



Email service provider brief

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Executive summary and purpose of this RFP

The DMA Group is undertaking a tender process to find a suitable supplier to provide a software platform for our email marketing.

The supplier must have a cloud based platform that is easily accessible, capable of sending thousands of emails a day based on targeted segments. The supplier will also need to provide a platform with robust APIs that can link to the DMA Group's bespoke CRM solution, and have the ability to build and manage automated campaigns.

The successful ESP will be engaged with the DMA Group's marketing teams to help realise our objectives with regards to outbound communication and automation.

The primary objective is to improve the effectiveness of the DMA Group's personalised email programmes and replace unnecessary manual work by utilising APIs and building triggered marketing campaigns.

About DMA Group

DMA

The DMA Group represents a member network of more than 1,000 UK companies.

Together we lead a data-driven marketing industry that drives creativity and innovation, responsible marketing and customer engagement.

With access to bespoke research, legal advice, lobbying, expert-led best practice guidance and the latest training, the DMA Group and our members shape the future of marketing.



Useful links

Please visit www.dma.org.uk for further information.

IDM

The IDM is Europe's leading training and qualifications organisation for the digital, direct and data-driven marketing profession.

The IDM delivers a portfolio of qualifications courses from introductory level through to postgraduate level. Each year approximately 1,000 students study for an IDM qualification. The IDM also provides corporate qualifications courses bespoke to the customers' industry sectors.

Useful links

Please visit www.theidm.com for further information.

DMA Group contacts for this RFP

All questions regarding this RFP should be put in writing and emailed to the DMA Group's contact.

Unless otherwise agreed with DMA Group management, the supplier should not discuss or refer queries to any other member of staff within DMA Group, only the primary DMA Group contact may be approached.

Primary Contact Name	David Baker
Address	DMA Head Office DMA House, 70 Margaret Street, London, W1W 8SS
Email	david.baker@dma.org.uk
Tel	0207 291 3300



Immediate response requirements

This item requires your immediate attention, prior to compiling your full response to this RFP.

Once you have decided whether to respond to this RFP we would firstly ask you to formally notify and/or confirm to us your acknowledgement of the following matters.

PLEASE SEND AN EMAIL TO THE PRIMARY CONTACT CONFIRMING THE FOLLOWING;

Your intention to respond to this RFP	
Confirmation that you will make a bona fide submission	
Agreement to DMA' confidentiality agreement appendix 1	
Declaration of any conflicts of interest (please specify)	
Agreement of DMA' RFP terms and disclaimers	
Confirm you are a DMA member	

Please delete as appropriate

Questions

DMA Group will accept requests for additional information via email to the contact above. Closing dates for questions will be **7th June 2017** DMA will respond to each question in writing as quickly as possible.

Timetable

Date	Milestone
31st May 2017	RFP issued by DMA
2nd June 2017	Confirm your "Intention to Respond" email to DMA



7th June 2017	Deadline for Questions regarding this RFP
9th June 2017	Deadline for Return of RFP response to DMA
16th June 2017	Confirmation of shortlist (3 providers)
w/c 26th June 2017	Pitches
3rd July 2017	Confirmation of chosen provider
July 2017	Contract initiation

Note; The above timings serve as guidelines and DMA reserves the right to change any timings as necessary.

Evaluation criteria

RFP responses will be assessed by DMA and IDM stakeholders. A guide to the indicative weighting of the response is provided below. The DMA Group is not obligated to share their internal scoring with respondents.

Only tenders from ESPs that are certified as adhering to the DMA Code (<https://dma.org.uk/the-dma-code>) will be considered.

Category	Weighting	Summary Description	Comments
Commercials	15%	Assesses the overall commercial model proposed, level of cost/resource estimated against industry norms and the market competitiveness, and approach to a contractual agreement. Agreement to a mutual exchange of services is critical with advertising impressions exchanged for use of technology.	
Technical specifications	40%	Assess technical specs of proposed platform and how these fit with the DMA's communications strategy. Ease of use, information architecture and ergonomics of the application are critical.	
Approach and recommended KPIs	10%	Assess intended approach including the regular activities and the intended outcomes (tracked via KPIs).	
Cultural fit with DMA	25%	Assesses the cultural alignment and professional relationship. The winning provider must be a passionate advocate of responsible marketing and best practice with a proven record of holding their own clients to high standards, in particular compliance with all data protection and privacy legislation.	
References	10%	Assesses the quality and content of customer feedback from case study reference sites.	



