

Email Vendor RFP Checklist

This guide is meant to help you update and enhance your RFP and vendor selection process with some topics that are particular to the world of email:

Category	Questions to ask	Comments/Tips
Analytics	<p>What is included with basic reporting? (injections, sent, delivered, bounced, etc).</p> <p>How are various bounce types handled and categorized?</p> <p>Is there a robust event search via UI and/or API for troubleshooting?</p> <p>How much detail is included with engagement data?</p> <p>Do they offer an easy look at your overall program success, like a deliverability or health score?</p> <p>Do they have built-in predictive data modeling?</p>	<p>Bounces can be difficult. In addition to hard and soft (i.e. permanent and temporary), there are “out-of-band” bounces. These are from emails that are initially accepted by the receiving server, but then bounce after the fact—sometimes hours later!</p> <p>Many vendors do not offer predictive analytics. With the use of machine learning rapidly on the rise, be sure that your email vendor is on the bleeding edge.</p>
Tech/Integration	<p>Do they support both API and SMTP for injection?</p> <p>For SMTP, what is the feature set like compared to API?</p> <p>What kind of functionality is available via webhooks?</p> <p>What onboarding help is included?</p> <p>How about warming up IPs? Do they offer assistance, or better yet Automated IP Warmup?</p> <p>What kind of automated alerts are available?</p>	<p>Going into your search, you should know whether you want to send via SMTP or API. Especially in the case of SMTP, dig in to your specific needs and be sure your vendor fully supports them.</p> <p>Many email vendors offer Webhooks; if you prefer data to be pushed back to you in real time, be sure to scope out your specific needs here.</p>
People/Support	<p>What support SLAs are included in a standard contract?</p> <p>Is deliverability support included with standard contracts? If not, what is available?</p> <p>How are issues reported/mitigated?</p>	<p>As with any vendor, you’ll want to know what level of support is built in. With email, don’t forget to ask about deliverability support, not just technical support.</p> <p>If you buy an advanced support/deliverability package, what is included? For email it’s important that you have a dedicated deliverability resource who understands marketing and business goal, not just “the tech.”</p>

Risk/Security

- Are emails encrypted in transit with TLS by default?
- How robust is their IDM/User Access Mgmt?
- Are they SOC 2 compliant?
- Do they have reliable, redundant infrastructure?
- Are they running their own data centers, or leveraging a cloud vendor like AWS?
- How many actual sending locations do they have? In which countries?

In addition to your typical security questions, dig in about infrastructure, too.

TLS has been a necessity since [find Gmail date here], but do keep this question on your list.

Locations of sending infrastructure are important for both speed and compliance.

Pricing

- How is pricing measured? CPM?
- Which features are included, and which are add-ons?
- Are there different tiers for enterprise support or Technical Account Management options?

CPM = cost per mille (thousand).

Be aware of ANY non-sending features that are potentially add-ons, including advanced analytics, deliverability tools/monitoring, recipient validation, etc.

Marketing Capabilities

- Do they have a WYSIWYG editor for designing emails without coding?
- How robust is their list management? How granular can you get with segmenting?
- How sophisticated is their drip campaign management?
- How easy is it to set up trigger-based workflows?

This might seem obvious, BUT if you are not on the marketing side of the house, be sure to get detailed requirements from your end users.

We could give you dozens of things to look for here. The bottom line is be sure to apply the same due diligence and research to this category. It may not seem as vital as security, but your company's ROI depends on it!