

Party Plan Software RFP Template

A vendor-neutral request for proposal for party plan and direct selling companies

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Guide: <https://partyplansolutions.com/guides/party-plan-software-rfp-template/>

Issued by: [Company legal name]

RFP reference: [RFP number]

Date issued: [Date]

Responses due: [Date and time zone]

Send responses and questions to: [Buyer contact role and email]

About this template

This template is written for buyers: party plan and direct selling companies, from startups to mid-size, choosing a software platform. Replace everything in [square brackets], delete questions you do not need, and adjust the suggested Must, Should, and Nice priorities to fit your business. A matching buying checklist and a weighted scoring workbook (.xlsx) are available from partyplansolutions.com.

Published by Party Plan Solutions, owned by CNR Consulting, which also makes direct selling software.

This template is general information for software buyers. It is not legal, tax, financial, or compliance advice. Requirements, laws, and vendor offerings change. Have your own counsel and advisors review your RFP, the vendor responses, and any contract before you sign. No vendor paid for or reviewed this template, and it does not rank or recommend any vendor.

How to use this template

- Fill in sections 1 to 3 so vendors understand your business. Vague RFPs get vague answers.
- Review every requirement in sections 4 and 5. Set each priority: Must (deal breaker if missing), Should (important, a workaround is acceptable), or Nice (a bonus).
- Keep the number of Must items small. If everything is a Must, nothing is.
- Send the same document to every vendor, with the same deadline, and answer vendor questions in writing to all vendors at once.
- Score responses with section 10 and the scoring workbook. Then confirm the top two or three in scripted demos using your own data.

Instructions to vendors

- Answer every question in the Vendor response column. If a feature is not available, say so. Mark each answer as Standard (live today, included), Configurable (live today, set up by settings), Add-on (extra cost), Custom (needs development), Roadmap (not live; give a date), or No.
- Answer in plain language. Link to public documentation where it exists.
- Include all costs in section 6. Costs not listed in your response will be treated as not payable.
- Questions about this RFP are due by [Date]. Answers will be shared with all vendors.
- This RFP is not an offer to contract. [Company] may change the process or decline all responses.
- Treat this RFP and all information in it as confidential. [Add NDA reference if one is required.]

1. Company overview and goals

Item	Details (buyer to complete)
Company and brand(s)	[Name, website, year founded]
Business model	[Party plan, direct selling, affiliate, hybrid. In-home, virtual, or both]
Products	[Categories, number of SKUs, kits, subscriptions]
Countries today and planned	[List]
Active consultants today	[Number] and target in 3 years: [Number]
Active customers and hosts	[Number]
Orders per month	[Number] and peak month: [Number]
Parties per month	[Number]
Compensation plan type	[Summary, attach plan document]
Home office team using the system	[Departments and number of users]

Goals for the new platform

List three to five measurable goals. Examples to adapt:

- [Launch on the new platform by date, without a missed commission run.]
- [Cut time to close a party and pay hosts from X days to Y days.]
- [Let the home office change host rewards and promotions without vendor tickets.]
- [Support a second country by date.]
- [Lower total platform cost per active consultant, measured over three years.]

What is not working today

[Describe current pain points in plain language. Vendors respond better to real problems than to feature lists.]

2. Current systems and data migration

System	Current tool or vendor	Keep, replace, or integrate	Notes
Back office and commissions	[]	[]	[]
Ecommerce and replicated sites	[]	[]	[]
Party management	[]	[]	[]
Payouts	[]	[]	[]
Payments and fraud	[]	[]	[]
Tax calculation	[]	[]	[]
Inventory, warehouse, shipping	[]	[]	[]
Accounting or ERP	[]	[]	[]
Email, SMS, CRM	[]	[]	[]
Reporting or BI	[]	[]	[]

Data to migrate

Data set	Approximate records	Years of history	Must migrate?
Consultants and genealogy	[]	[]	[Yes / No]
Customers and hosts	[]	[]	[Yes / No]
Orders and returns	[]	[]	[Yes / No]
Parties and bookings	[]	[]	[Yes / No]
Commission and payout history	[]	[]	[Yes / No]
Host credits and open balances	[]	[]	[Yes / No]
Autoship and subscriptions	[]	[]	[Yes / No]
Stored payment methods (via payment provider)	[]	[]	[Yes / No]

Vendor: describe how you would migrate each data set, how you validate it, and who does the work.

