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# SAMPLE: Email Marketing RFP

## Guidance and Templates

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# 1. About Econsultancy

Econsultancy is the leading source of independent advice and insight on digital marketing and ecommerce.

Our reports, events, online resources and training programmes help a community of over 75,000 registered marketers make better decisions, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy is an [award-winning online publisher of reports](#) covering best practice, user experience benchmarking, market data and supplier selection aimed at internet professionals that want practical advice on all aspects of ebusiness.

Econsultancy also operates a highly popular [training](#) division, used by some of the world's most prominent brands for staff education, both in-house and via public courses. We provide training across all areas of digital marketing and at all levels from one day courses to diplomas to Masters in Digital Marketing.

In addition, we host more than 100 events a year, such as The Online Marketing Masterclass, regular Supplier Showcases and Roundtables, an annual Future of Digital Marketing event, Digital Cream and a range of social events.

The [Econsultancy](#) site now attracts 175,000 unique users per month where they access research, read the blog and take part in discussions in the forums. And as a portal to the digital marketing community, Econsultancy members can also link up with other members and digital suppliers through our directories, as well as find a new job or new digital talent using the job listings.

Some of Econsultancy's client-side members include: Google, Yahoo, MSN, MySpace, BBC, BT, Shell, Vodafone, Yell.com, Dell, Oxfam, Virgin Atlantic, TUI, Barclays, Carphone Warehouse, IPC Media, Deloitte and Touche, T-Mobile and Estée Lauder.

[Join Econsultancy](#) today to learn what's happening in digital marketing – and what works.

Call us to find out more on +44 (0)20 7681 4052 or [contact us online](#).

## 1.1 Contact

If you would like to know more about corporate membership and our roundtables or events then please contact us on +44 207 681 4053 or [Peter.Abraham@Econsultancy.com](mailto:Peter.Abraham@Econsultancy.com).

If you have any comments or queries about this briefing then please contact Econsultancy's Research Director; [Linus.Gregoriadis@Econsultancy.com](mailto:Linus.Gregoriadis@Econsultancy.com)

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## 2. Introduction

Based on a wide variety of criteria, email marketing is now accepted as one of the most important tools in the marketer's armoury.

Some organisations see it simply a case of using a channel customers have requested to be communicated through – if they like it by email, we'll send it by email; others will identify the huge cost differential between messages delivered digitally and messages conveyed through direct mail or telemarketing and use “sticks and carrots” to encourage more customers to opt in to lower-cost email messaging; yet more marketers will argue that email allows such a rich click-stream of response history to be built up that they can segment, personalise and trigger campaigns based on the “watch, don't ask” mantra of digital marketing.

In short, email is being used by more and more consumers and business professionals and for marketers is a low cost-per-contact channel which provides a wealth of tracking and reporting information.

This report guides you through the choices that you need to make to select the right vendor for your needs. It looks at the things to consider at the planning stages, the questions you need to ask of a technology partner and some guidance on how the process could be managed.

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## 3. Setting out the RFP process

Before getting into the detail of how we choose one supplier out of the many in the marketplace, we'll need to step back and look at some wider issues.

### 3.1 Why selecting the right partner is critical

Your choice of which vendor to work with will have a huge impact on your email marketing effectiveness. If you select a partner with too few technical tools and capabilities your campaign management and execution will be compromised.

### 3.2 A technology supplier or a marketing partner?

Some organisations see email marketing technology as a commodity and, with little perceived difference in supplier capabilities, can be traded for at the lowest cost. However, most marketers probably want a deeper relationship with their key partners and we should not treat them in the same way that we treat utilities suppliers!

Your choice of service level will depend on a number of factors. For instance, an organisation just finding its way in email marketing will value the support, guidance and experienced staff that a full-service solution offers, but over time may choose to dedicate resource internally for data or campaign management.

