<<YOUR LOGO>>

Email Marketing
Request for Proposal Sample
March 2009

1. Introduction and Executive Summary

This is a sample of what a brief executive summary could look like. It should be brief expressing needs at a high-level

<<Company>> is seeking a supplier partner to provide hosted email services and campaign management. The purpose of this Request for Proposal ("RFP") is to solicit information and offers for these services from suppliers interested in collaborating with <<Company>> and able to provide solutions that meet all future requirements for <<Company's>> email delivery needs.

The future for <<Company's>> email will require integration, automation and personalization. <Company>> requires integration of three disparate email services under one provider in order to optimize customer communication by providing consistent messaging and enhance marketing efforts by maximizing each customer contact with relevant marketing. Advanced integration with <<Company's>> CRM analytics systems will allow for automation of recurring campaigns and customer service notifications. Integration with customer databases and enhanced dynamic content features from our service provider will allow more personalization and real time messaging for customer service.

2. Request for Proposal Timeline and Protocol

Here you should outline what the RFP process will look like. Be sure to allow enough time for providers to pull together a quality response. Rushing through the process is no good for anyone.

2.1 Acknowledgment of RFP Receipt

Within 48 hours of your receipt of this RFP via email to: contact@company.com to confirm receipt.

2.2 RFP Questions, Inquiries, and Clarifications

All written questions and inquiries will be answered in writing. In order to speed the RFP process, <<Company>> requests that all questions regarding the RFP be submitted by <<a specified date in writing or via scheduled 30 minute conference calls as defined by the company>>. Responses will be shared with all companies involved in the RFP in order to ensure the communication of <<Company's>> needs is as clear as possible.

2.3 Submittal Guidelines

Please provide an electronic document <<specific Word, PDF, other>> (e-mail attachment) response to the RFP to <<Contact>> at: contact@company.com . Hard copies are not required, but if you wish to submit one, please send to the following address:

>   <<Mailing Address informaiton>>

2.4 Disclaimers

Please be aware that <<Company>> is not committed to any course of action as a result of its issuance of this Request for Proposal and/or its receipt of a proposal from you or other firms in response to it.

3. Company Overview

Keep these sections brief. History should express company longevity and foundation – limit to one paragraph. Vision is relative to the future vision of the organization and should also be kept to about one paragraph. If you have an international presence describe the worldwide service(s) offered briefly; especially if you plan to include the international audience in your email marketing program.

3.1   History

<<YOUR HISTORY>>

3.2   Vision

<<YOUR COMPANY VISION>>

3.3   Worldwide Service

<<YOUR INTERNATIONAL PRESENCE>>

4. Request for Proposal Instructions

Include any specific instructions here. The recommendations below may not be applicable to all – additionally, there may be steps to include that are not listed here. These serve as examples only – instructions should fit your needs.

4.1   Definitions

Organizations receiving this RFP shall hereinafter be referred to as: "Bidders", "Suppliers" or "Vendors".

4.2   Selection & Implementation Process

Potential Suppliers will be evaluated on their responses in accordance with <<Company's>> pre-determined selection criteria. Responses shall be graded numerically for selection purposes and weighted accordingly to meet the specific needs of the organization.

Upon review of the responses, additional questions may be required of both parties. Additional negotiations may occur to secure the best competitive value for <<Company>> and its participants. <<Company>> may elect to forego this phase if it becomes apparent that a firm has proposed a sound approach and aggressive pricing which exceeds that of its competition.

4.3   Intent to Participate

In the event you intend to participate in this RFP, please inform us of your decision in writing no later than <<DATE>>. Please complete Appendix A – "Intent to Respond From" and e-mail the completed form to: contact@company.com.

4.4   RFP Questions, Inquiries and Clarifications

<<Define QA process – submit via writing or via conference call. Include dates and deadlines>>

Every attempt will be made to answer all inquiries from each bidder in a complete and concise manner. To ensure consistent interpretation of the RFP, the written answers will be made available to all suppliers including participant making the inquiry. <<You may or may not choose make your chosen participants transparent, but know that you have no obligation to keep it confidential. Often times keeping it transparent can work to your benefit.>>

Each supplier has a duty to inquire about and clarify any RFP issues that the supplier does not fully understand or believes may be interpreted in more than one way. <<Company>> shall have no obligation to correct, nor bear any responsibility for errors (whether by commission or omission), ambiguity, or inconsistency in this RFP. If any bidder is aware of or believes that the RFP contains such an error, it is the supplier's responsibility to promptly notify <<Company>> in writing.

