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Customer Engagement Platform RFP Guide

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Customer Engagement in a Perpetually Connected World

Today's perpetually connected customer is interacting with your brand through digital, mobile & social channels, leaving behind rich trails of behavioral data. Customers are expecting brands to deliver 1:1 personalization, based on recent & historical behavior, in a consistent manner across all platforms.

As a result, the nature of customer engagement marketing has changed dramatically over the past few years. For the modern marketer, being good at email marketing is no longer enough; instead you need to be able to engage customers across a journey that might span websites, email & mobile apps. "Newsletters", sent at a fixed time to every customer, are producing diminishing returns; instead you need to trigger communications based on customer behavior. Finally, it's no longer sufficient to send the same content to every user; instead you must meet customer expectations with 1:1 Recommendations.

Preparing Your Request for Proposal

Modern marketing organizations must invest in technology solutions whose vision and capabilities are aligned with today's needs. To assist with this, we have organized the various capabilities you need to evaluate into the following categories, with an extensive list of questions from these categories:

- Data & Identity Management
- Segmentation
- AI for Marketers
- Cross Channel Marketing
- Messaging
- Reporting & Analytics
- Platform
- Services & Support
- Privacy, Security & Compliance

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Data & Identity Management

Data Ingestion

1. What data types and formats does the solution support? Can your solution handle structured, semi-structured, and unstructured data using schema-less ingestion? Describe the methods through which your solution ingests data.

2. Does your solution provide pre-built connectors to ingest data from source systems?

3. Does your solution support both real-time data streaming and batch processing?

4. Can your solution ingest real-time behavioral event data, product catalog data, customer interaction data, transactional data, and customer account data types and make it available for use immediately?

Profile Unification

5. Does your solution connect and resolve identity, event, and attribute data from multiple touchpoints, devices and channels into unified customer profiles?

6. Is your solution capable of identity resolution between known and anonymous user data?

7. Does your solution maintain unsubscribe or opt-out information for each channel?

8. Can your solution assess data in the unified profile to determine the most accurate version of name, address, lifecycle state, and other attributes. Are data fields constantly updated as new data becomes available?

Data Access

9. Do business users have direct access to all data in the unified customer profiles without IT configuration and development? Is data available for segmentations, analytics, campaigns, and other system functions?

10. Can data from unified customer profiles be accessed in real-time by external and internal systems via API connections, Webhooks, or query?

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Segmentation

Segmentation

11. Does your solution have the ability to create advanced segments based on multiple conditions and dimensions of data, including real-time behaviors, user preferences, events, previous messaging engagement, transactions, demographics, location, and user attributes? Is there a limit to the number of criteria that can be used simultaneously to define a segment?

12. Can segments created in your solution be used to target communications across all channels (i.e. email, mobile, web, in-app, digital, print, etc.)?

13. Do segments update automatically as new data comes in or is updated? How often are segments updated?

14. Does your solution have a visual interface in which marketers can create and manage segments without technical knowledge?

15. While building a segment, can you see segment counts for each channel? Do segment counts update in real-time?

AI for Marketers

AI Predictors

16. Does your solution offer predictive scoring for customer actions? What scores are available, i.e. buying propensity, user engagement, and affinities? Are scores out-of-the-box and/or customizable?

17. Can predictive scores be used for dynamic segmentation and to automatically trigger communications based on a user's score?

18. Does your solution provide an interface for business users to generate, deploy, and refresh custom predictive models without involvement of a data scientist or IT?

19. Does your solution have the ability to integrate with and bring in in-house models into the system?

20. Does your solution offer transparent models that provide detail into the model feature inputs and the performance outputs?

AI Assistants

21. Does your solution utilize deep customer understanding and customer data to automatically generate personalized, brand-aligned content across channels using AI, demonstrably reducing campaign development time while improving relevance and marketer efficiency?

22. What specific marketing assets (e.g., email subjects, body copy, CTAs) can your AI Assistants generate and what channels are supported by your AI Assistants?

AI Agents

23. What specific marketing tasks can your AI Agents autonomously execute, and how are they configured to achieve predefined business goals?

