An RFP/ Procurement Tool For Today's Marketer

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DIGITAL
CLARITY
GROUP

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Introduction

Marketing as a function has moved beyond email and the Internet. With deeper and better integration with mobile, social media, display advertising, and search channels, it has evolved into a function that requires a true cross-channel digital experience marketing platform (DXMP).

Even despite huge growth in the space, most companies have not deployed a digital marketing or customer journey specific platform, much less a DXMP. And, even of those who have, most struggle with adoption and actualization; hindered by end users' lack of understanding about what marketing platforms are capable of delivering, as well as by a lack of awareness of constantly evolving modern marketing best practices. More education and awareness are the keys to addressing these gaps – and organizations want to, and should be able to, look to vendor and service provider (SP) partners to fill these gaps. In doing so, they also bring efficiency and effectiveness improvements to their processes.

Customers are looking for innovation in everything thing they do – from marketing to product development to go-to-market strategies. They need to be able to leverage data from their systems of record and systems of engagement in order to maximize the market impact. This means clients want existing and potential partners working with their cross-functional teams and leaders to identify and address gaps in their processes and skill set. Its not just technology, they need partners who will educate and inform their teams to vision on what is possible, rather than on just what they know. Clients now expect service-oriented experiences that help them generate new and innovative ways of thinking and executing so they can more successfully navigate the transformation that is taking place in their industry and business.

" Customers are looking for innovation in everything they do – from marketing to product development to go-to-market strategies."

Finding partners that can deliver this new way of thinking is the first step – and a major (self-imposed) barrier for many companies, particularly those bound by restrictive and antiquated procurement processes, is the often requisite request for proposal (RFP).

It is not so much the document itself, but rather what is asked for within the document and the manner in which it was asked. Characteristically highly prescriptive in nature, traditional RFPs typically don't provide respondents the opportunity to be innovative in their responses or approach. More significantly, they rarely capture the actual, real-world requirements of the company.

Through working with organizations, from SMB to global enterprises, we have found what is needed is a more open-ended and flexible approach that, first, allows the organization to CREATE the right atmosphere for assembling the request, rather than MANAGING the procurement process, or DEPLOYING the document to the vendors. This important first step provides organizations the flexibility to make their ask in context of what is "needed" to support a smart strategy – rather than "what is possible" in any given strategy.

This tool is meant to help organizations take this first step, and provide a guide to building a better procurement process for the new digital experience marketing platform.

"...what is needed is a more open-ended and flexible approach that, first, allows the organization to CREATE the right atmosphere for assembling the request, rather than MANAGING the procurement process..."

Why Change?

