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Evaluating Customer Engagement Platforms:
An RFP Template You Can Use

Instructions on How to Use This RFP Template

To help you find the solution that best fits your needs, we've put together a look at the most important questions you need to be asking when comparing different customer engagement platforms. By working through the questions, you can come away with a clearer picture of your brand's requirements, supporting a more effective assessment process.

We invite you to copy any questions below or save a copy of this document and use it as your own RFP template as you kick off your evaluation process.

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Questions for Your Company

Project Scope & Timelines

Before you dig into the different features and functionalities of the customer engagement platforms you're evaluating, you need to make sure you have a clear understanding of your organization's wants and needs.

QUESTIONS
What is your company's core mission and what role do your customer relationships play in achieving that mission?
What specific business goals (e.g. higher revenue, stronger customer retention) are you looking to drive with your chosen customer engagement platform?
If you're already leveraging a customer engagement solution, what motivated you to start looking for a replacement solution, and what roadblocks are keeping you from reaching your goals with your current platform?
What specific customer engagement use cases (e.g. onboarding, abandoned cart, year-in-review messages) do you need to execute successfully to achieve your business goals?
What key performance indicators (KPIs) do you measure to assess the impact of your customer engagement efforts?
What teams (e.g. marketing, engineering, product, data science) and individuals (e.g. c-suite) are core stakeholders in your evaluation and what roles does each play?
What is your target budget for your new customer engagement platform and will that amount shift based on the projected impact that a given solution will have on implicit costs (e.g. reducing data latency, improving time-to-value) and ROI?

Questions for Vendors

Data Connections & Integrations

Data is at the core of modern marketing—and today's customer engagement strategies live and die based on how data is collected, ingested, processed, actioned on, and exported. Make sure any new platform is able to handle your specific data needs.

QUESTIONS
What is the typical integration required to get data into this customer engagement solution?
How does this solution support connections to third-party systems in order to ingest customer and behavioral data (e.g. user preferences, transaction data, historical user action data)?
How is this customer engagement solution designed to work with other key technologies (e.g. product analytics, recommendation engines, CDPs, BI tools)?
Does this solution have an out-of-the-box connection to data warehouses? If so, which ones and how do the integrations work?
How does this platform ingest, store, and activate zero- and first-party data to support customer engagement?
When changes occur in connection with customer data, how quickly does this solution make the updated information available for segmentation, personalization, and customer journey orchestration?
Is this customer engagement platform set up to allow your brand to understand, engage, and convert anonymous users?
Can this solution receive, process, and support action on arbitrary JSON data (e.g. arrays of objects, nested objects) and, if so, how is this information saved on user profiles or leveraged for journey orchestration?
Does this solution support the creation of live-updating individual user profiles for each customer and, if so, what is the key user profile identifier (e.g. email address, device ID, phone number, unique ID) that is assigned?
Does this solution support dynamic aliases in connection with its user profiles?
Can this customer engagement platform support the export of data (including anonymous user data) to other systems, including data warehouses? If so, how fast are those exports?

Scale, Speed & Reliability

It's important to have peace of mind that a solution can reliably handle the volume and speed your business requires regularly and during peak times. Make sure you understand how a vendor can serve your everyday needs, all the way up to your most important and meaningful moments with your customers.

QUESTIONS
Is this customer engagement platform designed to be able to scale to handle major messages, data, and user volumes?
How has this solution been designed to handle high-volume/peak event demands associated with major campaigns and seasonal engagement peaks (e.g. Black Friday, Singles Day)?
What is this customer engagement platform's estimated annual message send volume, both overall and channel by channel?
How many brands are currently using this platform to send more than 10 billion messages per year (in total, and on a per-channel basis)?
What has this solution's annual growth in message volume (in total, and on a per-channel basis) been over the past five years?
Does this platform offer a send-speed SLA in connection with transactional emails?

Security & Compliance

The customer engagement world is moving toward a new normal defined by privacy rules and legislation and higher customer expectations when it comes to the security of their data, making an engagement platform built on privacy and security by design a must-have.

QUESTIONS
What security certifications does this customer engagement platform possess (e.g. SOC 2, ISO 27001, HIPAA, etc.)?
Does this solution support Single Sign On (e.g. SAML, WS-Fed, oAuth2) in connection with developer/administrative authentication?
Does this solution support SCIM for automated user provisioning and de-provisioning?
How does this customer engagement platform enforce user-level permissions?
What control does this solution have in place to ensure that all customer information is encrypted?
How does this platform monitor and secure access to cloud-based storage services?
Does this solution allow brands to mask PII Data (e.g. email addresses, phone numbers) on the dashboard for privacy purposes?
What does this solution's crisis communication process look like before and during an incident?
How does this solution completely isolate each brand's data from other customers (e.g. single tenant)?
How does this solution enforce limits on which dashboard users (e.g. marketers) can message specific customer bases (e.g. based on location, language, and audience)?
Can brands directly access security audit logs within the platform?

