

How to Use This Kit

Loyalty Platform RFP Evaluation Kit — start here.

This kit replaces open-ended vendor conversations with a structured, evidence-based evaluation process. It includes seven files. Here's what's in the kit and the recommended order to use them.

What's in this kit

File	Use it for
Clutch-Loyalty-RFP-Evaluation-Guide.pdf	The full reference guide — all 114 capability statements, scoring methodology, and Pro Tips.
Internal-Stakeholder-Alignment-Checklist.pdf	Getting marketing, IT, finance, legal, and operations aligned before vendor outreach.
Loyalty-RFP-Template.docx	An editable RFP you can copy directly into your own procurement process.
Vendor-Response-Worksheet.docx	The vendor-facing document you send out for vendors to complete and return.
Loyalty-Vendor-Scorecard.xlsx	A working spreadsheet to score and compare up to 3 vendors, with automatic weighted scoring and critical-flag detection.
Demo-Validation-Checklist.pdf	A short, tactical checklist to use live during any vendor demo.

Recommended order of operations

1

Read the Guide

Skim the full PDF guide to understand the methodology, the 11 evaluation sections, and the critical flag rule.

2

Run internal alignment

Use the Internal Stakeholder Alignment Checklist to get marketing, IT, finance, legal, and operations on the same page before any vendor outreach.

3

Send the worksheet

Send the Vendor Response Worksheet to every vendor in your evaluation, with a deadline for written responses before any demo is scheduled.

4

Score in the spreadsheet

Enter each vendor's response codes into the Vendor Scorecard. Weighted scores and critical flags calculate automatically.

5

Validate live

Use the Demo Validation Checklist during each vendor demo to verify what was claimed in writing.

6

Formalize if needed

If your organization requires a formal RFP process, use the Loyalty-RFP-Template.docx to issue a structured RFP under your own letterhead.

Questions about how to use any file in this kit, or want a second opinion on your evaluation criteria? Book a 20-minute RFP walkthrough at clutch.com/contact.

Published by Clutch | clutch.com