While we might argue that every aspect of the traditional RFP process needs to change, this is almost certainly beyond the remit and control of the typical marketing organization. To be clear, a multivendor evaluation and selection process can still one of the best ways to help ensure that a company maintains a good position for negotiation with new and existing partners. Request for proposals bring structure and organization to the process to help mitigate risk, stay aligned with the procurement project's goals, as well as clearly identify the pros and cons of each partner – vendor and service provider – being considered.
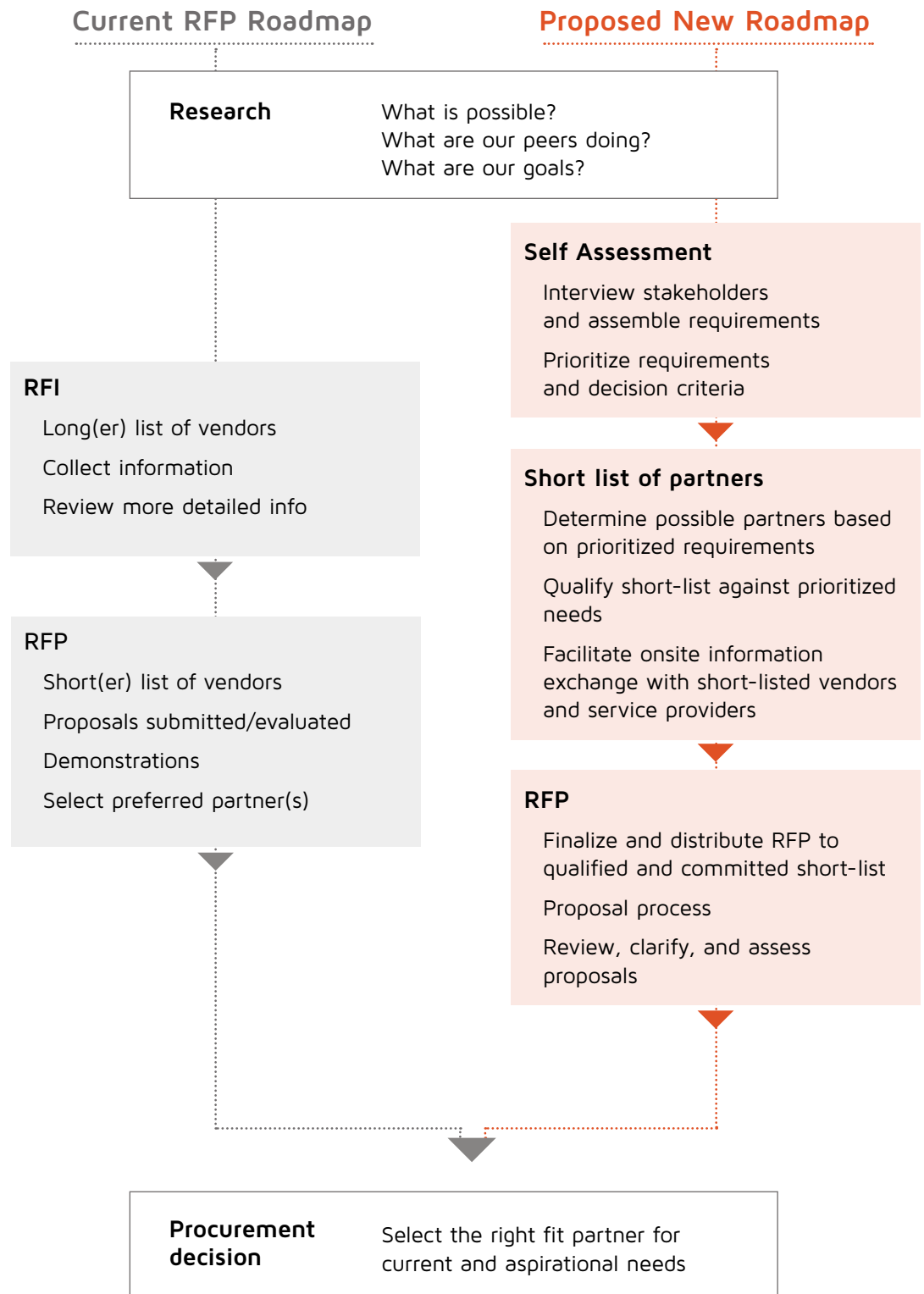
The opportunities for improvement come in both the shake-up in the traditional order of operations as well in the creation of the foundation from which the actual RFP document is built. Meeting with potential solution providers and their current clients prior to issuing the RFP can be highly educational and informative, and provide important insights into how the technology and service providers work in action. This also allows the potential partners to assess their fit with each other, and opt out if the alignment is missing.

Our experience has clearly shown a new, better procurement process for marketing technology is required because:

- Traditional procurement processes tend favor legacy relationships, not innovation or merit.

- RFPs tend to be a "one size fits all" structured with little room or accommodation for new or innovative business practices, needs, or technology.

- RFPs are overly structure limiting the opportunity for respondents to educate and bring new ideas to the requesting company.

- Today's RFP's are overly-reliant on the quantity of "features", rather than the contextual fit and a need for more service-oriented experiences from today's vendors.

- Procurement teams tend to drive the decision more than the affected teams and end users affected by the decision.

- New business and marketing language and practices need new and improved procurement language and practices.

When it comes to the actual RFP document – concise, well-structured, and well-documented requests make for better, less-ambiguous responses. An effective RFP process and document should reflect the strategy as well as short- and long-term business objectives, and provide detailed insight so that suppliers can provide their perspective on how to best meet those goals. Today's RFPs should detail clear and complete expectations of the prospective customer, as well as typical RFP process instructions, timelines/deadlines, and contact information.

The current versus a new procurement process roadmap

Current RFP Roadmap   ## Proposed New Roadmap

Research

What is possible?
What are our peers doing?
What are our goals?

Self Assessment

Interview stakeholders
and assemble requirements

Prioritize requirements
and decision criteria

RFI

Long(er) list of vendors

Collect information

Review more detailed info

Short list of partners

Determine possible partners based
on prioritized requirements

Qualify short-list against prioritized
needs

Facilitate onsite information
exchange with short-listed vendors
and service providers

RFP

Short(er) list of vendors

Proposals submitted/evaluated

Demonstrations

Select preferred partner(s)

RFP

Finalize and distribute RFP to
qualified and committed short-list

Proposal process

Review, clarify, and assess
proposals

Procurement decision

Select the right fit partner for
current and aspirational needs

The DXMP Self Assessment Tool

How to use this tool

Each self-assessment section requires the responders to assess their perception with regard to the organization's readiness, needs, or maturity on a scale of 1 to 6, according to the degree to which they agree with the statement. A score of 1 represents complete disagreement and 6 represents complete agreement. Leave the scoring blank if the statement is not applicable.

