QUESTIONS TO ASK

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CRM

Questions to Ask Yourself	Why It Matters	Questions to Ask Marketing Automation Providers
If you plan to use a CRM platform, which one do you plan to use?	If you plan to use a CRM platform, you'll want to make sure it is natively integrated to the marketing automation platform you choose. Implementing a marketing automation platform that integrates to your CRM will make the handoff between sales and marketing more efficient and effective.	• To which CRM platforms does your marketing automation platform integrate? • What is the nature of those integrations -- are they native integrations? • What is the typical amount of time it takes to complete the technical integration between the chosen CRM platform and the marketing automation platform?
Do you anticipate that CRM platform changing within the next 36 months?	If there is any chance that your company will change its CRM platform within the next 36 months, you'll want to choose a marketing automation platform that not only integrates to your current CRM, but also to the others you would consider migrating to. You would want to avoid choosing a marketing automation platform that only works with one CRM -- because changing to a new marketing automation platform that does integrate to the CRM could be disruptive to your marketing programs, time-consuming, and expensive.	• Should we expect to hire a third-party consultant or partner to build any custom integrations between the CRM and marketing automation platform? • What is the marketing automation provider's role in helping us resolve or troubleshoot issues that arise with the CRM to marketing automation platform integration?

FUNCTIONALITY

Questions to Ask Yourself	Why It Matters	Questions to Ask Marketing Automation Providers
Which elements of marketing automation are you solving for: • Email marketing • Inbound marketing • Outbound marketing • Account-based marketing • CRM module	The various platforms offered within the "marketing automation category" can vary widely, including: • Point solutions for email marketing to simplistic all-in-one solutions for CRM and light marketing automation • Complete marketing automation platforms • Highly configurable marketing platforms extending far beyond typical marketing automation. Since the functionality of these various types of platforms vary drastically, knowing which functions of marketing automation matter to you allows you to focus your search on the set of platforms that meets your needs versus inadvertently comparing apples to oranges.	• Which modules of functionality are included in the price? Which modules require an up-charge? • Beyond email marketing, what features does your platform include for doing outbound nurture marketing? • How prescriptive, versus customizable, is the nurture marketing module? • How does the platform address account-based marketing? • Which modules of the platform are most of your customers using? Which modules of the platform are the fewest of your customers using? • How robust is your CRM module? How should we assess whether we need a dedicated CRM platform, versus using the CRM module within the marketing automation platform?

IMPLEMENTATION

Questions to Ask Yourself	Why It Matters	Questions to Ask Marketing Automation Providers
What are your expectations for implementing the marketing automation platform?	Just as the breadth and depth of marketing automation platforms varies, so does the timeline, cost, effort and complexity of the implementation. Some platforms are designed for users to learn on their own, while others come with personalized training courses and support provided by the marketing automation provider, and yet others require the support of a third-party consultant. Being aware of the various levels of implementation effort ensures you'll be prepared to implement the platform within your project timeline and budget.	• What is the typical timeline from signing the contract to being live with the platform, including sending emails? • What is the process for technical set up, including timelines, costs, and responsibilities for the user, the provider, and any third-party companies involved? • What percentage of your customers use third-party consultants to implement or configure the platform, and at what average cost?

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INTEGRATION

Questions to Ask Yourself	Why It Matters	Questions to Ask Marketing Automation Providers
What, if any, third-party tools do you expect the marketing automation platform to integrate to?	Some marketing automation platforms integrate to dozens of third-party tools while others don't integrate to any. Likewise, the approach for providing those integrations varies. Understanding which third-party integrations are in place, how they are completed, and the cost associated with using those tools and integrations all contributes to the total cost of ownership for the marketing automation platform.	• Which third-party tools does the marketing automation platform connect to? • How are those integrations built? • Other than the cost of licensing the third-party tools, what are the costs, such as middleware or database call fees, are involved with using the third-party integrations? • What is the marketing automation provider's role in helping us resolve or troubleshoot issues that arise with the third-party to marketing automation platform integrations? • What additional 3rd party tools do I actually intend to use?

SUPPORT

Questions to Ask Yourself	Why It Matters	Questions to Ask Marketing Automation Providers
What type of support relationship do you need for marketing automation?	The customer support and services models for marketing automation platforms vary. Some platforms offer no support, some offer web-only support, others offer web and live phone support, etc. In some cases, live phone support is included in the monthly subscription fee, but in others there is an up-charge for phone support. Knowing what to expect when it comes to support ensures you identify a partner who provides the type of support you need, and allows you to budget for the right level in cases where there are up-charges.	• What type of customer support is included in the subscription package? • What type of support is available for an additional fee? • Will we have access to live phone support? • How does the onboarding and training process work? Will I go through a group training or individual training? How is the number of sessions or hours capped? • What are the hours and service level standards for your customer support?

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COST

Questions to Ask Yourself	Why It Matters	Questions to Ask Marketing Automation Providers
What is your budget, all-in, for marketing automation? How does that break out for initialization costs vs. monthly charges?	No two marketing automation platforms seem to be priced alike. The typical variables for the monthly cost include some combination of: • Modules of functionality included • Number of users • Number of contacts • Number of email sends per month • Support type/level • Integration and/or middleware fees The one-time costs can include: • Training • Data cleansing • Technical integration • Third-party consulting	• How is your product priced? • Which modules are included? How does the price increase as other modules are added? • How many users are included? How does the price increase as the number of users increases? • How many contacts are included? How does the price increase as the number of contacts increases? • How many email sends per month are included? How does the price increase as the number of email sends increases? • What level of support is included? How does the price increase for access to live phone support? • What is the one-time set up cost? • What are the one-time training costs? • Is there a fee for data cleansing? • How much does your typical client spend on third-party consultants? In what cases do your clients hire a third-party consultant? • What is the total cost of ownership in the first year? What is the total cost of ownership for subsequent years?