

Choosing a Marketing Analytics Partner

RFP Evaluation Checklist

Use this RFP evaluation checklist as a reference guide for the features, data, and methodology to consider when assessing marketing analytics partners.

Data used to measure campaigns

It's important to understand the data powering the insights you will receive and what media channels you can measure. If a single partner only provides analytics across select channels or reporting for the inventory they are selling, you may have to stitch insights together to get a unified view across campaign performance.

You will also need to confirm the type of health data accessed. The ability to tie results back to actual health metrics and not just media metrics is critical to make optimizations that will improve outcomes. With the marketing and media landscape constantly evolving, make sure your marketing analytics partner guarantees continuity of analytics.

Category	Requirement	Partner 1	Partner 2	Partner 3
Data	Explains how media is collected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Shares which media channels they track across both DTC and HCP campaigns (Ex: linear TV, streaming, social)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Describes the approach for mitigating the impact of cookie deprecation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Provides information about the health data they are accessing, inclusive of details around privacy and HIPAA compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Analytics used to inform campaign decisions

Analytics insights enable you to take action and improve campaign performance. Where and who has access to data and the cadence of when data refreshes are essential for your operational set-up. Executing omnichannel marketing strategies requires that you have a complete view across channels and the ability to make connections between DTC and HCP marketing campaigns. You will also want to understand if there are any differences in insights provided across both types of campaigns.

In addition, synchronization – the close and timely coordination of field engagements and digital advertising – helps marketers and field teams maximize efforts across their organizations. Check with your analytics partner to see if they provide insights to link your marketing campaigns to any additional activities.

Category	Requirement	Partner 1	Partner 2	Partner 3
Analytics	Explains deliverables and any differences between DTC and HCP reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Provides access to a cloud-based dashboard to see results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Metrics are delivered in a regular and timely cadence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Shares the timeline between contract execution and available data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Provides a holistic view of customer engagement including marketing and field force activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Methodology behind the insights

The methodology used to power insights lets you know how data is being processed and if and how it works with other data sources. Is there a consistent approach to the methodology across channels, is the data statistically significant, are there eligibility criteria to perform the analysis? Answers to these questions determine if you can have confidence in the results you receive and that you can actually use the data to make informed optimization decisions.

Category	Requirement	Partner 1	Partner 2	Partner 3
Methodology	Details measurement methodology across different channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Details attribution methodology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Outlines how they ensure accuracy of the results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Adequately demonstrates model validity and stability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Describes if/how they work with third parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Experience and account support

On top of data, methodology, and insights, your measurement analytics partner acts as an extension of your team. The life sciences industry is intricate and complex. A partner with experience specific to life sciences marketing can more effectively address your unique business challenges, compared to a partner who has applied a general solution across multiple verticals.

Along with the partner's experience and support model, clarify if they provide benchmarks across categories and media channels. Benchmarks serve as helpful data points when analyzing campaign performance and considering potential optimizations.

Category	Requirement	Partner 1	Partner 2	Partner 3
Experience & Partnership	Provides category and media benchmarks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Has more than 10 years of life sciences experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Provides a dedicated account team to provide insight analysis and optimization suggestions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Evaluate with consistency to select the right partner

Lastly, general media industry questions ensure partners meet advertising and measurement standards. Honing in on these categories and asking consistent questions across all partners will help you select the one to best support your business needs.

Interested in talking through the RFP process in more detail or getting specific answers from the Veeva Crossix team? [Schedule time](#) to speak with an account partner.