THE RFP GUIDE

5 Steps for Selecting the Right Email Marketing Platform

for Higher Education

emma®
by MARIGOLD

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In a world full of one-size-fits all marketing technology companies, finding a vendor that really understands the higher ed sector and your organization's specific size and other requirements is difficult. Your organization might require you to submit a request for proposal (RFP) to email marketing vendors you have identified, or you might use this guide to help you shape your requirements lists and guide you through the evaluation process. Regardless of your approach, it will help you define your requirements; learn ways to get all your stakeholders together; educate yourself on best practices; and select a relationship marketing vendor that understands your institution.

INTRODUCTION

Great marketing isn't just about conversion. Real connection matters, too. It's about making people feel seen, not sold to. If you're reading this, you're probably realizing that your current email marketing vendor doesn't have what it takes to deliver and scale your email marketing and communications strategy adequately enough to fulfill your institution's mission.

From emails to alumni associations, foundations and other groups of supporters for driving endowments, fundraising, and donations, to email targeted toward athletics and other departments within your university, you will want to take all needs into consideration when drafting your RFP.

All of these groups and stakeholders can be addressed; and you will lay out the capabilities needed to address them. You'll want to provide for the email capabilities to create a strategy for your institution that will include customizing and breaking down your communications by college, department, and other organizations within your institution so that audience relevance is ensured, and the right messages are going out to the right people. Consider all this to make sure it will be included, while still maintaining your brand voice, school colors and mottos, and everything else that draws your audience(s) in and keeps them engaged.

You probably spend your days dreaming about all the things you wish you could do with your email marketing platform. Imagine having the ability to collect and leverage zero-party data to deliver highly personalized content — communications and initiatives that enhance enrollment, elevate student engagement, increase staff loyalty, and foster stronger alumni connections.

You may find yourself at a crossroads: Do you stay with your current vendor who might be able to get the job done but isn't growing with you, or find a vendor who can match your ambitions and take your email marketing and messaging strategy to the next level? Selecting the right email marketing platform that has all of the capabilities your organization needs to achieve your wildest dreams is a pretty tall order. And, given the number of stakeholders and teams who will be depending on this technology, it's very important to get everyone in agreement on what you need and what you want to consider, prior to going into evaluations.

What You Will Learn

Finding a vendor that really understands your sector, requirements, and the scope of your needs can be a daunting task.

Regardless of your approach, the **5 Steps for Selecting the Right Email Marketing Solution for you** will help you:

- Define the functional, operational and technical requirements needed to deliver an engaging and revenue-generating email marketing strategy

- Learn ways to get all the stakeholders on the same page

- Select a relationship marketing vendor that understands the ins and outs of your organization and industry

- Educate yourself on the best practices and use cases for leveraging email marketing technology for *your* institution, whether it be a college, community college or university

It's a mission critical journey you're embarking upon, with your institution's approach to RFPs being established. This is a strategy that will be utilized, potentially, for other parts of your technology stack, too. So, begin with the preparation stage; initiate engagement with the right vendors; and you'll come out of it with an email marketing strategy that has been judiciously created specifically for your higher education institution.

5 Steps to Selecting the Right Email Marketing Solution

#1

Get the Big Picture

Mapping your organization's goals and objectives to your email marketing initiatives will provide the foundation for identifying the right solution provider.

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Before you start building your requirements list, you need to ask yourself and your colleagues the following questions:

- What is the state of your email marketing strategy, and what does it look like in six months, a year, and five years down the road?

- What will the new system be replacing?

- How much budget do you have to acquire, set-up, launch and manage your email marketing technology?

- What are the organizational goals; and how does email marketing support and deliver on these objectives?

- How do you currently grow your subscriber base? How quickly is it growing?

- How often do you email your subscribers? Do you leverage SMS or MMS?

- Do subscribers have options when it comes to the types and frequencies of messages they receive?

- How are you measuring success?

- What team members need to be involved in this decision: Marketing? Procurement? Legal? IT? Sales? Admissions? Compliance?

- For athletics departments, does the platform allow for integrations with various online ticketing systems? (We know you have to engage fans and sell tickets!)

