

Request for Proposal (RFP):

Marketing Mix Modeling (MMM) for Sam's Club

1. Overview & Context

Sam's Club is seeking a qualified marketing analytics partner to design, develop, and operationalize a Marketing Mix Model (MMM) to support enterprise-level marketing decision-making. This engagement will focus on delivering a robust, credible, and forward-looking measurement solution that quantifies the incremental impact of marketing investments across channels and supports strategic budget optimization.

This MMM is expected to serve as a core pillar of Sam's Club's modern marketing measurement stack, with clear pathways to ongoing use, refresh, and executive-level adoption.

2. Scope & Deliverables

Vendors responding to this RFP should propose an MMM solution that, at minimum, meets the scope outlined below. Respondents are encouraged to highlight recommended enhancements or best practices based on prior experience with large-scale retail or membership-based organizations.

Modeling Scope

Modeling Scope	Phase 1 (MVP)	Phase 2 (Enhancements)
Business KPI(s)	GMV, Membership Signups	Membership Renewals, Upgrades, Brand
Sales Path Insights Granularity	Total Sam's Club (Omni) In Store Online	
Geo Granularity	National	Regional/ DMA
Product Details	DMM	Category

Media Granularity Details	Channel, Publisher, Platform	Campaign
Refresh Cadence	Quarterly	Every 6 Weeks

Required Capabilities & Deliverables

The proposed solution should include the following core components:

1. Model Development

- a. Transparent and statistically sound modeling methodology
- b. Clear documentation of assumptions, limitations, and interpretation guidance
- c. Ability to estimate incremental contribution by channel and platform

2. Web-Based Interface/ tooling

- a. Secure, user-friendly interface for reviewing model outputs
- b. Visualizations of performance, contribution, and trends
- c. Designed for both analytical and marketing practitioner audiences

3. Quarterly Executive Reporting

- a. Standardized quarterly reports summarizing key insights and implications
- b. Live or virtual walk-throughs of results for senior leadership audiences
- c. Clear translation of model outputs into actionable recommendations

4. Scenario Planning & Budget Optimization Tool

- a. An interactive scenario optimizer or forecasting tool
- b. Ability to model budget shifts and forecast expected outcomes
- c. Support for planning and decision-making across quarterly and annual horizons

5. Ongoing Partnership & Support

- a. Defined engagement model for quarterly refreshes
- b. Clear roles and responsibilities between vendor and Sam's Club teams
- c. Recommended governance and operating cadence

Vendors should also describe their approach to data requirements, onboarding, change management, and knowledge transfer to ensure long-term adoption and value.

3. Intellectual Property, Transparency & Knowledge Transfer

Sam's Club requires that the Marketing Mix Model developed through this engagement be fully transparent, transferable, and owned by Sam's Club upon completion.

The selected vendor is expected to build the MMM in close partnership with Sam's Club, Marketing analytics team in Sam's Club analytics environment (GCP ecosystem). Sam's Club will assume full IP of the model. No black box modeling.

IP Ownership, Transparency, and Access

- All model code, scripts, and associated intellectual property developed specifically for Sam's Club under this engagement must be delivered to Sam's Club at the conclusion of the project.
- Sam's Club will retain full ownership and usage rights to the MMM codebase, outputs, and documentation.
- The model should not require ongoing dependency on proprietary vendor platforms or tools that prevent internal execution, modification, or extension.

Model Transparency & Documentation

Vendors must provide:

- A fully accessible codebase
- Clear, comprehensive documentation covering:
 - Model architecture and methodology
 - Data inputs, transformations, and assumptions
 - Calibration, validation, and diagnostics
 - Guidance on interpreting outputs and limitations
- Sufficient detail to enable internal teams to refresh, maintain, and enhance the model independently over time

Knowledge Transfer & Handoff

The engagement should include a structured knowledge transfer and handoff phase, including:

- Walk-throughs of the model logic and codebase with Sam's Club analytics teams
- Documentation and training materials to support internal maintenance
- Recommendations for ongoing governance, refresh processes, and best practices

Vendors may propose optional post-handoff support or advisory services; however, ongoing vendor operation of the MMM is **not required** and should be clearly separated from the core delivery.

4. Timing

Sam's Club is targeting delivery of an initial, production-ready MMM for the MVP Phase 1 scope by the **end of Sam's Club Q2 (July 2026)**.

5. Response instructions

Proposals should include:

- A high-level project plan and milestones
- Estimated timelines for data ingestion, modeling, validation, and delivery
- Assumptions or dependencies that may impact timing
- Description of proposed working team, including relevant expertise and past experience
- Proposed investment from Sam's Club to deliver RFP in full

Vendors should clearly identify any opportunities to accelerate value delivery (e.g., phased releases) while still meeting the target delivery date.

Response timeline:

Action	Deadline
RFP delivered to vendor	1/2/26
Optional Q&A video call w/ Sam's team	w/o 1/5/26
Written proposal delivered to Sam's	1/12/26
Live presentation to Sam's Team (if invited)	w/o 1/12/26
Final presentation to Sam's Exec Leaders (CMO, SVP Membership & Insights)	~1/16/26
Notification of selection	w/o 1/19/26

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