1	2	3	4	5	6
Disagree completely	Disagree	Disagree somewhat	Agree somewhat	Agree	Agree completely

- Each section's questions should be tallied up and then divided by the number of questions answered for a final score between 1 and 6 for that section.

- A reference guide for interpreting how the scores influence the RFP document can be found following the five self-assessment sections.

- Have the various stakeholders and/or stakeholder teams respond to the assessment questions that are relevant to their interests. Responses should be reviewed by the individual teams, as well as in comparison to other teams, and as a collective to get additional insights into where there are synergies and gaps among the teams' perception of available skills, strategy, and technology.

- Share the results with the following parties:

  — Leaders and sponsors, who can help bolster and reinforce the elements that need to be filled through this selection process.

  — Prospective vendors and service providers who can provide leaders and sponsors insights into your organization's current state. This can will enable the latter to be more responsive throughout the selection process.

Understanding your readiness and requirements

The self-assessment tool is comprised of five sections:

1. Business readiness

2. Marketing skills

3. Marketing strategy and execution

4. Marketing technology

5. Customer experience maturity

1. Business Readiness

Please rate your level of agreement with each statement from 0 to 6.	**1** Disagree completely	**2** Disagree	**3** Disagree somewhat	**4** Agree somewhat	**5** Agree	**6** Agree completely

1.1 There is a clear, articulated, and documented vision of the targeted customer experience.

1.2 There is a compelling business need for better technology to support the organization's marketing/sales/customer experience goals.

1.3 There is clarity and commitment to obtain the necessary funding for the acquisition, implementation, and ongoing maintenance of the technology (training, upgrades, etc.).

1.4 The initiative has engaged, acknowledged, and involved leadership sponsorship.

1.5 The necessary, responsible, and affected teams and people have been engaged and involved, and support the stated objectives of this initiative and its planned outcomes.

1.6 There is accountability, with specific and appropriate responsibility, recognition of measurable expectations by all concerned parties, and alignment of decision making.

1.7 The enterprise has the ability and capacity to perform all the tasks required, including the ability to make decisions within the tight time constraints and the parameters of the necessary processes, discipline, and skills to deal with this type of endeavor.

1.8 The enterprise has the ability to implement and operate the transformational technology and their related business processes, absorb the changes arising from implementation, and continually operate in the new environment.

1.9 The project has a clearly articulated, communicated, and understood the value proposition.

Your Score

Sum of ratings divided by the total number of ratings provided.

2. Marketing skills

Please rate your level of agreement with each statement from 0 to 6.

1	**2**	**3**	**4**	**5**	**6**
Disagree completely	Disagree	Disagree somewhat	Agree somewhat	Agree	Agree completely

The marketing team (internal and contracted resources combined) has the necessary skill set/abilities to successfully manage each of the following:

2.1	Marketing operations/project management
2.2	Digital engagement
2.3	Demand generation/customer acquisition
2.4	Data analysis
2.5	Customer journey/experience mapping
2.6	Customer segmentation
2.7	Advertising
2.8	Branding
2.9	Creative/graphics
2.10	Content creation/management
2.11	Persona development
2.12	Marketing systems/technology

Your Score Sum of ratings divided by the total number of ratings provided.

3. Marketing strategy and execution

Please rate your level of agreement with each statement from 0 to 6.	**1** Disagree completely	**2** Disagree	**3** Disagree somewhat	**4** Agree somewhat	**5** Agree	**6** Agree completely

		A clear strategy is in place ▼	Executes well against strategy ▼
3.1	Social marketing		
3.2	Mobile marketing		
3.3	Email marketing		
3.4	Integrated marketing		
3.5	Creative and design		
3.6	Analytics		
3.7	Customer-centric experience/journey		
3.8	Personas		
3.9	Personalization		
3.10	Marketing automation		
3.11	Advertising (non-digital)		
3.12	Content calendaring and planning		
3.13	Paid promotion of content		

Your Score

Sum of ratings for each column divided by the total number of ratings provided for each column.