- What analytics do you need to report on your return on investment (ROI)?

- Does your email marketing strategy need to fit into a bigger relationship marketing strategy? Perhaps adding elements like loyalty programs or experiences?

- Who is your champion? (Keep them close, because you're going to need them soon).

One-on-one interviews, surveys and polls amongst your colleagues are just a few ways you can collect this information. Even if you have a general idea of what you want and what you don't want — it's important that you document everything. You can't expect a vendor to know your institution until you capture the big picture yourself. And the greater the due diligence on your end, the easier it will be to build your business case to select the email marketing technology you'll love.

#2

Define and Rank Your Requirements

Navigating the complexities of technology procurement can be extremely challenging. Selecting a new email marketing technology requires a cross-functional team of stakeholders from marketing, operations, procurement, finance, IT and security — which is why RFPs need to be extremely detailed.

Before you hit that "request a demo button" with any potential vendors, you must build a comprehensive requirements list that addresses the functional, technical and operational requirements of the system. When thinking about your requirements, we recommend being as granular as possible. The vendor you select is going to help you grow your readership from thousands to millions.

Requirements are best broken
down into three groups:

FUNCTIONAL REQUIREMENTS

OPERATIONAL REQUIREMENTS

TECHNICAL REQUIREMENTS

FUNCTIONAL REQUIREMENTS

Functional requirements describe what the system needs to do. This list typically comes from tech-savvy leaders in your institution's administration, system administrators, and strategic marketing team members who are tasked with driving more readership and revenue from newsletters, emails and messaging.

Examples of functional requirements include:

- **Messaging.** Beyond asking about the ability to design and send a standard email campaign or newsletter, find out how sophisticated the campaign designer and manager is, and how difficult it is to use. Every sector has its unique requirements. If you need to manage multiple departments or colleges under one umbrella — an email marketing platform that gives you the ability to create, design and send campaigns on behalf of each of these is important. If delivering highly personalized content, announcements, articles and other messaging is critical to your marketing strategy — make sure the technology meets those requirements.

Other questions about features of email and messaging you should ask are:

→ What does the email designer tool look like? Is it drag-and-drop? Can this be controlled at the parent account level? (for example, when various departments within a university have sub accounts) *(A dedicated UI at the parent account level can give university administrators a single hub for these assets, and includes access to both a drag-and-drop email composer as well as an HTML coding interface, for example, which are features of Emma by Marigold.)*

→ Can you code your own HTML messages directly within the application or upload an HTML file?

→ Are emails responsive?

→ How does email automation work? Are automated workflows included?

→ Can you send messages via SMS or MMS?

→ Do you support transactional emails and auto-responders?

→ Can you deliver messages based on subscriber behavior or interests?

→ Are there options to branch out scenarios and trigger messages based on rules that you define?

→ Can you build multiple templates for different departments, affiliates, student groups, alumni associations and institutional categories, while also being able to lock in certain elements to allow for brand control?

Building beautiful, engaging messages is more important than you think. In fact, 24% of consumers favor brands whose messaging delivers a consistent user experience more so than *price*, nearly one-quarter of those surveyed; and 79% of consumers say they're likely to engage with a personalized email tailored specifically to their interests.[1] Don't feel silly or nit-picky about asking every question you can think of. Your emails need to capture your audience's attention and leave them wanting more.

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- **Zero-Party Data Collection.** Your subscriber and customer lists are the lifeblood of your organization. The ability to build standard subscription forms to collect names and emails is ideal, but you're probably already doing that, (or you wouldn't be here). **So consider what you can do with form capabilities**.

Start with the basics, like:

→ How difficult is it to build a form?

→ Can the form be branded in your brand colors and fonts?

→ Is 'drag-and-drop' included as a design feature?

→ Can you create custom fields?

→ Can actions happen upon submitting a form?

→ What types of integrations do your forms support? Is it open API?

→ How advanced are your forms? Can the system do progressive profiling, autocomplete, and dynamic fields?

