

# Marketing Automation Vendor Checklist

Functionality		
Database and segment builders	Allows multiple segments to be built and reused across campaigns	
	Allows for data to be uploaded manually using forms	
	Allows for data to be uploaded within a spreadsheet	
	Allows for data to be selected from CRM systems integrated with marketing automation	
Campaign management	Allows for unlimited email campaigns to be built	
	Allows for the building of emails without technical knowledge	
	Allows for campaign templates to be easily replicated	
	Allows for translations	
	Allows for dynamic content and personalization	
	Allows for A/B testing	
	Allows for email deliverability monitoring	
Allows for custom campaign rules, processing steps and triggers to be configured		
Landing pages and forms	Allows for building landing pages without technical knowledge	
	Allows for building data capture forms without technical knowledge	
	Allows landing pages to be easily integrated with the website	
	Allows landing pages to use PURLs (Personalized URLs)	
	Allows for progressive profiling within data capture forms	
Lead scoring models	Allows for lead scoring based on profile fit and behavior	
	Allows for multiple lead scoring models	

Functionality		
Lead nurturing	Allows for multiple nurture tracks at the same time	
	Allows for cross-channel nurturing including email, SMS, direct mail, social, etc.	
	Allows for automated nurturing based on campaign behavior, lead scores and/or set rules and triggers	
Lead alerts and routing	Allows for email alerts to be triggered to sales when key contacts visit the website and/or engage with campaigns	
	Allows for leads to be assigned to key sales contacts using emails that contain the lead data	
Visitor tracking	Allows for tracking scripts to be added to the website	
	Allows for tracking campaign referrals	
	Allows for tracking website behavior	
Real-time synchronization of lead data	Allows data to be automatically passed to CRM systems	
	Allows lead data to be assigned to CRM systems based on routing rules	
Measurement and analytics	Includes standard reporting templates	
	Allows for custom reports to be developed	
	Allows for tracking and measurement of standard email metrics including opens, clicks and engagements	
	Allows for tracking and measurement of campaign performance so ROMI can be tracked	
	Allows for tracking of funnel performance across key stages of marketing and sales funnel	
Integrations		
Third-party integrations	Has an open API and supports integrations with third-party applications and tools	
CRM	Integrates with standard CRM platforms	
Website	Allows integration with websites including tracking scripts, landing pages and form integration	
Data tools	Allows integration with data providers so data cleaning, enrichment and imports can be performed	
Webinar platforms	Allows integration with standard platforms	
Content tools	Allows integration with content tools and platforms such as DAMs, content marketing apps and sales-enablement tools	

## Integrations

DMP	Allows integration with DMP platforms so third-party audience data can be activated within programmatic and media platforms	
App clouds	Includes an active app cloud that provides out-of-the-box integrations with the most common third-party applications	
Marketing clouds	Has wider solutions as part of the same product family that are pre-integrated for ease of connectivity with marketing automation data and rules	

## Product Development

Product roadmap	Has an active product roadmap and releases new tools and apps on a regular basis	
Upgrades and releases	Releases major upgrades to the product at least every 2 years	
Thought leadership	Is a thought leader in the area of marketing automation and digital marketing and, provides valuable content on the subject	
Feature requests	Allows customers to contribute to the product roadmap in terms of functional requests	

## Training and Support

Training	Can provide custom training to enable upskilling of internal teams	
Education	Provides educational content for different marketing automation users	
Certification	Provides certification levels for teams to be recognized experts within the platform	
User community	Has an active user community that includes forums and educational content	
User groups	Has an active user group that meets on a regular basis	
Technical support	Provides active support and ticketing within agreed SLA timeframes	
Consultancy	Can provide consultancy support to help with implementation, onboarding and enablement	
Marketing maturity	Provides guidance on maturity with marketing automation to achieve success	
Partners	Has a partner network of consultants so additional support can be accessed when required	

## License and Cost Model

Scalability	Provides a flexible license model that allows scaling up and down without being locked into a fixed price	
Base pricing	Provides clarity on what standard functionality is included within the basic license	
Add-ons	Has a clear price list for each additional piece of functionality you might want to add in the future	