By submitting a proposal, the supplier represents that they have read and clearly understand this Request for Information and they are capable of providing the required services on the agreed implementation date. The contents of any submitted proposal will be considered an offer to contract by the bidder.

4.5 Response Preparation and Format

All responses to this RFP should be complete and concise. Suppliers must submit their proposal in strict accordance with all requirements of the RFP. Deviations, clarifications and/or exemptions must be clearly identified and listed separately as alternative items for consideration. The foregoing notwithstanding, you are encouraged to offer various options to meet our goals and objectives.

YOUR RESPONSE MUST BE RECEIVED NO LATER THAN <<DATE>>.
Suppliers may also be asked to give formal presentations and should be prepared to discuss all aspects of the proposals during this process.

4.6 Supplemental Information

Unless supplemental oral commentary is specifically requested, oral communications outside the scope of the procedures detailed in this RFP will not be considered in connection with your proposal.

4.7 Non-Disclosure

This RFP contains information that is Proprietary to <<Company>> and its subsidiaries. No part of this RFP may be reproduced, in whole or in part, unless specifically required for the bidder's internal use in responding to this RFP. Disclosure or distribution without the express written consent of <<Company>> and its subsidiaries is strictly prohibited.

The bidder will regard and preserve as confidential all information obtained from any source as a result of this RFP. It is for proposal purposes only and is not to be disclosed or used for any other purpose. <<Company>> reserves the right to request the return or the destruction of any of the material contained in this RFP document.

Information received in response to this RFP will be held in strict confidence and not disclosed to any party other than <<Company>> without the express written consent of said bidder.

4.8 Right to Change/Modify Response

This RFP is not an offer to contract, but represents a definition of our requirements. Your preparation and submission of a response does not commit <<Company>> or its subsidiaries to award the business to any bidder even if all of our requirements are met. <<Company>> and its subsidiaries reserve the right to amend, supplement, withdraw or otherwise modify our requirements in whole or in part and seek additional bidders to submit bids. We also reserve the right to accept or reject any or all responses to the RFP and to enter into discussions and/or negotiations with more than one qualified bidder at the same time should the action be in the best interest of <<Company>> and its subsidiaries. In no event will <<Company>> or its subsidiaries be responsible for any costs associated with the preparation of your proposal. All responses to this RFP will become the property of <<Company>> and its subsidiaries.

4.9 Terms of Responding

Responding to this RFP constitutes acceptance by bidder of all terms and conditions printed in this document, unless otherwise noted. All respondents to this RFP must agree to the terms and conditions listed with an understanding that they will be incorporated into an agreement.

4.10   Effective Term of Response

Following the date of submission of the proposal, and prior to contract award, the terms and conditions of the offers shall be binding upon the bidder for a period of one hundred and eighty (180) days.

<<Company>> reserves the right, in its sole discretion, to contract with a single bidder or multiple bidders based on the overall impact of the bidders' proposals or on any other evaluation criterion. Only the execution of a definite, binding agreement(s) will obligate <<Company>> in accordance with the terms and conditions contained in such agreement(s).

4.11   Not an Offer to do Business

The issuance of this RFP does not imply that <<Company>> is making an offer to conduct, expand, or terminate business with any RFP participant. <<Company>> reserves the right to accept a complete response, or portion thereof, or to accept none of the responses. Your preparation and submission of a response does not commit <<Company>> to award the business to any bidder even if all the requirements are met.

4.12   Reliance on <<Company's>> Comments

For the purposes of this RFP, no bidder may consider any oral representations or statements by an officer, employee, or agent of <<Company>> to be an official expression on <<Company's>> behalf, unless such representations or statements are made in a written communication from <<Company>> executed by a duly authorized representative of <<Company>>. All statements from <<Company>> regarding any substantive matter associated with this RFP will be in writing and copies thereof will be forward to all bidders under consideration.

4.13   Supersede Agreement

By submitting a proposal in response to this RFP, Bidder hereby agrees to offer <<Company>> the option to terminate, without penalty, all or a portion of any existing agreements between Bidder and <<Company>> for the services specified herein. The option to terminate may be exercised immediately, only in the event that <<Company>> selects the incumbent service provider as the winning bidder.

4.14   Binding Proposal Acknowledgment

A duly authorized officer of the bidder must sign each proposal and the completed proposal shall be without inter-lineation, alterations, or erasures. It will be assumed that all representations made in your proposal will be binding and that your organization has agreed to all the requirements of the RFP unless specifically stated otherwise.

4.15   Review Rights

Proposals submitted might be reviewed and evaluated by any person(s) at the discretion of <<Company>>, including employees or contract workers within <<Company>> and any third party or independent consultants retained by <<Company>> now or in the future.

