

# Guidelines for Writing a Request for Proposal for Engagement and Loyalty Solution Platforms

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Construct your own request for proposal for a loyalty initiative

Updated April 2020





## Evaluation Criteria

What will each supplier be measured on? What will it take to win the business? The following text provides an example:

[COMPANY NAME] is looking for a customer loyalty platform and service provider who can meet our needs as summarized in this Request for Proposal. We are looking for a provider who is able to develop, launch and run a best in class loyalty program. In addition, we are interested in a solution which would allow [COMPANY NAME] to manage the program directly after a training period.

The proposal should consider how to identify and implement a loyalty program you feel will best fit our objectives and our customer demographics. Please address all the components of each addendum of the RFP and provided responses/information following sequence of questions within each addendum. Please be very clear on your capabilities to develop and manage the program while also highlighting any client-facing capabilities for program management. Your proposal should also specify if any additional partners are required to provide the capabilities needed to support the program. Clearly identify any requirements that cannot be satisfied and the specific cause.

## Fact Sheet

This should provide vendors with the core marketing technology ecosystem of your company including specific products and version numbers. For example:

E-commerce: \_\_\_\_\_

Email Service Provider: \_\_\_\_\_

CRM: \_\_\_\_\_

POS: \_\_\_\_\_

Web Analytics: \_\_\_\_\_

Business Intelligence: \_\_\_\_\_

SMS Delivery Provider: \_\_\_\_\_

Content Management System: \_\_\_\_\_

Product Reviews: \_\_\_\_\_

Tag Management: \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# RFP RESPONSE INSTRUCTIONS

## Overview

Include the specifics on when RFPs will be accepted. For example:

Proposals in response to this RFP will be accepted by [COMPANY NAME] until 5:00 p.m. Eastern Standard Time (EST) on [INSERT DATE].

Submittals must be made electronically in Microsoft Office format and must follow the format of this proposal and corresponding addendums. Each section of RFP must contain a response to all items in the sequence identified. Please submit requested information via email to [COMPANY NAME] [COMPANY NAME] contact information for this RFP is:

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Cell: \_\_\_\_\_

## Schedule of Events

Include a schedule of action items to be completed with corresponding dates. For example:

All submitted responses must be completed in writing and emailed to the primary contact below no later than 5 p.m. EST on the date indicated below.

RFP PROCESS STEP	DATE
RFP issued to providers	[DATE]
Intent to respond to [COMPANY NAME]	[DATE]
Questions submitted to [COMPANY NAME]	[DATE]
[COMPANY NAME] response to submitted questions	[DATE]
RFP submission deadline (electronic copy and non-disclosure agreement)	[DATE]
Notification of finalists	[DATE]
Finalist presentations and demonstrations at [COMPANY NAME] HQ	[DATE]
Final selection	[DATE]
[COMPANY NAME] may change the schedule at any time in its sole discretion and will notify all participating vendors of any such change.	

## Terms and Conditions

Include a Terms and Conditions section establishing that in submitting a bid in response to this RFP, the bidder agrees to accept the terms set forth. Following is an example of a set of terms and conditions that can be repurposed for your RFP. Be sure to consult your legal team for final review.

Distribution of the RFP or receipt of any proposal shall not constitute a commitment or offer by [COMPANY NAME] to any or all of the RFP participants.

[COMPANY NAME] does not make any representation that it will, and disclaims any obligation to, proceed with or to commit to any particular future actions in relation to the subject matter of this RFP, including accepting or rejecting any RFP participant.

[COMPANY NAME] reserves the right, in its sole discretion, to initiate another selection process, enter into negotiations with a person or persons who have not been invited to respond to this RFP.

All costs and expenses associated with preparing and completing this RFP shall be the responsibility of each RFP participant and [COMPANY NAME] will not reimburse or pay for any expenses associated with the submission of this RFP.

RFP participant warrants that it has no actual or potential conflict of interest in relation to its participation in this RFP process or its delivery of the services if selected.

