

A Best Practices Report

# Content Marketing Software RFP: A Framework to Determine Needs & Solicit Proposals

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ALTIMETER®

# Table of Contents

- Why a Content Marketing RFP? ..... 3**
- Identify Specific Needs for Content Marketing to Aid in Vendor Selection ..... 4**
  - Step 1: Determine Goals and Provide Background ..... 4
  - Step 2: Determine and Prioritize Content Marketing Use Cases ..... 5
  - Step 3: Gather Cross-Functional Requirements ..... 5
  - Step 4. Plan for Integration and Evolution ..... 6
  - Step 5: Create the RFP Background and Vendor Response Documents ..... 7
  - Step 6: Identify and Prioritize Vendors ..... 8
  - Step 7: Compile and Compare Responses ..... 8
- Conclusion ..... 8**

# Content Marketing Software RFP: An Introduction

## Why a Content Marketing RFP?

Content is the atomic particle of all marketing — paid, owned, and earned. Content must be executed correctly for it to be effective across the marketing ecosystem, as well as across the broader enterprise.

Yet content marketing in digital channels is relatively new and therefore poorly understood. It also requires that marketers look around the corner to what the future will bring. In addition, content is bigger than one department. It spans multiple functional groups within and outside of marketing, including CRM, IT, HR, and knowledge management.

As a result, brands cannot yet clearly articulate their content marketing needs to the hundreds of content marketing vendors competing for their business, with new vendors emerging all the time.

Creating a request for proposal (RFP) and asking the right questions of both internal stakeholders and vendors, then, is incredibly difficult from the start. Nor can brands rely entirely on IT for purchasing content solutions, as it is even less familiar with these requirements than marketing is and is typically far removed from the scoping and selection process.

And while marketers are no strangers to the RFP process, existing templates cannot effectively be retrofitted to this task. That's because content marketing presents several specific challenges:

- Establishing content governance, processes, strategy, and inter-departmental coordination
- Matching content software needs to planned investments
- Finding solutions that scale toward the future (e.g., new technologies, vendor partners, or channels)
- Scoping software integration requirements, both with other marketing software and often with enterprise software packages such as CRM or customer data
- Accommodating existing workflows and processes (it's much more difficult to retrofit process to software than the inverse)
- Wining down a vendor shortlist, based on who best meets requirements

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## Identify Specific Needs for Content Marketing to Aid in Vendor Selection

To help marketers make sense of and document this complex process, we've created a content marketing RFP template, which can be adapted and customized to meet individual requirements, such as a campaign-based RFP or a request for enterprise software. You can also tweak the template to reflect highly specific integration requirements or the needs of individual departments or stakeholders.

The RFP Template reflects the two parts of our recommended process:

- **Part 1:** Conduct an internal assessment of use cases and requirements by asking key stakeholders about their needs and priorities.
- **Part 2:** Create an RFP to be used externally with vendors based on these needs. It should include an RFP Background (completed by the marketer) and an RFP Vendor Response sheet.

