



125+ QUESTIONS to include in your RFP as you evaluate B2C CRMs





If you've experienced onboarding new software for your business, you know an RFP is necessary to help you standardize evaluation criteria against a handful of B2C CRM vendors. But how do you actually put one together to ensure you choose the right one?

In order to make sure the platform aligns with your business goals, your RFP should generally consist of 3 parts:

01 The body or cover letter
Frames the business need that is the focus of the RFP

02 Selection criteria
Answers how you'll make your final selection and the specific elements each vendor must include in their proposal to be considered.

03 Questions
All bidders must answer in order to be considered for the job

Here's what should appear in each of those sections



Sections to include in your cover letter

You need to effectively communicate your business's story, needs around this particular project or purchase, and what you're looking for in your next B2C CRM.

Here are some of the business critical sections you want to include.



Business overview

Include an overview of the company and provide background information.



Anticipated roadblocks

Outline the key hurdles you expect to face during the process of adopting new ecommerce platform marketing technology, such as the cost of integrating with other platforms in your tech stack.



Statement of purpose

Detail project goals, deliverables, and key milestones as well as an explanation of what your next marketing platform needs to accomplish and a breakdown of how it should contribute to your overarching business goals.



Logistical parameters

Explain formatting guidelines, submission requirements and deadlines, targeted selection dates, and project timeline



Scope of work

Address the issues or challenges you're facing with your current solution that you need the next platform to solve, and how it's impacting your business.



Anything else

Build a section that explicitly asks each vendor to share recommendations and additional use cases that could impact their business, how they would implement them alongside the ones already outlined, and why.

Example selection criteria

Your business will have its own unique selection criteria for choosing the best B2C CRM for your needs. The below provides some consideration of what you might choose to include:

1. The platform must be designed to meet the needs of high-volume, transaction-driven B2C businesses.
2. The platform must support execution across priority marketing channels (email, SMS, mobile push, WhatsApp, and web) from a single UI—allowing for cross-channel campaigns, flows, and personalization with shared logic and segmentation.
3. The platform should offer out-of-the-box predictive analytics (e.g., churn, next purchase, LTV), generative content tools, send time optimization, and AI-based experimentation—all accessible without technical resources.
 - a. The platform should also offer AI-powered insights beyond predictive analytics, such as generative content and channel affinity.
4. The platform must have the ability to unify offline, online, SMS, email, mobile, and third-party app identities into a single, real-time profile with unlimited data retention.
5. The system must be intuitive for non-technical users, enabling our marketing and CX teams to build, edit, test, and launch campaigns, automations, and reports without developer support.
6. We will prioritize vendors that can demonstrate fast onboarding, minimal implementation lift, and clear pricing with no hidden dependencies on professional services or third-party platforms.
7. The CRM must demonstrate a track record of driving measurable revenue, engagement, and retention gains for B2C brands at our stage and scale.
8. The platform must support seamless integration with our tech stack, flexible data ingestion (e.g., APIs, SFTP), outbound syncs (e.g., webhooks, data warehouse), and real-time activation.
9. The CRM must meet enterprise-grade security standards, include built-in compliance features (e.g., consent management), and proactively support evolving sender and deliverability requirements.

Questions to ask on your B2C CRM RFP

Selecting a new B2C CRM comes down to asking the right questions. But with so many moving parts to consider, it's hard to know where to start.

Consider these sample questions from a few suggested categories, as well as an example of an requirements section:



Requirements

1. You must provide us with a test/sandbox environment as part of the RFP and RFP demo process so we can experience your technology and these capabilities for ourselves.
2. The test environment must allow me to input mock data to allow my team to effectively test the product.
3. You must provide a comprehensive pricing structure, unique to our business, detailing what's included in platform charges and what capabilities or features will require additional charges.
 - a. Please lay out all potential service line items (e.g. implementation costs, technical support hourly rates, customer support rates, premium support packages, premium deliverability packages, etc.)
4. You must provide a realistic timeline of implementation that details how quickly our business will be able to be fully onboard with your platform after and begin sending messages with live flows, IP warming, and end-to-end integrations.



Company overview

1. How many employees do you have and in what regions?
 - a. How does this compare to 12 and 24 mos ago?
2. Where is your business headquartered?
3. Has your business raised rounds of funding?
4. How many customers do you have?
5. How many new features have shipped in the last 12 months?
 - a. What are the 2-3 most impactful ones you'd highlight?
6. What use cases does your CRM specifically support for ecommerce, retail, hospitality, wellness, or restaurants?
 - a. Can you provide examples of B2C brands at our stage and scale that have achieved measurable revenue, engagement, and retention gains using your platform, specifically highlighting how they leveraged integrated marketing and service capabilities?
7. How does your platform support fast-moving, high-volume consumer transactions vs. long B2B sales cycles?