[COMPANY NAME] is not obligated to: (1) accept any RFP; (2) enter into any agreement with any RFP participant; (3) give reasons for not considering, rejecting or accepting all or any part of any RFP or canceling the RFP process.

[COMPANY NAME] may, in its sole discretion, consider for acceptance a response that does not comply with the requirements of this RFP.

RFP participant grants [COMPANY NAME] a non-exclusive license to use for the purpose of this RFP process any information, processes, sketches, calculations, drawing or other data or information submitted with, or included in, the response submitted by RFP participant.

RFP participant agrees to indemnify [COMPANY NAME] against all third-party claims arising out of any use of any propriety information submitted with, or included in this RFP.

RFP participant and each of the key personnel acknowledge that the details of the RFP may be disclosed to third parties, including the evaluation committee, for the purposes of this RFP process and any related purposes.

[COMPANY NAME] reserves the right to conduct due diligence on a RFP participant by verifying whether the represented resources and skills are actually available and assessing the experience and integrity of the RFP participant.

[COMPANY NAME] is relying on the information provided by the RFP participant for this RFP and RFP participant warrants and represents to [COMPANY NAME] that the information submitted to [COMPANY NAME] in response to this RFP is accurate in all material respect, that it is not misleading and that in preparing the information reasonable and professional skill and care has been exercised by RFP participant and its personnel and RFP participant acknowledges that [COMPANY NAME] may rely on such information.

RFP participant acknowledges and agrees that this RFP, and all materials submitted in connection with it, and the RFP selection process are strictly confidential and no public statements shall be made with regard to the process without prior written consent of [COMPANY NAME].

## Provider Service Agreement's Contractual Requirements

This section outlines that, if an RFP participant is selected under this RFP, the contractual expectations include, but are not limited to, what your company requires with regard to the legal agreement governing the engagement of the RFP participant/provider and the services provided. These include:

- Provider indemnification obligations for breach of confidentiality; data breach; violation of warranties, customer policies, applicable laws, regulations and industry standards; intellectual property and privacy infringement
- Exceptions to limitations of liability for breach of confidentiality obligations; indemnification obligations; warranties; negligent acts or omissions; and consequential damages
- Provider Warranties shall include compliance with all applicable federal, state, and local (and international to the extent applicable) laws, regulations and industry standards, including those relating to data privacy and protection, and customer's policies & procedures; best-in-class data security measures, processes and procedures; confidentiality; EU Safe Harbor and other applicable certifications, industry-standard product and service warranty periods
- Customer Audit rights – including audit rights for any subcontractors or third-party providers; and compliance with relevant standards such as SAS 70 Type II or equivalent successor qualification
- Customer data will not be withheld under any circumstances
- Customer's ability to access and retrieve its data in part or whole at any time in a reasonably useable format without restriction or cost
- RFP participant will not suspend services under any circumstances, including disputes between the parties
- Provision of termination/transition assistance (to another vendor and/or in-house)
- If provider is a SaaS or a cloud storage service, identify at least the following (i) the cloud
- Computing/storage platform; (ii) where vendor processes customer's data; (iii) data flow map and (iv) subcontractors/third-party service providers.

## Confidentiality

This section provides a sample confidentiality disclosure.

The confidentiality clause establishes that the contents and submissions of this RFP are confidential and governed by the Non-Disclosure Agreement executed by the RFP participant. Include the following language: [COMPANY NAME] requests that this RFP not be forwarded to any third party without the written consent of [COMPANY NAME].

## Addendums

The following addendums are included to clearly outline what is required from bidders in order for your company to complete the selection process.

### Addendum A: Intent to Respond

This section outlines how and when bidders should respond.

[COMPANY NAME] Request for Proposal (RFP)

Customer Engagement and Loyalty Program

Please complete this form regarding your Intent to respond to the RFP by [INSERT DATE], [INSERT TIME], and attach it to an email to [COMPANY NAME].

Receipt of this page will assist us in tracking your proposal.

## Addendum B: Vendor Company Information

Include the following sections to request the relevant company information from bidders.

