

Sample RFP Questions for Customer Data Platforms (CDPs)

Use this as a foundation for evaluating CDP vendors in healthcare environments.

When assessing CDP platforms for healthcare or privacy-first applications, it's critical to move beyond generic feature checklists and evaluate alignment with regulatory, architectural, and operational needs. The following questions are designed to help your procurement and technical teams assess real-world fit.

1. Privacy & Compliance

- Can you provide a signed BAA and documentation of HIPAA compliance?
- What mechanisms exist to suppress or de-identify PHI prior to data sharing or activation?
- How does the platform enforce consent across collection, storage, and activation layers?
- Do you support encryption at rest and in transit?
- How is audit logging handled for user access, exports, and data changes?
- Do you allow control over tag-level firing and pixel governance?

2. Data Architecture & Integration

- What integrations exist with healthcare CRMs, EHRs, or patient portals?
- Can your platform operate in a hybrid or on-premise deployment?
- How are consent states modeled and passed through the integration pipeline?

3. Identity & Segmentation

- How do you resolve anonymous and known identities into a unified profile?
- Is identity resolution handled in-house or dependent on third-party services?
- Can we segment audiences using behavioral, demographic, and consent-aware filters?
- How is suppression handled? Is it built-in or managed outside the platform?
- Can we apply role-based access to segmentation and identity data?

4. Egress & Downstream Activation

- **List all downstream platforms and destinations you natively support** (ad platforms, email tools, CRM, analytics, etc.)
- How do you ensure HIPAA-compliance or PHI suppression in outbound connections?
- Can destination-specific rules (e.g., allow/block fields) be configured?
- Is real-time or scheduled audience syncing supported?
- Are audit logs available for all outbound data transmissions?

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5. Measurement & Reporting

- Does the platform include performance reporting for activated segments?
- Can we connect segment delivery back to campaign outcomes?
- Are attribution or A/B testing tools embedded in the platform?
- How do you support analytics integrations with BI tools (e.g., Looker, Tableau)?
- Do you support journey visualization or user path analysis?

6. Platform Operations & Support

- What healthcare-specific implementation support do you provide?
- Do you offer SLA-backed uptime, onboarding, and support?
- Can your platform operate in air-gapped or private cloud environments?
- How are platform updates handled across governed environments?
- What documentation or audit artifacts are available for internal reviews?



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