

Case Study - Sherwin Williams

Building Consensus in Selecting and Migrating to a New ESP

A major home décor retailer needed a new email service provider that better fit their needs. Their current process involved multiple platforms pieced together that created a bulky and inconsistent send process for their marketing team and limited access to email reports.

The client had chosen not to renew their current platform and had a firm deadline for completing the selection and migration to a new system.



Understanding the client's needs

No two companies and no two ESP are alike. Identifying the right ESP requires an RFP process that focuses on understanding the current and future needs of the client and what matters most to them. That's why every RFP starts with an extensive discovery process to understand the client's current state, any pain points, and their short- and long-term goals.



With a deep understanding of the client's needs, Global Email Alliance partners Email Connect and Inbox Army, along with RPE Origin, customized a 300-question RFP and sent it to six potential vendors that had been identified based on the RFP team's extensive industry experience.

For this client, data management and privacy played a significant role. While some enterprise-level companies want a single system that can do it all, this client specifically wanted to compartmentalize their data. They had an existing data management platform, and the data team wanted something that could integrate with that system to deploy emails without storing any customer data. The marketing team needed faster data queries for email sends and more visibility into email metrics.

Achieving consensus through a scorecard-driven RFP

The scorecard-driven RFP is an objective process that gives a voice to anyone who wants a voice in the process. The scoring system provides equal weight to each voice and leads to a better outcome than more subjective approaches to RFPs.

More importantly, the scorecard is another step designed to drive consensus in the RFP process, which was critical for this client. Initially, their data team and marketing team each came to the table with their own frustrations about the current platform and their own desires for what a new platform might look like. Through both the discovery process and the scorecard process, the two teams developed a better working relationship and a shared understanding of why each team had certain concerns about data and functionality. In the end, both teams fully supported the same platform as the best choice to move their business forward.



Ensuring a smooth transition with a migration roadmap

Once the new platform had been identified, the process continued with a migration roadmap led by RPE Origin. The migration roadmap documents everything about the company's email processes and how various systems interact to ensure that no surprises occur that could delay migration.

This was a critical step given how the existing email system had been pieced together through multiple platforms over time, plus the ongoing use of a third-party system for data management. There was no standard process for how different teams deployed emails, so the RPE Origin team fully documented the new sending process and identified the training needs for the team to ensure a clear and consistent approach moving forward.

Celebrating a successful launch

The extensive discovery process, scorecard-driven RFP, and migration roadmap ensured the client's new ESP launched on time and on budget. The client was thrilled with the outcome, consensus building, and new process documentation. They also said it was the first time they had worked with a vendor who launched on time for a major project like this.



About RPE Origin

We are the industry's only vendor-agnostic, email-centric agency serving enterprise companies throughout their digital journey. We aim to be an indispensable partner for enterprise and agency clients who rely on email for success. Whether you need help choosing a new ESP, enhancing automated B2C or B2B customer journeys, or connecting data points across your tech stack, we help you move from simple to sophisticated to drive more revenue through email marketing.

Our team lives email every day, and that includes both email marketing and maximizing the connective tissue across all digital channels. With our customized approach and flexible services, we can do everything from one piece of the puzzle to the entire picture.



Need help with your enterprise email strategy and systems?

Contact our team to get the conversation started.