Marketing channels

1. What tools does your system have to create personalized emails?
2. Do you support transactional and mass email campaigns?
3. Do you provide guided email IP warming?
4. Are you able to integrate inbound SMS messages with {{insert helpdesk platform}}?
5. Do you offer short codes to SMS customers, and do you offer international SMS short codes?
6. Can I send SMS to my customers in different countries?
7. How do you ensure email and SMS deliverability and reliability?
8. How scalable is your SMS infrastructure to accommodate large message volume?
9. What measures do you have in place to ensure SMS compliance?
10. Do you provide two-way messaging?
 - a. In what countries?
 - b. Do you provide automated responses?
11. What is your pricing structure for SMS services?
 - a. Are carrier fees included?
 - b. Do you charge for inbound messages?
 - c. How do you charge for MMS?
 - d. What costs are associated with new channels like WhatsApp and RCS?
12. How do you measure attribution?
 - a. Do you support multi-channel attribution for email and SMS?
 - b. Do you support custom attribution windows for email and SMS?
13. Do you support transactional as well as marketing SMS?
14. Do you provide pre-built automations for email and SMS?
 - a. Do you support back in stock automations for email and SMS?
 - b. Do you support price drop alerts for email and SMS?
15. What customer data is available for me to personalize SMS messages?
16. Are you able to have email, SMS, and mobile push messages in the same automation?
17. Are marketers able to create new triggered automations, edit an automation's logic splits/branches, and add new email/SMS/push messages without relying on developers?
18. Can you capture email and SMS opt-ins along with additional 1st party customer data over multiple steps in sign-up forms?
19. Does your platform support WhatsApp messaging?
20. Does your platform support RCS?
21. Does your platform natively support coordinated messaging across email, SMS, push, and WhatsApp?
22. Can all channels be managed in the same automation or workflow builder?
23. Are real-time data, predictive signals, and behavioral triggers available natively in every campaign?
24. Does your platform support channel affinity?
 - a. How does your platform use AI to determine the best channel for each customer to maximize engagement and conversions?
 - b. Can your platform track real-time channel engagement preferences at the individual customer level?
 - c. How does your system orchestrate campaigns to hit the right channel at the right time without overlap?
 - d. Can flow branches be built based on predicted channel engagement?
25. Do you offer product reviews?
 - a. How does the platform enable us to effectively handle the timing of review requests? Can I make sure requests don't conflict with other marketing messages?
 - b. How can I leverage reviews data across other marketing channels (email and SMS)?
 - c. How can I use reviews data for segmentation and personalization?



CDP

1. We described our current tech stack in our RFP overview. Which of these systems do you have out-of-box integrations to?
2. Are there any limits to the data types and/or data structure to what I can pass into your system?
3. How does your solution unify identities from offline, online, SMS, email, mobile, and 3rd party apps into a single profile?
4. How many custom properties and attributes can you store on a single user profile?
5. Does your CDP provide data storage?
 - a. Are there any hard limits in terms of data storage?
 - b. Does your CDP require a data warehouse to store data?
 - c. How often is data synced between your CDP and connected platforms, including marketing execution platforms?
6. Do you have a limit on the number of criteria that can be used simultaneously in one segmentation?
7. What level of skill is required to build segmentation (i.e.: ability to write SQL, intimate knowledge of table schema and available data, etc.)?
8. Do you allow segmentation based on data from third-party integrations?
9. Do you have limits on how far back you can look for data in segmentation (historical data limits)?
10. Can you ingest flat files at scale via SFTP or another solution?
11. Can you transform data to enforce data hygiene and standardization?
12. Do you have API access to power onsite personalization?
13. Can you sync data outbound in real-time via webhooks?
14. Can you sync data to your data warehouse? (if applicable)
15. Does your CDP offer the ability to define and link custom data structures (e.g., pets, appointments, loyalty tiers) directly to customer profiles to unlock deeper personalization?



