DROPSOLID

GUIDE

RFP STARTER KIT

The complete guide to writing an RFP

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INTRODUCTION

What is the RFP guide?

A request for proposal (RFP) helps organisations in the search for the right vendor for a project. A successful RFP should make the process of finding and selecting the right vendor easier and will save you time, money and resources in the long run. When you use a certain structure for writing your RFP, the comparison process will be more convenient once all the offers come through.

This Starter Kit will help you ask the right questions and serve as a guideline to structure your RFP in the most effective way possible.

How can you use it?

You can use this RFP Starter Kit as a guideline to ensure that potential vendors propose the best possible DXP solution(s) for your organization, and this in a clear and structured way. Starting from your problem, wishes and needs.

> Starting from your problem, wishes and needs.

PART ONE

#1

Important information and questions to include in your RFP

PART ONE · INFORMATION ABOUT THE PROJECT

Important information and questions to include in your RFP

This part gives vendors a better understanding of your organization, your current digital maturity and ecosystem. This will help them propose a suitable solution just for you.

Description of your organization

Provide general information that presents your organization and identifies the needs. Possible information could be:

- Company name, legal form and address
- Brief history of the organization
- Description of some key financial figures
- Number of employees in the organization
- Composition of the organizational structure (organigram)
- Vision, strategy and objectives of the company
- Elements of value
- A brief description of the current IT landscape

Description of your current DXP or website

Give a more in depth description of your current Digital Experience Platform (DXP) or website environment. This will help potential vendors to recognise your needs more easily and efficiently.

If you don't currently have a DXP or website you can skip this part and focus on the following questions about 'Project goals and objectives'.

- More information about your current solutions, like the names.
- A simplified enterprise architecture diagram can be helpful.
- When was your current version implemented?
- What parts do you want to replace, and which solutions do you want to keep?
- Number of users of the platform and monthly visitors of the websites.
- Is the solution integrated with other back-end systems? If so, provide a list of integrations.
- Description of the aspects that are missing in your current solution and that are desired in the new one.
- Are there any points of attention or bad experiences with the previous implementation project or vendor?

Project goals and objectives

Give a clear insight on the goals and objectives for the project. Be specific for a more efficient way of working that will save you time and money. It's important to distinguish priorities from wishes. This way vendors know where to invest their efforts, and you will get a better solution. Don't give away your preferred solution yet. Let the vendors propose the best fitted solution. This might give you new insights.

While writing an RFP, consult your colleagues from other departments to gather more information, needs and objectives as many departments in an organization can benefit from the digital experience.

- Describe the reason(s) why you are looking for a new DXP
- What goal(s) do you want to achieve by implementing a new DXP?
- Give more information about your current processes in building digital experiences. How are they set up and how are metrics monitored?
- What budget do you have in mind for the project?
- What is the business case and what ROI do you expect?

Questions about the vendor

This part lists a number of questions that will allow you to better compare and even (dis)qualify vendors for your project. It can be difficult to know what to ask for. Therefore we provide you with some typical questions.

Basic information about the vendor

- Company name, legal form and address
- Brief history of the organization
- Description of some key financial figures, like total turnover in the past fiscal year
- Vision, strategy and growth objectives
- How does the vendor differentiate from competitors?
- Description of experience with your industry and business processes
- Is there a Product Research & Development department?

Employees

- Number of employees (FTE)
- Number of employees with DXP expertise
- Number of employees per location/country
- Expected employee growth over the next three years and in which domains is the growth expected?
- Composition of the organizational structure (organigram)

Product and service offering

- Description of DXP products and services in portfolio
- Description of other products and services in portfolio
- What services can the vendor deliver? Is there a partner network to deliver additional services?
- Number of employees in the service organization

Support

- Does the vendor have its own support department?
- Number of employees in the support department
- What is the support SLA?
- Does the vendor offer technical and user training?

Questions about the product offered by vendor

This part lists a number of questions that will allow you to better compare products offered by different vendors.

Basic information

- Name and version of the proposed solution
- How frequently are new releases released and are these updates included in the price?
- Give planned release dates for future versions
- Will the solution be implemented by the vendor, or by a partner?
- Is it open source? On what open source technologies and versions is the product based?

License

- Base price of the DXP solution
- Detailed pricing structure of the DXP solution (important criteria like number of users, modules, traffic, etc.)
- How is the price of a new release determined? Is there an additional cost for each new release or is it included in the maintenance cost?
- What are the maintenance costs per year?
- Is it possible to spread the license costs over multiple years?
- Ask for a timeline
- Provide guidance as to budget, in order to avoid irrelevant offers

References

- Description of relevant DXP references for our project

Future proof

- Has the proposed solution evolved in the last few years?
- What is the product vision and roadmap?
- Is the roadmap public?

Security

- How can the vendor guarantee a secured solution?
- Can the vendor offer the right securities for our project?
- Can the vendor assure us that the proposed solution complies with EU privacy legislation?

