ROKT

Ecommerce technology request for proposal (RFP) guide

Contents

01 Executive overview

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

The challenge is not just unlocking new revenue. It is doing so within real-world constraints: balancing internal priorities with partner demand, maintaining strict control over advertiser quality, and ensuring any partner integrates seamlessly without disrupting performance, latency, or user experience.

The most valuable, and vulnerable, moment in the customer journey is the Transaction MomentTM when buying intent is highest and brand trust is on the line. Activating this moment requires more than just adding new revenue streams. It requires 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?
- Will this partner operate effectively within your platform's constraints and priorities?

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 the Transaction Moment

Definition

The Transaction Moment refers to a set of high-engagement pages in the ecommerce journey, specifically the Selection, Cart/Review, Payment, and Confirmation pages, where intent is highest and customers are most engaged. Here, the customer has already decided to transact. Attention is focused, and customers are more likely to engage with what is in front of them.

Working effectively in this environment requires more than placing content into available space. It requires consistent decisioning, real-time context, and control over how experiences are presented so they support, rather than interrupt, the purchase.

Ecommerce technology partners use first-party data, behavioral signals, and machine learning to determine what to show, when to show it, and how it appears.

Benefits: -

- **Customer engagement, loyalty & retention:** Relevant experiences at the right moment can reinforce trust and strengthen long-term relationships.
- **New revenue streams:** High-intent pages create opportunities to introduce offers, partnerships, or messages that generate incremental value without disrupting the core transaction.
- **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

Several shifts are changing how ecommerce businesses think about monetization and customer experience.

High-intent moments are underutilized

The Transaction Moment concentrates customer intent, attention, and value. However, these moments are often not used to their full potential, particularly when compared to the level of investment and optimization applied earlier in the customer journey.

First-party data is the new frontier

As third-party signals become less available, businesses are relying more on their own data to drive decisioning. This increases the importance of environments where first-party data can be applied directly and responsibly.

Advertisers are shifting toward measurable outcomes

Advertisers are placing greater emphasis on performance and incrementality. This creates demand for environments where results can be tied more closely to real customer actions, not just impressions or clicks.

Poor execution has a higher cost

Introducing irrelevant or poorly integrated experiences in high-intent moments can disrupt the purchase and erode trust with your customers. The margin for error is smaller, which raises the bar for how these experiences are designed and delivered.

04 Understanding partner maturity

In any developing technology category, different types of vendors will offer similar capabilities on the surface. Differences become clearer in how those capabilities perform in practice, particularly at scale and under real-world conditions.

Maturity is one way to evaluate these differences. It reflects not just what a solution can do, but how consistently it performs, how it handles complexity, and how well it integrates into existing systems.

Use this framework to identify what matters most to you:

Category	Established partners (e.g., Rokt)	Emerging vendor
Customer experience	Dynamic AI-powered decisioning, suppressing irrelevant ads	Static, rule-based placement that often disrupts UX
Revenue model & partnership	Rev share models available to all partners, contract flexibility, and a proven profitable business model	Less standardized revenue model, tied more to commitments than performance; extended contract lock-ins
Advertiser depth & quality	Exclusive partnerships with brand-safe, premium advertisers	Reliant on affiliate networks and resale data models
Compliance certification	SOC 1, SOC 2, ISO 27001, GDPR/CCPA aligned	Limited certification; unclear data handling
Data handling	Data never shared, sold, or used	May pool or reuse data across clients
AI/ML capabilities	Deployed ML across 13B+ transactions; documented lift, scaled global engineering team	Limited detail on real-world performance
Post-sale support	Dedicated tenured account support, integrated technical teams	More limited support structure, often reactive with smaller or less experienced teams
Financial stability	Profitable with positive cash flow, transparent financials	Unprofitable with negative cash flow, or undisclosed
Technical performance	Proven across billions of annual transactions	Smaller scale, less proven infrastructure
Global scalability	Live in 15+ markets, multi-language, and region-ready	US or EU only
Client base	Global ecommerce leaders, multiple scaled verticals	Small and medium-sized companies, limited verticals with large clients

05 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

- How does the partner ensure relevance without disrupting the purchase journey?
- Is the partner able to support real-time decisioning and machine learning to optimize the experience?
- What level of control do you have over what is shown, including internal vs. third-party prioritization and suppression?
- Can the experience be adapted to maintain brand and design standards?
- How does the partner support ongoing testing and optimization?

