



Marketing Automation Functional Evaluation Guide

Evaluating Marketing Automation Functionality

Software Advice has analyzed the core functionality of the leading marketing automation systems and determined where they differ most.

In this guide, we pay less attention to “table stakes” features; instead, we zero in on those functions that truly differentiate the leading systems. Ultimately, this guide will provide important criteria when comparing a short list of systems. You can return to our website to download detailed side-by-side comparison documents that compare multiple products against a broad set of criteria.

Keep in mind that there are other critical, non-functional, criteria to evaluate: customer support, vendor viability, and pricing, for example.

FUNCTIONALITY TO ASSESS

- ☒ Lead capture
- ☒ Lead nurturing
- ☒ Lead scoring
- ☒ Email marketing
- ☒ Data management
- ☒ CRM integration
- ☒ Reporting & analysis

Lead Capture

Given marketing automation's promise of prioritizing leads, most marketers are keen to drive as many leads as possible. That process starts with effective lead capture. While there will be many lead sources - trade shows, purchased lists, third-party originators - a majority of leads are now originating on the web. Therefore, marketing automation buyers will start to differentiate solutions when they assess each system's ability to capture more leads through web marketing best practices like landing page optimization.

Differentiating Functionality

Form creation	Buyers should assess whether the system makes it easy to ask the questions they need to ask, especially with regard to field format (e.g. drop downs, text fields) and how the answers are stored.
Progressive profiling	Most systems can collect lead data across multiple web visits by adding fields to registration forms as trust is gained over time. The sophistication of this "progressive profiling" varies based on how the system tracks and prioritizes form field data.
Landing page creation	A landing page editor that is both powerful, flexible and easy-to-use will allow non-technical marketing users to quickly create and test landing pages and lead capture forms. Some are too complex, others too simple, so demo them in depth.
A/B testing	More sophisticated systems are integrating measurement tools to test different forms and landing pages against each other to identify the best performing approach. The sophistication of A/B testing varies considerably.
Open API	For more advanced integration between marketing automation and other web infrastructure, companies will want a robust and open API to achieve fully custom integration. If custom integration is required, ask to review the API documentation.

Lead Nurturing

Lead nurturing (aka “campaign management”) is the core of any marketing automation solution. This is where the marketing user will design, build and maintain the campaigns that govern how the business will interact with its potential customers. Most systems support multi-step campaign design, list building and content creation. Buyers should carefully assess how each system balances the ability to support complex campaigns with the marketing user’s need for ease-of-use.

Differentiating Functionality

Campaign design	There is a lively and fruitful debate as to the best way to visualize a campaign workflow. Determine which of the three major models work best for you: 1) visual flow chart, 2) outline-like list of steps, or 3) simple steps with drill-down detail.
Segment building	Segments (aka “lists”) define a group of contacts that will be marketed to in one or more campaigns. Systems vary in how sophisticated they are in defining segments and splitting those segments within campaigns.
Steps & decisions	Campaign sophistication varies based on the marketer’s ability to define granular, often nested steps and decision points. Assess the range of data that can be used in decisions, and the simplicity of managing multiple, related campaigns.
Automatic triggers	Campaigns should be living and dynamic. That means that campaigns should execute continually, reacting to each lead’s activities. Systems should trigger actions based on lead behaviors, not simply run in batch one time or on schedule.
Campaign testing	To improve campaigns, you will need to regularly test new campaigns against your existing “champion” campaign. To test effectively, make sure the system supports A/B testing, including the ability to split lists into test groups.

Lead Scoring

By assigning a score to each lead and updating that score over time, marketing will know when, and how much, sales attention that lead merits. Almost all solutions provide lead scoring based on demographic criteria (e.g. industry, size, contact’s role) or opportunity factors (e.g. budget, authority, needs and timing). Buyers can differentiate those systems if they evaluate the ability to define custom scoring, include behavioral criteria, and accomplish this in a manageable user interface.

Differentiating Functionality

Behavioral scoring	Demographic scoring is critical, but sophisticated lead scoring requires behavioral (aka “implicit”) criteria such as website visits, downloads, and time between interactions. Not all systems use a broad set of behavioral scoring criteria.
Time-based degradation	Smart marketers will want to decrease a lead score if a once active lead stops visiting the website and engaging the company. Buyers should assess how each system enables them to degrade scores based on schedules.
Multiple scores	Sophisticated marketers will score companies based on the aggregate of their employees’ behaviors. They might also maintain separate scores to measure a lead’s interest in each product line. Not all systems support multiple scores.
User scoring	Scoring models are smart, but many times the salesperson knows best. Assess how the system allows salespeople (and other users) to manually change scores and/or override the scoring model.
Scoring user interface	As scoring models get more sophisticated, the ability to manage scoring criteria becomes more challenging. There is an active debate as to how best to present the scoring user interface.

Email Marketing

While marketing automation systems are multi-channel in nature, email is the most frequently used channel. In fact, a number of vendors evolved from roots in email marketing by adding more sophisticated campaign management and lead scoring. Most systems provide the ability to design, send and measure email campaigns, as well as send emails based on events and schedules. Buyers will find differentiation in ease of email creation, content reuse and message deliverability.

