Acquia

CDP RFP Template / Standard Response

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Company Information

1. Description

Full Business Name

Full Business Address (street address, city, state, zip code, primary phone number)

Who will be the primary contact? Please provide name, title, office phone, mobile phone, and email.

What is the name, address and primary phone number of the person who should receive our correspondence, and who is authorized to make decisions or represents the business. Please state their capacity within the company.

How many years has your company been in business?

How many employees do you have?

Where is your company headquartered?

When does your fiscal year end?

Please list company facilities and locations

2. Business background

The product name(s) vendor is providing

Describe your unique capabilities/competitive advantage or expertise that differentiates you from your competitors

Describe your customer portfolio (number and industries) for the last 3 years and current year

Have you partnered with a company similar to XXXX(your company name) before. If yes, please provide the success and challenges you have faced?

3. Strategy

What are your company's core competencies?

What is your company vision statement and what are your core operating values?

Please provide your roadmap of new capabilities from the past two years and next year?

Please provide an executive summary.

4. Company overview

Describe your company and experience working with companies of our size and industry

How are your clients using your Customer Data Platform (CDP)? Please provide a case study.

Features and Functions

5. Data integration

Describe your typical onboarding process for CDP, including:

Length of a typical deployment.

Effort required by us.

The use of a system integrator or agency for onboarding.

What is the process to integrate various data sources? What integration options do you support?

Does your CDP have standard connectors to data sources such as ERP, ESP, OMS, CRM? Please describe.

Which ESPs do you have standard connectors with? Do you have a preferred ESP you integrate with?

If your CDP does not have a standard connector to a data source, what is the process to extract, transform and load the data into the platform?

Does your CDP have API technology? Describe the API technology (REST, SOAP), API security and API catalog of capabilities.

Who is responsible for the extraction and transformation of data into the CDP?

Does your CDP support Snowflake Data Sharing?

How often is the data taken into the CDP? Real-time, on-demand batch, daily, weekly, monthly?

Describe how you integrate and/or compliment a MDM solution.

Do you integrate with Datalakes such as Microsoft Azure or Amazon S3?

Can your CDP integrate with data sources in real time and/or near real time?

Can your CDP integrate with offline data sources such as prospect lists, event location data?

Can your CDP pass data back to integrated systems? If so how is the data passed back?

Can your CDP integrate with third party services and systems such as Loyalty programs, Clienteling Apps or Call Center? Describe how this is done.

Can your CDP integrate with third party data service providers such as Epsilon, Acxiom, Experian? Please describe the process.

Can your CDP collect website behavior data? Please describe process.

Can your CDP integrate with mobile apps and websites to gather and analyze information about customers?

Can data sources be integrated post implementation? Please describe the process.

6. Data quality and identity resolution

Can your CDP provide data cleansing and standardization capability for both street and email addresses and phone numbers? Please confirm that the solution includes standard postal updates (NCOA, DPV, CASS) and the frequency of these updates. Please describe the process of email address and phone standardization. Is this capability built into your CDP?

Can you describe the data standardization process for data sources (names, upper/lower case format, syntax corrections etc.).

6. Data quality and identity resolution

Does your CDP flag customer when identified as a mover by NCOA data?

Do you use advanced unification methods including probabilistic matching, fuzzy matching and distance measures?

Can you describe the techniques your CDP uses to match customer records (with and without primary key/foreign key relationships) across data sources?

How are duplicate customer records handled within the platform?

How often is your CDP data cleansed, enhanced, deduped, and enriched? Daily, Weekly, Monthly?

Is Data Quality and Identity Resolution done within the platform or through a third party service? Is there an additional cost for this process?

Does your CDP create a 360 view of the customer from all data sources? Please describe.

Can your platform handle non-latin character sets?

Describe how your platform handles multiple brands? Can it resolve customers within and across brands?

How does the platform handle online browsing behavior, does it backstitch over time and cross stitch across devices?

Do you have an out-of the box data model for retail. Does it include a set of calculations, models? Describe.

7. Customer data management

Can the CDP automatically assign unique identifier to each consumer that remains unduplicated throughout the consumer's lifetime? Please describe the process through which unique identifiers are assigned.

