

Selecting a Marketing Automation Vendor

10 questions for developing your short list

by Mary Gospe

Today's marketers are tasked with generating leads, nurturing prospects to build a pipeline of viable sales opportunities and demonstrating ROI. Fortunately, a wide variety of marketing automation platforms are available to help marketers execute, optimize and measure the results of their campaigns and programs.

There has been much growth and consolidation in the marketing automation market over the last few years. Key vendors include [Aprimo](#), [Eloqua](#), [Manticore](#), [Marketbright](#), [Marketo](#), [Oracle](#) (which purchased the IP assets of Market2Lead in May 2010), [SAS](#), [Silverpop](#) and [IBM](#) (which acquired Unica in August 2010). With so many vendor choices, how do you decide which automation platform is right for your company?

As with any technology purchase, it's important to identify your strategy, objectives and success metrics before selecting a vendor. And most importantly be ready to define or refine your marketing and sales processes before you automate. We learned that lesson from CRM implementations — automating a poor process does not improve results!

Areas that may come under the spotlight as you implement marketing automation include list segmentation, how leads will be scored, and the process for nurturing leads until they are "sales ready". Building a [persona](#) of key buyer types by industry can go a long way in streamlining this process and ensuring relevant messages and offers are created and delivered at the optimal point in your prospect's buying cycle. See Mike Gospe's article "[Shortening the Sales Cycle with Persona-Driven Marketing](#)" for more information.

In addition to your marketing and sales processes, consider your company size, campaign complexity and budget. According to [Marketing Operations Works](#), a Silicon Valley Consultancy run by Founder and Principal Larissa DeCarlo, marketing automation solutions can run anywhere from "\$10,000 to \$1,000,000 per year." Your choices include start-up SaaS companies to enterprise-class, on-premise solutions. Marketing Operations Works compiled a handy [list of marketing automation vendors](#), one sorted alphabetically by name and the other sorted by solution functionality.

Here are ten questions to help you develop your short list of vendors:

- 1. What are your internal resources for planning and managing campaigns?**
 - Do you have a small team that needs an easy, Do-it-Yourself interface?
 - Do you have graphic designers who can develop HTML emails, landing pages and forms?
- 2. What types of campaigns do you need to manage?**
 - Lead generation?
 - Lead nurturing, including drip campaigns (triggered messaging and offers tied to where prospect is in the buying cycle)?
 - Behavior-based marketing (monitoring web visitors and the assets/offers they download)?
 - Integrated campaigns (email, direct mail, telemarketing, social media, online ads)?
- 3. What media do you typically deploy?**
 - Email marketing?
 - Direct mail?
 - Online ads?
 - Print ads?
 - Personalization, including personalized URLs (PURLs)?
 - Social media?
 - Mobile applications?
 - Surveys?
- 4. What core functionality do you need for data management?**
 - Integration with CRM and/or other systems (ERP, contracts, etc.)?
 - De-duping contacts across the platform and CRM system?
 - Data cleansing and standardization?
 - Lead scoring - assigning scores automatically based on demographics, behavior and key buying qualification criteria?
 - List management and segmentation by product line, vertical market, geography, and language?
 - The ability to recycle Leads that sales deems as unqualified?
- 5. What notification options are available for sales reps?**
 - Email or mobile alerts if a prospect is on the website?
 - Email notification or CRM notification of new Leads?
 - Email notification or CRM notification of recent prospect activity?
- 6. What are your reporting and analytics requirements?**
 - Marketing and sales results in one system?
 - Testing and measuring the impact of copy, creative and offers?

- Monitoring social media and viral marketing activities?
- Monitoring and reporting on web visitors?

7. What type of software deployment is available?

- SaaS-based or on-premise?
- What is the typical implementation time?
- Are professional services needed? If so what is the cost and timeline for project completion?
- How often are new versions released?
- Do you need dedicated IT resources or sys admin?
- How does the vendor manage data privacy and security?

8. What type of training and support is available?

- On-demand videos or webinars?
- Tutorial guides?
- Contact center support (calls, live chat, email)?
- Do you have to pay extra for premium support?

9. What is the buying process?

- Is there a free trial?
- Do you have to sign a multi-year license agreement?
- What are your options if the solution doesn't work out for your organization?

10. How healthy and reliable is the vendor?

- What is the size of the company in revenue and employees?
- How long have they been in business?
- How many active customers do they have?
- Are there many testimonials and case studies?
- What happens if the vendor merges, is acquired or goes out of business?

Deploying a marketing automation system can help you take your marketing and sales processes to the next level. It can help you increase marketing and sales alignment and productivity, improve the ability to deliver relevant, timely content and offers based on behavior, optimize programs to boost conversion rates and shorten the sales cycle. Selecting a vendor is an important decision but doesn't have to be overwhelming. Hopefully this article gave you a good place to start in compiling your short list of vendors to assess.

About the Author

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