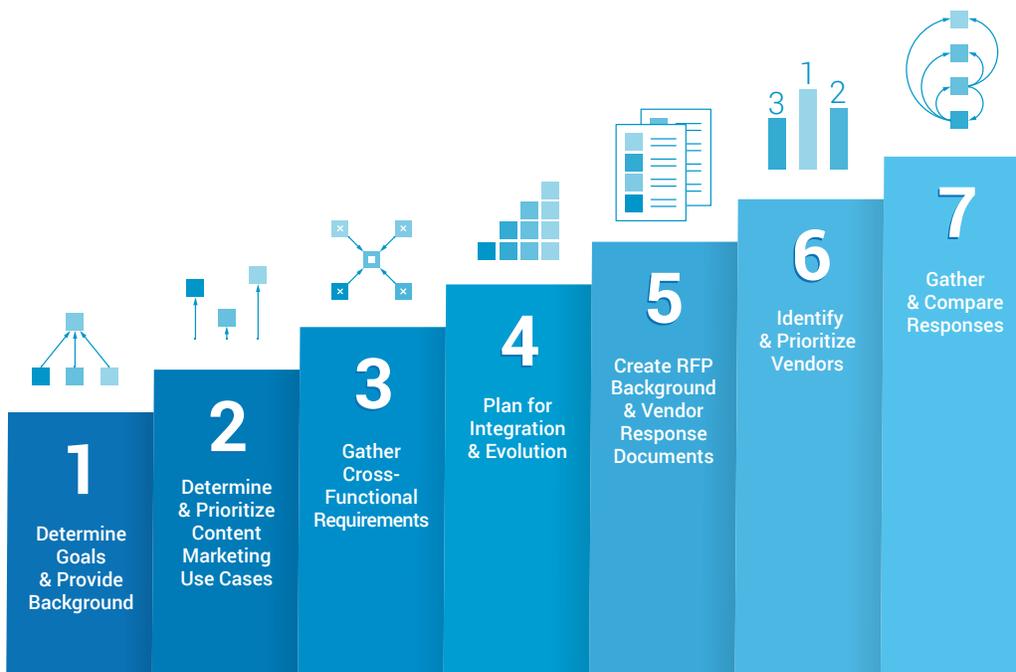
Below are specific instructions on how to use the template as part of your content marketing RFP creation process. These seven steps, outlined in Figure 1, will guide you through a comprehensive requirements gathering and vendor analysis process aimed at selecting the best-suited content marketing solution for your organization's current and future needs.

### Step 1: Determine Goals and Provide Background

Because content marketing is still nascent, this initial step helps align the organization with the RFP process. Write a brief that includes project goals/objectives of the project, your initial deployment approach, the competitive landscape (if relevant), and an implementation timeline.

For example, one goal could be to streamline content creation throughout marketing to reduce duplicated efforts. Or you may want to syndicate existing content across multiple websites and use analytics to optimize content for greater visibility. A thorough brief also helps the software vendors understand goals, targets, and unique challenges

**Figure 1** Seven Steps of Content Marketing Software Selection



Source: Altimeter Group

Once developed, add the goals and any additional background to the "Stakeholder Feedback" tab, which you will use to solicit feedback from key stakeholders.

## Step 2: Determine and Prioritize Content Marketing Use Cases

The next step is to determine which use cases apply to your project. The template reflects the framework outlined in Altimeter's report *The Content Marketing Software Landscape: Marketer Needs and Vendor Solutions*, which explains how to identify marketers' needs against eight use cases, each containing numerous subcategories and integration considerations (see Figure 2).<sup>1</sup>

A key part of your RFP process is determining which use cases and subcategory features are most important to your organization. Very rarely does an RFP address all eight use cases; you can

