The Complete Guide to
Building an RFP

*Evaluating Order Management Systems
Based on Your Goals*

lineup

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INTRODUCTION

Why Build an RFP?

When the time comes to replace one or more software solutions in your tech stack, it can be tempting to rush out and request demos of all the latest and greatest tools on the market. While there's nothing wrong with seeing what's out there, thinking through your internal requirements is critical. This is where Requests for Proposal (or RFPs) come in. Instead of letting vendors tell you what *they* can do, confirm that their tools can accomplish what *you* need.

But is going through the process of organizing an RFP worth the time and effort? Absolutely. Here's why:

1

It ensures stakeholders are on the same page.

Say it louder for the people in the back! Seriously, the value of knowing, up front, that your team is aligned on core requirements can save countless hours of back-and-forth later. If there is one thing you take away from this paper, let it be this!

2

It makes it easier to evaluate vendors side-by-side

Every OMS vendor you encounter will court you with their best value propositions, but this can leave you comparing apples with oranges. Having the same criteria for all vendors makes the evaluation process much smoother, because you end up with a truly comparable 'report card' by the end.

3

It ensures you'll get custom demos and personalized pitches from vendors.

You deserve personalized attention from the vendors that are after your business—and sending an RFP is a clear signal that you expect the sales process to be done on *your* terms. When a vendor walks you through your unique needs and use-cases, it saves you time in the long run. You won't need to puzzle through how their features apply to your needs, because you'll be able to see them work in tandem.

4

It helps you choose a solution that not only meets your feature requirements but serves your overall *goals.*

This should not be overlooked. When writing an RFP, it can be all too easy to focus in on minute details and requirements. While this is needed, it can distract from understanding how the questions you ask relate to your broader goals. That's what this document is all about—understanding how your questions can help you keep the end goal in mind, from the very beginning.

START WITH THE END IN MIND
Questions that Match Your Goals

> **"** *RFPs provide an opportunity to assess how a new solution fits into your organization's overall goals.* **"**

After answering hundreds of RFPs from media organizations all around the world, we've seen a wide variety of RFP styles and focuses. Most often, RFPs focus on features and requirements. While it's true that no RFP should be without these basics, it is important to remember that RFPs also provide an opportunity to assess how a new solution fits into your organization's overall goals.

Whether you're focused on achieving scalability or reducing costs, *start with the end in mind.* There are three common goals we see from organizations we work with: increasing efficiency, achieving scalability, and reducing costs. While you will want to ask a variety of feature and function questions, pay special attention to the answers that pertain to your larger goals. Here are some examples:

Increase Efficiency

Reduce Cost

Increase Scalability

GOAL 1

Increase Efficiency

Getting more done daily has a slow but steady impact on the bottom line. If you suspect your tech choices are the primary culprit of inefficient practices, searching for a new solution makes sense.

Here's an example we see frequently: Traditional order management systems were designed to work for a specific team and focus on one area of advertising sales. As such, some organizations still have a separate OMS for print, digital, classifieds, etc. This may have made sense before multichannel selling took over the media market, but today it results in "swivel chair syndrome," where a sales rep may find themselves entering the same campaign information in multiple systems. What a drag! This inefficiency not only forces a sales rep to spend more time on admin than selling, but it can be annoying to customers who expect to book across multiple channels and brands.

If efficiency is your primary motivation for choosing a new order management system, pay special attention to:

1

Answers about system administration.
Is it easy to manage users? Make batch edits? Configure the system internally?

2

Pricing and Inventory features.
Can you update your product catalogue on the fly? Check inventory in real-time?

3

Multichannel capabilities.
Does the OMS cover print, digital, classifieds and non-traditional channels like outdoor, events, and marketing services?
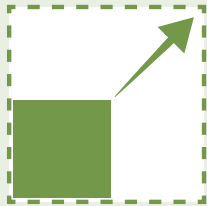
4

Integration options.
How easily can you integrate with other systems?

5

Workflow features.
Can you customize your approval process? Advance orders automatically?

GOAL 2
Increase Scalability

One of the clearest trends in the media industry is consolidation. In the United States, just 6 conglomerates control much of the media industry. Whether you're experiencing an acquisition, concerned about a future merger or potential downsizing, scalability is more important than ever in today's media business climate.

Too many media companies end up locked into contracts for more vendors than they need or face rising costs for adding users later. And if adding products to your OMS isn't seamless, acquiring new brands or titles can be time consuming.

Unfortunately, many vendors are not prepared to scale alongside their customers, and a current solution choice may limit future options. If scalability (up or down) is your goal, consider answers to questions like:

1   **Flexibility of Service Level Agreement.**
Are you able to add or remove users during your contract period?