Does the CDP household individual customer records with the same physical street address for purpose of marketing and analytics. Please describe the process through which individual records are householded together?

Can the CDP segregate and manage customer and prospect populations at the individual level?

Can prospect data be managed, marketed to and reported on like customer data? Please describe how the CDP separates customer from prospect data.

Any limit on number of attributes stored per customer, product etc?

Can new attributes be created and can they be calculated from existing data?

How does the CDP handle returns orders, in store pick and in store returns?

How does the CDP handle promotions, coupons, can it handle multiple coupons per order, coupons specific to a customer and item?

What is the QA process to ensure revenue/margin calculations are in sync with client's internal reporting systems?

How flexible is the architecture to adapt to new data, changes in data feeds? I.e. can new attributes added to the CDP.

Can the CDP create customer level geographical and preferred store locations such as geographically closest stores and the store most shopped at?

Can the CDP capture and store customer contact preference including contact by SMS, email opt in, direct mail opt in, voice mail opt in. How are changes in preferences managed?

Does the CDP require or supply a prepacked, documented physical data model in order to function? If So can that model be extended with new entities and/or attributes.

Are there any restrictions on data types ?

Does the CDP create a 360 View of the customer from online, offline and behavorial data? Please describe the details.

Can the CDP ingest anonymous data? What at does the solution do with anonymous data?

Please describe the platform's underlying data model structure (graph, relational ,schemaless). Please explain in detail the platform's data model approach and in there any inherent limitations or benefits to this.

Can you store unstructured data such as product reviews, call center comments etc.

Do you store first party cookie data from owned websites?

8. Reporting and analytics

Please describe the CDP reporting capabilities? Such as Dashboards, Visualizations, Access & Scheduling, out of the box and customizability.

Does the system automatically create a 360 degree view of the customer?

Does the 360 degree view provide all the interactions a customer could have (in-store, web, call center, direct mail etc.)?

Can the CDP provide reporting for online channels, such as email, Web, display and mobile, as well as offline channels, such as direct mail and call center. Please describe all available reporting tools included in the solution.

Does the CDP do calculated attributes at customer level? Please describe.

What types of marketing analytics are shown in the CDP? i.e. Days since last purchase, or last marketing source.

Is Lifetime Value calculated for each customer?

Is there a geocoding or location data shown or calculated?

Does the CDP have analytics and KPIs for retail, direct mail, email, ecommerce and physical store?

Are there RFM (Recency, Frequency and Monetary) analytics in the platform?

Are you able to report on first to second time buyers or repeat buyers?

Does the CDP provide trend analytics? E.g., YOY analysis.

What type of segmentation analytics can be done?

Can I bring in my own marketing analytics attributes or segments into the platform?

Can the CDP integrate with external BI and Analytical tools? Such as Excel. Please provide outline of the process.

Does your CDP provide cross-sell and upsell analysis?

What type of reports can I create?

Is acquisition source reporting available? If so which sources are available for analysis?

Can I create Dashboard type reports?

Does the CDP provide reporting on cohorts or segments?

Can I do product & product category reporting?

What type of reports are available to report on direct mail campaigns?

Can data exploration be done in the data? i.e. drill downs, filters, cross tabulations, trend analysis, and cohort analysis.

Can you email reports to other users?

What skillset is required to run reports? Is SQL expertise needed?

Do you provide SQL access to the data in the back end for reporting if requested?

Describe visualization capabilities.

9. Predictive models

Is machine learning and predictive models part of the CDP or done outside of the CDP? Please describe.

What type of machine learning algorithms are used in the CDP?

Are there clustering model(s) based on products available in the CDP?

Are there clustering model(s) based purchasing behaviors available in the CDP?

How often are models refreshed?

Are there are any Propensity models? What are they?

How the models are made actionable?

Are product recommendations models available in the CDP? Please describe what they are.

Is there an email engagement model?

Can CDP do customize predictive models based on our needs?

Is there any additional costs for the models available in your platform?

Do you have resources at your company that can create new or custom models upon request?

Can client data scientist develop and deploy models, what options are available for model development and deployment?

