

COMMON FEATURES IN MARKETING AUTOMATION



PART FOUR: COMMON FEATURES IN MARKETING AUTOMATION

FEATURES OVERVIEW

Marketing automation platforms provide broad functionality including email marketing, landing pages and forms, campaign management, lead nurturing/scoring, lead lifecycle management, CRM integration, social marketing capabilities, and marketing analytics.

Each vendor has different strengths and capabilities across these categories, so we've also indicated how common each feature is in the tables below:



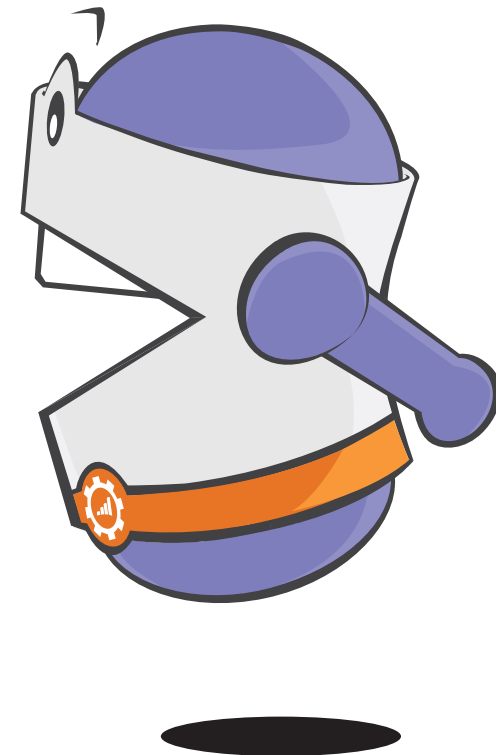
COMMON



VARIANCE



SOMETIMES








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EMAIL AND ONLINE MARKETING



Email marketing is often the most important online marketing channel and is even more powerful when combined in a single platform with landing pages and forms. Marketing automation systems can usually replace an email service provider (ESP), though the depth of email functionality does vary across vendors.

<p>Batch Email Marketing Email marketing is the ability to create “what-you-see-is-what-you-get” (WYSIWYG) emails and newsletters with easy-to-use design tools, send emails to groups of customers and prospects, and track and report on deliveries, opens, and clicks. It gives you a complete view of email performance.</p>	
<p>Email Deliverability and Reputation Management Simply sending emails cannot impact revenue if the emails do not make it to the recipients’ inboxes. Since marketing automation typically replaces a stand-alone email service provider (ESP), your vendor should offer functionality and services to ensure inbox delivery. This can include opt-in management, bounce handling, unsubscribe processing, and suppression lists, as well as higher-end services such as dedicated IP addresses and capabilities like email preview, spam checking, link validation, and delivery monitoring.</p>	

<p>Real-Time Triggered Emails Triggered emails give you the ability to listen for specific customer behaviors and events and respond with an appropriate real-time email. For example, when a prospect clicks on a specific link, a sales rep logs a call, or a lead score goes above a certain threshold, you can automatically send the right message at the right time. Personalized, 1:1 emails based on real-time behavioral data can increase open rates by 50% and conversion rates by 350% (Jupiter Research).</p>	
<p>Landing Pages The landing page is an essential part of many marketing campaigns. By directing clicks to a landing page customized for a specific email rather than a generic home page, marketers can significantly improve their conversion rates. That’s why many marketing automation systems include the ability to build WYSIWYG pages with a graphical interface, without help from IT or the Web department.</p>	
<p>Forms Registration forms can be placed on landing pages, microsites, and corporate websites. When a prospect or customer fills out the form, it captures the activity and adds the lead to the database (if new). Some systems have “progressive profiling,” which are smart forms that recognize known visitors and ask different questions to build out the profile over time. Some systems also allow for “social sign-on,” letting users register on landing pages using their social credentials.</p>	

<p>Testing An effective split-testing strategy drills into what works to maximize response rates, and can raise your conversions by 48% or more, according to MarketingSherpa. You can test emails (subject lines, copy, graphics, calls to action, frequency, timing, etc.) as well as landing pages, forms, and so on.</p>	
<p>Dynamic Content Emails and landing pages that have been customized for specific segments drive much higher engagement. Customize text, images, and calls-to-action based on criteria, including location, industry, job title, and much more. For example, send different messages to current active opportunities than to early-stage prospects.</p>	
<p>Mobile Optimized As mobile devices become increasingly popular in business, the marketing system must support mobile-optimized emails and landing pages.</p>	
<p>Sales Emails This is the ability to personalize “from addresses” and signatures on behalf of individual sales reps, so that automated emails appear to come from the specific sales owner.</p>	



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LEAD MANAGEMENT

The bread and butter of marketing automation, most vendors provide at least some level of lead management functionality.








