

## BUYER'S GUIDE:

# MARKETING AUTOMATION MATRIX

A visual buyer's guide ranking the top vendors in the Marketing Automation industry.



# Introduction

At its simplest, marketing automation software is a set of tools that automates common, repeatable tasks performed by marketers. Hinging on email marketing, the industry has grown to incorporate the entire campaign management landscape.

## Defining Marketing Automation

Interest and adoption of marketing automation has increased by more than 15 times over the past 5 years, and this exponential growth is not expected to slow anytime soon. Because the industry is nebulous in nature, vendor choices can vary drastically – with some systems focused exclusively on sales funnel automation and others focused heavily on search engine optimization. As you traverse this landscape, keep in mind some of the key features and functionality that make up successful, ROI-centered marketing automation strategies:



**Email Marketing:** One of the most fundamental pieces of functionality in any marketing automation evaluation – including drip campaigns with advanced branching capabilities, strong email template creation tools and thoughtful IP management to ensure deliverability.



**Landing Pages:** Another foundational element, incorporating the ability to easily create responsive landing pages with flexible forms and design capabilities – often including a template and module library for easy setup.



**Contact Management:** Abilities to segment users based on behaviors, personalize email communication and landing page content and apply intelligent scores to prioritize marketing and sales efforts.



**Alerts:** Though seemingly basic, dynamic, rule-based alerts are a critical component to successful marketing automation strategies, allowing marketers to quickly set up rules to ensure proper and timely communication and alerts to the sales team.



**Content:** Every marketing automation strategy centers on content – and the underlying tools to properly manage that content are an often overlooked but very important component. Content libraries with easy to use interfaces save countless hours in setup and ongoing management.

## Understanding the Marketing Automation Matrix

Using curated research conducted by analysts from Digital Marketing Depot, Forrester, Gartner, Forbes, along with an in-depth analysis of review sites like G2Crowd and Capterra, this guide looks beyond the selection process and examines a vendor's total ability to deliver on the promise of the engagement, by rating Features, Ease-of-Use, Services, and Value.

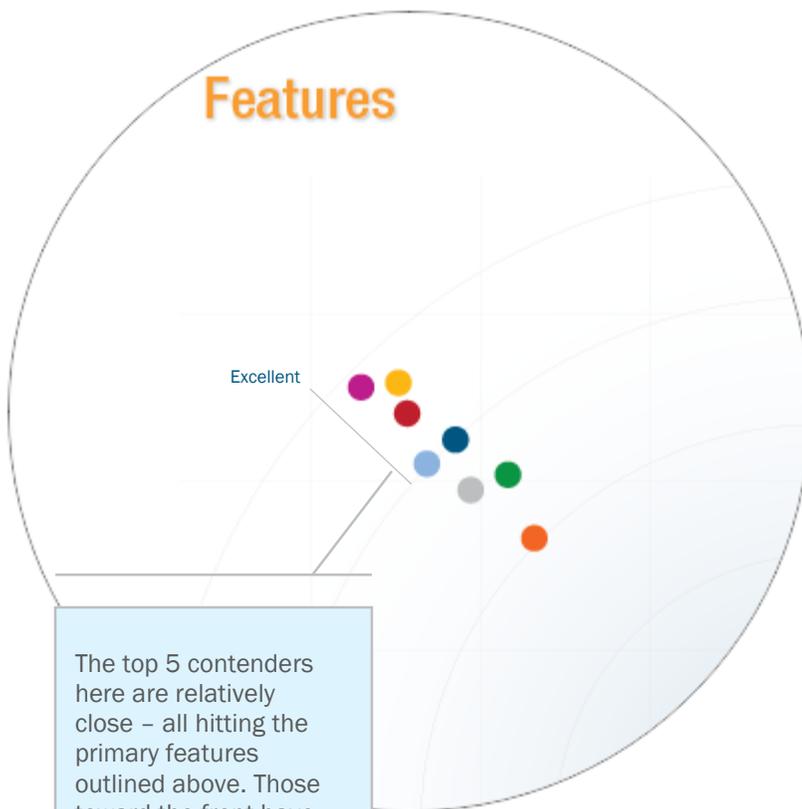
# Top Marketing Automation Ratings



# 1. Features

Key features and functionality vary drastically in this industry – understanding what is most important to you is central to your selection.