4. Marketing technology strategy and execution

Please rate your level of agreement with each statement from 0 to 6.	**1** Disagree completely	**2** Disagree	**3** Disagree somewhat	**4** Agree somewhat	**5** Agree	**6** Agree completely

		A clear strategy is in place ▼	Executes well against strategy ▼
4.1	Robust audience segmentation		
4.2	A full 360-degree view of the customer		
4.3	Data collection and tracking across channels		
4.4	Reporting		
4.5	Content management		
4.6	Digital asset management		
4.7	Marketing systems integration		
4.8	Integrated content discovery		
4.9	Content creation/management workflow		
4.10	Asset metadata and tagging		
4.11	Mobile		
4.12	Campaign management		
4.13	Journey mapping		
4.14	Technology and partner ecosystem roadmap/vision		

Your Score

Sum of ratings for each column divided by the total number of ratings provided for each column.

5. Customer experience maturity

Please rate your level of agreement with each statement from 0 to 6.	**1** Disagree completely	**2** Disagree	**3** Disagree somewhat	**4** Agree somewhat	**5** Agree	**6** Agree completely

5.1	The organization has clearly communicated its customer experience strategy and adopted an organizational-wide customer-first philosophy	
5.2	There is a customer acquisition strategy.	
5.3	There is a clear customer-onboarding process for newly acquired customers.	
5.4	Customers are continually engaged with relevant content/outreach efforts.	
5.5	There is a clear strategy on re-engaging lost customers.	
5.6	There is a clear strategy to convert customers to brand advocates.	
5.7	The customer record integrates data from all relevant systems of record and systems of engagement.	
5.8	The organization has a clearly articulated and understood value proposition.	
5.9	Customer experience-related KPIs are defined and tracked.	
5.10	The organization works cross-functionally to deliver on its customer experience strategy.	
5.11	The company has adopted an outside-in perspective on all marketing activities.	
5.12	Your marketing technology landscape is fully integrated.	

Your Score   Sum of ratings divided by the total number of ratings provided.

Interpreting your score

It doesn't matter if each section netted out to be ones, or if you scored fives and sixes across the board. The results – regardless of what the actual number is – help to tell your readiness story. Each score – the individual line items as well as the averaged section scores – can be used to better understand areas of strength, as well as to point to where support from a partner could be most useful in meeting your marketing and organizational customer related goals.

The following pages provide guidance on how to use the information and insights:

- To build a tailored RFP, and

- What to look for in the interactions, exchanges, and RFP responses to better understand how the potential partners can meet your organization's needs.

The higher the score, the better prepared and more mature your organization is in that particular area. So look to the lower scores (1 to 3) for the priority areas of experience and expertise the technology vendors and service providers need to bring to the table to best support and guide you in the technology implementation, as well as overall marketing and customer experience maturation.

1. Business readiness

Find your score on this scale	1	2	3	4	5	6

What to include in the RFP Scope of Work (SOW)

1–2	Current state analysis Requirements gathering Business case development Strategy review/development Project management lead Business transformation guidance Change management leadership
3–4	Business case review and analysis Requirements and assumptions validation Project process review and recommendations Change management support Project management support
5–6	Validation of requirements and assumptions Project process review and recommendations Change management participation Project management support Ideation on maturing vision

What to look for from respondents

1–2	3–4	5–6
Experience in business case development Expertise in strategy development and alignment Change management plan Proven project management process Willingness to educate	Innovative approach to stakeholder engagement Proven execution process Experience in building out existing strategies Cooperative team approach	Proven execution process Experience in strategy maturation Cooperative team approach Ideation on gaining efficiencies and effectiveness in current project process

Additional .....

1–2	3–4	5–6
With an average score of 1 or 2, the organization may not be ready for a procurement process; it may be prudent to step back and focus on getting better prepared before proceeding.	With a solid base of readiness, finding partners that are willing to work with you to augment specific areas that are lagging or to fill gaps is important to ensure a strong foundation for the initiative.	With clear sponsorship, ownership, and goals for the initiative, potential partners can provide a fresh perspective and new ideas on how to mature and improve the vision.

2. Marketing skills

Find your score on this scale	1	2	3	4	5	6

What to include in the RFP Scope of Work (SOW)

1–2
Staff/resource augmentation

Marketing skills and best practices education

Training plan

Process planning

Audit of marketing team skills and structure

3–4
Marketing process assessment and recommendations

Marketing best practices knowledge transfer

Marketing team skills audit Training plan

5–6
arketing process assessment and recommendations

Marketing best practices knowledge transfer

Marketing team skills audit

What to look for from respondents

1–2
Experience in working with client team as a knowledge lead

Expertise and innovative approach for knowledge transfer

Staffing augmentation options

Accessible network of resources

3–4
Expertise and innovative approach for knowledge transfer

Bench augmentation options

Accessible network of resources

Recommendations for resource requirements to execute

5–6
Expertise and innovative approach for knowledge transfer

Accessible network of resources

Ideation on maturing marketing practices and execution

Additional .....

