THE RFP GUIDE

THE **5** STEPS FOR

Selecting the Right

Email Marketing Platform

How to create unique and highly personalized messages that make people feel seen, not sold to

MARIGOLD™

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.

Email remains the most effective channel for driving sales — with half of consumers (50%) having purchased a product directly as a result of an email they received in the last 12 months. That's more than banner ads (21%), SMS (24%), social media posts (43%), and social media ads (48%).[1] So, it's important that your email marketing platform has what it takes to support your messaging strategy.

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 promotions that increase subscribers, boost customer engagement, generate more revenue and create deeper brand loyalty.

So, you are at a crossroads: 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 tall order. And, given the number of stakeholders and teams depending on this technology, it's very important to get everyone in agreement about what you need and what you might want to consider, prior to going into evaluations.

[1] "2024 Consumer Trends Index," Marigold, 2024

What You Will Learn

In a world full of one-size-fits-all marketing technology companies, finding a vendor that really understands your industry, size and requirements is hard.

Your organization might require you to submit a request for proposal (RFP) to email marketing vendors you have identified, or you might use this eBook to help you shape your requirements lists and guide you through the evaluation process.

Regardless of your approach, the **5 Steps for Selecting the Right Email Marketing Technology** 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 media and publishing

It's a hero's journey you're embarking upon. May you depart with preparation, initiate engagement with the right vendors, and return triumphantly with a new Relationship Marketing plan that seems like it was created specifically for media and publishing professionals.

STEP 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. **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 does it grow?

☐ How often do you email your subscribers? Do you leverage SMS (text) or MMS?

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

☐ Does your organization monetize email by offering options for your partners, affiliates and advertisers to have the ability to send messages to your lists?

☐ How are you measuring success?

☐ What team members need to be involved in this decision? Marketing? Legal? IT? Sales? Compliance?

☐ 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 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 business until you capture the big picture yourself. And the bigger the due diligence on your end, the easier it will be to build your business case to select the email marketing technology you love.

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STEP 2

Define and Rank
Your Requirements

Navigating the complexities of technology procurement is daunting. 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 are extremely detailed.

Before you hit that "request a demo button," 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 you are 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   **OPERATIONAL**   **TECHNICAL**

FUNCTIONAL REQUIREMENTS

Functional requirements describe what the system needs to do.
This list typically comes from tech-savvy 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** — No surprises here that we're starting with email and messaging — the most effective channel for driving sales and engagement.

  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 industry has its unique requirements. If you need to manage multiple brands under one umbrella — an email marketing platform that gives you the ability to create, design and send campaigns on behalf of each of those brands is important. If you like to monetize your emails by allowing your advertisers to sponsor emails — you need to make sure the system supports that upfront. If delivering highly personalized content, promotions, sales, articles and other messaging is critical to your business — 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 you code your own HTML messages directly within the application or upload an HTML file?

☐ Are emails responsive?

☐ How does email automation work?

☐ 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 the rules you define?

☐ Can you build multiple templates for different brands, affiliates and categories?

Building beautiful, engaging messages is more important than you think. In fact, 92% of consumers favor brands whose messaging delivers a consistent user experience, irrespective of the channel, and 82% of consumers favor a brand's messaging that strives to develop a relationship.[1] Don't feel silly about asking every question you can think of. Your emails need to capture your audience's attention and leave them wanting more.

- **Zero-Party Data Collection** — Your subscriber and customer lists are the lifeblood of your business.

The ability to build standard subscription forms to collect names and emails is great, but you're probably already doing that, or you wouldn't be here.

So, don't sleep on form capabilities.

> **DID YOU KNOW...** that consumers will share their personal, psychographic and behavioral data in return for unlocking content (60%), to feel part of a brand's community (55%), and for early or exclusive access to products and services (83%)?[1]

Start with the basics like …

☐ How difficult is it to build a form?

☐ Can the form be branded in your colors and fonts?

☐ Is drag-and-drop design a feature?

☐ Can you create custom fields?

☐ Can actions happen upon submitting a form?

☐ What sorts of integrations do your forms support?

☐ 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 subscribers?

Your subscribers, customers and audience get value out of your emails. This means they are willing to share more of their personal information and interests with you in exchange to receive 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.

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• **Segmentation** — Every industry depends heavily on list segmentation.

Your organization likely produces a high volume of content covering a broad range of topics, promotions, sales and new products and services. Some readers might be interested in one topic or ad, while others might glaze right over it.