### 3.4 What if you need more than just the technology?

ESP's all have different business models and you may want to consider what range of services you require now, and as your email experience grows. For example, some players see themselves as "technology providers" and seek to make their money through contracts that offer a huge degree of self-service dependence and very little manpower support.

### 3.5 How long do you want the relationship to last?

As a general rule, the longer the contractual period, the more attractive the terms will be from vendors. In a fiercely competitive marketplace ESP's will probably be happy to trade a lower cost for greater commitment – with many offering significant discounts for 24 or 36 month contracts. For them, a well-established client familiar with the ESP's technology and processes will also be less of a "burden" on account management and technical support and they will reflect this with better commercial terms.

### 3.6 How will you judge the winner?

A detailed RFP process will enable you to glean information in a consistent format from all potential partners but will not necessarily tell you who will be best. But restricting the questions to a binary yes/no sequence will make the tender unnecessarily complex and may not allow a good potential partner's expertise to shine through.

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# 4. The Invitation to Tender Process

## 4.1 Information you need to share

The more information you can provide ESP's at the early stage the better they will be able to respond to your needs. This does not mean that you should drown prospective partners with huge amounts of background documentation so try and strike a balance between enough and too much. There are certain things that you need to share with them:

- Timescales – when do they need to respond
- Process – if and when you require a presentation, a demo, who needs to attend

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# 5. RFP Template

## 5.1 Background to our organisation, email marketing and business goals

An introduction to the organisation and current email marketing activity.

## 5.2 Background to this project

This information should be enough for ESP's to understand why you are looking for a supplier and what you expect a partner to deliver.

## 5.3 Timescale

This should include the "Live date" for the new partner to be broadcasting and all key milestones for the evaluation, appointment and migration projects:

March 6th	Invitation to tender notification sent to all ESP's
March 12th	Deadline for notifying us that you intend to respond to this RFP and list any initial questions you have
March 14th	
March 29th	
April 3 <sup>rd</sup> to 5 <sup>th</sup>	
April 8th	
April 15th	
April 25 <sup>th</sup> -29th	
May 1 <sup>st</sup>	

## 5.4 Project deliverables

This section should break down the key elements that you require and enable the ESP to identify the technology, resources and pricing required to meet your needs. Campaign management resource and requirements – none, some or managed campaigns?

- Database management resource and requirements - none, some or managed campaigns?
- Dynamic/conditional content requirements
- Action/event-based trigger campaigns – how many and who sets them up

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## 5.8 Service Level Agreements

Any broadcast provider needs to demonstrate that they have the capability to manage their technology and your business. You should ask the vendors for any standard SLAs that they work to and review with them the critical elements. These will include:

- System up-time – should be in the “triple nine” zone (99.9% performance)
- System back-up – how many other email messaging “runways” are available
- Disaster recovery – how is data backed-up and how quickly will it be available

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# 6. Appendix

## 6.1 Roles and Responsibilities for Email Campaign

Below is a simple list of activities for the production of an email campaign. This will be a useful prompt for discussion to determine who will be actually undertaking each task and its place on the critical path. Once the client and ESP have agreed who does what and how quickly it can be turned around it will be possible to assign a cost for the campaign production.

Activity	Day of Schedule	Client	ESP
Agree Broadcast Date	1	✓	
Create mailing file	2	✓	
Upload mailing file to broadcast platform	2		✓
Create HTML version	3	✓	
Create Text version	3	✓	
	3		
	3		
	3		
	4		
	4		
	5		
	5		
	5		
	5		
	5		
	5		
	5		

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## 6.2 Detailed Specification of ESP Capability

### 6.2.1 Technology Platform, Security and Integration

Activity/Issue	Yes/No	Comments
Provide a summary of the platform hosting architecture and technologies and relevant hosting/support vendors		
Provide details of scalability, system redundancy, disaster recovery and data back-up		
Provide documentation to support system up-time		
Provide any SLA's that the platform support team works to with active clients.		

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