<p>Marketing Database A marketing database is the system of record for your most important marketing assets: your leads and contacts. It should include more than the data in your CRM system, providing a rich view of all marketing interactions between each person and your company, including website visits, email clicks, scoring changes, data updates/history, and so on.</p>		<p>Multi-touch Campaigns / Lead Nurturing This is the ability to automate “drip marketing” campaigns that send relevant messages over time, based on prospect behaviors and pre-defined campaign steps. This can include automated email marketing flows, but can also include other channels as well. Often, this capability is used to run lead nurturing workflows that are designed to maintain and deepen relationships with prospects over the long term.</p>	
<p>Single View of the Customer The more powerful marketing automation solutions extend the marketing database to include data from third-party systems, social networks, in-house applications, and more. They provide a true single view of your customer and prospect. This enables the platform to trigger “right-time, right-message” interactions and extend beyond marketing into broad customer lifecycle management.</p>		<p>Online Behavior Tracking This is the ability to track which emails prospects open and click, what webpages they visit, what keywords they use, even what they say on social networks – all with the goal of understanding who they are, what they are interested in, and where they are in the buying process with your company.</p>	
<p>Segmentation The ability to precisely micro-segment your database and target the exact right list of leads and contacts is essential to the success of all marketing activities. These filters should include a combination of demographic, household, and firmographic attributes (title, company size, location), as well as behavioral filters and CRM information. Here are some example lists: high-score leads in a particular region who visited your website in the last seven days; contacts at active opportunities who registered for an upcoming webinar; or prospects who received an email offer and did not click through but visited your website anyway.</p>		<p>Lead Scoring and Grading With lead scoring, you automatically qualify leads based on demographics and BANT criteria as well as specific prospect behaviors, including recency and frequency. By tracking each of these factors and assigning appropriate weights to each, you get a comprehensive view of prospect interest and engagement. More advanced capabilities include reducing scores based on inactivity, and supporting multiple scoring models that separate demographic fit from behavioral interest, as well as scores for different products, divisions, etc.</p>	

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<p>Data Quality and Append CRM data is often full of duplicates and missing records. This isn't a problem for salespeople who work with one record at a time, but it's hard to use for Marketing. Data quality is an essential underpinning to any successful marketing program, consisting of de-duplication, cleansing, and appending. De-duplication recognizes leads and contacts you already have in your database, prevents duplicates before they enter, and merges any duplicates that already exist. Cleansing standardizes data, such as titles and company names, and removes bad data, such as contacts that are no longer with the company. Appending means filling in missing or incomplete data by adding additional contacts to an account or filling in missing fields, such as phone number or industry.</p>		<p>CRM Integration (Data Sync) Marketing automation solutions have varying levels of integration with CRM systems. While some require manual mapping of fields, others do it automatically and maintain the connection over time. Some sync information in near real-time; others less frequently. Some systems provide access primarily to lead and contact information; others give access to opportunity and custom objects as well. This is a particularly complex area with high variance among solutions, so it's worth taking the time to understand your needs and your vendor's capabilities.</p>		<p>Sales Intelligence Sales intelligence provides account executives with easy access to the key interesting moments and prospect behaviors, so they can focus on the hottest leads and opportunities—and know what the prospect wants to talk about. Some solutions provide reps with drill-in capabilities to see which emails are opened and clicked, which web pages the prospect visits, and how the lead score changes over time.</p>	
<p>Automated Sales Alerts and Tasks This is the ability to create tasks automatically and provide real-time sales alerts over email, RSS, or mobile device. It can be important to ensure that Sales receives and acts on lead information in a timely fashion.</p>		<p>Lead Lifecycle Workflows This takes marketing automation beyond email and web marketing, extending the workflow engine to integrate with the CRM system to create complete lead management workflows. It includes automated data field updates (e.g. update lead status based on changes to the lead score); automated list management; and lead routing / territory assignment rules. It also lets you ensure sales follow-up by creating tasks directly in the CRM system, reassigning leads if they don't follow-up, and converting hot leads to opportunities. And it supports lead recycling processes, where sales leads are passed back to Marketing for further nurturing.</p>		<p>Sales Campaigns Some solutions allow Marketing to create campaigns that Sales can add prospects into, or even run targeted campaigns of their own.</p>	
				<p>Revenue Cycle Modeling This is the ability to define the stages for how leads flow through the revenue cycle, automate the rules for how leads move from stage to stage, and to provide an easy-to-understand framework for the sales and marketing process. It provides the foundation for establishing clear rules governing how leads transition from one stage to the next and assigning Service Level Agreements (SLAs) for lead response and disposition.</p>	