We reserve the right to accept or reject any or all responses to this RFP and to enter into discussion and/or negotiations with one or more qualified bidders at the same time, if such action is in the best interest of <<Company>>.

4.16   Unsuccessful Proposals

Non-acceptance of any proposal does not imply any criticism of the proposal and/or any implication that the proposal was deficient. Non-acceptance of any proposal will mean only that another was deemed to be more advantageous to <<Company>> and/or <<Company>> has rejected all proposals. <<Company>> is not obligated to accept the proposal offering the lowest cost of services.

Upon award and execution of a binding agreement, the bidder's contacts for the unsuccessful bidders will be notified.

4.17   Copyright

No part of this publication may be reproduced, reformatted, or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or through any information storage and retrieval system currently available or developed in the future, without prior written approval of <<Company>>. Copyright law and international treaties protect this document.

4.18   Performance Guarantees

<<Company>> expects the chosen firm to provide performance guarantees with associated fees/premiums at risk. You should demonstrate your commitment in the Technical Questions portion of this RFP.

4.19   Advertising

<<Company>> and its subsidiaries will seek to agree with the Supplier the terms under which the <<Company>> name or any of its trademarks or service marks can be used in advertisements or those of any of its subsidiaries. Any use outside of such an agreement is strictly forbidden.

The Supplier will be responsible for obtaining any and all licenses and permits and for complying, on a voluntary basis, with all applicable local, state and federal laws, codes and regulations in performance of services at premises of <<Company>> and its subsidiaries.

4.20   Independent Contractor

Nothing contained in this RFP shall be construed to constitute the bidder as a partner, employee or agent of <<Company>> or its subsidiaries, nor shall either party have the authority to bind the other in any respect, it being intended that each shall remain responsible for its own actions. The Supplier is retained only for the purposes and to the extent set forth in this Agreement, and Supplier's relationship to <<Company>> and its subsidiaries shall be that of an independent contractor. Neither the Supplier nor the Supplier's employees assigned to perform services shall be deemed to be employees of <<Company>> or its subsidiaries. The Supplier shall be solely responsible for the payment of compensation to the Supplier's employees assigned to perform services hereunder. The Supplier shall be solely responsible for the payment of employee benefits, if any, workers' compensation, disability benefits and unemployment insurance, and for withholding and remitting any local, state or federal payroll-related taxes.

4.21   Conflict of Interest

The bidder shall disclose any actual or apparent conflict of interest that may exist between the bidder, any employee or owner, or any party that the bidder contemplates may provide services or materials to <<Company>> or its subsidiaries if the bidder is selected and any party having an interest in <<Company>> or its subsidiaries.

4.22   Proposed Timetable

The following is the proposed timetable developed for this project. You will be notified of any significant changes that may occur:

EVENT	DATE
Distribute Request for Proposal	DATE
Intent to Participate – Response due	5 Business days from distribution
RFP Questions are due	5 Business days from intent due date
<<Company>>'s Response to Supplier Questions	3 Business days from question receipt
RFP Response Due	10 Business days from responses provided
<<Company>> to complete review	30 days from receipt or later

5. Business Size and Ownership Certification <<if applicable>>

<<Company>> is committed to enhancing business opportunities for small, minority, and women-owned business enterprises (SBE,M/WBE) as 1st and 2nd Tier Suppliers. Should your company qualify for any of the designations listed in Appendix C, please ensure that you also submit a signed copy of the Business Size & Ownership Certification form when you submit your bids.

6. Operational Capabilities

Following are a series of questions ranging from very basic to very complex. Not all questions would be applicable to you – and some of your needs may not be addressed. This is a comprehensive list of examples to be leveraged to determine phrasing and positioning.

A. General Company Information

1. How long has your company been in business?

2. What is your mission statement?

3. Has your company changed ownership in the last 3 years? If so, please describe the changes in ownership.

4. Advise of any significant mergers, acquisitions, or projected changes in ownership of your company within the next 12 months.

5. Please describe your major divisions and each of your primary products by division.

6. Please describe any strategic partnerships that you currently have with other companies and <<Company Competitors>>.

7. If you currently do business with <<Company>>, what percent of your total business does <<Company>> represent?

8. Is your company currently under investigation?

9. Provide three (3) client references. Include: name of company, name of primary contact, responsibility, phone number, and e-mail address.

10. Is your company publicly traded or privately held?

11. Provide any financial statements, such as a Dun & Bradstreet report, company annual reports, etc.

12. Provide a one page summary describing your company's traits, attributes, capabilities and why you are interested in participating in this program.