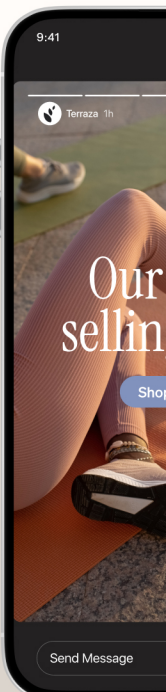
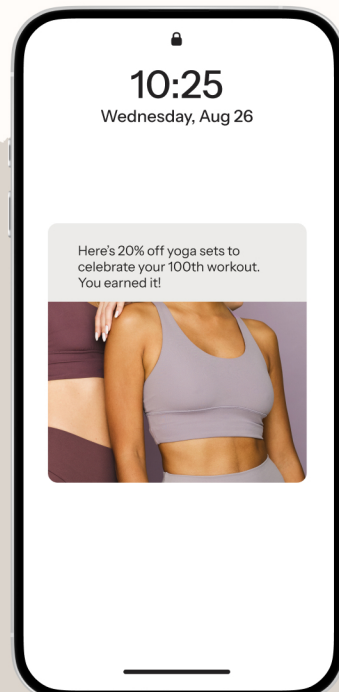
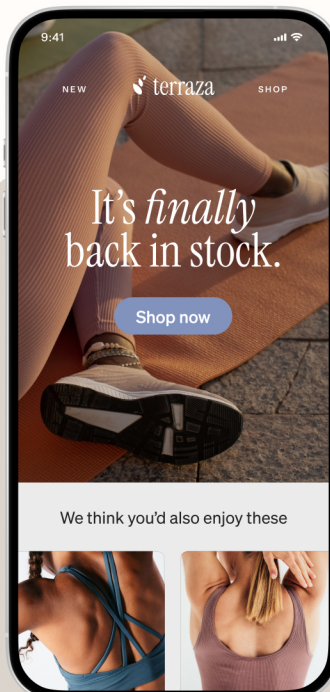
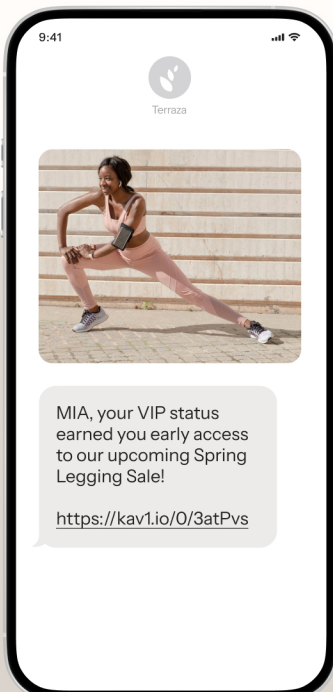
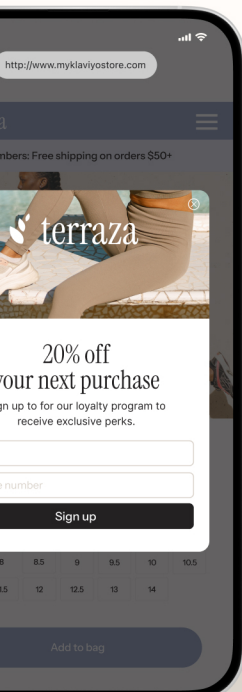
AI

1. What is your company perspective on AI?
2. What problems do you solve with AI and what results can I expect?
3. What's your AI roadmap and how are you planning to innovate AI capabilities for the future?
4. Would I have access to predictive analytics? If so, how accurate are they?
 - a. Can we predict a customer's lifetime value? If so, how can we use this data?
 - b. Can we predict the date a customer will purchase next? How can we use this data?
 - c. Can we predict a customer's likelihood to churn? How can we use this data?
 - d. Can we make personalized product recommendations?
5. How are you enabling testing and optimization in your platform today?
 - a. How does your current platform help us warm our sending infrastructure?
 - i. What guidance does your platform offer for IP warming?
 - b. How are you keeping customers up to date with the latest industry benchmarks?
 - c. How can we learn what metrics we need to improve?
6. Are we able to A/B test the following without any coding knowledge?
 - a. Content & display timing for sign-up forms
 - b. Email subject line/content in campaigns and flows
 - c. SMS content in campaigns and flows
 - d. Timing of flows
7. Do you offer send time optimization? How does your model account for statistical significance?
8. Do you offer an AI sales agent?
9. Do you have generative AI capabilities to help create the following:
10. Segments
11. Email content & subject lines
12. SMS campaigns
13. Responses to reviews