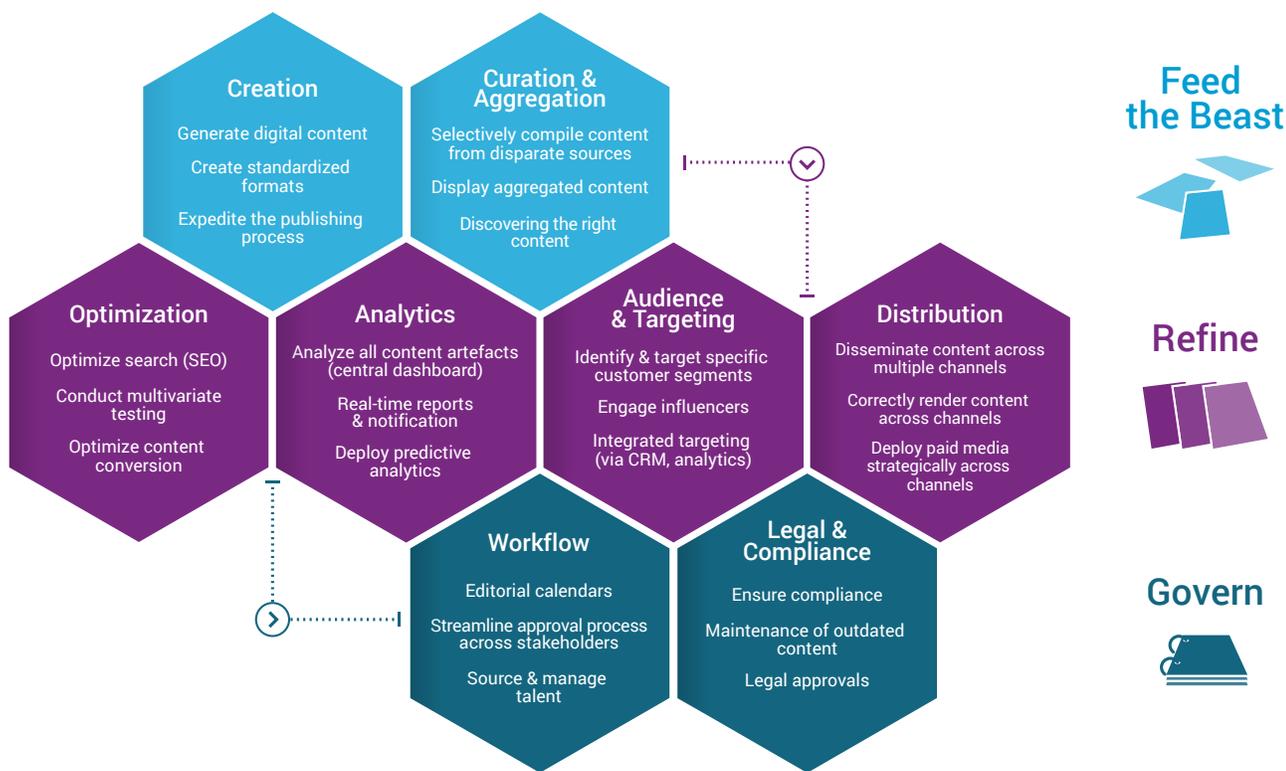
reduce the complexity of your process by selecting from the start only those use cases that most apply to your organization's content needs. To help identify use cases, look at the subcategories within each use case and assess which needs apply to your organization.

In the "Stakeholder Feedback" tab of the RFP Template, you have the option of including all or just some of the use cases, asking stakeholders to rate how important each area is to help determine prioritization for the organization.

## Step 3: Gather Cross-Functional Requirements

Now that you have the broad outlines of your organization's content needs, identify stakeholders and end users and solicit them for their requirements, input, and collaboration by circulating the "Stakeholder Feedback" tab of the RFP Template.

Figure 2 Content Marketing Use Cases and Subcategories



Source: Altimeter Group

It's important to gather requirements across teams, both cross-functionally and across workflows. Some brands actually submit mini internal RFPs or surveys to stakeholders to help gain very specific documented input on needs, pain points, and feature requests. Not only does this step help identify needs you may have overlooked, but collaboration also creates a sense of ownership and facilitates end-user adoption, especially when compared to having tools foisted upon the teams that will have to use them. Gather all of the stakeholders' responses in the "Consolidated Feedback" tab so that it's in one place and easy to review.

It's worth noting that steps 3 and 4 are often conducted in tandem; cross-functional requirements help build out integration needs unforeseen by marketing functions.

#### Step 4. Plan for Integration and Evolution

Integration considerations are essential because of the consolidation driven by converged media, as well as the evolution of content stacks, end-to-end content marketing solutions akin to ad stacks. Each content marketing use case comes with a host of potential integration issues. Identifying essential integrations can help refine your final list of prospective vendors. Content marketing software integration considerations are tripartite:

1. **Integration with marketing systems:** This includes legacy and existing marketing-related systems, such as CRM, social listening tools, content management systems (CMS), digital asset management (DAM) solutions, marketing automation, and so on. Integration requirements with other marketing systems are critical and typically comprise the most immediate integration needs when implementing new content marketing software.
2. **Integration with enterprise systems:** This includes legacy and existing enterprise systems that support or could support content marketing processes (e.g., management, workflow, analytics, etc.). Examples include internal communications platforms, corporate intelligence, and internal collaboration networks. Depending on organizational needs, enterprise system integration may be an immediate or a longer-term priority.
3. **Future integrations:** While *future* will hold different definitions for different organizations, remember to consider how the business and IT roadmap will impact integration needs down the road. Also consider external forces, emerging technology platforms, changing capabilities, and device types.

