

CHECKLIST

Marketing Automation Buyer's Checklist

Looking to make a change in your marketing automation technology?

You'll want to do more than just a feature comparison to help you make the right decision 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.

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



KEY CONSIDERATIONS

- Your goals.** Can the platform help you reach your long term and short term targets?
- Time to value.** How quickly can you get from start to value?
- Ease of use.** Is the platform intuitive and easy to use for everyone on your team?
- Hidden costs.** What is the total cost of ownership beyond the monthly subscription price?
- Integrations.** Think about your most important tools. Will it be easy enough to integrate them with your new marketing automation choice?
- Data sync.** Does your data sync automatically between systems, or must you do it manually?
- Onboarding.** Does the vendor offer white glove migration service, and all the training your team needs to get started?
- Support.** How much personalized, human support is included, and what happens when it ends?
- Account based marketing.** Does the platform support account-based marketing (ABM) tactics such as account scoring?
- Account profiles.** Does the platform support account profiles that roll up all contact-level engagement data?
- Your resources.** Some platforms require a full-time employee dedicated to keeping the gears turning. Do you have someone ready and available?

Want help thinking through these questions?

Contact us 