

1	Table of Contents
2	Introduction
2	Evaluation Team
2	A Sales Person?
3	Scheduling a Demo
3	Vendor Selection
3	Pricing
3	Time to Launch
4	Categories to consider in the evaluation process
4	Email List Management
4	Email & Campaign Management
4	Other Campaign Tracking
4	Website
4	Lead Scoring
4	Reporting
5	Data Management
5	Workflow – Marketing Automation?
5	Users
5	Pricing – Base price may have limits

Introduction

There are several Marketing Automation companies that integrate with Salesforce with more coming everyday. This document will explore the general considerations and topic areas that you should keep in mind when researching these vendors.

Some of the advantages of using this type of solution include:

1. Marketing Automation
2. De-duping and advanced activity tracking
3. Lead Scoring
4. Metrics on user behavior as well as campaign response
5. Ability to store and market to external lists without populating Salesforce
6. Advanced segmentation
7. Email marketing

Every company you interview
will have its own spin

Every company you interview will have its own spin on how to manage things. They will also have strengths and weaknesses. I have been through many review cycles with clients and each client selects different solutions based on:

- Their need for support (how easy is it to learn, what if I forget? What if I have a new hire?)
- Their in-house technical abilities
- Key metrics they need to report on and functionality they need
- Need for a robust email marketing solution
- How sales will interact with marketing data
- Cost including training, number of 'seats' per cost & volume pricing increments
- Peer reference

Evaluation Team

Before beginning the evaluation you should have the following team members:

1. Marketing Person
2. A technical Person (understands data and website and Salesforce)
3. Salesforce administrator or consultant (if the technical person above doesn't understand Salesforce – if consultant, make sure they know marketing)
4. Sales Person

In a perfect world we can view marketing automation as a part of the sales effort

A Sales Person?

OK you're not always going to get this person – but in a perfect world we can view marketing automation as a part of the sales effort – helping the sales team. Marketing automation can take the place of prospecting low probability leads to see if they then will respond to a better sales-indicating behavior. In any case, I need to mention this (because I'm an idealist?) because if we had a sales person as part of this process, they could contribute their insight into what qualifying criteria can play a role in the automation along with getting buy-in from sales on the value of the solution and helping sales understand how this solution can help them (adjusting criteria and workflow can directly impact the lead volume they are processing. . .).

Scheduling a Demo

Realistically – you will need at least 3-4 hours per solution to understand it well enough to make your first cut. Schedule your initial demo to be at least 2-hours long (you can tell them I said so). If you have a technical team member – ask for a technical person to be on the demo. Most demos presented by a sales person will not be able to answer technical questions and you'll just leave the demo frustrated by a large set of questions they need to answer. After your first cut, you will then need to run through your last finalists to ask specific questions and view specific examples.

Vendor Selection

The Salesforce AppExchange has many solutions and there are even companies not listed there that integrate with Salesforce. My Quick list is MarketBright, Market2Lead, VTrendz, Marketo. You should probably take a quick look at Eloqua as well since it has such a huge market share — but I don't feel bad when they are excluded from evaluation. I have not sat in demos for all companies that are available so don't use this as the only criteria and keep in mind that my list will change as these companies change (this is not the list I had even 6 months ago)

Price is negotiable – drive a hard bargain!

Pricing

Negotiable – drive a hard bargain! Don't sign more than a 1 year contract if you can avoid it because this is a highly competitive market in a very young stage – you need flexibility if you can get it.

Time to Launch

These solutions can take anywhere from a day to three months to launch. Find out what their process is and how long it will take to be live.

Categories to consider in the evaluation process

You're going to come up with your own set of questions as you delve deeper – but here are some starting places (now you will see why an initial 2-hour demo makes sense).

Email List Management

- How are lists managed?
- Can you store external lists?
- Can you build lists that will pull the latest data? Or are they set at a point-in-time? Can you have both?
- Opt-out controls and how they map to Salesforce – and the other direction
- Merging, segmenting, managing lists
- Excluding folks in other lists
- Managing frequency a user/list is marketed to
- Can you nest lists?

Email & Campaign Management

- Campaign structure – and how it maps to Salesforce campaign module
- Campaign reporting and where it lives (application, force platform or Salesforce.com integrated)
- Email blasts build interface, send capabilities, preview capabilities
- Email blast tracking and reporting
- Form submission tracking & outcome page delivery
- HTML & text Email formats?
- Handling of foreign character sets
- Email blast segmentation? A/B testing?
- Customized messaging?
- Pre-populate form data?

Other Campaign Tracking

- Banner ads to forms?
- Third party to forms?
- Offers within the website?
- AdWords?
- Partner co-op marketing?

Website

- Tracking and metrics (Web metrics, or specific user metrics)
- Form submissions tracking
- Outcome page tracking
- Gated form capabilities
- Download tracking capabilities
- What is involved with integration
- Form delivery (From website or hosted by them?)

Lead Scoring

- Do they have it? If so, how does it work
- Does it meet your criteria
- Does it have the ability to adjust scores based on time, activity?
- What can you do with a lead based on its score?

Reporting

- Out of the box reporting?
- Campaign ROI Reporting (Does it tie in to opportunities?)
- Campaign influence reports? (This is an evolving space, don't expect much now)
- Custom reports? Sharing them? Saving them?
- Advanced Queries?
- Exporting? Dashboards?
- How do you see site traffic? (If at all)
- Where do you see visitor behavior? (Consolidated and specific by user)
- Can you create aggregate reports on visitor behavior, across campaigns? Etc.

Data Management

- How they view records in their database
- How you update records
- How application interacts with custom fields in Salesforce. Does it support custom fields on all objects? Or just Lead/contact fields?
- How do you add a new custom field?
- How do you add a new campaign?
- Any data standardization tools?
- Any data intelligence plugins (visitors by company, address correction/formatting)?
- How do they synch to data in Salesforce? What is their justification for this approach?
- Document Storage – and if direct links can be on email blasts and tracked
- How robust is their de-duping solution? Do you have to have clean data before implementing the solution? If you merge records in Salesforce – what happens on their end? If there are 2 records in Salesforce? What happens when a person submits a form? Which record gets updated?

Workflow – Marketing Automation?

- Are there global rules? Or are they campaign specific?
- How do you build automation rules or set criteria? Change them? Do it yourself? Or do you need them to do it?
- How can you view everything that is going on?
- How can you see if there are conflicts (A single person involved in multiple automation programs which will create too many touch points)
- What kind of notifications can you have?
- Can you send responses that come from the rep the person would get (assignment rules)? Or just a generic person?
- Where would assignment rules be if you support them (from Salesforce? Or in the app?)

Users

- Different access levels/rolls?
- Required training?
- Context sensitive help/documentation?
- Cost per additional users?

Pricing – Base price may have limits

- Number of users
- Number of records in Salesforce
- Volume of email
- Volume of form submissions
- Number of active campaigns
- Document Storage
- Look at the cost of training
- Look at the setup costs
- Look at number of users
- Time to implement & their process
- Support levels and availability