

ROKT

Ecommerce technology request for proposal (RFP) guide



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01 Executive overview

Ecommerce leaders face more expectations than ever: drive profitable growth, deepen customer relationships, and do everything without compromising trust. As teams across product, marketing, media, and technology align around performance, the quality of your partners becomes a competitive advantage - or a potential risk.

The most valuable, and vulnerable, moment in the customer journey is the Transaction Moment™ when buying intent is highest and brand trust is on the line. Activating this moment well means more than adding new revenue streams. It means unlocking **relevance**, **safely**.

This guide aims to help you evaluate ecommerce technology partners through a strategic lens:

- Will this partner protect your customer experience?
- Can you trust their technology under real-world pressure?
- Are their incentives aligned with your long-term business outcomes?

You'll find frameworks to:

- Evaluate solutions against your needs
- Define the non-negotiables of partner trust
- Compare maturity levels across vendors
- Align cross-functional teams on what matters
- Ask the questions that uncover real-world performance

Whether you're looking to replace an underperforming partner or launch a next-generation monetization program, this guide helps you do one thing well: Choose a partner you can trust with your brand, your customers, and your reputation.



02 Understanding ecommerce technology

Definition and benefits

When meeting your expectations, ecommerce technology partners optimize the best next action for your customers - what customers see, when they see it, and how it is presented across the Transaction Moment.

The Transaction Moment refers to the set of high-engagement pages in an ecommerce journey - specifically, the Selection, Cart/Review, Payment, and Confirmation pages - where a customer's intent, attention, and value converge. During this moment, customer engagement is highest, and the economic opportunity is greatest. Over 90% of the ancillary revenue opportunity for ecommerce brands exists within these four pages.

You can expect to deliver relevant content, offers, and experiences that drive conversion, loyalty, and revenue using first-party data, behavioral signals, and machine learning.

Benefits:

- **Customer engagement, loyalty & retention/repeat:** You can expect to delight your customers and deepen your relationship with them by delivering real-time relevance.
- **New revenue streams:** Monetize and optimize high-intent moments, including your cart page, payment page, post-purchase confirmation page, and/or account page through the Transaction Moment.
- **Improved business performance:** Providing relevant content and offers enhances the customer experience. It also supports key business initiatives such as loyalty programs, strategic partnerships, app downloads, private label credit cards (PLCC), and advertising.
- **First-party data utilization:** Leveraging your first-party data to power targeted campaigns that drive greater value for both the business and customers.



03 Market trends and opportunities

According to recent industry research¹, non-endemic advertising continues to grow as a critical component of retail and commerce media networks and ecommerce relevance strategies. Key trends shaping the market include:

What's changing	<ul style="list-style-type: none">• Cookies are fading. First-party data is the new frontier• Advertisers want outcomes, not impressions• Brands are expected to do more with less, fast
Buyer risk If you're not using high-intent, owned real estate to deliver relevance, you're either:	<ul style="list-style-type: none">• Leaving revenue on the table• Or worse, disrupting the customer journey with irrelevant noise
Winning orgs prioritize	<ul style="list-style-type: none">• Real-time relevance at scale• Closed-loop measurement frameworks• Clear data governance• Incremental value across the entire Transaction Moment



Solution maturity: evaluating emerging vendors vs established partners

In any new technology category, many emerging vendors will claim similar capabilities to those established partners who founded the category. This framework helps distinguish between the more nascent options (those with product maturity under 4 years) and established partners like Rokt, based not on promises, but on measurable and proven performance.

Use this framework to identify what matters most to you:

Category	Established Partner (e.g., Rokt)	Emerging Vendor (product <4 years old)
Customer Experience	Dynamic AI-powered decisioning, suppressing irrelevant ads	Static, rule-based placement that often disrupts UX
Compliance Certification	SOC2, ISO 27001, GDPR/CCPA aligned	Limited certification; unclear data handling
Data Handling	Data never pooled, sold, or reused	May pool or reuse data across clients
AI/ML Capabilities	Deployed ML across 6B+ transactions; documented lift, scaled global engineering team	Buzzword-heavy, few specifics
Advertiser Quality	Direct partnerships with premium brands, exclusive offers	Reliant on affiliate networks and resale data models
Commercial Alignment/Transparency	Rev share models available to all partners, contract flexibility, and a proven profitable business model	Undisclosed non-standard rev share, extended contract lock-ins
Post-Sale Support	Dedicated tenured account support, integrated technical teams	Reactive, access to 1-2 team members, low tenured and experienced team
Financial Stability	Profitable with positive cash flow, transparent financials	Unprofitable with negative cash flow, or undisclosed
Client Base	Global ecommerce leaders, multiple scaled verticals	Small and medium-sized companies, limited verticals with large clients
Global Scalability	Live in 15+ markets, multi-language, and region-ready	US or EU only



04 Essential criteria for partner evaluation

A strong RFP doesn't just test functionality - it surfaces trust, alignment, and long-term fit. Use these questions to go beyond the demo and understand how a partner will perform when it counts.



