CDP RFP Template

Instructions: Determine your organization's CDP requirements and list them in column B. Ask vendors to respond to each question in column C.

Your Information		
	Your Company Name:	
	Your Name:	
	Your Contact Info:	
	Company Overview:	
	Executive Summary (challenges, goals, business outcomes):	

Category	Functional Requirement	Vendor Response *(Vendor to Complete)*
Data Management		
Data Ingestion	Please describe your typical onboarding process for the CDP, including length of a typical deployment and effort required by us, or the use of a system integrator or agency for onboarding	
	Can you ingest attribute, event, and transactional data from all sources including online and offline? (Please describe ingestion process)	
	Can your CDP ingest data in all formats? If yes, does data filtering happen before/after ingestion?	
	Can your CDP ingest data directly from our data warehouse? If yes, at what cadence?	
	Does your CDP ingest campaign membership and engagement data from paid and owned channels?	
	How often is the data taken into the CDP? Real-time, on-demand batch, Daily, Weekly, Monthly?	
	Can ingest real-time and historical data to be made available for immediate use?	
	Can your platform store relational data like product catalogues, retail locations, etc. ?	
	Please describe your approach to data storage. Does this put constraints on the system? Will it be able to grow with us as the market and our needs change?	
Profile Unification	Can non-technical users view a single unified view of any customer with all actions and properties attached to them from all the inbound systems? Please describe the view and permissioning.	
	Describe your ability to unify customer records across customer data sources using deterministic and/or probabilistic ID matching.	
	How do you ensure data accuracy when aggregating a unified customer profile compiled from multiple online and offline data sources? How often is data accuracy updated?	
	Explain how you supports both anonymous and known user data and resolves identities between them.	
Data Access	Does your CDP give users direct access to all data in the unified customer profiles for segmentation, analytics, campaigns, and other business functions?	
	Does your solution offer modern RESTful APIs? What APIs and integrations with third party and enterprise applications do you offer today?	
Analytics & Intelligence		
Segmentation	Can perform advanced segmentation based on all data types collected from across channels? Is there a limit on how many fields can be used in a segment?	
	Describe your platform's capabilities to orchestrate a segment usage across many channels. Expand on your platforms' ability to automatically select the channels that are most likely to be effective for a given user.	
	Is the CDP able to create segments from the data stores/calculated data in the CDP? Are segments updated in real time?	
	Is the UI for segment creation easy to use for non-technical roles?	
	What standard segments does your CDP provide out-of-the-box to get started? Can these be customized to our business?	
AI/Predictive Intelligence	Describe the out-of-the-box predictive features available in your CDP.	
	How does your platform support native product recommendations? Do you also integrate with 3rd party recommendation solutions?	
	Does your company have the ability to integrate with and bring in in-house models into the system?	
	Describe how we would be able to modify existing predictive models or create our own predictive models within your platform to be used for activation / retention purposes.	
Experimentation & Reporting	Describe your platform's reporting capabilities. What are the capabilities and processes for generating custom reporting?	
	Please explain how your platform integrates with BI tools such as Tableau, Looker, Power BI etc. What data can be passed back?	
	Does platform support multivariate testing across channels? How are the results visualized and used to inform campaigns?	
Cross Chanel Orchestration		
Orchestration	Do you provide a non-technical user interface to conduct journey-based orchestration?	
	Describe your journey orchestration capabilities across email, sms, app, paid ads, direct mail, and other messaging channels.	
	Does your platform have the ability create and updated journeys based on a variety of data triggers?	
	Does your platform allow for automated skips of single or subsets of contacts for steps within a multi-step campaign based on attribute or customer action?	
	What is the maximum number of steps in an orchestration journey?	
	How does your platform support real-time event triggered campaigns (i.e. abandoned cart) ?	
	What standard journeys does your CDP provide out-of-the-box to get started? Can these be customized to our business?	
Personalization	Can platform personalize messages in real-time?	
	Does tool enables marketers to configure personalization outcomes that drive customer journey optimization?	

Personalization		
	What kind of personalization features are built into the platform?	
	Can your platform include personalization based on dynamic content in messages?	
Integrations	Does your CDP support cross-device matching? If you integrate with 3rd party vendors, please describe how you've integrated with them.	
	How does your CDP integrate with customer services applications? Is the flow of data bi-directional (back and forth for both core data and metadata)?	
	How many integrations (data sources) does your CDP have for data collection? Please provide a URL which lists up all of the integrations natively supported by your CDP.	
	Can platform seamlessly integrate with our existing tech stack?	

Privacy, Security & Compliance		
Privacy & Compliance	Company supports customer data privacy preferences and adheres to privacy compliance regulations (please link to privacy policy)	
	Is your company GDPR and CCPA compliant?	
	How does your company manage PII?	
Security	Is multi factor authentication and VPN access required for remote access to your computing environment?	
	What is the timeline for removing access for terminated users?	
	Does your organization perform annual penetration tests and if any high risk issues are found how quickly are they corrected?	
	Has your organization implemented a formal risk assessment program?	
	Is data encrypted in transit and at rest, if yes what type of encryption is employed?	
	Are all external network connections monitored by an IPS/IDS or other network monitoring tools?	
	Does your organization have a formal incident response policy?	
	Does your oganization maintains audit trails for interactions with the system?	
	Does your organization use single-sign on?	
	Does your organization require code reviews and approvals of all new or modified applications prior to implementation?	

Platform & Services		
Platform	Does the CDP offer scalability? Describe any system limitations and options to scale. Is the scaling automated?	
	How can the product be extended for incorporating specific requirements of your clients?	
	How often do you have Maintenance & Releases? How do you communicate this to your customers?	
	Can you processes large volumes of data and campaign workloads without interference or latency?	
Services	Please describe your customer support methodology including through the inital onboarding	
	Describe your typical onboarding process for the CDP, including length of a typical deployment and effort required by us, or the use of a system integrator or agency for onboarding	