



10 STEPS TO A SUCCESSFUL EMAIL RFP

A must-read guide for telcos and service providers issuing an email tender



The total number of business and consumer emails sent and received per day... is forecast to grow to over 333 billion by year-end 2022.

The Radicati Group, 2018

Introduction













In March 2018, [The Radicati Group](#) predicted that 333 billion emails will be sent per day by year-end 2022. This means that **email hosting still represents a huge and expanding opportunity** for astute telcos and service providers. With the [2017 Adobe Consumer Email Survey Report](#) finding that the average consumer is spending 5.4 hours a day checking email, providers who want to stay close to their customers are realising that they need to stay close to their emails.

Telcos and service providers already offering an email hosting service will know how important it is to review that service and its capability at least every two to five years. Historically, that review was prompted by end-of-life software and/or hardware. However, given that some telcos and service providers are now reporting that their **active email customers churn less and spend three times more** across their brand portfolio, an increasing number of providers are reviewing their email service more frequently, to ensure they are delivering the stickiest customer email experience possible.

When it comes time to choose a new email hosting service, one option is to issue a Request for Proposal (RFP). An RFP invites potential email vendors to submit solutions-based proposals that meet an organisation's email needs.

If your organisation has decided to issue an email RFP, this comprehensive guide will walk you through **ten steps to a successful email RFP**.

10 Steps to a Successful Email RFP

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STEP 1

Check Before You Start

An RFP is not always the best way to find your new email solution. The process, from start to finish, can be incredibly time consuming and frustrating for both purchasers and vendors, with no guarantee of a favourable outcome for either side.

So, the first step in the email RFP process is to double-check if it is the right investment of valuable time and resources, or whether there might be a faster and more cost-effective way to meet your organisation's email needs.

In principle, an email RFP:

- Alerts vendors that your organisation is looking to procure an email hosting service
- Announces that the selection process will be competitive
- Requires you to formally articulate the email problem you need solved
- Requires the vendor to spell out how they will solve that problem
- Allows for wide distribution and response
- Follows a structured evaluation and selection procedure



An email RFP is best suited to your organisation if you:

- Need to procure the technical expertise of an external email solution
- Have a good overview of your email requirements
- Have already identified some of the key vendors in the email market
- Are flexible in terms of the exact vendor solution
- Are not making your decision solely on price
- Are committed to purchasing an email solution

If you are not certain that an email RFP is right for your organisation, it is best not to proceed until you compare alternatives. Time spent re-examining your options now could be time saved and a more favourable outcome later.



ADVANTAGES

EARLY ARTICULATION OF YOUR NEEDS

The formality of the process encourages considerable effort into articulating your technical and commercial requirements at the beginning of the project. This typically results in better-fit proposals and a more successful result at the end of the project.

BROADER VENDOR PARTICIPATION

While you may have already identified and started conversations with a shortlist of email vendors, the widespread promotion of an RFP can attract additional vendors who you may not have otherwise discovered. These vendors could bring new and highly valuable solutions to the table.

COMPETITIVE PROPOSALS

If you have formulated an RFP that is enticing to vendors, you should receive proposals that are competitive in price. Aware of the competitive process, vendors may also be willing to negotiate even further.

PEACE OF MIND

There is a certain level of comfort, for both purchasers and vendors, in having a clearly defined and accountable process in place, with an estimated timeline to follow. Vendors also appreciate the list of key contacts for questions and concerns.



DISADVANTAGES

TIME AND MONEY

Given the number of internal people and departments involved in an email RFP, the process can sometimes become an expensive black hole of organisational resources. Often, an RFP may not have been needed in the first place.

SLOW DECISION MAKING

With multiple internal contacts needing to convene for multiple meetings to read multiple lengthy responses, it is no surprise that RFPs rarely sail through committee member meetings quickly or adhere to all of the timelines. Be prepared to wait longer than you expect for an outcome.

LACK OF VENDOR PARTICIPATION

The level of effort, combined with the complexity, timeline and specificity of an RFP, can discourage vendor participation. This is especially true if the emphasis in the criteria is more on price than product fit.

INNOVATION MAY SUFFER

While RFPs usually offer more flexibility than RFTs and RFQs, they can restrict vendor creativity if the best-fit solution is outside the scope of the RFP. This can also occur when the problem, needs and requirements are incorrectly articulated in the RFP.

A Request for Information (RFI) is typically used by a potential purchaser to gather preliminary information, with no commitment to purchase.

A Registration of Interest (ROI), otherwise known as an Expression of Interest (EOI), is similar to an RFI and is often used as a screening or shortlisting tool.