Customer experience

Does the partner -

- Ensure relevance without disrupting the purchase journey?
- Support real-time decisioning and machine learning to optimize the experience?
- Enable control over internal vs. third-party offer prioritization?
- Support audience-specific ad suppression (e.g., for existing customers or sensitive categories)?
- Offer design control to maintain brand standards?
- Support owned initiatives like surveys, loyalty promotions, or product messages?
- Enable ongoing experimentation and A/B testing to improve customer experience and performance?



Compliance certification

- Does the partner hold certifications such as SOC2 Type II or ISO 27001?
- Do they comply with global regulations such as GDPR and CCPA?
- Have they experienced any regulatory investigations or enforcement actions in the last five years?





Data handling

- How will they collect, share, and/or use customer data, especially any personally identifiable information (PII)? Can they guarantee it will never be sold?
- How long is data retained, and can data retention be configured?
- Have regulators ever required them to delete customer data?
- Does their technology leverage first or third-party cookies?
- Have they had any data breaches or security incidents in the past five years? How were they resolved?
- What is their process for managing opt-outs, cookie consent, and user-level data governance?
- Do they rely on affiliate data networks or indirect advertiser pipelines?



AI/ML capabilities

- Do they use machine learning to suppress irrelevant offers?
- Do they personalize offers based on loyalty status, product context, or offer fatigue?
- Do they optimize in real time across the customer journey?
- What AI and ML capabilities are on their roadmap?
- How frequently do they release new functionality enhanced by AI?



Advertiser quality

- How many advertisers are integrated directly (not via affiliate networks)?
- Can they provide 20+ examples of high-quality, relevant offers live now?
- Does the partner provide advertiser quality controls?
- What is the partner's approach to testing and optimizing advertiser performance?



Commercial alignment & transparency

- What's the typical revenue performance for clients in our vertical?
- What is the partner's fee or revenue share model?
- Are incentives aligned with value per transaction, AOV, or long-term business outcomes?
- Do enterprise partners receive tailored commercial terms?



- How does the partner structure its best deals, and how might a new partner compare?
- Are revenue share terms transparent, or are there complex carve-outs and commissions?
- Can I exit the contract if product, revenue, or payment expectations aren't met?



Post-sale support

- Do they provide a dedicated account team and technical support?
- Is real-time reporting available via self-serve dashboards?
- How does the partner support ongoing optimization and campaign performance?



Financial stability

- Can they provide audited financials?
- Does the partner demonstrate financial stability and ongoing investment in innovation?
- What percentage of revenue is reinvested into R&D?



Client base

- How many ecommerce clients does the partner support?
- What is the total annual transaction volume that the partner processes?
- Can the partner provide references from current clients?
- Are there examples of customers who have switched from other vendors and can speak to the differences?
- Who are some of the other major brands in your vertical that they work with, and how long have they been clients?
- Who are some of the partner's major clients in the same vertical, and how long have they been active?



Global scalability

- Do they support international markets and multiple currencies?
- Can the partner support high-volume, high-velocity ecommerce moments (e.g., surges from 5,000 to 300,000 transactions/hour)?
- What is the partner's uptime SLA and performance under load?





Roadmap and innovation

- How do they co-develop features with partners?
- How often do they release new functionality?
- How is their company embracing and enhancing your technology with AI?
- What innovations has the partner released in the past 12 months, and how have they performed?



Red Flags

- Vendor is currently under regulatory investigation and/or has been penalized by the FTC or State organizations
- Your customer data is owned by the vendor and/or shared with external entities
- Use of affiliate networks that aggregate low-quality ads
- No direct advertiser relationships
- Lack of compliance such as SOC2 or GDPR compliance
- Unclear/young business maturity (e.g., <50 clients, no enterprise deployments)
- Commercial model only works for one vertical or region, or prioritizes revenue at the expense of customer experience
- Different pricing for all clients
- Partners who overpromise revenue without evidence of volume, advertiser diversity, or proven ability to scale
- Lack of product maturity, e.g., no support for advertiser suppression, loyalty integrations, or peak demand reliability.
- Lack of SLAs you can trust: stringent uptime guarantees, measurable performance metrics, and enforceable penalties — giving you complete confidence in our operational commitment.
- Lack of always-on monitoring and proactive response: Without real-time system monitoring, automated alerting, and rapid response protocols, potential issues may not be resolved before they become business disruptions.

05 In Summary

This guide isn't about selecting a vendor but choosing a partner you can trust with your brand, customers, and reputation.

The right partner will:

- **Deliver great customer experiences while driving new revenue** without compromising control, privacy, or brand safety.
- **Unlock value across your full Transaction Moment**, not just on one page, product, or campaign.
- **Evolve with your business** by offering enterprise-grade products, responsive support, and constant innovation.
- **Operate with aligned objectives**, building toward the same outcomes with shared incentives and long-term accountability.

Trust isn't just a value - it's a requirement. And your decisions will shape your customer experience and growth trajectory for years to come.

(1) SOURCE: The State of Retail Media 2025, Forrester Research, Inc

