

Digital Adoption Platform RFP

Request for proposal template for evaluating digital adoption platforms (DAPs)

How to use this template: replace everything in [square brackets], delete requirements that do not apply, and send the same document to every vendor so responses are easy to compare. Pair it with the AdoptionStack vendor scoring sheet.

1. Introduction

[Company name] is inviting proposals for a digital adoption platform to support employees using [applications]. This document describes our goals, scope and requirements, and explains how to respond.

Item	Details
Issued by	[Name, role, email]
Issue date	[Date]
Questions due	[Date]
Proposals due	[Date]
Decision expected	[Date]

2. About us

[Short description of the company: industry, size, locations, number of employees who will use the platform.]

3. Scope

Applications in scope

Application	Number of users	Key workflows	Priority
[e.g. Salesforce]	[e.g. 800]	[e.g. Opportunity creation, call logging]	[High]
[e.g. Workday]	[e.g. 5,000]	[e.g. Time off, expenses]	[Medium]
[Application]	[Users]	[Workflows]	[Priority]

Objectives and success metrics

- [Reduce how-to support tickets for in-scope applications by X% within six months]
- [Reduce time to productivity for new hires from X to Y days]
- [Improve completeness of required fields on key records to X%]
- [Increase active usage of in-scope applications to X% of licensed users]

4. Requirements

Please respond to each requirement with: Yes (standard), Partial, Roadmap (with date) or No, plus a short explanation.

ID	Requirement	Priority	Vendor response
F1	Step-by-step walkthroughs on our in-scope applications, including single-page apps and iframes	Must	
F2	Contextual tips on specific fields and buttons	Must	
F3	Searchable in-app self-help widget linking to our knowledge base	Must	
F4	Onboarding task lists for new users	Should	
F5	Field-level validation to prevent incorrect data entry	Should	
F6	Targeting by role, department, region and language	Must	
F7	Multi-language content and translation workflow	[Must/Should]	
A1	Analytics on guidance usage and completion	Must	
A2	Analytics on end-to-end business processes and drop-off points	Should	
A3	Export of analytics data to our BI tool or data warehouse	Could	
C1	No-code editor usable by our own content authors	Must	
C2	Detection and alerts when guidance breaks after application updates	Must	
C3	Versioning, approvals and content governance	Should	
T1	Single sign-on (SAML/OIDC) and role-based access for authors	Must	
T2	Deployment method (browser extension, snippet, desktop) and IT management	Must	
S1	Masking of sensitive data; details of data collected and where it is stored	Must	
S2	Security certifications (e.g. SOC 2, ISO 27001) and recent audit reports	Must	
S3	Data processing agreement and sub-processor list	Must	
P1	Implementation approach, timeline and team for the first application	Must	
P2	Training and certification for administrators and authors	Should	
P3	Support model, hours, response times and customer success coverage	Must	

5. Pricing

Please provide a detailed, all-inclusive price for three years, broken down as follows:

- Platform or per-application fees for each in-scope application
- User or licence fees, and how users are counted
- Optional modules and add-ons, priced separately
- Implementation and professional services
- Support and customer success tiers
- Price protection: maximum annual increase at renewal
- Any costs for additional applications, environments or users added mid-term

6. Proof of concept

Shortlisted vendors will be invited to a [two to four]-week proof of concept on [application]. We will provide access to a test environment and ask you to build guidance for [two] workflows, with one built by our own content author using your editor.

7. Evaluation

Proposals will be scored on the following weighted criteria:

Criterion	Weight
Fit with our applications and requirements	[30%]
Ease of content creation and maintenance	[20%]
Analytics and ability to prove outcomes	[15%]
Security and compliance	[15%]
Total three-year cost	[15%]
Vendor support, references and roadmap	[5%]

8. How to respond

- Send your proposal as a PDF to [email] by [date and time].
- Include completed responses to section 4 and the pricing breakdown in section 5.
- Provide two customer references with a similar application stack.
- Direct all questions to [name] by [date]; answers will be shared with all vendors.

Need help choosing vendors to invite? See adoptionstack.com/categories/digital-adoption-platforms and adoptionstack.com/blog/how-to-choose-a-digital-adoption-platform.