Audience Building & Targeting

Today's consumers expect relevant, individually tailored experiences—but achieving that ideal takes the right set of tools and functionalities.

QUESTIONS
How quickly can user data sent to this platform be used for segmentation in connection with interactive channels (e.g. in-app messaging) or action-based behavioral triggered messaging?
Can this solution support real-time suppression lists in connection with direct customer messaging or external ad targeting? If so, how does this process work?
Does this solution offer an audience builder feature and, if so, how long does it take for an end user to create an audience?
Does the solution require the participation of other teams beyond marketing to build an audience?
Does this solution support both real-time and historical segmentation out of the box? If so, how is the solution designed to make this possible?
Can this platform import segment lists from other systems and, if so, how does it support these imports?
Does this solution offer lifecycle and AI predictive attributes (e.g. propensity to churn) for segmentation?
Does this platform provide any native analysis of segment behavior?

Campaign & Journey Orchestration

It's no longer enough to send a barrage of disconnected, ad hoc messages and call it day—brands today need to ensure they have the ability to build, execute, and iterate on ongoing messaging journeys to fit customer expectations.

QUESTIONS
Which specific message channels can be orchestrated via your platform and can they be overseen all from a single interface?
How does this customer engagement platform support the creation of lifecycle campaigns and journeys?
Does this solution make it possible for marketers to build out complex workflow automations and, if so, what elements of the solution support that functionality?
What percentage of the brands using this solution are leveraging it to send messages in three or more natively supported channels (i.e. not including channels supported via webhook or other non-native integrations)?
What sorts of criteria can brands use to trigger campaigns and orchestrate customer journeys within this solution?
Can this customer engagement platform seamlessly create cross-channel journeys for transactional notifications (i.e. order confirmation, order shipped, order delivered)?
How does this solution support asynchronous collaboration, versioning, and approval for distributed marketing teams in connection with multi-step customer journeys?
In what specific ways does this customer engagement platform leverage AI/ML to support more effective campaign and journey orchestration?

Cross-Channel Support & Message Composition

The customer lifecycle is driven by digital messaging, and one core need when it comes to customer engagement is the ability to reach users on the channel or channels that matter to them.

QUESTIONS
Comprehensive Channel Capabilities
Does this platform support native, easy-to-use, drag-and-drop message composition across all channels?
Does this solution allow brands to leverage all channels in both campaigns and orchestrated customer journeys?
Does this solution include intelligent channel optimization and, if so, what channels are supported?
Does this platform support send-time optimization and, if so, what channels are supported?
Does this solution include real-time personalization at message send-time and when a message is opened?
If so, what channels are supported and how does the solution carry out this sort of personalization?
Does this platform allow marketers to quickly compose, set up, execute, and launch campaigns and journeys across multiple coordinated channels?
Does this solution make it possible for brands to cap the number of messages that a given customer receives based on custom business rules?
Does this solution offer AI-powered tools to assist with message composition and, if so, what channels are supported?
Does this platform have the ability to automatically and immediately direct a given user through a customer journey when a relevant new event or action occurs?
Email
Does this platform integrate with email testing and rendering tools?
Is it possible to use this solution to preview how emails will appear across the full range of different browsers, inbox providers, and devices?
What email deliverability tools and services does this solution support?

How does this platform manage email subscription states and preferences?
Does this platform include both an intuitive composition tool (e.g. a drag-and-drop email editor) and an HTML editor?
What recent email innovations like AMP for Email (i.e. dynamic emails) and Gmail Promo Tab customization are supported by this solution?
How does this platform manage email headers/footers?
Is it possible to use this solution to automatically propagate a change to a single header/footer across all relevant email campaigns?
What percentage of this platform's customers currently use it to send emails?
SMS/MMS
Does this customer engagement platform natively support SMS and MMS?
Can this solution automatically carry out two-way SMS/MMS communication with users by triggering follow-up responses to the custom keywords used by customers?
How does this platform manage SMS compliance and opt-ins and opt-outs?
What percentage of this platform's customers currently use it to send SMS/MMS?
Web Messaging
Does this customer engagement platform support web-based channels (e.g. web push, in-browser messages, web Content Cards) and, if so, which ones?
What ongoing resources are needed by brands leveraging this solution to maintain their web messaging capabilities?
What percentage of this platform's customers currently use it to send web messages?
Mobile Messaging
What mobile messaging channels does this customer engagement platform support natively?
Does this solution include support for Apple's iOS Live Activities functionality?
What percentage of this platform's customers currently use it to send push notifications?
Does this solution provide mobile SDKs and, if so, what percentage of its customers currently integrate those SDKs?
How many apps in the Apple App Store and Google Play Store include this platform's mobile