1–2
Think about which skills you need within the in-house talent team, and which can be contracted; work with the selected service provider (SP) to set a plan for ongoing skills development.

3–4
With a good baseline skill set, the marketing team will need to adopt best practices and gain more expertise in order to successfully execute and continue to mature the company's marketing efforts; evolution is key to ongoing success.

5–6
With a mature, robust marketing team, integrating their knowledge and skill set with those of other stakeholders will help drive customer experience maturity across the organization; look to potential partners for ideas on how best to do that.

3. Marketing strategy and execution

Find your score on this scale	1	2	3	4	5	6

What to include in the RFP Scope of Work (SOW)

Marketing strategy and KPI development Marketing strategy leadership Marketing workflow and process expertise Marketing tactical review Business transformation guidance	Strategy review and analysis Marketing and organizational strategy alignment Marketing process review and recommendations Marketing best practices knowledge transfer	Strategy review and refinement recommendations Marketing and organizational strategy alignment Marketing strategy maturation plan

What to look for from respondents

Marketing strategy planning experience Change management expertise Willingness to educate Multifaceted approach to marketing maturation and evolution Flexibility in approach	Logical and articulated strategy planning approach Experience in aligning marketing and organizational goals via strategy Expertise in relevant types of marketing (mobile, content, etc.)	Expertise and innovative approach for strategy and execution Innovative ideation on maturing marketing strategy and execution Experience in aligning stakeholder teams on strategy and integrated execution

Additional .....

To help mature marketing's strategy and ability to execute, look to other areas of the business that do both well for insights on how to improve both.	With some areas of the marketing strategy being executed well, consider what the next important marketing effort/channel/ etc. should be the focus for improvement.	Consider seeking help from your potential partner on building centers of excellence to enable continual best practices and sharing across the organization.

4. Technology strategy and execution

Find your score on this scale	1 2	3 4	5 6
What to include in the RFP Scope of Work (SOW)	Technology strategy, roadmap, and KPI development Workflow and process planning Data analytics and reporting strategy development Marketing technology implementation and integration plan	Integration plan analysis and recommendations Technical workflow review and recommendations Technology strategy, roadmap and KPI review/development Data, analytics and reporting review and recommendations	Technology strategy and roadmap review and refinement recommendations Marketing and enterprise technology strategy and roadmap analysis and alignment Marketing technology adoption planning
What to look for from respondents	Marketing technology strategy development experience Technology integration expertise Workflow efficiency experience Willingness/ability to educate	Logical and articulated strategy planning approach Experience in aligning marketing and organizational goals via strategy Expertise in relevant types of marketing (mobile, content, etc.)	Expertise and innovative approach to further technology integrations Experience in guiding broader/deeper adoption and use of technology
Additional	Get clarity on what the current marketing technology landscape includes and provides; identify and prioritize integration points with the new marketing technology that will provide quick wins and/or efficiency impact.	Look for ways the marketing team can extend and leverage more features and functionality available within the marketing technology landscape.	Consider working with the selected partners to understand how the marketing technology landscape can be used by other parts of the business to improve customer experience.

5. Customer experience readiness

Find your score on this scale	1	2	3	4	5	6

What to include in the RFP Scope of Work (SOW)

Strategy for ongoing channel integration services

Education and training on new channel development

Customer experience management training plan

Customer Experience process planning

Experience team skills and structure audit

Audit of existing customer experience channels for fit and finish

Integration technology help to understand buyer's journey

Training plan

Future-proofing and new channel integration capabilities

Capacity for more sophisticated integrations to real-time data or predictive analytics

Agility and integration of new channels, platforms, etc.

What to look for from respondents

Experience in working with client team in customer experience development

Excellent training and ongoing services or partners for such

Bench augmentation options

Accessible network of resources

Expertise and innovative approach for knowledge transfer

Accessible network of resources

Recommendations for resource requirements to execute

Technology and integration capabilities

Accessible network of forward-leaning experts

Ideation on maturing marketing practices and execution

Additional .....

Understanding how technology can help to integrate multiple experiences/channels to create a better "total experience" is a must. Understand how they might recommend a phased approach.