→ How can the platform help collect and analyze form data to better understand our faculty, student, alumni, board members or other stakeholder subscribers?

Your audience and subscribers get value out of your emails. This means they are willing to share more of their personal information and interests with you in exchange for receiving content that is curated to their interests. Think about all of the information you can capture — and all the exciting things you can do with that information — if you go beyond collecting the traditional contact information.

- **Segmentation.** Every industry depends heavily on list segmentation. Your organization likely produces a high volume of content covering a broad range of topics, initiatives, and events. Some readers might be interested in one topic or ad, while others might glaze right over it.

Once you combine the zero-party data you collect with information from other areas of the organization, you can build robust segments for your readers. Hint, this is where features like progressive profiling can really help fine tune your readers' interests.

Be sure to cover questions like:

→ How do you build list segments?

→ Can you segment based on branching questions and "if/then" scenarios? Reader behaviors? Expressed interests? Defined triggers?

→ How easy is it to suppress an audience?

→ Are list segments static or dynamic? Meaning, can people move in and out of segments freely based on behaviors they perform?

There are so many ways to slice and segment lists. Selecting an email marketing technology with powerful segmentation capabilities is critical if you want to deliver uniquely targeted messages to consumers and drive more revenue from your marketing campaigns.

- **Personalization.** We all know that a mistaken *"insert | first name"* does not cut it in today's digital marketing landscape. Consumers want to feel like you know them. In fact, **62% of consumers** favor a brand's messaging that treats them like an individual.[1] With the wealth of data collected as individuals visit your website and engage with your content, personalization needs to be best-in-class. Ask the tough questions, like:

→ What can you do beyond standard personalization fields?

→ Is there an ability to insert dynamic content into messages? (like countdown timers)

→ Do you support cross-channel personalization?

→ Can you pull in data from other areas of the organization — like payment history, content views, and advertising engagement — and leverage that data to make the experience uniquely customized for that person?

If your messaging isn't relevant, it won't resonate. Look for technology with powerful segmentation and personalization features that help you send emails that create loyal readers.

[1] *Relationship Marketing Trends: Brand Rankings Report, Marigold, September 2024* https://go.meetmarigold.com/relationship-marketing-trends/get-report

OPERATIONAL REQUIREMENTS

Operational requirements describe how the system should run, including user profiles, scalability, security and customer support. This list typically comes from a collaborative effort between the marketing and operations teams.

Examples of operational requirements include:

- **Scalability.** As your institution grows, so does your subscriber base. You need a technology that allows you to build email marketing campaigns, workflows and automations at scale. Ask things like:

→ How many messages can you handle per year, and how is that number impacted by unpredictable activity spikes?

→ How many contacts does the system hold?

→ What do the contact tiers look like?

→ Does the system administrator, or parent account, have the ability to control access to contacts/ contact sets when sub accounts for separate departments are involved (i.e. user permissions)?

→ Number of Users/User profiles: Are there any limits?

→ Can you support sending sponsored emails from advertisers and sponsors?

→ If a message or topic goes viral, can your email provider handle it?

If they confidently say "yes!" to all or most of these, then you are golden; but if they hesitate at all — mark that as a red flag.

- **Integrations.** Every organization has information stored across multiple systems. What distinguishes a good email marketing system from a great email marketing system is the ability to pull together multiple systems of record to build a snapshot of individual subscribers. Ask things like:

  → Does the system integrate with our customer or subscription management database/system?

  → Does the system integrate with our payment system, etc.? With major educational APIs like Assembly, Evertrue, GiveCampus or Blackboard?

  → Are integrations native (meaning applications provide a direct means of integrating with one another via application programming interfaces) or through a third-party API connector like Zapier (which requires its own subscription)?

  → Do you integrate with major advertising systems like Meta, Google Ads, AdRoll, or others?

Conduct your due diligence on integrations, pulling in your operations and IT colleagues to help you understand the capabilities and restraints each integration might have.

- **Customer support.** You need a vendor that is available to help when things go wrong. That's why understanding how easy it is to troubleshoot issues is critical. Ask questions like:

  → What are the customer support tiers? Is there an additional cost for support?