A Request for Proposal (RFP), also known as a Request for Offer (RFO), is designed for the purchaser who is typically committed to buying, but doesn't want to limit their options to exact specifications because they want to review solutions-based proposals from vendors.

A Request for Solution (RFS), is similar to an RFP but more open in that it allows the vendor the most scope to express their unique solution and mould the purchase process.

A Request for Tender (RFT), also known as an Invitation to Tender (ITT), demonstrates a clear commitment to buying. The purchaser has clearly defined criteria or specifications and submissions are judged on both price and quantitative factors.

A Request for Quote (RFQ) is best suited to price-driven purchasers who know exactly what they want.

STEP 2

Build Your Team

Gone are the days where an email service was only the I.T. department's responsibility. With today's cross-accountability within organisations, together with a growing industry recognition that branded email hosting can help reduce customer churn and grow revenue, the selection of your email service should be holistic team effort.

Ideally, you should be putting together an RFP committee, comprising members from various departments that can help make your RFP a success, including (but not limited to):

- **Marketing:**
Product Management,
Brand Management
- **Information Technology (I.T.):**
DevOps (including Solution Architects),
Operations, Engineering, Security
- **Customer Support:**
Customer Service, Email Support
- **Legal:**
Contracts, Compliance
- **Finance:**
Procurement, Budgets



Whether the catalyst for your RFP is your Marketing team's need to grow customer engagement and revenue, or your I.T. team's need to replace end-of-life software and/or hardware, it is vital to get buy-in from all key departments early.

Importantly, you should be seeking not just any representative from these areas, but influencers who can help you get answers, make decisions and fast track red tape.

Before going any further, it is also advisable to reflect objectively on whether you are the best champion for this RFP. If your chances of a rewarding outcome are boosted by having a different internal champion, now is the time to recruit your successor.

STEP 3

Determine Your Needs



To best determine your email RFP needs, your cross-functional team will need to ask their respective divisions the following questions, as a minimum:

Marketing/Product Management

- Do they understand and value the power of branded email hosting to reduce churn and grow revenue? (e.g. Via paid email, in-app advertising, cross-sell, upsell and cross-portfolio spend)
- If so, what features and capabilities does the email service need to boost customer engagement and enable revenue growth? (e.g. Company branding, in-app monetisation, user experience features)

- Who are their target customers for an email service? (eg. Mobile-savvy students and young workers, 18-25 years? Frequent travellers, 25-34 years? Busy work/family customers, 35-44 years? Mature customers, 45-54 years? Desktop-lovers, 55+ years?)
- Will the email solution need to be tested in any customer focus groups?

Customer Support

- What do customers most want/not want from your email experience?
- What are the most common complaints about your current email service?
- What back end administrative features would make life easier for your customer service team?

Information Technology

- Do they want an email service that is on-premises or hosted in the cloud?
- Will the email service be managed internally or outsourced to experts?
- What product features are required and which are only 'nice to have'?
- Do they need a native mobile app or is mobile-responsive sufficient?
- Is white labelling important, so they can customise and brand your email?
- Do they need multi-tenancy support to enable customers to create their own brands?
- What are their migration needs?
- Does a new email service need to be compatible with any specific legacy browsers or technology?
- If the email service will be new, what internal capabilities do they have and where do they most need external expertise?
- What exact technical specifications must be adhered to?
- Is API availability required? If so, what should it look like?
- Are they looking to evolve their email platform to also implement Machine-to-Machine (M2M), Application-to-Person (A2P) and/or Internet of Things (IoT)?
- What accessibility requirements might need to be met?
- How many users and/or mailboxes do they need?

Finance

- How much budget is available to purchase an email service?
- When will the budget be available?
- Will the service need to be paid in instalments and/or over different financial periods?
- Is CAPEX or OPEX preferred?
- What is the current Total Cost of Ownership (TCO) of their email service? (eg. Software, hardware, staffing, operating systems, network costs, maintenance costs, support costs, costs of outages, lost opportunity costs for resource diversion from core business, and so on)
- What other commercial requirements need to be taken into consideration?

Legal and Compliance

- What regulations must be adhered to? (e.g. Must data remain onsite and/or onshore? Do you need a GDPR-compliant service? What do you need in terms of lawful interception?)

Whilst extensive consultation might feel burdensome, the more questions you ask at the beginning, across the more internal teams, the more chance you will avoid unnecessary roadblocks down the track and the more likely the success of your email RFP.

STEP 4

Talk To Vendors

Once you have completed your internal consultations and have determined your exact email needs, it's time to test the market to see if your assumptions are accurate and your expectations are reasonable.