13. Describe how your company's capabilities are distinguishable from your competitors in your industry.

14. Provide any details of any pending disputes or threatened litigation between principal shareholders, partner, wholly owned subsidiaries, or any sub-contractors that may impact this program.

B. Account Management

1. In the event that <<Company>> selects your company to provide <<SAMPLE: complete email management and delivery services, including but not limited to, email template design, HTML programming, scheduling and sending of all emails, how will you structure your support personnel to provide adequate services>>? What account management options do you offer?

2. How do you execute account reviews? How often?

3. What are the Service Level Agreements (SLAs) for technical support?

4. Describe the formal and informal communication processes. How will communications occur between our companies?

5. Describe your documented service standards regarding returned phone calls or client inquiries?

6. How do you share "best practices" information with customers, and for apprising them of important or urgent developments in the email marketing industry?

7. Describe your method for apprising customers of important product performance issues, developments or updates.

8. Describe how your system accommodates multiple departments that require control and access to the email system.

C. Campaign Management

1. What is your capacity for retaining response and opt-in/opt-out data? What length retention period can we expect?

2. How do you recommend that email response data be passed back to our campaign management system? Include frequency, file format, protocol, security, etc.

3. Describe how to execute trigger based campaigns in your system.

4. Explain the campaign management process within your system.

5. Please discuss size and volume limits related to the data we can store in your campaign management tool.

6. Please describe your ability to apply predictive models to optimize our marketing campaigns.

7. Describe the delivery format capabilities of the platform (i.e. text, HTML, multi-part, SMS, RSS, Post to Social, etc).

8. Describe your capability to establish triggered campaigns across formats. For example, if we send an email and it bounces, it triggers an SMS to the cell phone on record.

9. Describe how your platform hosts data (list-based, relational database, etc) and how you can segment data within the user interface.

10. Discuss the process for normalizing data in your system (field names, upper/lower case format, etc).

11. What are your requirements and guidelines around assigning dedicated IP addresses?

12. Provide detail around your various levels of service (full-service, self-service, strategy, deliverability, etc)

13. How do you preview campaigns in all their formats before launching?

14. Detail the ideal process for executing QA prior to message launch.

15. If necessary, how would we stop, and then re-start campaigns?

16. How could we control email frequency to recipients through your application?

17. Describe data and content archive management for the system.

18. Describe how we could integrate systems to allow for triggered automated messaging based on external actions: such as email opt-in, change in preferences, catalog request, online purchase or other actions?

19. How would we automate event-driven mailings such as subscription renewal reminders or birthday greetings?

20. How would you recommend we leverage your platform to automate a sequence of messages based on where someone is in the customer, product or purchasing lifecycle?

21. Please describe your dynamic content capabilities and the reporting capabilities of the dynamic content rendered.

22. How would we dynamically generate personalized URLs at the individual level?

23. How would we conduct A/B or multivariate testing within your application? What are your systematic limitations as to what we can test within an email?

24. How will your system help <<Company>> manage a large queue of promotional and trigger event emails while simultaneously giving the highest priority real time transactional emails?

25. How do you see yourselves fitting into an organization with an established campaign management system? A) What expertise do you bring to CRM? Please provide detail around your best practices organization. B) How do you envision yourselves integrating with our in-house system? C) Are you able to fulfill on a pre-selected list in some cases and on selection criteria you apply to the data in other cases? D) Please give examples of successful integrations you have performed.

26. Describe your system's workflow management process.

D. Data Security and Storage

1. Describe your redundancy procedures should a server failure occur.

2. Describe your data backup policies and procedures.

3. What measures or processes do you have to ensure that our customer data will remain safe in your databases and throughout the transfer of data between our company and yours?

E. Deliverability

1. Describe the deliverability services team, their responsibilities and how they interact with clients.

2. Provide detail around the deliverability tools available through your UI for client use.

3. Discuss your ability to provide real-time alerts for deliverability by ISP, blacklist or abuse issues?

F. Implementation

1. Describe your proposed approach to transition from our current state to your proposed future state. Include an itemization of the required expenses to make such a transition, and identify the individual in your organization who will act as a focal point for implementation. Include an organizational chart depicting your proposed implementation team, including titles and functional roles, and any subcontractors. Describe your escalation procedure for addressing problems during implementation. Provide a milestone chart and include roles & responsibilities of both your company and <<Company>>.

2. What new and improved program(s) can you see your company being able to activate within 30 days of implementation being complete to help our email program immediately?