  → Can I reach someone via phone, email or a ticketing system?

  → How do I escalate a mission-critical problem?

  → What are your customer support hours?

  → What languages do you support?

Vendors that put a strong emphasis on customer service and support often have the happiest clients. When things can change in the blink of an eye, you need a vendor that has your back no matter what time of the day, and no matter how long an individual service call may take.

❝ Think about services and support... Trust me, you are going to need something here no matter how 'self-service' you consider yourself to be.

Chris Marriott
President & Founder of Email Connect LLC

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TECHNICAL REQUIREMENTS

Technical requirements describe how the vendor and the technology adhere to compliance, security, privacy and IT standards.

This list typically comes directly from your IT and/or procurement team and likely feels a bit like alphabet soup with all of the acronyms. Often, marketers tend to get really excited about the functional and operational requirements and toss the technical requirements over to IT.

In the spirit of making you the subject matter expert on all things email marketing, we encourage you to get involved in this step. Having a good understanding of today's current compliance mandates, industry regulations, data privacy laws, AI policies and internal processes will help you become a tech-savvy marketer and ensure all the safeguards are in place to remain compliant.

Examples of technical requirements include:

- **Compliance.** IT will give you a list of compliance mandates the technology must meet in order to be considered by your organization. All you need to do is send this list to potential vendors, so they can verify whether they meet those needs.

Compliance mandates related to marketing technology include the following:

→ **SOC 2** specifies how organizations manage customer data. The standard is based on trust services criteria, which outlines the security, availability, processing integrity, confidentiality and privacy requirements. If you're looking at a new vendor, make sure you ask if it supports SOC 2 requirements. (Note: Many tech start-ups are working toward SOC 2 compliance but might not be there yet.)

→ **California Consumer Privacy Act of 2018 (CCPA)** requires organizations to give California residents the ability to opt out of third-party data sales, the right to be informed of data collection and rights, the right to have collected data disclosed, the right to have collected data deleted, and the right to equal services and prices.

→ **General Data Protection Regulation (GDPR)** governs the way organizations communicating with individuals and other organizations in the European Union (EU) can use, process, and store personal data. This compliance mandate is unique to email marketing and requires features like double opt-ins to email lists and consumers' ability to opt-out at any given time.

→ **Payment Card Industry Data Security Standard (PCI DSS)** is an information security standard used to handle credit cards from major card brands. If you're connecting your email system through your subscription management system, you might need to check into these requirements.

→ **CAN-SPAM:** It was first introduced in 2003, and if an email marketing technology you're considering does not have CAN-SPAM in place, it's a big red flag. The CAN-SPAM Act is a law that sets the rules for commercial email, establishes requirements for commercial messages, gives recipients the right to have you stop emailing them, and spells out tough penalties for violations. Simply put — you need to give your reader the ability to unsubscribe; and you need to be thoughtful about the frequency and types of messages you send.

→ **Health Insurance Portability and Accountability Act (HIPAA)** is a United States federal law that protects sensitive patient health information from being disclosed without the patient's consent or knowledge. If your college or university is serving the health, wellness or medical community in any way, HIPAA might come up. A lot of consumers connect their health data to applications nowadays, and anything they share must be safe and secure.

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- **Customer Data.** Understanding how the data — which you work so hard to collect — is structured, accessed, protected and delivered is critical for internal IT teams. Your organization likely has an internal set of standards for customer data and privacy that you'll need to include in your evaluation process. Enlist input from the right people and include that list in your evaluation process.

- **Business continuity and security incidents.** Outline how your business continuity and security incident response plans are tested and at what intervals. Demonstrate how your incident plans include any third parties and supporting organizations.

- **Deployment, firewall and security.** Since email marketing systems operate as a software as a service (SaaS) model, IT needs to know all about the deployment, firewalls and security standards for your environment. You need to ask and understand how they handle enhanced authentication and data encryption. It's also good to know what their *vendor security model* and SaaS Security Posture Management (SSPM) look like.