This is an important step because there is no point writing an RFP that excludes all of your potential suppliers, due to unrealistic price and/or product expectations on your part.

Talking to vendors will help you:

- Gain an initial sense of which vendors you could work well with on this project
- Understand if your budget is compatible with vendor budgets
- Separate your 'must haves' from your 'nice to haves'
- Learn from vendors about RFP lessons at similar organisations to yours
- Draft an appropriate scorecard to evaluate proposals
- Better understand vendor thinking and terminology, which will be an advantage when it comes time to reviewing RFP responses
- Talk through timeline requirements and dependencies from a vendor's perspective
- Learn from vendors' past RFP experience with similar organisations to yours



Before talking to vendors, be sure both sides sign a Non-Disclosure Agreement (NDA) to demonstrate mutual respect and to protect confidential and sensitive information.

After talking to vendors, but before proceeding to write your RFP, you may wish to consider engaging one or more vendors for technical discovery. Technical discovery is the activity of identifying the problem within the 'bigger picture' context and more thoroughly scoping the technical requirements (and current system architecture). This often results in more accurate and comprehensive vendor solutions.

You may also wish to talk to peers in similar organisations who have been through an email RFP process. They might be able to share insider learnings that could prove invaluable to your email RFP's success.

STEP 5

Write Your RFP



Now that you have completed your external consultation, the next step is to write the master document that will guide both you and your participating vendors for the remainder of your RFP journey.

Once you write your RFP, it's important that it is reviewed by all email RFP team members and signed off by their respective departments. If there are any concerns or gaps, these need to be addressed before your RFP is issued to the market.

Included in this section is a basic, suggested template. Some additional tips include:

Clarity is everything

- Be as specific as you can for every aspect of the RFP

Compare apples-to-apples

- Invest time in creating clear templates and well-organised spreadsheets that can help you to more easily compare vendor capabilities and responses

Don't propose your own solution

- Focus on your needs and problem – let vendors propose the best solution

Don't ask for the kitchen sink

- Unless your budget is infinite, understand your limitations early and focus on your essentials rather than your 'nice to haves'

Don't dodge the pricing issue

- The more accurate your price guide, the greater your ability to attract right-fit vendors
- To avoid pricing issues from distracting the focus on capability, you may elect to write a multi-step RFP (where you only specify and/or request pricing once vendor capability has been determined and technical specifications agreed)

Suggested Template

YOUR ORGANISATION

Company

- About us
- Structure
- Locations
- Position in the market
- Values
 - General?
 - Environment?
 - Corporate Social Responsibility (CSR)?
- Vision
- Priorities for the future
 - Cloud-first company?
 - OPEX not CAPEX?
 - Outsourcing non-core business?

YOUR PROJECT

Overview

- Description
- Objectives

Current email platform

- Explanation of current software, hardware and capabilities
- Main concerns with current platform
- Diagram of current architecture
- List of current technologies

YOUR PROJECT (CONTINUED)

Requirements for new email platform

- Product
 - Essential requirements
 - Non-essential requirements
- Service delivery
 - Migration requirements
 - Support requirements
 - Platform management requirements (if applicable)
 - Account management
 - Professional services requirements

Timelines

- Details of project timelines and milestones

Key Performance Indicators (KPIs)

- Suggestion of KPIs to be measured

Pricing

- Price guide (or notification that a price guide will be given to vendors who are shortlisted for capability)

General

- Instructions for vendors
- Explanation of the RFP's procedure
- Evaluation criteria
- Terms and conditions
- Frequently Asked Questions (FAQ)
- Additional information
- Contact points
 - Commercial
 - Technical
 - Other

VENDOR

Company

- About us
- Experience (number of years)
- Structure
- Locations
- Values
- Vision
- Priorities for the future
- Team member profiles

Experience

- Description of prior, relevant experience

Customers

- Customer references
 - Written references and/or
 - Contact details of referees
- Customer case studies

Compliance

- Privacy policy
- Data processing policy
- Operational policy
- Security measures
- Lawful interception (if applicable)
- GDPR compliance statement (if applicable)
- Terms and conditions

Contact Points

- Commercial
- Technical
- Other

VENDOR'S PROPOSED SOLUTION

Overview

- Description
- Objectives

Response to requirements

- Product
 - Proposal to meet essential requirements
 - Proposal to meet non-essential requirements
 - Reference architecture
 - Innovation and vision for the future
- Service delivery
 - Proposal for migration
 - Proposal for training (if applicable)
 - Proposal for support (and escalation chart)
 - Proposal for platform management (if applicable)
 - Proposal for account management
 - Proposal for professional services

Timelines

- Commitment to timelines or a proposal of new timelines (including reasons for the change)
- Risks and dependencies

Key Performance Indicators (KPIs)

- Proposed KPI measurement
- Proposed penalties for inability to meet KPIs

Pricing

- Commercial breakdown
- Alternative option (if applicable)

Additional information

- Product collateral
- Supporting documents
- Other

STEP 6

Issue Your RFP

Writing your email RFP is only half the battle. Now it's time to get it in front of the right vendors, to get the best solution, for the most attractive price, within your allocated timeframe.