The marketing automation industry is filled with tools offering dozens of different bells and whistles – but in many cases, those features are just that: Noise. This matrix considers the fundamental features needed for a solid marketing automation strategy: Email Marketing Capabilities, Email Drip Campaigns, Landing Page Generation, Form Generation, Contact Management, Contact Segmentation and Personalization, Contact Scoring, Alerts, Content Management and Reporting.



The top 5 contenders here are relatively close – all hitting the primary features outlined above. Those toward the front have additional features that go beyond serving these outlined use cases.



## Industry Insight

"...marketing automation is rooted in email marketing, automated tasks include campaign development and execution; landing page creation; capturing, scoring, and nurturing leads; tracking website visitors; and analyzing and reporting results."

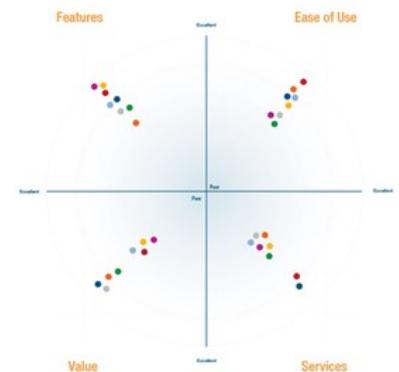
*Market Intelligence Report, Digital Marketing Depot*

"Marketers have access to an overabundance of marketing tools, each of which automates just a portion of the end-to-end L2RM (lead to revenue management) process. This forces them to build skills around each tool, integrate the data from each and compile them into a cogent perspective about status and results to drive continuous process improvement."

*Forrester in 'Automating Your End-To-End Process'*

### Key

- Marketo
- NetResults
- Eloqua
- Act-On
- Pardot
- Hubspot
- SharpSpring
- iAPPS



## 2. Ease of Use

Intuitive User Interfaces paired with a clear eye toward simplifying highly repetitive tasks is central to marketing automation success.

Any marketing automation purchase will include one or a series of demos to provide more insight into how the tool will be used. Before entering any demo, take careful note of the primary features you will need to use on a regular basis and push for an in-depth review of those. In this matrix we considered those most often repeated: Landing Page Creation, Form Creation, Email Creation, Personalization, Automation Flow Generation, Alert Setup and Lead Scoring.



### Industry Insight

“Automating time-consuming, manual tasks around content creation, management and personalization, campaign scheduling and execution, data hygiene...communication with sales, and lead nurturing saves time and improves productivity.”

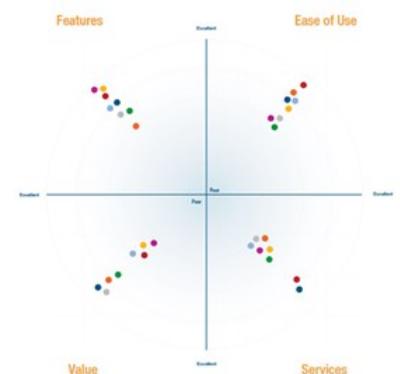
*Market Intelligence Report, Digital Marketing Depot*

There just isn't a lot to love with (Pardot's) UI...where you can sometimes get lost navigating through a series of buttons and hyperlinks that can run you in circles.”

Mike Templeman, Forbes Contributor

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## 3. Value

Value can be determined through a variety of metrics – but ultimately, it comes down to ROI – the amount of revenue the tool helped generate vs. its cost.

The long-term costs associated with a marketing automation platform is easily the largest complaint seen in customer reviews. Pricing is generally variable and can increase substantially depending on the underlying model.