But, 51% of consumers feel annoyed by irrelevant content or offers, and 41% are frustrated by messages that don't reflect their wants and needs. Additionally, 34% are irked by messages that don't recognize their shopping or loyalty card history, while 35% are irritated by messages based on information that they hadn't shared directly with the brand.[1] **We're willing to bet the last thing you want to do is frustrate your audience, so selecting an email marketing technology with strong segmentation is** *very, very important.*

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

There are so many ways to slice and dice 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.

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- **Personalization** — We all know that "insert {first name}" does not cut it in this digital landscape. **Consumers want to feel like you know them.** 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?

☐ Do you support cross-channel personalization?

☐ Can you pull in data from other areas of the business — like payment history, content views and advertising engagement— and leverage that data to make the experience both online and in email 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.

OPERATIONAL REQUIREMENTS

Operational requirements describe how the system should run, including user profiles, security, scalability 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 brand 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?

  ☐ Do contacts count more than one time if they live in different lists?

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

  If a message, promotion or topic goes viral, can your email provider handle it? If they confidently say "yes!" then you are golden, but if they hesitate at all — mark that as a red flag.

- **Integrations** — Every company 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 questions like …

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

  ☐ Does the system integrate with our payment system?

  ☐ Do you integrate with major advertising systems like Meta, Google Ads, AdRoll, etc.?

  ☐ 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 your due diligence on integrations and pull in your operations and IT friends to help you understand the capabilities and restraints each integration might have.

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- **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, and is there an additional cost for support?

☐ Can I reach someone via phone, email or 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 it is.

> " **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 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 is going to 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. Many tech start-ups are working toward SOC 2 compliance but might not be there yet.

- **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 the customer's ability to opt-out at any given time.

- **California Consumer Privacy Act of 2018 (CCPA)** requires businesses 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.

- **CAN-SPAM** is an oldie but a goodie. 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.

- **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.

- **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 media or publishing company is serving the health, wellness or medical community, HIPAA might come up. A lot of consumers connect their health data to applications nowadays, and anything they share must be safe and secure.

- **Children's Online Privacy Protection Act (COPPA)** is a United States federal law that protects children under the age of 13. COPPA puts parents in control over what information is collected about their young children online. If a message, promotion or topic goes viral, can your email provider handle it? If they confidently say "yes!" then you are golden, but if they hesitate at all — mark that as a red flag.

- **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 company likely has an internal set of standards for customer data and privacy that you'll need to include in your evaluation process. Get with the right people and include that list in your evaluation process.

- **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 fall in love with a vendor only to realize it doesn't adhere to a compliance mandate or security framework required by your organization. It's wise to cover these items at the beginning of the process to ensure the vendors you're considering can work with your business.

STEP 2   **SUMMARY**

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 get with your stakeholders or selection committee to prioritize those 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*.

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NICE-TO-HAVE   TOTAL
                                  DEAL BREAKER

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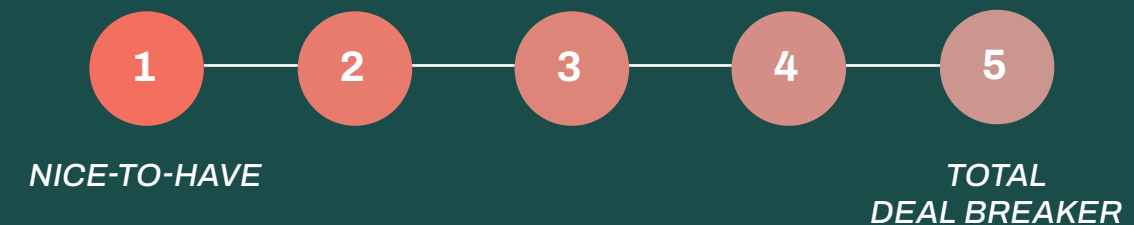
STEP 3 — *Schedule* Demos and/or Issue Your RFP

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 full-blown 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.

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

STEP 4 — *Score* 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 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 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 media and publishing industry to learn how they're finding success from the platform

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

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STEP 5

Make it *Official*

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 have found the right email technology vendor to build lasting relationships with consumers and customers.

Bravo!

5 NEW TIPS

FOR MASTERING YOUR EMAIL RFP

from Chris Marriott

President & Founder of Email Connect LLC

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's.

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

5. Be OK with paying a little more to get a lot more.

As you compile a group of vendors to evaluate, we hope you'll _consider Marigold's_ relationship marketing technology suite.

Conclusion

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

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

There are a lot of companies out there that can send your emails.

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

MARIGOLD™

WE ARE MARIGOLD.
Where *relationships* take root.

Where *relationships* take root

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.

Find out more at **MeetMarigold.com**

MARIGOLD™ | **Campaign Monitor**   **Cheetah Digital**   **Emma**   **Sailthru**   **Selligent**   **Vuture**