2   **Business Unit flexibility.**
Are you able to easily add or remove business units, whether they are titles, brands, channels, etc?

3   **Cloud hosting options.**
Private or multitenancy cloud

4   **Integrations.**
Does the solution have an open API? What's the vendor's history of partnering and integrating with supplementary systems?

5   **Pricing and Inventory flexibility.**
Can you add new products easily?

GOAL 3

Reduce Costs

$

Reducing costs without sacrificing functionality is always a goal. Every vendor will say that their product is less expensive and simply better than the competition—do you know how to evaluate these claims? For SaaS solutions, cost reduction involves more than simply price.

Can the system replace multiple platforms you're currently using? Automate costly, redundant tasks? Reduce or eliminate human error? Is it flexible enough to scale down if necessary? Consider the total cost of ownership for the solution compared to the systems it can replace.

When trying to lower total cost of ownership (and generally reduce costs overall), consider:

1

Answers about system administration.
Is it easy to manage users? Make batch edits? Configure the system internally?

2

Pricing and Inventory features.
Can you update your product catalogue on the fly? Check inventory in real-time?

HOW DO I START?

> " Even with all these resources, where should you begin? Here's a step-by-step checklist. "

Even with these guidelines, sitting down to write a complete RFP can be an intimidating process. That's why we've also included a robust RFP template with this guide, which covers standard order management system evaluation questions. We've also mapped these example questions to the goal they serve and jotted down notes throughout to help you evaluate the responses you gather. But even with all these resources, where should you begin? Here's a step-by-step checklist:

☑ Meet with key stakeholders and end users to discuss wants and needs for your new OMS.

☑ Confirm primary (and secondary) goals.

☑ Use enclosed template to generate question ideas and check that the questions are helping you stay aligned with your goals. This is also a good time to note feature priority.

☑ Add questions about any features we may not have listed.

☑ Write use-cases you would like vendors to run through during custom demos.

☑ Send your RFP to chosen OMS vendors. Include a timeline for vendor responses and schedule short Q&A sessions where vendors can clarify your use cases and expectations.

☑ Paying special attention to the goal-specific questions, evaluate responses and invite top performers to present a demo to your stakeholder team.

☑ Find an awesome OMS your entire organization loves!

WHO DO I SEND IT TO?

So you've written a killer RFP with your goal-specific questions front and center—congratulations! Now for the fun part—send your RFP to key vendors, sit back and relax (for now) and wait for responses to come in.

Not sure who to send it to? Develop a list of vendors you'd like to evaluate. Usually this list comes from word-of-mouth recommendations, vendors you have current or past relationships with, and of course, good ol' Google.

Here are some helpful terms to search:

Multichannel advertising OMS 🔍

Digital OMS 🔍

Advertising management software 🔍

Media sales solution 🔍

Ad sales systems 🔍

ABOUT LINEUP SYSTEMS

Getting more done daily has a slow but steady impact on the bottom line. If you suspect your tech choices are the primary culprit of inefficient practices, searching for a new solution makes sense.

Lineup Systems caters to many of the biggest, most iconic and innovative media organizations in the world. Our first-of-its-kind media sales solution, Adpoint, is credited with transforming media companies by helping to increase revenue, improve productivity and reduce costs.

Adpoint combines order management with a media-focused CRM, finance and analytics suite. No more "swivel chair syndrome"—instead, manage your ad sales from lead to billing from one easy-to-use, customizable solution.

Our customers include top media groups such as TI Media, News Corp UK, Gannett, Net-a-Porter, Bonnier Corp, Metro Media, Torstar, Metroland, Block Communications, Hearst Magazines, Mansueto Ventures and many more.

> " *The partnership with Lineup has been transformative for us, freeing up so much time and significantly reducing our operational complexity. The agility the Lineup platform provides for the future is a real game-changer for Gannett.* "
>
> – **Rick Baker**, VP Technology, Gannett

Our History

As an organization, we empower media companies with the systems and tools they need to sell more and increase efficiency across the board. And we understand how to do this because Lineup was started by a team that needed exactly that. In the early 2000s, our founder and CEO Michael Mendoza was the global IT director of Metro International, the same innovative media conglomerate that shook the world up with the concept of the 'free newspaper'. Wholly dependent on advertising revenue, Metro struggled to find a system that would help Metro's sales teams proactively generate more sales. Determined to move beyond clunky technology and expensive infrastructure, Michael and his Metro team decided they'd build their own proprietary software solution. That solution was Adpoint. Adpoint was so transformative for Metro that Michael launched it to the global media market under newly created Lineup Systems in 2009.