

MARKETING AUTOMATION BUYER'S CHECKLIST

Looking to invest in marketing automation technology, but not sure where to start?

for your organization. Your selection should be informed by your own business processes, available resources, company goals, and budget, to name just a few considerations. You'll also want to make sure that your marketing automation easily integrates with your CRM and any other key technologies you use.

We've listed some important things to think about when making your decision:

KEY CONSIDERATIONS

- Your goals.** Can the platform help you get from A to B? And then to C?
- Speed.** How quickly can you get from start to value?
- Ease of use.** Is the platform intuitive and easy to use?
- Hidden costs.** What will it cost for strategic planning and implementation?
- How difficult will integration be?** Is it native or an API? Or is it development intensive? Will it take more than one day? One week?
- Does the data sync** automatically between the two systems, or must you do it manually?
- Does the vendor's onboarding** program look appropriate for your team? Do they provide a dedicated team to help you?
- How much support** is included, and for how long? What happens when it ends?
- Does the platform have** native integrations with Microsoft Power BI, Cisco WebEx, Litmus, and many more marketing tools?
- Does the platform support** account-based marketing (ABM) tactics such as account scoring?
- Does the platform support** account profiles that roll up all contact-level engagement data?
- Your resources.** Some platforms require a full-time dedicated resource to keep the gears turning.
- Your access to IT.** Some platforms require ongoing attention from your IT department or other development resources.