**AI Content Vendor Selection:**

Request for Proposal Template

**How to Use This RFP Template**

Generative AI offers enterprises huge creative, efficiency, and efficacy advantages that traditional methods cannot match. Marketers should eagerly explore implementing generative AI to capitalize on these benefits. However, enterprise marketers must balance this excitement with evaluating AI content solutions with the same level of scrutiny as any other enterprise application.

To help you navigate this exciting but uncharted landscape, we’ve compiled essential questions to consider when evaluating different AI content providers. These questions will help you better understand your requirements and assess the capabilities, reliability, and suitability of different AI content providers in relation to those needs.

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# Questions for Your Company

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## Project Scope & Timelines

Before diving into the different features and functionalities of AI content platforms, a clear understanding of your objectives and requirements is crucial for determining the best-fit solution.

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| **Questions & Responses** | |
| What makes a good vendor partner for you? |  |
| What specific business objectives are you aiming to drive with your chosen AI content provider? (E.g. customer-centric culture, personalization and data-driven strategies, technological innovation etc.) |  |
| To successfully meet your business objectives, what are you looking to achieve with your AI content provider? (E.g. streamline content creation, increase engagement, optimize customer communications etc.) |  |
| What content types are you considering using AI to generate? e.g. imagery or written content? Long- or short-form content? |  |
| How many channels do you use for proactive and direct customer engagement? |  |
| How many campaigns are there per channel per month? |  |
| What is the audience size per channel per deployment? |  |
| How many languages per channel? |  |
| How many copywriters do you have? What is the output capacity of your copywriters and their average performance? |  |
| What customer engagement platform (CEP) do you use? |  |
| What is the scope and timeline for the contract? (e.g. one-year or multi-year) |  |
| Who are the key stakeholders in your evaluation and what role does each play? |  |

# Questions for Vendors

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## Vendor information

|  |  |
| --- | --- |
| Vendor name |  |
| Location |  |
| Year established |  |
| Mission |  |
| Number of employees |  |
| Client base |  |

What sets your company apart from other competitors?

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## Section 1: Content Generation & Curation

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| **Questions & Responses: Generation & Curation** | |
| Does the vendor’s platform access Large Language Models (LLM) for content generation? |  |
| If the vendor’s platform does access an LLM, please detail which one(s). |  |
| If the vendor’s platform accesses an LLM or multiple LLMs for content generation, are there guardrails in place to prevent hallucinations? i.e. incorrect or inappropriate content. |  |
| If the vendor’s platform accesses an LLM and has guardrails in place to prevent hallucination, how are these guardrails implemented? |  |
| Does the vendor have its own proprietary NLG (natural language generation), or does it rely solely on LLMs? |  |
| If the vendor has its own NLG and uses an LLM, how do they co-exist? |  |
| What is the process to ensure the generated content adheres to [brand’s] unique identity and tone of voice? |  |
| Is prompt training required to generate quality output? |  |
| Is content generation real-time? |  |
| If content generation is real-time, what is the mechanism for this? |  |
| What channels can the vendor generate content for? E.g. email, Push, SMS, Social, Web, etc. |  |
| How many variants of content can be generated at a time? |  |
| How does the vendor ensure a diversity of language versus slight variations? |  |
| If a competitor uses the platform, is there anything in place to ensure similar content is not generated? |  |
| Does the system automatically avoid using repetitive language from previous content generations? |  |
| Can the vendor’s platform generate content in non-English languages? |  |
| If the vendor’s platform can generate content in non-English languages, please list out which ones. |  |

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## Section 2: Performance & Insights

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| **Questions & Responses: Performance & Insights** | |
| Does the vendor’s platform learn over time based on empirical data? |  |
| If the vendor's platform learns over time based on empirical data, how much data is feeding this network? |  |
| If the system claims to generate high-performing content, how does this work? |  |
| How is performance proven? |  |
| Once content is generated, can experiments run via the integration to find the best-performing content for the audience? |  |
| If experiments can run via the integration using the content generated, what is the methodology? |  |
| How does the vendor measure performance? Key KPIs? |  |
| Can/does experiment performance data influence future content generation? |  |
| If experiment performance data influences future content generation, how does this work? |  |
| Does the platform provide insights to understand what content the audience is and is not engaging with? |  |
| What insights are available via the platform? |  |
| Does the training data for the AI come from a credible source? Please explain. |  |

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## Section 3: Data Connections & Integrations

In addition to answering the questions below, please attach any relevant integration documentation.

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| --- | --- |
| **Questions & Responses: Data Connections & Integrations** | |
| Does the platform integrate with [brand’s ESP/CEP] for [channels]? |  |
| What additional ESP/CEPs does the platform integrate with? |  |
| Do the platform’s integrations allow for continuous optimization over time testing any number of variants at any point in time? |  |
| If the platform’s integrations allow for dynamic optimization, what are the use cases? |  |
| Do the platform’s integrations pull results back? |  |
| If the platform’s integrations pull results back, is this real-time? |  |

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## Section 4: Personalization

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| **Questions & Responses: Personalization** | |
| Is the vendor’s content generation audience specific? |  |
| If the vendor’s content generation is audience specific, how does language adjust from one audience to another? |  |
| Can the vendor’s platform provide more relevant content to a user based on their current context? |  |
| Can user profile data be used to recommend best fit generated content for the individual? |  |
| How many possible permutations are possible of a particular piece of content? |  |

## Section 5: Scale, Speed & Reliability

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| **Questions & Responses: Scale, Speed & Reliability** | |
| What is the scheduled uptime with respect to the platform? |  |
| Do audience size and/or # of messages impact platform performance? |  |
| How quickly does the platform generate content? |  |
| How quickly does the platform distribute content at point of request? |  |

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## Section 6: Security & Compliance

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| **Questions & Responses: Security & Compliance** | |
| Does the vendor use an open or closed data set to power its AI? |  |
| Is the vendor compliant with the NIST AI Risk Management? |  |
| If the vendor uses 3rd party LLMs, does the information cross international boundaries? |  |
| What sources does the AI draw information from? Is any open-source code used? |  |
| What [brand] data needs to be submitted to get outputs from the AI? Please specify if any [brand’s] source code, customer information or other confidential information will be inputted to the AI. |  |
| Does the AI have an incognito mode or privacy feature where information inputted by [brand] won’t be stored and used to train the AI? |  |
| If the AI has an incognito mode or privacy mode feature, please provide details about how these private modes work, including how long it takes for the AI to delete the information entered by [brand]. |  |
| Is the vendor willing to indemnify us if we have a legal problem based on our use of their AI? |  |
| How will the [brand] data that is provided be protected? |  |
| Will [brand’s] data be accessed/passed to any 3rd party as part of the AI ingest/training process? |  |
| Does the vendor use a third party’s AI platform? If so, what platform is it? |  |
| Does this solution support Single Sign On (e.g. SAML, WS-Fed, oAuth2) in connection with developer/administrative authentication? |  |
| What security certifications does this customer engagement platform possess (e.g. SOC 2, ISO 27001, HIPAA, etc.)? |  |

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## Section 7: Product Roadmap, R&D Strategy

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| **Questions & Responses: Product Roadmap, R&D Strategy** | |
| What additional products/features does the vendor plan to launch in the next 3/6/9/12 months? |  |
| How will the platform protect against high-risk novel AI technologies while taking advantage of their capabilities? |  |
| Please define your overarching product vision |  |
| How does the product vision associated with this customer engagement platform support your customers' business goals? |  |

-- END --