There is some integration and tracking, but in order to advance, an audit of the weak areas is needed. Look for experience in developing these solutions with peers, and those with expertise to successfully execute and continue to mature the experience creation efforts.

With robust integration in experiences, the team is most likely looking to become more agile, and "step on the gas". Understanding how this solution will scale, or create more agility than the existing systems will be key.

Use cases

Use cases are a great way to present your requirements and goals in a real-life, contextual manner as opposed to one based on a perceived list of features and functionalities that may be required to execute the desired task. By presenting your needs in the form of a story or situation, responders have the opportunity to demonstrate multiple facets of how they can meet the stated goals, including their ability to innovate and think outside the box, their technology and process proficiency, as well as their experience and maturity in the area of need.

A use case can include a single scenario or a series of scenarios needed to achieve a goal.

Responders' descriptions and depictions of use cases should include details on the functional, user, workflow, and data requirements their proposed approach calls for in order to execute the use case. Insights into how their proposed approach will mitigate risk and/or increase efficiency are also important components they should convey.

Employ use cases to effectively structure and evaluate the RFP document and on-site demonstration sessions. By providing each of the technology vendors and service providers a common set of relevant use cases to present to the evaluation team (both in writing and via interactive demonstrations), the team will be in a better position to understand the differences between what each of the potential partners bring to the solution table.

The following pages provide examples of use cases for specific goals.

Use case:

A large manufacturer with product sales, and parts and service offered directly to customer and distributor channels is experiencing low customer satisfaction scores from direct and distributor customers for parts and service, as well as increasing call center volumes and decreasing web service request volume.
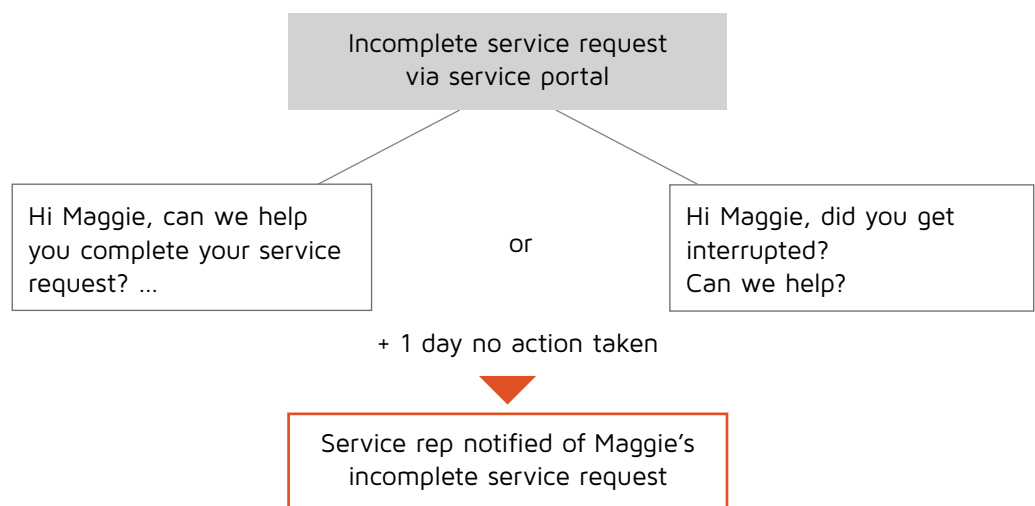
Improvements needed:

Primary: increased web request volumes and lower call center service request volumes

Other: better use of available data, increased use of availabletechnology functionality, increased customer satisfaction

Things to look for in respondents' proposed solution:

- More mature outside-in approach and customer-centricity
- Improved collection, tracking, and leveraging of customer data
- Use of A/B testing on the rate of responses to differentmessaging, sent in response to abandoned transaction
- Applicability to both B2B and B2C (e.g., commercial website, services extranet, dealer/contractor portal, etc.)
- Efficiency of process
- Recommended skill set/resources
- Sample journey map

Sample partial journey map

Incomplete service request via service portal

Hi Maggie, can we help you complete your service request? …

or

Hi Maggie, did you get interrupted?
Can we help?

+ 1 day no action taken

Service rep notified of Maggie's incomplete service request

Sample use case 2:
Improved data/analytics access

Use case:

Large equipment manufacturer has a strong interest in tracking and sharing the information across the organization which is currently only accessible by via a generalized dashboard or via the BI team through specific report requests.

Improvements needed:

Primary: Ease of access to useable data and dashboards on DXMP data.