Differentiating Functionality

Email design	Based on your in-house HTML skills, assess whether the system offers a simple enough WYSIWYG editor, and/or whether it allows technical users the flexibility to code any HTML they want. There is often a trade-off between simplicity and flexibility.
Templates & reuse	Email templates are critical for efficiency, but they can also get frustrating. Consider how changes to a template are reflected in existing emails. Do they change or does the change simply apply to new emails created using the template?
Offer optimization	All email marketing systems offer email personalization. The real differentiation becomes clear when assessing the system's ability to present custom offers or content within an email based on lead score, past interactions or other factors.
A/B testing	Like campaigns and landing pages, you will want to consistently test email layouts, content and offers. Any system will allow you to create multiple versions and measure success rates, but the best systems offer sophisticated A/B testing.
Deliverability	To maximize how many emails are received by leads, most systems offer SPAM testing through ReturnPath, Strong Mail or Pivotal Veracity. More importantly, assess vendors' SendScore - a real measure of how many of their emails get through.

Data Management

If your system’s underlying data is not clean, your prospects will have some pretty wacky marketing interactions. However, maintaining data is easier said than done. After all, marketing automation systems are constantly receiving data from multiple sources and synchronizing data with CRM systems. All of the major players offer data management tools, primarily focused on de-duplication of records. However, a careful review of each vendor’s data management capabilities reveals differentiation between systems.

Differentiating Functionality

Smart de-duping	Duplicate records are a huge challenge, but the sophistication of duplicate checking varies. Simple checks are performed against the email address field; the smartest tools look for “near-matches” on numerous fields.
Point of de-duping	Ideally, the system will check for duplicates on data import or form submission. Inevitably, duplicates will still exist, so it is important that the system offers a fast, efficient means of performing bulk (aka “batch”) duplicate checks.
Custom fields	Most every system permits custom field creation. However, consider who creates custom fields. You? Customer support? Professional services? Also determine if custom fields can be used for scoring criteria and the personalization of campaigns.
Web tracking	The most complex data challenge is tracking, storing and making sense of web behaviors, especially on anonymous visitors. Assess what behaviors the system tracks and how it joins this data to “known lead” data.
Active segments	You will want your segments and lists to update - add or remove members - based on lead behaviors; otherwise, they become outdated very quickly. Assess each system’s ability to automatically update lists in real time.

CRM Integration

It's often critical for marketing automation systems to synchronize with CRM or SFA systems. Most vendors have sophisticated integration between their system and Salesforce.com, but integration to other CRM systems is limited. Integration consists of replicating pertinent data from the CRM database, and synchronizing changes every few minutes. Buyers will find real differentiation between systems' ability to integrate CRM customizations, as well as how the system will initiate activities within the CRM system.

Differentiating Functionality

Synch frequency	Synching is a challenge when you consider how many simultaneous synchs occur (remember: you're not the only customer). Be sure to check how often the system will synch and if it can synch immediately for certain actions (e.g. form submission).
Triggered updates	Salespeople will want to take action on certain buyer behaviors. While an email alert from the system is valuable, it is often best to drive alerts and actions into the CRM system, since that is where the salesperson works and maintains records.
Automatic field mapping	Mapping fields isn't a one-time project. As you make changes in your CRM system, you will also want to update the mapping of fields with the marketing automation system. Does this happen automatically or require human intervention?
Lead assignment	Routing leads to the appropriate salesperson is critical and the marketing automation system should help. Determine what systems can map to your territories and how they re-assign leads based on buyer activities.
CRM task creation	Many buyer behaviors require follow-up from a salesperson. The likelihood of proper follow-up improves if the marketing automation system can trigger the creation of new tasks in the CRM system, rather than just send an email.

Reporting & Analytics

Every marketing automation system provides reporting and analytics; specifically, reports on the number of leads created and the progression of those leads through the marketing funnel, as well as revenue and ROI analysis. Most reports are visually compelling. However, buyers should carefully assess the flexibility of each system’s reporting capabilities. There are a number of areas where buyers will want to define custom reports, drill down into greater detail and analyze a wider range of multi-channel data.

Differentiating Functionality

Standard reports	The more standard reports available in the system, the less custom report building you will need to do. Take a detailed look at each system’s standard reports. Ideally, they should meet >80% of your reporting requirements.
Custom reports	Eventually, you will want to develop custom reports. Make sure the system can support the power and flexibility required to analyze any data, including custom fields, you need to analyze, in the format you need.
Web analytics	Buyers will discover differentiation around what pages can be analyzed and what data is tracked. Simple systems track just their own landing pages. Sophisticated systems track any page on the site and even third-party website visits.
Drill-down reporting	Reports will often illuminate a trend or answer a simple question, but smart marketers will want to drill down deeper. When assessing reports, ask to drill down into a deeper level of data.
Report delivery	It’s often most effective if the reports come to you, rather than finding the time to conduct your reporting. The best systems allow for scheduled report delivery by email, as well as alerts when thresholds are exceeded.

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