3. Timeline and budget

Milestone	Target date
RFP issued	[Date]

Milestone	Target date
Vendor questions due	[Date]
Answers sent to all vendors	[Date]
Proposals due	[Date]
Shortlist and scripted demos	[Date range]
Reference calls and sandbox testing	[Date range]
Vendor selected	[Date]
Contract signed	[Date]
Parallel commission runs	[Date range]
Go-live (avoid month end and peak season)	[Date]

Budget item	Range
One-time implementation and migration	[Range or To be discussed]
Recurring platform cost per year	[Range or To be discussed]
Internal staff time available	[Hours per week]

Sharing a budget range is optional. It often gets more realistic proposals.

4. Functional requirements

Suggested priorities are a starting point. Change them to fit your business before you send the RFP.

Party and host management

How the platform runs parties (shows), from booking to close.

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
A1	How does a consultant create, schedule, and manage a party (in-home, virtual, and hybrid)? Show the full flow from booking to close.	Must	
A2	Can a party stay open for orders for a set period, and can the consultant reopen or extend it? Who controls the close date?	Must	
A3	How are party bookings (future parties booked at a party) tracked and credited to the host and consultant?	Should	
A4	Is there a host portal where the host can invite guests, track party sales, and see rewards earned in real time?	Should	
A5	How are party sales, guest counts, and bookings reported to the consultant and to the home office?	Must	
A6	Can parties be linked to a fundraiser, catalog show, or online-only event, and how do those differ in rules?	Nice	

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
A7	How does the platform support virtual parties (live video links, social posts, party page) without a separate tool?	Should	

Host rewards

Host rewards are the core of party plan economics. Ask vendors to configure your plan, not describe it.

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
A8	How are host rewards configured (free product credit, half-price items, booking gifts, tiered levels)? Can the home office change tiers without vendor help?	Must	
A9	How are host credits calculated when guest orders are returned, cancelled, or changed after the party closes?	Must	
A10	Do host credits expire, and can expiry rules, minimums, and redemption limits be set by the home office?	Should	
A11	Can a host redeem rewards across more than one order or carry a balance to a later party?	Nice	
A12	How are host rewards shown on the host's order, invoice, and in reports, including the cost of rewards to the company?	Should	

Guest ordering

How guests buy, pay, and receive product.

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
A13	Can guests order online from a party link without creating an account? Describe guest checkout.	Must	
A14	Can the consultant enter orders for guests (paper or in-person orders) and take payment on the spot?	Must	
A15	Does the platform support ship-to-host (group shipping) and ship-to-guest on the same party, with correct shipping and tax for each?	Must	
A16	How are returns and exchanges handled after a commission run has closed? Describe clawbacks or adjustments to commissions and host credits.	Must	
A17	Can guests be invited to become customers, hosts, or consultants from the order flow, and how is that tracked?	Should	

Replicated sites and ecommerce

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
B1	Does each consultant get a replicated site? What can consultants customize, and what does the home office lock?	Must	
B2	How is a customer or guest attributed to the right consultant (link, cookie, consultant search, order lookup)? What happens when there is a conflict?	Must	
B3	Do you offer a native storefront, an integration with a third-party ecommerce platform, or both? If you integrate, describe what syncs (products, orders, customers, inventory) and in which direction.	Should	
B4	If we use a third-party ecommerce platform, which checkout, discount, and subscription features still work, and which features of your platform do not?	Should	
B5	How are promotions, coupons, and consultant-only pricing managed across the storefront and party orders?	Should	
B6	What page speed, SEO controls (titles, URLs, redirects), and accessibility standards do your storefront and replicated sites meet?	Nice	

Compensation plan and commissions

Ask each vendor to model your actual plan with sample data during the demo.