Promoting your email RFP

There are many ways to get the word out about your email RFP, including:

- Inviting vendors directly
- Asking industry groups to share the news for you
- Announcing it on your organisation's website and social media channels
- Promoting it on various business forums and industry social media channels
- Advertising it in relevant newspapers and/or industry newsletters
- Listing it on tender/RFP directories (e.g. [GlobalTenders](#), [Tender247](#), [Tenders Electronic Daily](#) and more)

It is important to keep a keen eye on how many proposals are coming in early on. This will help you to ascertain how many more channels you might need to explore to achieve your desired results.



Nominating contact points

Your RFP team should agree on separate technical and commercial contact points, then clearly state these in the RFP documentation, so everyone knows with whom to liaise. If you want to encourage proposals from outside national borders, you may also wish to nominate which languages your contacts speak and in which language(s) you will accept proposals.

Determining submission time

The time period you nominate for submissions will depend on your organisation's priorities, capabilities, timeframe and budget.

An additional factor would be any impending end-of-life deadlines for your current software and/or hardware, because running end-of-life email software would risk poor system performance as well as security and compliance violations.

Typically anywhere from two weeks to six months is a normal timeframe for submissions, depending primarily on:

- The catalyst behind your decision to issue an email RFP. For example, is your current email platform reaching end-of-life? If so, when? Does your available budget expire in four months? If so, you should ensure you have finished your email RFP process one to two months prior. Are you outsourcing your email because key technical personnel are leaving? If so, when? Have you been given a deadline by your executive team?
- How long your RFP team determines it reasonable for vendors to submit a quality proposal. This means allowing time for promotion of the RFP to vendors, vendor consideration of the RFP's merits, initial exploratory calls, construction of a detailed response and time for vendor edits and refinements.

Encouraging vendor submissions

It is a good idea to encourage participation by at least three to five relevant and capable email vendors. Fewer than this and you risk losing both internal and external credibility in your process. More than this and you risk becoming overwhelmed and unable to dedicate enough time to each participating vendor.

It's advisable to ask the vendors you are already in discussions with to let you know within the first few days if they intend to bid. If they do intend to submit a proposal, you should request the details of their main contact points. If they do not intend to submit a proposal, you should try to ascertain what barriers there might be to their participation, in case you need to make amendments to your RFP sooner rather than later.

If you do not expect to receive and/or you have not received enough final submissions, you may elect to extend your timeline to proactively recruit more participant vendors.

STEP 7

Shortlist Responses



The shortlisting process is truth time. It is where all of your internal consultative efforts, external vendor talks, RFP articulation and promotion efforts will either come to fruition, or, remind you how much more time you should have invested in the earlier stages.

With evaluation metrics in hand, each RFP team member should review submissions individually, then come together to compare evaluation scores and discuss.

The significance of adhering strictly to the criteria cannot be underestimated and it is a timely idea to remind your review team of their accountability in this regard.

The primary goals in the shortlisting phase are to:

- Eliminate vendors who did not meet or answer the criteria
- Compare the remaining responses and agree on a shortlist of proposals that best meet the RFP criteria
- Seek any clarifications needed from vendors, to enable that shortlist to be finalised
- Decide whether to extend the submission deadline and/or seek more proposals

Usually, two to three vendors are shortlisted in email RFPs. However, the key deciding factor will be the strength of the vendor submissions. If only one vendor ticks all of your boxes for shortlisting, you may decide to shortlist only one vendor. You can reserve the others as backups and possibly go back to the market for additional submissions.

If all of the vendors are worthy of shortlisting, feel free to shortlist them all. This does require some extra work because it means you need to reconvene internally to draft secondary criteria, in order to narrow the field down to a more manageable size.

STEP 8

Invite Presentations

Once the shortlist has been agreed, the RFP team should invite vendor presentations for the highest rated submissions. This gives each vendor a fair and open opportunity to present their best case in person.