24. How do your AI Agents use real-time customer data to make decisions and self-optimize campaigns without direct human intervention for each action?

25. Describe the guardrails and oversight mechanisms available to marketers when deploying AI Agents for automated campaign execution.

26. How do your AI Agents learn from past performance and evolving customer behavior to continuously improve their decision-making and task execution?

Recommendation Engine

27. Does your solution have a visual interface in which marketers can create and manage recommendation types without technical knowledge? Is this a native capability or through a partnership/ additional integration?

28. Describe what types of recommendations your solution supports (i.e. collaborative filtering, trending items, similar items, new items, expiring items, etc).

29. Does your solution ingest product, content, and offer catalog data and use dimensions of that data (i.e. product name, price, etc.) within dynamic recommendations?

30. Does your solution allow us to import recommendations from our in-house team? If yes, describe how.

31. Does your solution support combining multiple types of recommendations within a template? If yes, describe how.

32. Does your solution generate unique recommendations for every user based on real-time data? Does it offer the ability to preview recommendations for different users and add filters?

33. Can your solution generate ready-to-deliver content using templates that select different items (text, images, offers, etc.) for different individuals based on fixed rules, predictive models, or both?

Cross Channel Marketing

Orchestration

34. Does your solution provide visual customer journey mapping to orchestrate multi-stage, multi-logic sequence of messages that execute across channels?

35. Can your solution trigger messages across multiple channels simultaneously from one journey, including across email, mobile, web, in-app, push, messaging, customer support, and offline channels?

36. Can journeys dynamically adapt subsequent messages in response to customer interactions, including interactions on other channels?

37. Can your workflow trigger an API call to another solution? Describe how that is done.

Campaign Management

38. Describe your solutions abilities to schedule messages and recurring campaigns. Can campaigns be paused, rescheduled, and/or modified?

39. Does your solution enable frequency capping? Can you limit the total number of communications sent globally and/or by user in a certain timeframe to avoid fatiguing users?

40. Does your solution provide support for day-parting (i.e. limiting triggered messages to go out only on certain days and times)?

41. Does your solution allow you to set priority levels at the campaign level and at the message level?

42. Does your solution provide a calendar view of all past and future campaigns?

Personalization

43. Can your solution personalize messages in real-time and determine the next-best-action at the user-level based on up-to-the-minute data in the customer profile, predictive scoring values, and customer behaviors?.

44. Does your solution enable marketers to configure personalization outcomes that drive customer journey optimization?

45. Describe how your solution creates dynamic content. What user and event attributes can be used to personalize content?

46. Can your solution fetch external content in real-time from in-house personalization systems and include them in messages right before sending?

47. Does your solution autonomously update the text, images, offers, and other template elements in real-time for each user based on the latest user data and behaviors?

48. For which channels do you support dynamic content personalization?

Triggered Workflows

49. Can your solution execute responses and trigger communications across channels based on customer behaviors, events, states, and other defined criteria as well as changes in

product data, status, and pricing?

50. Can your solution trigger a message in one channel based on a real-time interaction in another channel?

51. Describe what rules and triggers exist to automate lifecycle and transactional campaigns within the campaign workflow.

52. Can your solution trigger a response to buyer behavior in real time, not just based on the campaign schedule?

Messaging

Design

53. Does your solution provide a visual template editor for non-technical marketers to use? If yes, for which channels?

54. Does your platform offer a variety of customizable message templates to choose from? Can users easily customize these templates to their brand guidelines?

55. Does your solution allow templates to be reused? Do you provide the ability to reuse snippets of code across multiple email templates?

Email

56. Describe your solution's ability to support email.

57. Are dedicated IPs available? Do you provide IP health monitoring?

58. Does your solution provide deliverability reporting?

59. Does your solution have the ability to throttle send, and can you adjust throttle post deployment?

60. Does your solution allow us to edit the HTML of the message? Does the HTML coding tool support scripting or easy insertion of dynamic content?

61. Does your solution provide the ability to create or edit customized and mobile-optimized email templates without needing to know HTML or CSS?