Background

The DMA Group is ambitious, motivated and has a powerful vision for both itself and the wider marketing industry.

Purpose: Business' most customer focussed community

Why we exist: To empower brands to responsibly create more value for and from their customers

What we do: Lead, educate, advocate and connect

How we act: Bold, brave, innovative, inclusive and inspiring

This brief has been developed to identify the right supplier who can help deliver upon this vision.

The DMA Group has a wide scope of external communications which centre around our email programs. Our aim is to move to a truly targeted one-to-one approach that matches content to our subscribers through automated and optimised email campaign management.

The DMA Group has a bespoke CRM system, drawing data from various touchpoints to provide a single customer view. The successful ESP will need to have methods of utilising this data to provide personalised communications to our target audience.

It is vital that platforms that are submitted for the tender have built in modules to handle intricate trigger campaigns and robust APIs that will allow simple connection with bespoke DMA Group software including the DMA and IDM website, CRM and the IDM's learning platforms.



Scope/Key activities

The successful ESP will need to be capable of integrating with all DMA Group platforms to enable pre-planned and automated messaging, with the ability to manage contacts and report on standard marketing metrics.

The following should all be covered:

- API's for easy integration to CRM platform
- Separate accounts for DMA, IDM and Employability
- Data segmentation and segmentation library
- List build comprised of multiple segments
- Dynamic lists
- Transactional messaging
- Trigger campaigns
- Template management
- A/B & multivariate testing
- Real time personalisation
- Dynamic content based on segmentation
- Survey tools and webform creation
- Social integration
- Preference management system
- Reporting and analytics
- Personalised links
- Deliverability solutions

Activities should include, but not be limited to:

- Training on platform for DMA Group staff as required
- Technical support as required
- Dedicated account management support

Additional ideas for activities are welcomed as part of the submission.



Pricing and commercials

The DMA Group is offering up this tender as a reciprocal arrangement. The ESP technology partnership aligns the successful tender with the DMA Group's authority, leadership and profile within the one-to-one marketing industry. All email communications to our large base of industry contacts will include the successful ESP's branding as 'powered by'. The DMA and IDM audience comprises marketing professionals who are the prospect market for marketing cloud solutions. The combined IDM and DMA annual level of email impressions is over 5 million providing a robust advertising presence for the ESP, increasing brand awareness and generating new business leads for the successful provider.

Submission

In your tender submission please outline the following:

1. Methodology including features and functionality of the technology platform
2. Ideas and recommendations to deliver against brief
3. Timeline
4. Team experience (including day-to-day contact)
5. KPI recommendations
6. Deliverables
7. Proposed timeline of activity
8. Relevant case studies and experience

We would prefer the submission to be in PDF format and less than 20Mb in size.



Supplementary information

Please complete all the following requested information regarding your company. The following tables may be copied and pasted into your own submission template.

Company Information

Company Name	
Parent Company Name	
Public or Private Company	
Affiliated Companies	
Main HQ Address	
Telephone	
Web Site	
Financial Year Start Date	
Chairman's Name	
CEO's Name	
Number of Employees	
Annual Turnover £	

Company structure

Please provide details of your company/group structure including ownership, sister companies, subsidiaries, affiliations and divisions



Brief summary of your company history

Brief summary of your company strategy and culture

What do you feel are the competitive advantages you offer?

Key features and functionality of the technology platform. Please include any unique functionality and why your interface provides the best experience for building campaigns.



References

Provide details of a selection of references for the DMA Group to contact (minimum 2 relevant references).

Company	Contact Name	Contact Tel	Contact Email	Scope of work

Appendices

Appendix I: Clarifications

Your intention to respond to this RFP

Please confirm to us that you will be responding to this RFP; alternatively tell us that you are declining to respond.