SDK?
Does this platform's mobile SDK support Swift (iOS) and Kotlin (Android)?
What SDK wrappers does this solution provide?
In-Product Messaging
What in-product channels does this platform support (e.g. in-app messages, Content Cards)?
Can this solution support in-product messages across digital platforms (e.g. mobile, web, Smart TVs, etc.)?
Does this solution have the ability to create persistent in-product messages (i.e. messages that can last beyond a single session)?
What in-app message formats and templates does this platform provide?
Does this platform support the ability to turn on, turn off, or change specific functionality of an app or website that is leveraging it?
How does this solution allow marketers to trigger in-product messages?
What is the end-to-end latency associated with event-triggered in-product messages powered by this platform?
Does this platform include both an intuitive composition tool (e.g. a drag-and-drop in-app message editor) and an HTML editor?
What percentage of this platform's customers currently use it to send in-product messages (e.g. in-app messages, Content Cards)?
Other Channels
Does this platform support other messaging channels and, if so, are they supported natively or through a partnership integration?
Does this solution include any out-of-the-box integrations with paid media or social platforms? If so, which ones?

Optimization & A/B Testing

Great campaigns don't just happen—they're built on a foundation of thoughtful testing and ongoing iteration.

QUESTIONS
Does this solution support real-time multivariate testing and control groups (including global control groups covering all journeys)?
How is this platform configured to support A/B testing for both single- and cross-channel campaigns and journeys?
What limitations does this solution have when it comes to allowing marketers to test and experiment with elements of their campaigns and journeys?
Does this customer engagement platform support automatic variant selection based on a test's winning variant and, if so, can that selection be leveraged for both campaigns and journeys?
Can this solution automatically choose campaign variants based on each individual recipient's preferences and attributes?
Does this platform's A/B testing capabilities include the ability to test message copy/creative, message timing delays (i.e. wait 15 minutes vs. 30 minutes), and campaign channel mix (i.e. email vs. SMS vs. push)?

Reporting & Analytics

It's not enough to send great messaging campaigns—you need to understand the performance of those campaigns so you can showcase the value you're driving.

QUESTIONS
What specific in-platform reports and reporting metrics does this solution provide?
Can this platform support easy, self-service custom report creation?
How quickly are campaign results and reporting made available to marketers in the platform dashboard?
Does this solution support the ability to create dynamic reports and then query a given report's underlying analytical data set?
Can this solution support in-platform reporting on the campaign, journey, channel, and global program level?
Does this platform allow marketers to iterate instantly by editing campaigns/journeys after analyzing insights in real-time?
What AI, ML, or predictive intelligence capabilities are built into this solution and how do they add value for marketers?
Is this platform capable of automatically segmenting users based on how likely they are to convert?
Does this solution allow marketers to stream event and performance data in real-time into other reporting tools and databases for further analysis?

Support & Services

It's important to have dedicated and experienced teams to help you maximize your solution investment.

QUESTIONS
What does the strategy and process look like when it comes to successfully onboarding new customers onto this platform?
Are new customers given a named customer success manager after onboarding is complete and, if so, what types of support are provided?
Are new customers given a named customer technical resource after onboarding is complete and, if so, what types of support are provided?
What is this customer engagement platform's general implementation timeline?
What teams and resources are available during the solution's platform integration?
What is this platform's average time-to-value?
Are all customers given 24/7/365 technical support in connection with the use of this solution?
Are all customers given access to ongoing strategic support following the completion of their platform onboarding?
Are all customers given access to learning, training, and community-related resources in connection with their use of the platform?
What additional services are offered in connection with this customer engagement platform?

Product Roadmap, R&D & Strategy

Understanding how a vendor invests in innovation is critical and ensures you don't have to transition to another vendor in a few years to get the capabilities you need now and into the future.

QUESTIONS
How does the product vision associated with this customer engagement platform support your customers' business goals?
What level of R&D investment is currently associated with this solution?
To what extent are customers involved in this solution's product roadmap prioritization process and what's an example of a situation where customer feedback influenced the roadmap in a beneficial way?
What is the AI philosophy associated with this customer engagement platform and how does it influence its roadmap?

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