10. Audience and campaign management

Is the CDP able to create segments from the data stores/calculated data in the CDP? Please describe interface/user experience

Can the CDP provide multidimensional segmentation? Specifically, the ability to group audiences based on different attributes along multiple dimensions like products, likely buyers, consumer profitability, consumer life cycle , closet store etc. Please provide an outline of how the CDP handles multidimensional segmentation.

Do you support advanced segmentation filters- for example choose a filter based on customer who bought a product- then choose product attribute and # products bought between two dates.

Does the CDP have the ability to do direct mail campaigns? If so how?

Does the CDP send automated marketing campaigns? i.e. triggered events like abandon cart or abandon browse.

Does the CDP support flat file export of the campaigns?

Can the CDP create, execute and manage multichannel (offline and online) campaigns including ability to create and manage customer journey campaigns? Please describe the solution campaign management process.

Can the CDP provide marketing automation for repetitive task such as triggered or abandonment or KPI metric threshold campaigns?

Can the CDP provide event triggered campaigns such store visit, event attended, call to call center etc.?

Can the CDP create segments to be used in social media campaigns? Please describe example of social media marketing campaign.

Can the CDP to target customer on mobile apps and sites them with offers and content? Please describe.

Can the CDP manage the various elements of display marketing campaigns, including customers or look a like targeted in campaign and performance measurement? Please provide an example of display marketing integration and campaign.

What skillset is required to create audiences and campaigns within your platform?

Can your CDP deliver content elements for dynamic personalization, what models are available out of the box (e.g., last browsed products, last purchased products, profile attributes etc.) and can it be configured for additional elements (e.g., custom recommendation models).

Describe A/B testing capabilities.

Can you provide insights about selected and previously selected audiences, i.e., cohort analysis over time to report on sales, campaign performance, profile analysis.

11. Predictive models

Is the CDP on premise, vendor hosted or cloud based? Please provide details.

What hardware or software is required to use the CDP?

What does it take to operate the CDP?

How often the platform upgrade or changes made to the CDP?

What are your SLAs?

How do users access the CDP?

What limitations does your CDP have? Bandwidth storage, number of integrations.

Does the CDP offer scalability? Describe any system limitations and options to scale.
Is the scaling automated?

12. CDP platform services

Does the CDP provide general support? Describe the availability of help desk-quality problem resolution, breadth of support capabilities and geographic reach. Is your support onshore or offshore?

Does the CDP provide any self-service help? Describe the resources available for platform self-service help such has online user communities, wiki's, knowledge base etc.

Please describe the account management team structure that would support this relationship? Where does the account team report within the organization.

What type of training is required for your account management personnel?

What type of training does company provide for the solution?

What resources are provided or available to analyze data, segment clients, or run campaigns?

What resource available for direct mail?

How are clients informed of updates and changes to the platform or your offering?

Do you provide any consulting or professional services? If so please describe.

What geographies is your system available and utilized?

Security

13. Access

Do you have user level access controls on the various applications within your platform? Please describe authentication model, protocols, access control, logging, auditing etc.

Do you user level type security access to reports and the reporting tool?

How can clients retrieve/export their data?

Does the technology provide for authentication and authorization security? Describe all technical options for authenticating users and authorization to solution capabilities.

14. Data storage and ownership

Where do you store data?

Who owns the data?

What are the security protocols around data storage? Please describe

Describe encryption capabilities for the data at rest and in transit?

What is done with customer data when a contract ends or is terminated?

How do you avoid co-mingling of customer data?

15. Solution security and availability

What is CDP's Service Availability?

Is there dedicated application support?

Do you have a disaster recovery process? Describe the DR process and expected recovery times

Do you conduct regular vulnerability assessment scans, web application scans, and penetration testing?

Do you follow industry best practice system hardening and secure configuration guidelines, and what sources are used for the benchmarks (CIS, NIST, SANS, vendor guides, etc.)?

16. Certifications and compliance

What type of security is used? Do you have any data security certifications?

Are you SOC Type 2 certified?

Are you GDPR Compliant?

Are you FINRA compliant?

What type of vulnerability assessments have been done on your platform?

Is the data encrypted at rest and in transit?

Do you have a privacy API?

Can any field related to customer be designated and managed as PII?