Sometimes, marketers start to favor a particular vendor only to realize it doesn't adhere to a compliance mandate or security framework required by your organization. So it's wise to cover this checklist at the beginning of the process to ensure the vendors you're considering can work with your business.

Don't forget to rank your requirements

Now that we've gone through the types of requirements you need to build out, it's time to confer with your stakeholders or selection committee to prioritize your top requirements. When you start this exercise, you might notice that everyone thinks their requirement is critical, so a quick tip is to objectively rank requirements on a scale of 1-5, one being a *nice-to-have* and five being a *total deal breaker/must have*.

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Schedule Demos and/or Issue Your RFP

There are a few different ways to go about the vendor evaluation process. You can submit a formal RFP to a handful of vendors you've already vetted. This RFP is a highly-detailed document that lists out all of your functional, technical and operational requirements, and includes questions about each topic. The vendor has a certain time period to complete your RFP and submit its proposal, which you will then review internally, and schedule a demo if the vendor is a good fit "on paper." (For example, you may have up to ten to twenty responses to your RFP, but you'll pick the top three to five, for example, to invite to schedule a demo as your final round of selection.)

If you prefer a more one-on-one, conversational route you can start requesting demos from the vendors on your vetted list. Since you went through the very thorough but rewarding process of requirements gathering, you'll have everything you need to know when you start the selection process.

#4

Scoring Your Top Vendors

At this point, you have a working document of your requirements list that you will use as you move through a series of demos with your top vendors.

Typically the sales process you will go through with vendor(s) includes:

1. Discovery call to get a general understanding of your requirements

2. Functional demo to see how the email marketing system works

3. Follow-up call with pricing and implementation scope

4. Technical demo, which brings in — you guessed it — the technical (& some marketing) team members who can dig into the inner workings of the system

5. Additional demos to dive deeper into questions or functionality you want to better understand

6. A longer conversation about implementation, system migration, on-boarding and ongoing training

7. Opportunity to speak with customer references from the higher ed sector to learn how they're finding success with the vendor's platform

During each of these calls, you will leverage your requirements document to create a ***vendor evaluation scorecard***. This scorecard — which is often a simple spreadsheet — will list your features in the first column and your rankings of the vendors in the remaining columns. (You can see an example **here**.) That way, you can easily and objectively assign scores and determine your ultimate chosen vendor.

FIVE NEW TIPS FOR MASTERING YOUR RFP

from Chris Marriott

President & Founder of Email Connect LLC

#5

Make it Official: Choosing your Vendor of Choice

It's time to make your selection *officially* official and let your vendor of choice know you're ready to sign.

Thanks to your due diligence, you've found the right email technology vendor to build lasting relationships with consumers, future students, faculty, alumni groups and all your audience.

Bravo!

1 Make absolutely sure you know what your specific requirements are

2 Only invite vendors to your RFP that match those requirements

3 Don't waste your time or that of your incumbent

4 Repeat after me: "There isn't a best vendor, but there's a best ESP for my (organization)."

5 Be okay with paying a little more to get a lot more

As you compile a group of vendors and platforms to evaluate, we hope you'll consider the value of **Emma by Marigold**, an email marketing platform **tailormade for college and universities**.

Conclusion

Selecting the right **email marketing technology** for your organization requires deep investigation and vast brainstorming by a variety of stakeholders to determine what you actually need, and how it can actually work with your team and your higher ed business model.

This process can be an illuminating and valuable experience, one that results in a new relationship with an ideal partner to help grow your organization.

There are a lot of companies out there that can shape and send your emails for you.

We can build relationships. *Let's talk!*

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Marigold's approach to Relationship Marketing stands alone in a world of one-size-fits-all marketing technology companies. Our solutions are designed for your specific size, industry, and maturity, giving you the technology and expertise you need to grow the relationships that grow your business, from customer acquisition to engagement to loyalty. And, with a team of strategists that provide insights into what's working, what's not, and what's changing in your industry, you're able to maximize ROI every step of the way.

Great marketing isn't just about conversion, but true connection. Learn why 40,000 businesses around the world trust Marigold to be the firm foundation they need to help relationships take root.

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