Brand Portal RFP Template

We recommend to ammend this template based on your requirements and to complement it by a detailed project description.
You may want to delete column C before sending the questionaire out!

Reference ID	Vendor information		
	Questions	***Why this is good to know***	**Vendor response**
1	Are you the vendor or a representative/reseller	*It is important to have clarity who you are dealing with.*	
2	Your value proposition eith regard to Brand Portals	*You need to know this to see if the vendor's positioning, vision, expertise and values align with yours.*	
3	Name reference customers for the solution and describe their solution and benefits.	*This question gives you insights into your vendor's vision and plans for the future.*	
4	Describe your roadmap plans for the solution.	*Choosing a Brand Portal is a long-term commitment, a roadmap gives you a glimpse of future features and what the vendor will prioritize.*	

Reference ID	Functional requirements		
	Questions	***Why this is good to know***	**Vendor response**
5	How is content authored? Describe the process for creating content	*Content authoring capabilities ensure extensability and adaptability as well as your ablilty to maintain the system without expert involvement.*	
6	Does the Brand Portal provide a means to browse reusable content in the content repository?	*A modern Brand Portal enables you to reuse content and modules easily. If this vendor doesn't offer that, move on.*	
7	Does the solution support viewing embedded media such as images, videos and sound?	*A central requirement of any Brand Portal*	
8	How easy it is for users to find content in your Brand Portal? Describe the search capabilities.	*Finding content quickly with an easy to use search functionality is an important usability aspect of your solution.*	
9	What are the sharing options of the Brand Portal?	*Sharing content among users will enable easy*	
10	Are there individual collections or light-boxes?	*Collecting favorited assets to individual boards / collections will increase the solution's usability for all users*	
11	Describe the download capabilities of your solution.	*The ability to efficiently download assets in different renditions is a central requirement for any Brand Portal.*	
12	Describe the task management functionality of your solution.	*Managing access or download requests or other system tasks will be necessary. How is it done?*	
13	Does the solution support different languages? Describe the capabilities.	*Supporting different languages should not be a big effort!*	

Reference ID	Authoring and creation		
	Questions	***Why this is good to know***	**Vendor response**
14	Describe the solution's capabilities to build pages	*A Brand Portal conveys the brand message and guidelines. Therefore, it is crucial for it to be on brand itself.*	
15	Describe the solution's capabilities to build pages and to embed brand assets	*A Brand Portal conveys the brand message and guidelines. Therefore, it is crucial for it to be on brand itself.*	
16	Does the solution support modern UX and responsive design principles?	*Only engaging digital experiences will let your branding efforts live up to your objectives.*	
17	Can design changes be easily applied to new and existing pages across the website?	*A Brand Portal conveys the brand message and guidelines. Therefore, it is crucial for it to be on brand itself.*	

Reference ID	Connectivity to content sources and adjacent systems		
	Questions	***Why this is good to know***	**Vendor response**
18	Describe the systems concept to access content sources such as Digital Asset Management (DAM) systems or other sources such as Enterprise Content Management Systems (ECM).	*If your content has a home already you will not want to create another silo, but rather publish the content from where it is.*	
19	Does the portal allow users to search content from source systems and to display it along with relevant meta data?	*Direct search and access to third party data will be important if your assets are stored in different systems.*	
20	Does your system possess an API and or SDK's to connect to adjacent business applications? Describe the possibilities.	*Connecting to adjacent systems will increase and leverage the value of your solution.*	

Reference ID	Roles and users		
	Questions	***Why this is good to know***	**Vendor response**
21	How are users and user authentication managed?	*A modern Brand Portal needs to offer different authentication methods to prevent data breaches.*	

	Questions	Why this is good to know	Vendor response
22	Are there limits to the number of users that can be added as contributors?	*An important factor to determine boundaries of your solution.*	

Implementation		
Questions	**Why this is good to know**	**Vendor response**

	Questions	Why this is good to know	Vendor response
23	What skill is required to set-up a portal	*The answer will give you an idea about the cost of implementation.*	
24	What skill is required to make changes to site functionality and content?	*The answer will give you an idea about barriers to keep the solution up do date.*	
25	Is it possible to run portals under dedicated URL's?	*Running the solution under your own URL will be an important element of branding and identification.*	
26	How frequently do you publish releases? How many releases per year contain new functionality?	*A modern, buoyant headless Brand Portal should release frequent updates to stay ahead in the game. If that's not the case, ask your vendor why.*	
27	How is content migration handled?	*Content migration is often cumbersome. A modern platform should make migration easy. Your vendor needs to have a migration path specific to different platforms.*	

Security / authentication		
Questions	**Why this is good to know**	**Vendor response**

	Questions	Why this is good to know	Vendor response
28	What identity management and federation methods do you support.	*You will want to spare your internal users the need to authenticate separately, but rather use existing identity providers.*	
29	Describe the single-sign-on features (SSO) of your system	*There are different SSO protocols which vendors may or may not offer. Make sure to find something that fits perfectly with your case.*	
30	Is it possible to use different authentication systems for internal and external users?	*You may not want to use your internal authentication systems for external users.*	
31	Is it possible to define different administration and user roles?	*You may want to differentiate access rights.*	

Technology		
Questions	**Why this is good to know**	**Vendor response**

	Questions	Why this is good to know	Vendor response
32	Describe the delivery method. Saas, on-premise...	*Backend technology needs to fit to your requirements.*	
33	Is there a need to install client-side software?	*The anser will give you an idea about ease of deployment.*	
34	Backend technology: Please describe your backend solution?	*The answer will give your IT experts information about the reliabilty, security and future viability of the solution.*	
35	Does the solution come with Cloud Destribution Network (CDN) capabilities?	*If your organization and/or users are geographically distributed you will need to provide fast and secure delivery content.*	
36	How much effort is involved in performing a release upgrade?	*Sometimes upgrading is a complicated process. Make sure updating is quick and easy.*	
37	When it comes to user and / or content growth, how does your solution support scaling?	*The answer is to ensure that you are not stuck with you vender when you need to grow your solution.*	

Pricing & costs		
Questions	**Why this is good to know**	**Vendor response**

	Questions	Why this is good to know	Vendor response
38	Describe your pricing structure	*There are many pricing models for SaaS businesses, pick a Brand Portal that offers flexible pricing.*	
39	Which features would incur additional costs?	*You need to know which features come out-of-the-box and which are paid ones.*	
40	Are there any additional maintenance and support fees?	*Many solutions include maintenance in their fees, but some don't.*	
41	What are external costs of implementation?	*You need to asses whether your business users can handle the implementation or whether you need external help.*	
42	Are there any other costs to be taken into account?	*Always good to ask that question.*	