G. List Management

1. Describe how we would query recipient data from the user interface.

2. Explain how we would merge lists being imported through the user interface.

3. Please describe the data purging and archiving process including how long content/data is stored.

4. Describe your opt-out management process.

5. Describe how new data fields can be created, edited and deleted in the existing database including an systematic limitations.

6. Describe your bounce/undeliverable and feedback loop management process.

7. What is the maximum number of attributes allowed for each customer record and the flexibility of the data file layout?

8. Explain how we would get data in to the system.

9. Describe your real time progress monitoring capabilities through the UI.

10. How many users can have access to the user interface at one time concurrently?

11. Describe the process for creating a user in the system.

12. Does the administrator(s) have access to user passwords?

13. Can the administrator(s) change user passwords?

14. Do we need to contact you for any user actions?

H. Platform Integration (APIs)

1. Describe your ability to interface with Web-site analytics systems.

2. What is involved in automating list imports/exports through FTP?

3. What is the timeline and process for account implementation involving data integration?

I. Professional Services

1. Describe any additional services available, including but not limited to: creative, strategic and technical services

J. Reporting and Analytics

1. What email response data do you typically capture (e.g., delivered, bounced, open and click through rates) and what are your capabilities for segmenting it by customer or campaign type?

2. Please provide detail around campaign reporting capabilities for all email activity (sent, bounces, opens, forwards, clicks, unsubscribes etc.)

3. Describe your system capabilities to track multiple conversion activities (i.e. sales, enrollment etc.)

4. Describe reports available through the UI.

5. Describe any mechanisms available to track Web page visits.

6. How would we report on the Web-site click-stream, and track downstream purchase conversions after the initial click within an email?

7. Explain how the system reports on which dynamic content rules are being triggered most often, and what links are associated with those rules.

8. How would we export reports via the user interface as well as APIs?

9. Explain how we would drill down into our results and create customized reports within your application.

10. Can demographic or profile information be added after the mailing has been sent and still used for analysis?

11. How would we set the business rules for handling hard and soft bounces?

12. Describe your forward-to-a-friend tracking functionality. How does it ensure our message will not be forwarded to someone who has previously unsubscribed from our mailings?

13. How long will reporting information be available after the campaign is mailed?

K. Technology Infrastructure

1. Describe your ability to automatically transfer data between your database and our database, including method of transfer, technology(ies) utilized and set-up process.

2. Describe your ability to interface with in-house list management systems.

3. Describe your ability to support PGP Encryption.

4. Describe the capabilities to make changes to an email after it has launched – ie images, links, etc

5. Describe the architecture of your system.

6. Identify all hosting service providers.

7. What technologies are used (Java, ActiveX, etc)?

8. What OS platform(s) do you run within your product infrastructure?

9. Will client side hardware or software be required?

10. Describe your hardware platform.

11. Do you use load balancing?

12. Which database(s) are used for custom application development?

13. Which relational database(s) are used in your product environment?

14. How is change control managed?

15. How is testing accomplished?

16. Describe your database structure in terms of how data is stored.

17. Discuss your scalability.

18. What is the average and maximum speed of email deployment through your ASP platform?

19. What is the volume and frequency of email in the largest campaigns you send?

20. Describe your software maintenance and update procedures.

21. Describe your problem resolution and escalation procedures.

22. How does your company manage black-listing/white-listing or ISP inquiries and complaints?

23. Describe your integration opportunities with web analytic systems and services.

L. Training

1. Describe the training process, including schedule, formats and costs.

M. CRM

1. Do you have the ability to handle and manage a large relational database? A) Are there limits in terms of size/number of variables and observations you can accept from us? B) Please indicate the pricing impact of storing relational data on your servers.

N. Pricing/Cost

1. Please detail your pricing structure.

Email Distribution Work Scope

Provide an outline of your work flow, email programs/campaigns executed, volume, any future plans to consider, internal support team/execution team, challenges, etc.

Email Execution

Email Marketing Management

Email Programs and Targeting Tactics

Deliverability Needs/Concerns

Challenges

Intent to Respond Form

Please list your company name, printed contact information, and intent to participate in this Request for Information.

Return the signed document to <<CONTACT>> via email: contact@company.com no later than <<DATE>>

Company Name: _____

Contact Name: _____

We DO NOT intend to participate in this RFP: _____

Brief Reason:

We DO intend to participate in this RFP: _____

Signature _____

Date   _____

Confidential Disclosure Agreement

<<INSERT YOUR STANDARD NDA>>

Business Size and Ownership Certification

<<INCLUDE STANDARD REQUEST HERE>>