**Contact-based model:** The most common pricing model is based on the number of contacts you have in your database. Though often sold as a benefit, this model is the most common ‘gotcha’ amongst customer reviews. Marketing automation inherently increases customer acquisition, thereby increasing the number of contacts in your database and your monthly costs.

**Email-based model:** Many marketing automation platforms started out with this pricing strategy. However, as systems became more intelligent and volumes decreased due to smarter communication methods, many changed to a contact-based approach to maintain monthly revenues. Ultimately, email-based models will be most cost advantageous to customers using marketing automation strategies. If the tool is being used for unintelligent, blast approaches its important to understand the pricing vs. comparative email blast tools.



### Pricing Breakdown

Sample Customer

Current contacts in database: 20,000

Projected acquisition growth: 15% annually

Emails per user: Dependent on score. 40% of database is colder and contacted once a month, 20% is warm and contacted twice a month, 15% is in a new acquisition flow and contacted 8 times, the remaining 25% are engaged and contacted 4 times a month.

**Sample projected monthly costs year 1:**

Hubspot: \$2,600-\$2,900

Pardot: \$1,300-\$2,600

Act-On: \$2,000

NetResults: \$1,440

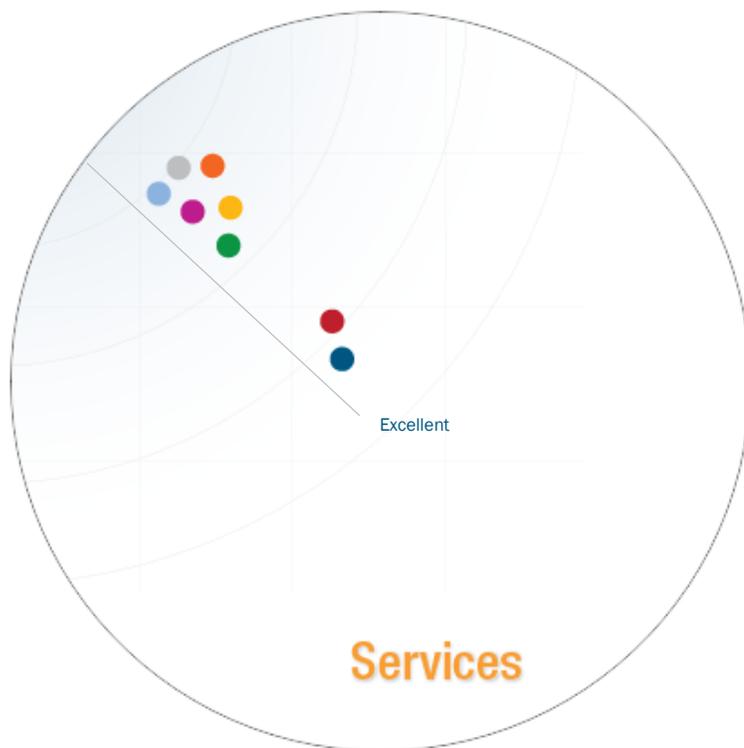
iAPPS: \$900

Costs above based on published rate cards with estimated overages for additional contacts where applicable.

## 4. Services

From implementation to the customer service that follows, understanding how a company will support you long-term is a crucial decision point.

Though it can often seem like an expectation, the necessary services to get you up and running on a platform and to provide ongoing support is critical for your success. This matrix evaluates each vendor on their ability to help you quickly execute your marketing automation strategies – including services for brand application to landing page and email template libraries. This matrix also looks at the ongoing customer service capabilities and what is included at no additional costs.



### Service Breakdown

**Implementation:** Vendors have varying degrees of implementation services - some have their own team to support you, others rely on 3<sup>rd</sup>-party agencies. Understanding how you will be supported – from help with custom design for landing page and email templates to training – is an often overlooked but important element to your selection criteria.

**Training:** Will a vendor supply you with custom training or are you expected to rely on videos and documents for success? Understand your options and what is included with your setup costs.

**Customer Service:** Once you launch, what access will you have to customer service? Many offer tiered support options requiring extra investment for any support beyond forums and their knowledgebase.

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