1. Provide the name and contact information of person responsible for responding to the RFP.
2. Company name and background
  - i. Company structure (for example, corporation or partnership)
  - ii. Number of years the company has been in business
  - iii. Leadership organization
3. Please provide a description of the company's business and objectives, summary of offering, locations, and number of employees.
4. Please provide a statement about your company's growth strategy.
5. How many clients are currently using the proposed loyalty platform and services? Give a few examples of your current clients.
6. List any affiliates or other business partners of your company that could potentially provide services that support an overall loyalty platform solution.
7. Does your company have any pending litigations? Please provide any current litigation your company has been involved with in regards to program management of loyalty programs.

## Addendum C: Loyalty Program Experience

By asking for this information, your company can evaluate vendors based on their experience and expertise.

1. Provide case studies for two (2) current and active client loyalty programs running on your Loyalty Solution Platform.
2. What do you consider to be your organization's core competency(ies)? What makes you a leader in your market? What's your distinct advantage over your competitors in meeting [COMPANY NAME] objectives? What unique capabilities or qualifications does your company possess regarding customer loyalty programs?
3. What role does engagement play in a loyalty program?

## Addendum D:

By asking for this information, your company can evaluate vendors based on strategy and platform functionality.

1. How do you help your clients define their loyalty strategy and design their program?
2. Does your platform have gamification capabilities? If so, please describe.
3. Does your platform have survey functionality? If so, please describe.
4. Does your platform have refer-a-friend functionality? If so, please describe.
5. What other benefits and capabilities does your platform offer?
6. What type of strategies do you use to drive member engagement?

## Addendum E: Loyalty Approach and Philosophy

By asking for this information, your company can evaluate vendors' specific capabilities as they pertain to your business and loyalty needs.

1. Do you support tiered-based programs that are also points based? If so, please describe.
2. How do you support/promote new signups? What are new signup best practices?

## Addendum F: Program Management

By asking for this information, your company can evaluate vendors' program management capabilities.

### Enrollments

1. Please describe what data elements your Loyalty Solution Platform can capture during the member enrollment process.
2. Describe the various methods or channels for enrollments into the Loyalty Solutions Platform (mobile & web).
3. What types of information outside of the initial enrollment can you collect?

## Social, Mobile, and Digital Engagement

1. Describe the various ways your platform is designed to allow members to earn rewards & recognition from community, website, and email engagement, mobile, social media platforms, and non-spend engagement activities.
2. Please list the social networks with which your platform has existing integrations already established and in production.

## Earning, Recognition, Surprise and Delight, and Points

1. Does your platform support earning points for [COMPANY NAME] products purchased through retailers?
2. Please describe your system's ability to manage multiple bonus/promotion events concurrently. Can they be prioritized? Does the system permit the user to set a "maximum" point value on a transaction (for example, a maximum of 10 points per dollar)?
3. Please describe the process for adding a new benefit, point earning or redemption scheme to the Loyalty Solution Platform.
4. Describe how your platform handles retroactive credit to a member's account. Do the clients and/or members have direct access to the system to attach a transaction based on receipt information or order number information?

## Recognition and Redemption

1. Please describe the reward recognition redemption functionality of your platform. How does the fulfillment notification work? Is there a limit to the number of redemption items that can be offered?
2. Please describe how your platform handles the redemption process for members? How is their member account impacted and what do they see? Does your platform handle "returned" items (thus points added back to the member's account)?
3. Please describe the functionality as it relates to member point expiration.

## Addendum G: Reporting and Analytics

By asking for this information, your company can evaluate vendors' reporting capabilities and how they translate to actionable insights.

1. What are the standard reports and dashboards available in the system?
2. Describe your system's ability to handle ad hoc query capabilities.
3. Please describe the process for creating a new report to be added to the automated reporting capabilities.
4. Please describe your current in-house analytics capabilities. Do you offer predictive modeling, segmentation modeling, response modeling? If so, please describe any software you are using for these efforts.
5. What other customer insights are available out of box that will allow [COMPANY NAME] to better understand the behaviors of our most loyal customers?