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
C1	Can you configure our compensation plan as written (attach plan document)? List any parts that need custom code.	Must	
C2	Who can change plan rules, ranks, and bonuses after launch: our staff through settings, or your team through a change request? What does a change cost?	Must	
C3	How does a commission run work (frequency, preview or what-if runs, approval step, re-runs)? How long does a run take at our expected volume?	Must	
C4	Which plan types are supported (unilevel, party plan team overrides, breakaway, compression, binary, hybrid)?	Should	
C5	How are adjustments, manual bonuses, holds, and clawbacks recorded, and is there a full audit trail?	Must	
C6	Can consultants see real-time volume, rank progress, and estimated earnings in their back office, and how is that kept accurate?	Should	

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
C7	Is the commission engine tied to your platform only, or can it run on order data from another system?	Nice	

Payouts

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
C8	Which payout methods are supported (bank transfer, card, e-wallet, international)? Are payouts made through your own service or a third-party provider?	Must	
C9	Can we choose or change the payout provider without changing platforms? What does switching involve?	Must	
C10	How are consultant tax and identity details collected and verified before payout (for example W-9 or local equivalent, TIN checks, KYC)?	Must	
C11	Who holds the funds between commission approval and payout, and how are failed or unclaimed payouts handled?	Should	
C12	List all payout fees (per transfer, per payee, currency conversion, monthly minimums) and who pays each one.	Must	

Inventory and autoship

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
D1	How is inventory tracked across warehouses, kits, bundles, and backorders? Which inventory or fulfillment systems do you integrate with?	Must	
D2	How do autoship or subscription orders work (frequency, skip, swap, pause, cancel)? Can customers and consultants manage them on their own?	Should	
D3	How are failed autoship payments retried and communicated?	Should	
D4	Can starter kits and enrollment packs be sold and tracked separately for reporting and compliance?	Should	
D5	How are refunds and returns reflected in inventory, volume, and commissions?	Must	

Mobile app

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
D6	Is there a consultant mobile app (iOS and Android) or a mobile web back office? Which features are available on mobile?	Should	
D7	Can the app be branded as our company, and who manages app store listings and updates?	Nice	
D8	Does the mobile experience support party management, order entry, and payment at in-person parties?	Should	

Compliance

Software cannot make a company compliant, but it can make compliance easier to run and prove.

Background reading: the FTC's Business Guidance Concerning Multi-Level Marketing (updated 2024) and its Notice of Penalty Offenses Concerning Money-Making Opportunities (2021) explain how US regulators view earnings claims. Links are in the Sources section.

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
E1	What tools help monitor consultant earnings claims and product claims (for example on replicated sites and social posts)? How are flags reviewed and recorded?	Should	
E2	Can the platform produce the data we need for an annual income disclosure statement (for example payouts by rank or percentile, active versus inactive participants)?	Must	
E3	Can required disclosures and policies be shown and accepted at enrollment, with a timestamped record?	Must	
E4	How does the platform support inventory buyback, cancellation, and refund policies required by our policies or local law?	Should	
E5	Is there an audit log of who changed consultant records, plan settings, and payouts, and how long is it kept?	Must	
E6	How are consent, unsubscribe, and data privacy requests (access, deletion) handled for consultants and customers?	Must	

Multi-country, tax, and reporting

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
F1	Which countries, currencies, and languages are live today with paying customers? Which are on the roadmap?	Should	
F2	How is sales tax or VAT calculated (built in or a tax service integration)? How are party orders shipped to a host taxed?	Must	
F3	How are year-end consultant tax forms produced (for example 1099-NEC in the US or local equivalents)?	Must	
F4	Can a consultant sell or recruit across borders, and how are commissions and currency handled?	Nice	
F5	What standard reports come included? Can our staff build custom reports and export them?	Must	
F6	Do you offer a data warehouse feed or direct read access for our own BI tools?	Nice	