Confirmation you will be making a bona fide submission

We ask you to certify that you will make a bona fide response, intended to be competitive and that you have not fixed or adjusted costs/fees/rates by or under or in accordance with any agreement or arrangement with any other respondent. We also ask you to certify that you have not done and undertake that you will not do at any time before the hour and date specified for the return of this Tender any of the following acts:

1. Communicate to a person other than a member of DMA Group your rates/fees to be included in our Tender, except where the disclosure, in confidence, of such rates/fees is necessary to obtain information/advice required for the preparation of the Tender;
2. Enter into any agreement or arrangements with any other person that they shall refrain from tendering or with another tenderer as to the rates/fees included in any Tender to be submitted;



3. Offer to pay or give or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Tender or proposed tender for the said Services any act or thing of the sort described above.

Appendix II: Agreement to the DMA Group confidentiality agreement

All information provided in relation to this project should be treated as “commercial in confidence” by recipients.

Accordingly, you shall use this RFP and any other information furnished to you under this RFP solely for the purposes of responding to this RFP. All such documents and information you receive shall remain the property of DMA Group, shall be kept confidential and shall be returned to DMA Group on

request. Reproduction of any part of this RFP is authorised only for the preparation of the response. You shall ensure that all such copies are destroyed when no longer required in connection with this RFP. The RFP respondents shall not issue any form of publicity or advertisement regarding this process without the prior written consent of DMA Group.

Appendix III: Declaration of conflicts of interest

Please provide details of any known, perceived and/or potential conflicts of interest (may include Directorships, business or private relationships). You are expected to follow a declaration process with your staff, any information provided will be treated as confidential. Failure to disclose such information may result in disqualification from the Tender.

Appendix IV: Terms of this RFP

Response instructions

Response instructions are provided below as guidance for the Agency submission.

- In Full - Please complete this RFP in full. A clear and concise response will be appreciated by the DMA Group team when reviewing and comparing submissions.
- Copies - You should please provide an emailed electronic version of no more than 10MB. We cannot accept responsibility for non-delivery of emails should your attachment prevent your email from being delivered.



It is your responsibility to ensure your submission has been received by DMA Group by the submission deadline.

- Cancellation – DMA Group reserves the right to annul this process and reject all submissions to the RFP or during any subsequent stage of the process without incurring any liability to the affected RFP responders.
- Definitions - Please ensure that your response explains the use of any terminology, abbreviations or initials. This is best shown at one point early on in your response and also detailed in a table of definitions to be included in your response as an appendix if relevant.

Tender costs

All the respondents are responsible in full for all costs incurred in the preparation or submission of responses to this RFP, and/or incurred in responding to any requests for information, preparation of any responses and attendance at any meetings in relation to this or any subsequent phase of the DMA RFP process relating to this or any project.

Contract award

The DMA Group reserves the right to revise the scope of this tender request and award any contracts of business as they deem appropriate. Any successful technology provider will be notified by DMA Group as soon as is reasonably possible, having undergone the necessary ratification within DMA Group management. All notifications of business award are subject to contract.

The Contract will be awarded to the technology provider that has the best technology, support, and expertise. In assessing which Tender is the most advantageous DMA Group will have regard to both qualitative and quantitative aspects of the Tender submissions. Technology providers are expected to propose their most competitive options in response to this RFP and not hold back any commercial proposals for future anticipated negotiations. Based on the submissions to this RFP, all or only a selection of the respondents may be selected to continue discussions or negotiations with DMA Group. DMA Group will notify unsuccessful providers as soon as is reasonably possible (a timeline has been outlined in this document for reference). Where appropriate a brief explanation of why the proposals were unsuccessful will be given.

Three shortlisted providers will be asked to present their technology and service proposals in a 90-minute slot and to provide access to a demo account so the users



can assess functionality and ease of use. The pitch to include your track record and how you would deliver a programme of activity over a 12-month period. Wherever possible, the team in the pitch meeting should be the team expected to deliver the work.

Terms and disclaimers

The submission of a Tender by a Tenderer will be deemed to imply the Tenderer's acceptance of the disclaimers set out below and the terms of tender as set out in this document.

Proposal validity

All bids/proposals must be valid for no less than one hundred and twenty (120) days from the proposal due date. Pricing must be provided in GBP and include the Agency rate card as a guide to the expected number of personnel hours for activities or the retained programme (e.g. anticipate hours per month per role).

Appendix V: Undertaking of confidentiality in favour of DMA Group

Please refer to the accompanying documentation *NDA - ESP Tender*

Appendix VI: Payment terms

DMA Group standard payment terms are 30 days