Other: Flexibility in creating reports and dashboards (both canned and ad hoc), ease of digestion of data from other sources, ease of export of DXMP data to other databases.

Things to look for in respondents' proposed solution:

- How the proposed solution helps optimize marketing efforts via the use of analytics.

- Whether there are third party integrations versus OOB capabilities.

- Details/explanation on the method/ease and flexibility for users to gather the appropriate information for their needs.

- Capturing analytics – note whether analytics capabilities are built into the tool or whether you integrate with third parties.

- Reporting analytics – How are the integrations with third party tools handled (Tags only? Use of APIs?)

- Ease of access for end users to run their own analytics reports (as opposed to relying on a central team of administrators).

Questions for your potential partners

To assess...	Ask potential partners...
Experience and relevance	To provide examples or case studies of current or recently completed projects with similar scopes of work and complexity.
Credibility	Contact information from client references that are either actively using the solution or are in the implementation process. (Note: this may be done later in the selection process.)
Project management and process	To create and supply a proposed project timeline and budget for the scope of work being requested.
Innovativeness	To describe how they would bring creativity and innovation to the project team to address a current challenge the organization is facing.
Adaptability	For details on their product roadmap and how it demonstrates their ability to integrate new channels, technology, and devices into the proposed solution for the existing scope of work and problem statement.
Customer experience maturity	For specific examples of where their suite of solutions have integrated to help create a "total customer experience" across channels, across digital experiences.
Fit	About their project approach: team make up, change request process, access to executives, escalation process, etc. As well as about the personality of the team, and their perspective on the perceived fit between them and your organization/team.

The Selection Process

Selection process recommendations

1 Pre-qualify potential vendors and service providers prior to formally engaging them in the procurement process. Narrowing the potential partners down to three or four will streamline the process and help the team focus on actual potential partners.

2 Meet with prospective or interested partners before sending out the RFP. Doing this provides the following:

- The buyer team gets to meet with the vendor and/or implementation team to do a gut check: "Can we work with these people?" and vice versa.

- A great opportunity for both teams to ask questions and seek clarity on what is being requested and offered.

- Another opportunity for the buyer team to see the product/solution in action. Maybe even do some hands-on testing.

3 Meet with current/past customers of potential partners and see how they are using the product/solution.

4 Present requirements in the form of use cases, not a laundry list of features and functionality. Include core values like simplicity, flexibility, and accountability to guide the respondents' approach for responding.

5 Invite (relevant) individuals from across the business to participate in the on-site and RFP evaluation process. This will provide a variety of perspectives and ensure that all groups affected feel included and part of the process.

6 Be prepared to not make a selection. If, during the selection process, requirements change, new information provided needs to be considered;
or, if a fit just isn't there, allow "no decision" to be an acceptable decision.

RFP: What to include

Section	What to include and why
Overview	A brief introduction to the organization (and don't just copy what is on the website) and the purpose for the RFP. Include details like the company's core values and operating principals. This will help you find an organization that's a good fit with your organization's goals, processes, and philosophies.
Project overview and goals	Explain clearly and concisely what the problem is that your are trying to solve, not the technology you are looking to acquire. Provide a high-level overview of the organization's primary pain points – what's not working or what's missing? Explain what you want to accomplish and your intended outcome. The more clearly you articulate what you want, the more likely you are to get it.
Scope of work and deliverables	Structure the scope of work and expected deliverables in a detailed and organized fashion. Be explicit about what is required and where there is flexibility with regard to process and deliverables. Present goals and requirements in the form of use cases wherever it is possible/makes sense. Include any relevant timeline and/or dependency details as well. This will help ensure responders provide adequate detail in the required/desired format.
Technical requirements	Describe any technical limitations, requirements, dependencies, and integration points (e.g., commerce, CMS, BI, etc.) that you are aware of and/or desire to provide insights into complexity of the affected technology landscape. Including a high-level architecture of relevant systems and data points can also be helpful.
Budget	It is important to include budget information. While you will have vetted the shortlist to be budget- appropriate, providing respondents with even just an informed estimate can help ensure responses are viable for consideration.
RFP process particulars	To simplify and facilitate the selection process, include details on the RFP timeline, communication protocols, primary contact information, and proposal response format.
Selection criteria	Let respondents in on what you will value most: price, expediency, quality, as well as what is and isn't acceptable (e.g., team make-up: local team, off-shore, contractors). This will help the potential partners tailor their responses to best meet your organization's needs.