5. Technical requirements

API and integrations

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
G1	Do you provide a documented API and webhooks? Share the public documentation link and any rate limits.	Must	
G2	Which integrations are included in the price, and which are paid add-ons (ERP, accounting, CRM, email, shipping)?	Should	
G3	Is there a sandbox or test environment we can use during evaluation and after launch?	Must	

Hosting model

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
G4	Is the platform offered as SaaS (you host), licensed source code (we host or own a copy), or both? Describe what we receive under each.	Must	
G5	If SaaS: is our data in a shared or dedicated environment, and in which regions is it hosted?	Should	

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
G6	If licensed source code: what rights do we have to modify, host, and maintain the code, and how are your updates delivered?	Should	
G7	If SaaS: is a source code or data escrow arrangement available if your company stops operating?	Should	

Security

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
G8	Which independent security audits or certifications do you hold (for example SOC 2 report, ISO 27001)? Can we see the latest report under NDA?	Must	
G9	Is the platform PCI DSS compliant for card payments, or are card details handled entirely by a payment provider?	Must	
G10	How do you handle encryption, single sign-on, multi-factor authentication, role-based access, and penetration testing?	Must	
G11	Describe your incident response and breach notification process and timelines.	Must	

Uptime SLA

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
G12	What uptime do you commit to in the contract, how is it measured, and what credits apply if you miss it?	Must	
G13	Are commission runs, payouts, and month-end closing covered by the SLA? What support is available at month end?	Should	
G14	Is there a public status page and history of incidents?	Should	
G15	Describe backups, recovery point and recovery time objectives, and disaster recovery testing.	Must	

Data ownership and export

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
G16	Does the contract state that we own all our data (consultants, customers, orders, genealogy, commission history)?	Must	
G17	Can we export all of our data at any time, in a documented standard format, without a fee? List what is included.	Must	
G18	Are our comp plan rules and configuration exportable in a readable form, so another vendor could rebuild them?	Should	

6. Pricing model

Ask for a full price at three sizes: today, in two years, and at your stretch goal.

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
H1	Describe your pricing model: flat monthly fee, per active consultant, per order, percentage of sales, or a mix. Define how you count an active consultant.	Must	
H2	Provide a three-year cost at our current size, at two times our size, and at five times our size, with every fee listed.	Must	
H3	List one-time fees: setup, data migration, comp plan configuration, training, and custom development rates.	Must	
H4	What costs extra: additional countries, mobile app, ecommerce platform connector, API calls, storage, extra environments, or premium support?	Must	
H5	How and when can prices increase during the contract, and is there a cap?	Must	

7. Implementation and support

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
I1	Provide a sample implementation plan with phases, milestones, and the staff time you need from us.	Must	
I2	How will you migrate our data and test commission accuracy before launch (for example parallel commission runs against our current system)?	Must	

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
I3	What training is included for home office staff and for consultants?	Should	
I4	What support channels, hours, and response times are included? Is there a named account contact?	Must	
I5	How often do you release updates, how are we told, and can we test before changes reach production?	Should	

8. References

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
J1	Provide three references of similar size and model (party plan if possible), including one client that launched in the last 18 months.	Must	
J2	Provide one reference from a client that left your platform in the last three years, if available.	Nice	
J3	How many party plan or direct selling clients are live on the platform today? (Approximate is fine.)	Should	

9. Contract terms

ID	Question for vendor	Priority (Must / Should / Nice)	Vendor response
J4	What is the initial term and renewal term? Does the contract auto-renew, and what notice is needed to cancel?	Must	
J5	Is there an exit clause? What does it cost to leave early or at the end of the term?	Must	
J6	On exit, how and when will you return all of our data, and what help do you provide during the transition? Is there a fee?	Must	
J7	Who owns custom code, comp plan configuration, and integrations built for us?	Must	
J8	What limits of liability, indemnities, and insurance do you carry?	Should	

10. Evaluation and scoring

Tell vendors how you will decide. It keeps the process fair and the answers focused.