Data migration

- How can data be migrated or loaded into the DXP

Product training

- Which training do they provide for: administrators and users?
- If so, where do they provide this training? At their location or our location?
- How much training do they suggest as a solution for our problem?
- What is the base price of this training?

Change management

- Does the vendor offer support for change requirements?

PART TWO

#2
RFP checklist example

DXP project checklist

A DXP project consists of multiple stages. Each stage requires different expertise and team involvement. You can choose to include/exclude certain stages in the project. Perhaps some work is already done. Be as clear as possible on what you expect from the vendors in the scope of this project.

	We have it and can be incorporated in RFP	We have a first approach, but expect the vendor to co-create	We don't have it and is part of the assignment for vendors	We don't have it and we don't want it incorporated in RFP
Digital experience strategy roadmap	☐	☐	☐	☐
Digital experience project strategy	☐	☐	☐	☐
Data architecture	☐	☐	☐	☐
Enterprise architecture	☐	☐	☐	☐
Brand guidelines	☐	☐	☐	☐
Information architecture	☐	☐	☐	☐
UX prototyping	☐	☐	☐	☐
Wireframes	☐	☐	☐	☐
UI design	☐	☐	☐	☐
Functional analysis	☐	☐	☐	☐
Technical analysis	☐	☐	☐	☐
SEO migration	☐	☐	☐	☐
WCAG	☐	☐	☐	☐
Project documentation	☐	☐	☐	☐

DXP product features checklist

This part contains a list of all the functions for each domain of the proposed solution. The list below can be used as a checklist. On each of the topics, carefully consider your detailed requirements. Also, do not assume that this list, once made up, is fixed. If specific requirements emerge, the list can always be extended. Important to know is which requirements are available out of the box within the proposed solution, can be added via custom development or are not possible to do.

	Out of the box	Custom	Not available	Not relevant
CMS				
Intuitive page builder	☐	☐	☐	☐
Version management	☐	☐	☐	☐
Approval workflow	☐	☐	☐	☐
Template library	☐	☐	☐	☐
Flexible content types	☐	☐	☐	☐
Content taxonomies	☐	☐	☐	☐
WCAG compliance	☐	☐	☐	☐
SEO optimizations	☐	☐	☐	☐
Digital marketing campaign tracking & support	☐	☐	☐	☐
Content personalization	☐	☐	☐	☐
Capabilities to manage content across multiple channels, sites and front-ends (headless)	☐	☐	☐	☐
Capabilities to re-use content from CMS into email	☐	☐	☐	☐
Responsive or fluid design	☐	☐	☐	☐
Menu building	☐	☐	☐	☐
Multi Language	☐	☐	☐	☐
Multisite	☐	☐	☐	☐
Advanced roles and permissions	☐	☐	☐	☐
Insite search	☐	☐	☐	☐

	Out of the box	Custom	Not available	Not relevant
MARKETING AUTOMATION				
Email marketing	☐	☐	☐	☐
Form building	☐	☐	☐	☐
Segment building	☐	☐	☐	☐
Multistep campaign building	☐	☐	☐	☐
Email personalization	☐	☐	☐	☐
Lead scoring and nurturing	☐	☐	☐	☐
Custom reports	☐	☐	☐	☐
Support for sms and mobile push messaging	☐	☐	☐	☐
CUSTOMER DATA PLATFORM				
Segment building	☐	☐	☐	☐
Integration external data sources	☐	☐	☐	☐
AI driven segmentation	☐	☐	☐	☐
Omnichannel personalization	☐	☐	☐	☐
INTEGRATIONS				
Integration CRM (detail which CRM)	☐	☐	☐	☐
Integration DAM	☐	☐	☐	☐
Integration Marketing Automation	☐	☐	☐	☐
Integration CDP	☐	☐	☐	☐
Integration analytics, BI and/or Dashboarding solution	☐	☐	☐	☐

PART THREE

#3

RFP do’s and don’ts

RFP do's and don'ts

MAKE SURE TO

- Set high level goals, be clear about the priorities of the project
- Distinguish between must and nice to have
- Keep a clear and realistic budget in mind
- Present vendors with problems, not solutions

DO THIS	NOT THIS
Focus used content	Key pages with a flexible slider
Focus on a clear navigation	Focus on a mega menu
Give a walk through your design and discovery process	Set up a fixed process phase. The vendor most probably had its own process that is effective
Research vendors upfront and invite a select group to respond to get the most fitting offer	Invite more than five firms to answer your RFP
Let the vendors give you the solutions for your project	Give vendors too much details as far as the type of response you want
Let the personality of your team and organization shine through in the RFP	Treat writing an RFP as a strict process
Focus on the overall picture and use a follow-up for more clarity when questions arise	Expect all your questions to be answered immediately
Discuss with colleagues from other departments when preparing an RFP	Develop an RFP without consulting users who will operate the platform in the field on day-to-day operations