Sample procurement timeline

Activity duration	Activity	Total duration in weeks	
2 to 5 weeks	■ Gather and analyze requirements; determine focal needs	2	5
2 to 4 weeks	■ Investigate possible vendors and/or service providers that meet focal needs and other requirements via research, vendor-SP discussions, vendor-SP-existing client interviews ■ Identify and build use cases ■ Build RFP document	4	9
1 to 2 weeks	■ Confirm shortlist of up to three vendors and three service providers ■ Confirm participation of shortlisted vendors and SPs	5	11
1 to 2 weeks	■ Vendor and partner on-site information exchange	6	13
1 week	■ Update RFP document based on information gathered during on-site sessions	7	14
3 weeks	■ RFP response period	10	17
1 to 3 weeks	■ RFP evaluation period	11	20
1 week	■ Confirm selected vendor and/or service provider	12	21
2 to 4 weeks	■ Plan contracts and proofs of concept	14	25

Reminders for buyers
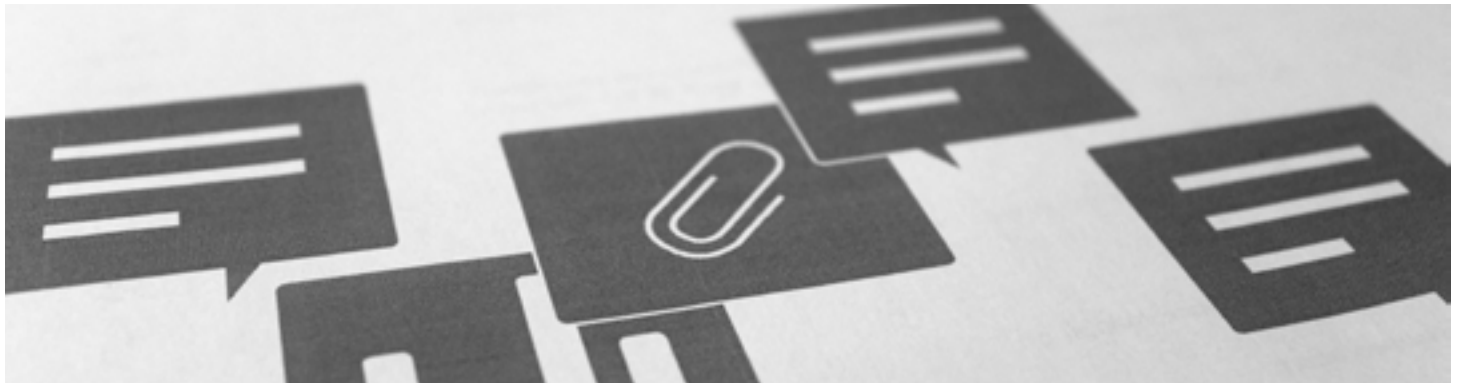
Be prepared:

- Understand what you do well.

- Recognize the gaps in your knowledge and seek to fill them.

- Involve and get input from the team that will be using the tool.

- Understand your budget for licensing, professional services, hardware, etc., then identify prospective vendors and service providers that fit within your budget.

- Identify and differentiate current, required, and nice-to-have capabilities.

- Talk about what you do and want to be able to do (tasks and tactics), instead of asking for a list of features and functionality.

- Enable/ask respondents to be creative and innovative in their approach/ response.

Final Thoughts

In today's marketplace, the question for the visionary modern marketing team isn't "what must we evolve into?", but rather, "how can we build an agile marketing organization that can rapidly adapt to the unknown and unpredictable?". The answer to this question lies in having the right-fit digital experience marketing platform (DXMP) to support that agile execution model, and a great service provider partner to help guide your organization on that evolutionary journey.

Marketing departments must re-align themselves into more fluid, organic organizations. The new marketing department is one that embraces complexity and is highly adaptive to changing conditions. This not only refers to the way marketing departments operate to deliver better customer experiences – but in the way they purchase the tools that will help them deliver that fluid operation.

In this new world, the DXMP is a new adaptive system and set of tools, staffed by teams that will be similarly flexible. These teams should work together toward developing integrated customer experiences; toward processes that resemble something that scientists call "emergence," in which relatively simple and separate interactions develop into productive patterns. This marketing ecosystem made up of people, processes, and technology becomes a learning system, one that iterates as the conditions change. It embraces the unknown and is simply built to adapt and change.

The first step in this evolution is in taking a fundamental assessment of where we are, our needs, and our current actions. It is critical that marketers understand what challenges they are actually solving for. Only then can we ask the correct questions – of ourselves and others – in order to get the answers we need to change.