Request For Proposal

Contact

Name:

Company:

Email:

Phone:

Company presentation and project context

Presentation:

Current situation:

- Technology stack: How long in use?
- Architecture: How long in use?
- Solutions used: How long in use?
- Internal IT resources: ◯ Yes / ◯ No
- External service provider: ◯ Yes / ◯ No

Limitations/pain points:

Why change/evolve the stack?

Your needs

Customer data sources

Channels (email, SMS, push, etc.) + associated volumes

Examples of use cases (scenarios, types of message personalization)

Examples of expected KPIs...

Project description and objectives

The project

Objectives

-
-
-
-
-
-
-

Required functional and technical specifications

			Essential	Important	Useful
Data	Data	E.g.: Data collection, data integration, data storage…			
	Segmentation	E.g.: Segment historization, segment cross-referencing…			
	Targeting	E.g.: Targeting historization, potential calculations: pre-counting…			
Activation	Campaigns	E.g.: Configuration (template, message personalization, AI…), execution (real-time, A/B testing…), routing and channels (email, SMS, push…), on-site personalization / product recommendation, tracking…			
Data security		E.g.: Compliance and security, data ownership…			
Reporting		E.g.: Dashboards, malfunction alerts…			
AI		E.g.: Objects, send timing, scoring…			

Evaluation and selection criteria for providers

Criteria	Weighting
• Business expertise	%
• Technical expertise	%
• Functional coverage	%
• Client references	%
• Proposed methodology	%
• Security	%
• GDPR compliance	%
• CSR policy	%
• Financial stability	%
• Vision & Roadmap	%
• Quality of deliverables	%
• Meeting deadlines	%
• Budget	%
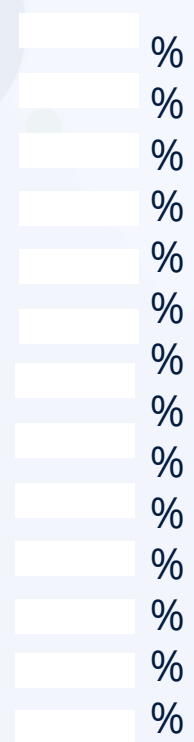
Provisional planning

RFP submission

Q&A period

Proposal submission deadline

Shortlist

Finalist presentations

Vendor selection

Project start date

Dates

Allocated budget

How to use this RFP template

This document is fully customizable to fit your needs. You can fill in only the sections that seem relevant to your project and leave the others blank.

All text fields are editable: you can fill them in, modify them or delete them as you see fit.
For multiple-choice questions, simply check the boxes that match your situation or expectations. You can select multiple answers if needed.

We recommend that you fill in at least the contact information, a description of your context and needs, and your main selection criteria.

These elements will allow suppliers to understand your project and respond in a relevant way.

Don't forget to indicate your schedule and the next steps in the selection process (response deadline, presentation, decision-making, etc.).

Once completed, you can send this document to pre-selected suppliers. We advise you to remain available to discuss with them and answer any questions they may have.

We hope this RFP template will be useful in framing your project and choosing the solution that best suits you. If you have any questions, please do not hesitate to contact us. We wish you an excellent project!