Step 1: Must-have gate

Any vendor that answers No or Roadmap on a Must item is flagged. The team decides whether to drop the vendor or ask for a written commitment and date.

Step 2: Score each answer

Score	Meaning
5	Fully meets the need today, included in the price, shown in a demo
4	Meets the need today with configuration by our staff
3	Meets most of the need, or needs a paid add-on
2	Partial; needs custom work or a manual workaround
1	On the roadmap only, with a date
0	Not available or no answer

Each answer score is multiplied by its priority weight: Must = 3, Should = 2, Nice = 1.

Step 3: Weight the categories

Category	Default weight
A. Party and host management, host rewards, guest ordering	15%
B. Replicated sites and ecommerce	10%
C. Compensation plan, commissions, and payouts	20%
D. Inventory, autoship, and mobile app	10%
E. Compliance	10%
F. Multi-country, tax, and reporting	5%
G. Technical, security, and data ownership	15%
H. Pricing and total cost	5%
I. Implementation and support	5%
J. References and contract terms	5%
Total	100%

Adjust the weights before proposals arrive, not after. The scoring workbook calculates a weighted total out of 100 for up to four vendors.

Step 4: Confirm with evidence

- Scripted demo: each finalist runs the same script with your data, including a full party from booking to close, a return after a commission run, and a commission run on your plan.
- Sandbox: your team tests key flows without the vendor driving.
- Reference calls: ask about launch, month-end support, price changes, and data export.

- Contract review: confirm that answers on data ownership, exit, SLA, and pricing appear in the contract itself.

Red flags to watch for

- **Comp plan lock-in:** Plan rules can only be changed by the vendor, live in custom code, or cannot be exported in a readable form. Every plan change becomes a paid change request, and leaving means rebuilding the plan from scratch.
- **No data export:** No self-serve export of all data, a fee to get your own data back, or vague contract language about who owns the data and the genealogy.
- **Per-distributor pricing surprises:** Fees per active consultant with a loose definition of active, minimums that rise with growth, or a three-year cost that the vendor will not put in writing at two or five times your size.
- **Payout provider dependency:** Payouts only run through one provider the vendor chose, switching providers requires a new platform, or payout fees and fund holding are not disclosed up front.
- **Demo without your data:** The vendor will not run your comp plan or a sample party with your own data before contract signature.
- **Hand-picked references only:** No references of similar size or model, and no client that launched recently.
- **Auto-renew with long notice:** Multi-year auto-renewal with a long cancellation window and no price increase cap.
- **No SLA credits:** Uptime promised in marketing but not in the contract, or month-end commission runs excluded from support.

Appendix A. Vendor response cover sheet

Item	Vendor response
Vendor legal name and website	
Products proposed	
Hosting model offered (SaaS, licensed source code, both)	
Number of Must items answered Standard or Configurable	
Three-year total cost at current size	
Earliest realistic go-live date	
Response contact (role and email)	
Proposal valid until	

Appendix B. Short glossary

Term	Meaning
Party (show)	A sales event, in-home or virtual, run by a consultant with a host who invites guests.
Host rewards	Credits, discounts, or free product a host earns based on party sales and bookings.
Commission run	The scheduled calculation of commissions and bonuses for a pay period.

Term	Meaning
Clawback	Recovering commission already paid when an order is returned or cancelled.
Replicated site	A personal storefront for each consultant built from a company template.
Autoship	A recurring order shipped on a schedule.
SLA	Service level agreement: contract terms for uptime and support, with remedies.
Escrow	A third party holds source code or data, released to you under set conditions.

Sources

- Federal Trade Commission, Business Guidance Concerning Multi-Level Marketing (2018, updated April 2024). <https://www.ftc.gov/business-guidance/resources/business-guidance-concerning-multi-level-marketing>
- Federal Trade Commission, Notice of Penalty Offenses Concerning Money-Making Opportunities (2021). <https://www.ftc.gov/enforcement/notices-penalty-offenses/penalty-offenses-concerning-money-making-opportunities>

About this template

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