62. Does your solution have a live preview while editing? Can you view personalization previews for different types of users? Can you preview an email across all inbox types and mobile devices?

SMS/MMS

63. Describe your solution's ability to support SMS messaging.

64. Describe your support for 2-way messaging?

Mobile Messaging

65. Describe your solution's ability to support mobile push notifications.

66. Describe your solution's ability to support in-app messaging. Which in-app template types are supported?

67. Do you provide Mobile APIs or SDKs for Android and iOS?

68. Does your solution support deep linking?

69. Which development platforms do you support?

Additional Channels

70. Describe your solution's abilities to create, update, and syndicate a custom audience to digital ad platforms such as Facebook, Google, etc.

71. Describe your solution's ability to support consumer messaging apps.

72. Describe your solution's ability to support IVR calls.

73. Describe your solution's ability to support direct mail.

74. Describe your solution's ability to add new channels.

Reporting & Analytics

Testing

75. Describe your A/B/n testing capabilities across channels (i.e. email, mobile, app, web, etc.).

76. Does your solution have the ability to automatically pick the winner of A/B tests and continue a campaign based on this winner?

77. Does your solution have the ability to test multiple template and campaign components simultaneously within a workflow?

78. Describe how A/B tests are analyzed. Do you calculate statistical significance?

79. Does your solution provide the ability to create holdout groups?

80. Can your solution send test emails and mobile messages to specific people or groups of people before a live send?

Reporting

81. Describe your ability to measure campaign performance across all channels (i.e. email, mobile, app, web, etc.) in a central location.

82. Does your solution provide a set of preconfigured, out-of-the-box reports and dashboards appropriate for marketing and executive users? Does it allow for customization of reporting dashboards?

83. Does your solution have the ability to show results of each individual step in a workflow?

84. Does your solution support customer journey analytics across channels over time?

85. Does your solution offer a heatmap?

86. Does your solution have the ability to export reports? Can the reports be scheduled?

87. Describe your audience reporting capabilities

Platform

Integrations

88. Does your solution support rapid and seamless integration through existing connectors to other vendors' products? Describe your library of off-the-shelf integrations.

89. Does your solution integrate with e-commerce systems?

90. Does your solution offer support for multiple websites or apps to be linked within a single account?

Scalability

91. Describe how your solution offers the flexibility, customizability, and scalability to support current and future business needs and volume.

92. Describe how your solution is extensible to new channels, systems, and data sources as our needs and tech partners evolve.

93. Describe the reliability of your platform and your down-time. Do you provide continuous uptime monitoring? Please provide reporting.

94. Describe how your solution processes large volumes of data and campaign workloads without interference or latency.

95. Can your solution store ingested data for as long as the customer requires (subject to regulatory constraints) and provides data retention options by time period, source, and data type?

Services & Support

Services

96. Describe your onboarding process and the resources to expedite onboarding and time to value. What's the typical timeline?

97. Do you have services that can help in migrating our current programs?

Success

98. Describe how you provide an appropriate level of support, including dedicated customer success resources.

99. Describe what dedicated product training and self-learning resources are available.

Support

100. Do you offer 24/7 customer support? Do you have a global presence for support? What support levels are included and what are the Service Level Agreements (SLAs) for technical support?

Privacy, Security & Compliance

Privacy & Compliance

101. Describe how your solution supports customer data privacy preferences and adheres to privacy compliance regulations (e.g. CCPA, GDPR, HIPAA).

102. Describe how your solution manages Personally Identifiable Information (PII) such as name, address, email, and phone number in ways that comply with privacy and security regulations in the regions where it is deployed.

103. Describe your solution's functions to store and enforce customer consent for data usage to comply with privacy regulations.

Security

104.   How is customer data stored and protected?

105.   Does your solution provide user-level and role-based access controls as well as custom user management to what data is available to which user?

106.   Does your solution undergo stringent security audits? Can you provide certifications (e.g. SOC2)?

107. Does your solution encrypt data in transit and at rest?

108.   Does your solution maintain audit trails for interactions with the system?

109.   Does your solution support Single-Sign On?