## Addendum H: Account Management and Professional Services

By asking for this information, your company can assess the level of support provided by each vendor, including the people, the implementation process, level of training, and the provision of ongoing support.

## Account Team

1. Describe the account management structure for an account like [COMPANY NAME]. Be sure to include each member's set of responsibilities.
2. Please give some examples of the personnel that would support [COMPANY NAME]. Please include names, titles, length of time with your firm and their background and skills.
3. Please describe your plan to communicate progress with [COMPANY NAME] during implementation and post-launch.

## Implementation

1. What is your typical timeline for full implementation, including strategy and implementation? Please break down the typical timeline for each phase.
2. What are the major components of the implementation process (including training)?
3. Please provide a summary of the roles of your implementation team.

## Training

1. Describe what marketing, training and technical services are included with program deployment offering.

## Ongoing support

1. How is ongoing account support handled?
2. What is your standard SLA for support?

## Addendum I: Technology

By asking for this information, your company can evaluate vendor technology in terms of hosted solutions, integration capabilities and security features.

### Hosting

1. What is your service level standard for website percent up-time? In the event a full failover to a second data center is necessary, what is your expected downtime?
2. How does your solution adjust for peak loads?
3. What are your development and release cycles? How long does a client have to move to the newest version once it is released?
4. What is your notification methodology for planned and unplanned outages? How many instances does a standard contract allow?

### Security

1. Describe the security and privacy features for each module of your solution to safeguard client data.
2. Describe your overall Business Continuity and Disaster Recovery process.
3. Describe any physical security for the proposed solutions.
4. Is the software PII compliant?

### Architecture

1. Provide an overview of your technical infrastructure. Please include information covering technologies used, hosting, backups, availability, scalability, monitoring and security as well as any additional relevant information.
2. What methods are available to extend the functionality of your platform into existing [COMPANY NAME] properties and experiences via web and/or mobile?

### Integrations

1. What type of integrations do you support? (API, Web Services, file transfers, etc.)
2. Do you provide out of box integrations or do you or third-party providers support the integrations?

### Customer Portal and Member Accounts

1. Please provide an overview of your user interface/customer portal.
2. Does the client have the ability to specify/customize required capture fields for Member account creation?

## Privacy

1. What 3rd party security / privacy certifications have your organization completed? Please share results of audits / certifications where appropriate.
2. What safeguards / protections are in place to ensure that activity is authentic and to prevent gaming? Specifically, what safeguards / protections do you have in place to prevent gaming in non-spend activities.
3. Does [COMPANY NAME] own all data collected through this program?

## Web Application Management and APIs

1. Does your customer portal allow for personalization, self-service, etc.?
2. Do you provide REST APIs? If so, how do integrations work with your portal?
3. Do you have an API library? If so please provide details.

## Addendum J: Pricing and ROI

Finally, by asking for this information, your company can determine the cost to implement a new loyalty solution and the ROI.

1. Overall, please outline your pricing structure.
2. Please provide detailed description of services provided.
3. Regarding web hosting, please provide pricing for a scenario where [COMPANY NAME] hosts the site and a scenario where the provider hosts the member website.
4. Include a section that contains Other Professional Services and related pricing.
5. Do you provide ROI modeling? If so, please share details of your ROI modeling capabilities.

## CONCLUSION

Using this guide and suggested format, you're positioned to articulate your company's objectives and what you're looking for in a loyalty solution. The more detailed and informative the RFP is, the better the proposal your vendors will send in response.

## Learn More

Oracle CrowdTwist customer loyalty platform enables brands to unlock unique insights and incremental value through omnichannel engagement. A flexible SaaS solution, Oracle CrowdTwist leverages AI technology and predictive analytics to deepen brand-customer relationships and build emotional bonds. Forrester recognized the platform as a Leader in "The Forrester Wave: Loyalty Technology Platforms, Q2 2019."

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