CCM Compared

FREE CCM RFP CHECKLIST · 2026

CCM RFP requirements checklist

84 vendor-neutral requirement lines in 12 sections, with suggested priorities and section weights. Use it to replace SmartCOMM, Quadient Inspire, OpenText Exstream, Oracle Documaker or an in-house system.

84	12	27
requirement lines	sections	suggested Mandatory

How to use it

1. Cross out lines that don't apply. Change Mandatory or Desirable to fit your project.
2. Adjust section weights so the ones you use total 100%. Score price separately.
3. Ask every vendor to answer each line by its ID with one code below and a short explanation.
4. Write each vendor's code in its column. Treat a Y on a Mandatory line as unproven until you see it in a demo.

CODE	MEANING	ASK THEM TO SHOW
Y	Works today in the proposed edition, no custom code	A document reference, screenshot or demo slot
P	Partly there, or needs configuration or services	What's missing and who builds it
R	On the roadmap	Target release, and whether it's committed
N	Not available	Nothing

An N or R on a Mandatory line knocks the vendor out before scoring starts.

Editable online version with CSV download: ccmcompared.com/ccm-rfp-template

AU Template design and authoring

Suggested weight 15%

LOOK FOR In the demo, ask a business user, not a developer, to change locked wording and send it through approval.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
AU-01	Business users can edit approved content without developer involvement.	Mandatory			
AU-02	Administrators can lock regulated text, logos and disclosures so only authorized roles can change them.	Mandatory			
AU-03	Shared components such as clauses, address blocks and footers update every template that uses them.	Mandatory			
AU-04	One master template can serve variants by state, product or brand.	Desirable			
AU-05	Approval workflows with role-based review before publishing.	Mandatory			
AU-06	Full version history, comparison and rollback for templates and components.	Mandatory			
AU-07	Audit trail showing who changed which content and when.	Mandatory			
AU-08	Preview with real test data before publishing.	Desirable			
AU-09	Promotion of assets across development, test and production environments.	Desirable			
AU-10	Multilingual content management, including right-to-left languages where needed.	Desirable			

CO Composition and batch production

Suggested weight 13%

LOOK FOR Ask for the configuration behind any volume figure in writing. Peak numbers without it can’t be compared.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
CO-01	Batch generation at our stated peak volume within our processing window, with the configuration used to measure it.	Mandatory			
CO-02	On-demand single-document generation through an API, with stated response times.	Mandatory			
CO-03	Print output in AFP and PostScript, plus PDF.	Desirable			

CO-04	Print stream post-processing: sorting, splitting, merging and inserter barcodes.	Desirable			
CO-05	Input in XML, JSON, delimited and fixed-length formats.	Desirable			
CO-06	Scaling of production engines in the proposed deployment, with the limits stated.	Desirable			
CO-07	Job monitoring, reprint and restart from the point of failure.	Desirable			
CO-08	Householding and grouping of documents for one recipient.	Desirable			
CO-09	Font, image and resource management across print and digital outputs.	Desirable			

DE Omnichannel delivery

Suggested weight 8%

LOOK FOR Check that email and SMS come from the same template as print, not from a separate tool.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
DE-01	Email output from the same template as print.	Desirable			
DE-02	SMS output, including two-way SMS where needed.	Desirable			
DE-03	Responsive HTML for web portals and mobile apps.	Desirable			
DE-04	Channel selection based on stored customer preference.	Desirable			
DE-05	Fallback to another channel when delivery fails.	Desirable			
DE-06	Delivery tracking and status reporting by document and channel.	Desirable			
DE-07	Connectors to our named email, SMS and print providers.	Desirable			

IN Interactive and agent-assisted documents

Suggested weight 6%

LOOK FOR Have a front-office user complete a document with data pre-filled from your CRM or policy system.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
IN-01	Browser-based editor for front-office staff, with no desktop install.	Desirable			
IN-02	Staff can edit only the sections their role allows.	Mandatory			
IN-03	Guided, interview-style document completion.	Desirable			
IN-04	Launch from our CRM or policy system with data pre-filled.	Desirable			
IN-05	Save, resume and route drafts for approval.	Desirable			

FO Forms and data capture

Suggested weight 4%

LOOK FOR Only weight this section if forms are in scope for this project.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
FO-01	Responsive digital forms with pre-fill from back-end systems.	Desirable			
FO-02	Field validation and conditional logic.	Desirable			
FO-03	Save and resume across devices.	Desirable			
FO-04	Conversion of existing PDF forms into digital forms.	Desirable			
FO-05	E-signature integration with our named provider.	Desirable			

OR Journey orchestration

Suggested weight 4%

LOOK FOR Confirm whether orchestration is in the edition being quoted or licensed separately.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
OR-01	Visual design of multi-step journeys such as reminders, follow-ups and escalations.	Desirable			
OR-02	Next steps triggered by customer responses or inaction.	Desirable			
OR-03	Journey analytics showing completion and drop-off by step.	Desirable			

OR-04	State whether orchestration is included in the proposed edition or licensed separately.	Mandatory			