Analytics & reporting

1. How do you help me understand what good engagement and purchase performance should be for my unique brand?
2. Who do you compare us to for your benchmarks and how is this determined?
3. Can you schedule reports or do they have to be run manually?
4. Can you track conversions across email, SMS and push?
5. Can you compare conversions broken out by channel?
6. Can you customize the attribution window for each marketing channel?
7. How does your platform credit every interaction, not just the final click, across email, SMS, and push to understand conversion influence?
8. Can we customize which touchpoints to include or exclude (e.g., transactional messages, bots) in attribution models?
9. Does your platform allow retroactive updates to attribution models without losing historical insights?
10. Can you track the growth of a segment over time?
11. Can you see what customers were added/dropped to a segment?
12. Do you have access to out-of-the-box models for customer behavior, like RFM?
13. How can you use insights from customer behavior models like, RFM, in segmentation and personalization?
14. Can you create customer journey funnels based on a customer's engagement across your tech stack and website?
15. Can you customize prediction windows for lifetime value?
16. Can you compare audiences (and their respective performance) against each other?
17. Can you create custom metrics for accurate reporting and attribution?
18. Does your platform provide predictive analytics such as churn risk, purchase likelihood, and next-best product?
19. Can non-technical users access RFM analysis and journey funnel reports without SQL or external BI tools?
20. How does your platform benchmark performance and make recommendations based on real-time data?





Developer experience & tools

1. Does your platform have APIs available for integration?
2. What API standards do you follow (JSON:API, GraphQL, etc.)?
3. What programming languages do you support?
4. Do you offer pre-built client libraries for your APIs?
5. What training and support is available for developers building custom integrations to your platform (reference docs, guide docs, developer-specific training, developer community, etc.)?



Customer service capabilities

1. How does your platform integrate marketing and service workflows?
2. Can support agents access real-time customer data (e.g. order history, marketing messages received) in a single inbox?
3. Does your platform support 24/7 self-service tools for order tracking, returns, and FAQs?
4. Does your CRM offer a personalized, signed-in customer hub experience?
5. Can customers view orders, manage subscriptions, initiate returns, and discover new products in one place?
6. How does your platform power logged-in user experiences across owned channels?



Ecosystem

1. How many tech partners have a pre-built integration with your platform?
2. Do you have a partner program for marketing agencies and system integrators (SIs)?
3. How many agencies and SIs are in your partner program?
4. What are typical projects that are in scope for your agency partners?



Security & infrastructure

1. Do you have baseline security certifications (privacy shield, trustE, SOC2, ISO 27001)?
2. What security policies are you able to provide?
 - a. Information Security Policy
 - b. Business Continuity Policy
 - c. Acceptable Use Policy
3. What controls do you have to restrict access to PII for users and for vendors?



Compliance, consent, and data privacy

1. How does your platform handle compliance?
2. What type of abuse prevention system do you have in place to protect your customers from potential fraud?
3. What safeguards are in place to ensure your customers are complying with data privacy laws, including international data privacy laws such as GDPR and CCPA?
4. What type of regulations do you enforce regarding the types of lists allowed to be uploaded to the platform?
5. What measures do you have in place to ensure customers are compliant on SMS? Do you enforce the following:
 - a. Collecting consent
 - b. Mobile terms of service
 - c. Proper disclosure language
 - d. Automatic consent checks
 - e. Remove recycled or inactive phone numbers
6. How does your organization stay up to date with changes in compliance, consent, and data privacy?



Deliverability

1. What steps are in place to ensure our IP address is properly warmed?
2. What anti-abuse and campaign monitoring measures do you have in place to protect your customers?
3. Is your organization able to assist customers who need to configure DMARC authentication policies?
4. What safeguards are in place to ensure your customers comply with Google and Yahoo sender requirements? Will customers be blocked from sending if they're not in compliance?
5. Are you able to support setting up branded sending domains?



Client success & support

1. Do you provide onboarding services?
2. What is your average time-to-value (e.g. up-and-running)?
3. What resources are there for new users to learn your software?
4. Are there any additional costs for training resources?
5. How do you support your clients in deliverability?
6. What hours is your support available?
7. What is your average time to value for new users?
8. Can marketers fully build and launch automations, experiments, and segmentation without developers?
9. What percentage of implementations require professional services?

Switching platforms: a match-making long game

Your B2C CRM should grow and scale with you, to ensure you're setting your business up for future success—so you don't have to go through the RFP process again.

klaviyo[®]

THE ONLY CRM BUILT FOR B2C

Powered by its built-in data platform and AI insights, Klaviyo combines marketing automation, analytics, and customer service into one unified solution, making it easy for businesses to know their customers and grow faster.

Klaviyo helps relationship-driven brands like Paul Smith, Dermalogica, Grind, Simba Sleep and 169K+ others deliver 1:1 experiences at scale, improve efficiency, and drive revenue.

[Try Klaviyo today](#)