Tech Services (Program Manager, BSA, Programmer) and Web Engineering.		are designed to ensure Fortune 2000 marketers' email communication objectives are accomplished in the most efficient manner possible. Vendor 3's flexible technology platform enables marketers to switch or use multiple models at once, depending on a specific need or project.		Self-Service - Vendor 3 offers a self-service model. Self-service clients have 24/7 access to all functionality via a web-based user interface. The functionality includes extremely robust list management capabilities, segmentation, content management, mailing assembly, scheduling and reporting (opens, click through, bounces, undeliverables, opt-outs, etc.). Additionally, self-service clients have access to Vendor 3's Help Desk. The self-service model is best suited for clients having a large team of employees dedicated to the company's overall email marketing efforts.				

Get the Price Right



Don't Let Descriptions Fool You



Cloud-based Marketing Stacks

More Channels

Full-Service MSP ESPs



IBM Marketing Cloud



Fewer Services



More Services



PostUp



AlchemyWorx



Point Solutions

Fewer Channels

Services Only

MASTERING THE EMAIL RFP

Technical Aspects to Consider for a Successful Project

What should I consider?

1. Campaign Inventory
 - Has everything been accounted for?
 - Are the inventory items being tracked?
2. Data Model Requirements
 - What data will be needed for personalization?
 - What data will be needed for segmentation?
3. Data Source(s)
 - Where does the data come from?
4. Feedback Loop
 - Where does the data go?
 - How often should this data be delivered?
5. Deliverability
 - What link branding will be used?
 - SPF; DKIM; YFBL; - What???
6. Automation
 - What should the machines be doing on their own?

Campaign Inventory

1. Identify your campaigns

- What campaigns do you have?
- Do you plan to keep all of them?
- What would you like to add?

2. What creative is needed?

- Isolate common elements – logo's, social icons, spacers
- Templates.

3. Track your inventory

- Create a traceability matrix as part of the RFP planning or as a step in the RFP.

Data Model Requirements

1. What data is needed for personalization
 - Are you personalizing the greeting on each message?
 - Are you adding any cart or order history items?
 - Is there any dynamic content based on profile attributes?
 - What data will the user be able to update in the profile/preference center?
2. What data is needed for segmentation
 - How do you currently segment your target audience?
 - How will this criteria change over time?
 - Can the subscriber change this criteria?

Data Source(s)

1. Identify where the data comes from
 - Are you using a CRM? Multiple CRM's?
 - Do you need web metrics to drive campaigns?
 - Do you need data from the cart on your website?
2. Establish the database of record
 - All data sent to the ESP should come from the database of record
 - Data originating at the ESP will be sent back to the database of record

The Feedback Loop

1. Feed the database of record
 - What data is needed in the database of record?
 - How should you handle changes made in the profile/preference center?
2. Identify what data is needed in the CRM
 - Does customer service need to know if the customer unsubscribed?
 - Does customer service need to see the customers campaign history?

Deliverability

1. What link branding is going to be used?
 - What sub-domains will be needed for each brand?
2. Will you be using a dedicated IP address?
 - DNS entries will need to be made for:
 - SPF
 - DKIM
 - Create the YFBL (Yahoo Feedback Loop account)
 - Get the IT team involved early so it's on their radar

Automation

1. What can we let the machines do?
 - Data loading
 - Data exports
 - Reporting
2. Long running and drip campaigns.
 - Identify the data needed to trigger long running and drip campaigns.
 - Does the ESP support automation?
 - Does the automation occur through the API (i.e. – data loading, unsubscribes, etc.)

Key Take Aways

- Have you identified the campaigns that will be served from the ESP?
- Have you identified what data will be needed to drive these campaigns?

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