Revenue model & partnership

- How is the partner's revenue model structured, and how does it align with your business outcomes?
- What's the typical revenue performance for clients in our vertical?
- What level of transparency is provided into pricing, fees, and revenue share?
- How does performance vary by advertiser type, category, or constraint?
- How do they co-develop features with partners?
- **What flexibility exists in contract terms, including the ability to adjust or exit based on performance?**

Advertiser depth & quality

- What types of advertisers make up the partner's demand, and how are they sourced? Are they integrated directly or via affiliate networks?
- What level of control do you have over advertiser and category inclusion or exclusion?
- How does the partner ensure the quality and relevance of ads shown to customers?
- How is advertiser performance monitored and optimized over time?
- Can they provide 20+ examples of high-quality, relevant offers live now?

Compliance certification

- What certifications and regulatory standards does the partner meet (e.g., SOC 2, ISO 27001, GDPR, CCPA)?
- How are compliance practices maintained and updated over time?
- Have they experienced any regulatory investigations or enforcement actions in the last five years?

Data handling

- How do 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?
- 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

- How does the partner use data and machine learning to determine what is shown and when?
- How is decisioning applied in real time across different contexts and customer states?
- What AI and ML capabilities are on their roadmap?
- How frequently do they release new functionality enhanced by AI?

Post-sale support

- What level of support is provided, including account management and technical resources?
- How does the partner support ongoing optimization and performance improvement?
- What reporting and visibility are available to monitor performance in real time?
- What service levels are in place for issue resolution, including response times and escalation?

Financial stability

- What level of financial transparency does the partner provide?
- Is the business profitable or on a clear path to sustainable profitability?
- How is the company investing in product development and long-term growth?
- Are there any risks related to funding, ownership structure, or long-term viability?

Technical performance

- How does the partner perform under real-world conditions, including peak traffic and high-volume scenarios?
- What are typical latency benchmarks, and how is performance maintained without disrupting the user experience?
- How does the system behave in the event of timeouts or failures?
- What service level agreements (SLAs) are in place for uptime and reliability?

Global scalability

- In which markets does the partner currently operate, and how is localization handled (e.g., language, currency, regulations)?
- How does the partner support expansion into new regions or markets over time?
- Can the solution operate consistently across regions with different regulatory and operational requirements?

Client base

- What types of clients does the partner work with, and how do they compare to your business?
- What level of scale does the partner support across its client base (e.g., transaction volume, traffic)?
- Can the partner provide references or examples from comparable clients?

Red Flags

- Lack of transparency in data usage or unclear data ownership
- Limited control over advertiser quality or category exclusions
- Revenue models tied more to commitments than performance
- Inability to demonstrate performance at scale or under real-world conditions
- Overreliance on affiliate networks or indirect demand sources
- Limited compliance certifications or unclear regulatory posture
- Lack of clear SLAs, monitoring, or fail-safe mechanisms
- Overstated performance claims without supporting evidence

06 In Summary

This guide isn't about selecting a vendor, but choosing a partner you can trust to operate within your platform and support your customer experience.

The right partner will:

- **Deliver relevant experiences that support the purchase journey** while maintaining control, privacy, and brand standards.
- **Unlock value across the full Transaction Moment**, not just a single page or placement.
- **Perform consistently under real-world conditions,** including scale, complexity, and operational constraints.
- **Operate with aligned incentives**, with clear, transparent models tied to performance.

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.