These presentations should:

- Have been outlined in the original RFP timeline and therefore not come as a surprise to the vendors
- Be in front of the full RFP team, not just one or two representatives of the team. This is so that all team members can assess the merits of each submission, as well as take shared responsibility for the final outcome.

Your RFP team should use well-articulated judging criteria to score the vendor presentations. Ideally, this criteria should be shared with the vendors prior to their presentations.

If not completed earlier in the process, now is also the time to request a product trial and/or a proof of concept (PoC), if required, to supplement a vendor's presentation.



Most times, the RFP team's decision will be clear cut after the vendor presentations and overall proposals have been scored. Other times, the team will need to schedule additional meetings before coming to a consensus.

In between the meetings, team representatives will likely be liaising back and forth with vendors for clarifications and further information, so that the team have everything they need when they start negotiating commercials with the preferred email vendor.

STEP 9

Negotiate & Reference Check



Negotiating Commercials

By this stage of the process, negotiating the commercials (and terms and conditions) should be relatively straightforward. Excluding, of course, the obligatory dance between purchaser and vendor, where both sides make one last ditch attempt to secure the best terms possible.

Once commercials are agreed, the final part of the decision-making process is to talk to current or past customers of the preferred vendor(s). It's easy for vendors to claim they can deliver wonderful outcomes, but that claim is only validated with reputable references.

Reference Checking

When conducting your reference checking, remember that the onus is on you to ask the tough questions about their experience with the vendor. Do not rely on the vendor or their referee to volunteer any hiccups in either the relationship or the solution delivery experience.

At this point in the process, you will be hoping that the reference calls go smoothly with no unexpected surprises. That being said, it is unrealistic to expect vendors to never have had any bumps in their road. Instead, what you are trying to ascertain is how big those bumps were, how they affected the customer, how quickly and effectively they were resolved and how well the relationship was preserved.

In terms of how many referees you should speak to, a general rule is that less than two could be irresponsible, but more than three is probably overkill.

Once commercial negotiations and reference checking are complete, bring the RFP team together to confirm agreement on the winning vendor. If there is not yet agreement, it's time to go back a few steps in the process and seek further information and/or progress the proposal of a secondary vendor. This process will continue until the RFP team is in agreement on the winning proposal – including commercials and references.

STEP 10

Award Your Project

Finally, the time has come to award your project and let the real work begin.

Remember that before you can officially award your project, you need to be sure you have all of the necessary decision makers sign the appropriate paperwork and you need to run it through your legal team. It is critical that you check that all of the documentation is in order, so that nothing can come back to undermine your decision or process later.

Notify the winning vendor as soon as possible. This is both to congratulate them and arrange the first project implementation meeting, while there is still strong momentum on both sides. It is important to kick off the implementation stage quickly, to ensure that timelines are adhered to and both sides are given a fair opportunity to prove that the correct vendor was selected for the project.



Hopefully, you have selected a vendor with whom you are excited to build a long-term relationship. Email platforms typically only get reviewed every three to five years, so you will be working closely with the winning vendor for a long time to come.

Congratulations on the successful completion of your RFP process and we wish you all the best with your new email solution.



Want an email RFP template?

If you are a busy telco, ISP or hosting provider and do not have time to write your email RFP from a zero base, atmail can help.

Contact us today to discuss your needs and request our email RFP template.

About Us

With **20 years of global email expertise**, we help telcos, ISPs and hosting providers tap into the power of **branded email hosting** to fight customer churn and grow revenue.

We offer modern, user-friendly, white label, cloud-hosted email with 99.99% uptime and your choice of US or GDPR-compliant, EU data centres. For companies wanting to stay in-house, we offer on-premises webmail and/or mail server options.

Based in Australia, we power **170 million** mailboxes worldwide, with the help of our team members in Europe, Asia Pacific and the United States.

With 24/7* support, you can rely on our professional services team for a smooth transition and an email platform that is secure, stable and highly scalable.

To learn more, [contact us today](#).

Testimonials

"It was a great opportunity for Optus and atmail to work together to enhance customer experience for webmail. I have been impressed with the delivery of your commitments on time and your swift actions. It has been my pleasure to work with the great team at atmail."

Scott Park,
Project Manager, PEI
Technical Delivery,
Singtel Optus

"Working with the atmail team has been a true pleasure for DreamHost. They understood our needs and worked closely with us to deliver an incredible email solution for our customer base. We can't say enough good things about their product and their talented team."

Micah Sachs,
VP Systems Engineering,
DreamHost

"atmail's enthusiastic performance throughout the last six months was unprecedented. We would have no hesitation in recommending atmail products and services."

Mohammad Al-Sharafi,
Cloud Product
Development Manager,
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