AR Archive and retrieval

Suggested weight 5%

LOOK FOR Ask how archive export works at contract end, in what format, and what it costs.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
AR-01	Archive of every sent communication in its original form.	Desirable			
AR-02	Retention rules by document type and jurisdiction.	Desirable			
AR-03	Search and retrieval by customer, date, channel and document type.	Desirable			
AR-04	Customer self-service access to archived documents.	Desirable			
AR-05	Bulk export of archived documents and metadata at contract end.	Mandatory			

IT Integration and architecture

Suggested weight 10%

LOOK FOR Name your real core systems in the RFP so answers are specific, not generic.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
IT-01	Documented connectors or APIs for our named policy administration, billing and CRM systems.	Mandatory			
IT-02	REST APIs for template management, generation and status, with published documentation.	Desirable			
IT-03	Tools to map our data structures to template fields.	Desirable			
IT-04	Event triggers from our core systems in real time.	Desirable			
IT-05	Hosting models available: vendor-hosted SaaS, private cloud, our cloud account, on-premises.	Mandatory			
IT-06	Data residency in our required regions for production data and archives.	Mandatory			
IT-07	Release cadence, and the ability to defer upgrades during our critical periods.	Desirable			

SC Security, compliance and accessibility

Suggested weight 12%

LOOK FOR Ask for the reports themselves, not a summary. Check the dates, scope and any exceptions.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
SC-01	Current SOC 2 Type II report and ISO/IEC 27001 certificate.	Mandatory			
SC-02	Single sign-on through SAML 2.0 or OpenID Connect, and role-based access control.	Mandatory			
SC-03	Encryption in transit and at rest, with customer-managed keys as an option.	Desirable			
SC-04	HIPAA support with a signed business associate agreement, if applicable.	Desirable			
SC-05	Tagged PDF output conforming to PDF/UA-1 (ISO 14289-1), with a roadmap for PDF/UA-2 (ISO 14289-2).	Desirable			
SC-06	Electronic documents meeting WCAG 2.1 Level AA.	Desirable			
SC-07	Typography rules such as 12-point Times New Roman or equivalent for Medicare Advantage materials (42 CFR 422.2267).	Desirable			
SC-08	Taglines in at least the 15 languages required under 45 CFR 92.11, where applicable.	Desirable			
SC-09	Fixed placement and bold formatting such as the Regulation Z Minimum Payment Warning (12 CFR 1026.7), where applicable.	Desirable			
SC-10	Adverse action notice content that meets Regulation B (12 CFR 1002.9), where applicable.	Desirable			

AI AI features and governance

Suggested weight 6%

LOOK FOR Separate what is generally available from early access and roadmap.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
AI-01	For each AI feature, state whether it is generally available, early access or roadmap.	Mandatory			
AI-02	AI-assisted authoring with human approval before anything is published.	Mandatory			

AI-03	Audit trail and rollback for every AI-assisted change.	Mandatory			
AI-04	Readability and plain-language scoring with suggested rewrites.	Desirable			
AI-05	AI translation with a review step.	Desirable			
AI-06	Detection of personal data in content.	Desirable			
AI-07	Which AI models are used, where they run, and whether our data trains them.	Mandatory			
AI-08	Ability to switch AI features off by role or environment.	Desirable			

MI Migration and implementation

Suggested weight 9%

LOOK FOR Ask each finalist to convert three of your hardest templates and show what was automated.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
MI-01	Tooling that reads our current platform's templates natively, not only PDF or Word output. Name the supported source platforms.	Mandatory			
MI-02	Analysis of duplicate and near-duplicate templates before conversion.	Desirable			
MI-03	Conversion of business rules, with a stated approach for rules the tool cannot convert.	Desirable			
MI-04	Output comparison tooling for parallel testing old against new.	Desirable			
MI-05	Whether migration tooling is licensed to us, run as a service, or both.	Mandatory			
MI-06	A named implementation plan with roles, phases, gates and our responsibilities.	Mandatory			
MI-07	References from at least two customers who migrated from our current platform.	Mandatory			

CM Commercial and contract terms

Suggested weight 8%

LOOK FOR Get per-unit prices and the renewal increase cap into the contract, not just the proposal.

ID	REQUIREMENT	PRIORITY	VENDOR A	VENDOR B	VENDOR C
CM-01	Licensing metric stated: environments, author seats, page or document volume, connectors, or a combination.	Mandatory			
CM-02	Overage rates and how volume tiers are measured.	Desirable			
CM-03	Cap on renewal price increases for the contract term.	Mandatory			
CM-04	Exit terms: export of templates, content and archive in open formats at no extra charge.	Mandatory			
CM-05	Service levels for uptime and support response, with credits.	Desirable			
CM-06	Transition pricing for any overlap period with our current platform.	Desirable			
CM-07	Named support model and customer success resources.	Desirable			

Where to go next

Score the answers
Weight and compare finalists side by side.
ccmcompared.com/ccm-vendor-scorecard

Compare the vendors
Ratings, review counts and analyst placements.
ccmcompared.com/ccm-benchmark

Leaving SmartCOMM?
Eight alternatives worth a shortlist.
ccmcompared.com/smartcomm-alternatives

Get budget sign-off
Stay-or-switch calculator and business case outline.
ccmcompared.com/ccm-business-case

Free to reuse. Regulatory lines use US rules as examples, so swap in the rules that apply to you. CCM Compared is independent and not affiliated with any vendor.