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**Figure 3 Content Marketing Integration Needs**

	 Ad Exchange	 Data & Analytics	 Digital Media	 Marketing Cloud	 Search Engines	 Sharing Platforms	 Storage Platforms	 Syndication Tools
	Display Inventory Sources Mobile Ad Servers Desktop Ad Servers	Web Analytics Business Intelligence CRM Mobile Data E-Commerce Platforms A/B Testing Tools	Publisher/News Outlets Blogs Video Platforms Audio Platforms Image Platform	Other CM Tools Marketing Automation SMMS Publishing & Embedding Tools E-Mail Marketing Tools Influencer ID Tools	Search Engine Optimization	Social Networks Community Platforms Enterprise Collaboration Tools	Cloud Storage CMS DAM Web Server	RSS Feeds Syndication Widgets
Creation		⊗	⊗	⊗		⊗	⊗	
Curation & Aggregation			⊗	⊗	⊗	⊗	⊗	⊗
Optimization	⊗	⊗		⊗	⊗	⊗	⊗	
Audience & Target	⊗	⊗		⊗		⊗	⊗	
Analytics		⊗		⊗		⊗	⊗	
Distribution	⊗	⊗	⊗	⊗	⊗	⊗	⊗	⊗
Workflow				⊗		⊗	⊗	
Legal & Compliance	⊗		⊗	⊗				⊗

Source: Altimeter Group

## Step 5: Create the RFP Background and Vendor Response Documents

The goal of any RFP is to bring structure to the procurement process. Each step outlined above provides you with the requirements needed to build as realistic and complete a picture of your current and future needs. Framing good questions around strategies, needs, and business objectives results in better answers from vendors, especially when an industry sector is new, crowded, diverse, and inconsistent and is undergoing rapid change and upheaval.

The Background also provides company and background information, current tools, and integration needs, enabling vendors to respond to the bigger picture. You should also include the decision-making timeline and any evaluation criteria or budget information that you would like to share.

Clearly outline out all requirements as they apply to each use case (feel free to edit out those that are not relevant). Pay special attention to integration requirements, from both the internal stakeholder input and the RFP appendix, which contains a more detailed list of the types of integrations most common in content marketing technology.

Two sheets in the RFP Template can help with this process:

- The RFP Background sheet provides details about the strategy and approach to content marketing.
- The RFP Vendor Response sheet contains specific requirements and questions to be answered by identified vendors (see step 6).

## Step 6: Identify and Prioritize Vendors

Having prioritized use cases and integration requirements, you now must figure out which vendors can satisfy the requirements of those use cases. Altimeter requested information from 110 content marketing vendors, and 53 provided responses to our extensive survey. Each vendor was not only asked which use cases their platform supports but also asked to force rank the use cases they support best.

The results are summarized in the appendix of *The Content Marketing Software Landscape: Marketer Needs and Vendor Solutions*. Look at your own prioritized use cases developed in step 4, and see which vendors should be on your shortlist because their priorities match your own. Also consider working with multiple small vendors that provide point solutions, because they may concentrate on key use cases that are important to your content marketing organization.

## Step 7: Compile and Compare Responses

With your responses in hand, you can begin to compare your options. Consolidate and review all responses to the RFP in the “Consolidated Vendor Response tab of the RFP Template. At the end of the process, follow up with all of the vendors and provide feedback to those not selected, because you may want to work with them in the future. The information gathered can provide you with pointed feedback and documentation.

## Conclusion

We hope the RFP template will serve as a substantial foundation for matching technology solutions with your content requirements.

Business technology investments are complex, and content marketing software is no exception. It's worth noting that there is likely no content marketing software on the market today that will perfectly address every current and future requirement; concessions may be necessary and prioritization is key. As digital marketing continues to evolve, so too will business needs, tactics, and the technologies needed to harness it.

## Appendix A: Content Marketing Software RFP Template

Below is a preview of Altimeter's Content Marketing Software RFP Template. For your convenience we've provided this template as an Excel spreadsheet that you can edit to fit the needs of your organization. The full template consists of multiple tabs, outlining requirements across each phase of the content marketing software selection process.

This template follows a 4-phase approach for content marketing software selection:

- Phase 1:** Collect Stakeholder Feedback
- Phase 2:** Combined Stakeholder Feedback
- Phase 3:** Submit the RFP Background & Collect RFP Vendor Responses
- Phase 4:** Combined Vendor Responses

You can download this template at: <http://www.altimetergroup.com/content-marketing-rfp.xlsx>.

1	Category	Questions	Question or Request for Information	Marketer Response	Vendor Response
41	<b>Use Case Requirements</b>				
42	<b>Creation</b>				
			Delete any categories or subcategories that do not apply to your technology needs.		
43		Our Creation Requirements	Describe your workflow when it comes to creating content: 1. Generating digital content 2. Creating standardized content formats 3. Expediting the publishing process What specific creation pains are you trying to solve with new content marketing software? Describe your wishlist for creation workflow capabilities.		
44					
45		Vendor's Ability to Create	Does vendor provide content? If yes, licensed content? Non-licensed (custom) content? If work with outside content sources, who are your preferred partners/vendors? Do you offer a Content Management Solution (CMS) as part of your software package? Do you offer a Digital Asset Management (DAM) Solution as part of your software package? With what frequency is your tool able to publish content? (indicate if/how your software serves the following today)		
46					
47					
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49					
50					
51					
52		Specific Creation Needs:	Concept/Creative Submissions Template/Layout/Design Capabilities (Custom) Branded Content Creation Image Editing Video Editing Non-CMS Publishing Platform Publishing Platform		
53	<b>Curation &amp; Aggregation</b>				
54			Describe your workflow when it comes to curating and/or aggregating content: 1. Compiling content from disparate sources 2. Displaying aggregated content 3. Discovering the right content (for ideas, for sharing) 4. Offering content licensed from a variety of publishers What specific curation/aggregation pains are you trying to solve with new content marketing software? Describe your wishlist for curation workflow capabilities.		
55		Our Curation & Aggregation Requirements			
56					
57		Vendor's Ability to Curate & Aggregate	Does vendor provide curated or aggregated content? If the vendor works with outside sources for curation, who are your preferred partners/vendors? (indicate if/how your software serves the following today) Curation (i.e., collecting, organizing, and displaying information relevant to a particular topic or area of interest) Aggregation (i.e., compiling and publishing syndicated web content)		
58					
59					

## Endnotes

<sup>1</sup> Rebecca Lieb, *The Content Marketing Software Landscape: Marketer Needs and Vendor Solutions* (Altimeter, May 2014), <http://www.altimetergroup.com/content-marketing-software-landscape>.

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## How to Work with Us

Content strategy establishes strategic, business-oriented goals for content and also enables repeatable processes for the planning, creation, delivery, and governance of digital content that are both useful to and useable by an organization's constituencies. In conjunction with content marketing software research, there are several ways Altimeter can help with your content strategy:

- Content strategy roadmap: Development of benchmarks for your organization's content marketing maturity and a roadmap for moving forward.
- Content audit: A qualitative and quantitative assessment of your organization's content marketing effectiveness, capabilities, and governance
- Content vendor selection: Based on existing capabilities, content strategy, and stated needs and requirements, Altimeter Group will suggest a short list of vendors/solutions.

To learn more about Altimeter's content offerings, contact Leslie Candy at [leslie@altimetergroup.com](mailto:leslie@altimetergroup.com) or 617.448.4769.