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MARKETING PROGRAMS/ LEAD GENERATION

Believe it or not, marketing automation did not originally provide capabilities for running broad marketing programs or generating leads. As a result, many platforms do not provide deep functionality in this area. But some vendors do, so once again, it's worth understanding your requirements here.

	 COMMON	 VARIANCE	 SOMETIMES
<p>Program Management Manage marketing campaigns and programs across multiple channels, including online ads, video campaigns, mobile, virtual events, and social media. Create and optimize program assets such as landing pages, emails, campaigns, and lists. Track program objectives, results, and costs to assess the program ROI.</p>			
<p>Event Marketing including Webinars From attracting attendees to registration administration to post-event follow up, the event management lifecycle can be laborious. Event marketing capabilities streamline the entire event process, including personalized invitations, registration, reminders, and post-event follow-up. They can also provide analytics, so know how many people have registered, how many attended, and so on. For online events, some marketing automation systems integrate with tools like Cisco WebEx®, Adobe Connect, Citrix GoToWebinar, ON24, and Readytalk to streamline the process further.</p>			
		<p>Cloning Each marketing program contains multiple emails, landing pages, campaigns, and lists, but many programs are similar in structure. The ability to clone an existing program can save significant time and resources, especially if your system makes it easy to edit all program parameters in one place and automatically update all the underlying assets (e.g. emails).</p>	
		<p>Program Import/Export Some systems provide access to a shared library of pre-built verified programs and the ability to exchange marketing programs with other users. This means you can take advantage of their best practices to jump-start your implementation and see results faster and with less effort.</p>	







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SOCIAL MARKETING

Marketing automation vendors have been adding social functionality for the last few years, but each vendor offers a different set of functionalities – so take the time to understand what your vendor provides.

Note: For much more on all aspects of social marketing, see the: [Definitive Guide to Social Marketing](http://www.marketo.com/DG2SM).
(www.marketo.com/DG2SM)



	COMMON	VARIANCE	SOMETIMES
<p>Social Listening and Tracking Monitor what leads and contacts say on sites such as Facebook, Twitter, YouTube, LinkedIn, blogs, and online communities, and use those social insights to segment prospects, trigger campaigns, change lead scores, and more.</p> 			
<p>Social Sharing and Campaigns Add intelligent share buttons to your campaigns and content so your audience can amplify your message to drive broader reach – and then track who shares your content and drives conversions. Most tools let you customize the default share message and image for each share; some provide triggered capabilities to prompt the share at the right time.</p> 			
<p>Social Campaigns Schedule automated posts to one or more social accounts. Use or integrate with URL shortening services. Measure likes, comments, replies, retweets, etc.</p> 			
<p>Social Profiles Incorporate social profile data to enhance segmentation and scoring, including name, location, and description – as well as a history of social sharing activity.</p> 			
<p>Social Engagement and Promotion Social applications such as polls, sweepstakes, and referral programs can enhance audience engagement and encourage people to amplify your message. Some tools let you easily create and include such social content on your website, landing pages, Facebook pages, and emails so that you can tap into your customers' and prospects' social networks.</p> 			
<p>Social Analytics By adding tracking to social sharing applications, you get insight into who shares your content, your social conversion rates, how much “social lift” you are getting from your campaigns, and how social impacts your bottom line.</p> 			

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ANALYTICS

Reporting and analytics reside at the intersection of marketing art and marketing science. They give you the ability to prove the impact of your marketing efforts. All vendors provide some level of marketing measurement and analytics, but the depth of functionality – especially in terms of measuring impact on revenue and ROI – varies greatly, from extremely basic to extremely deep.



	COMMON	VARIANCE	SOMETIMES
<p>Web Analytics This capability tells you why prospects visit your site, which pages they visit, and how often they come back. It can even tell you who visits your site when visitors aren't in your database, thanks to anonymous company lookup, and can send daily alerts to sales reps so they know which companies are interested. When prospects do register, you also have the complete history of their prior web activity as part of their record and lead score.</p>			
<p>SEO/Keyword Analytics Monitor and track how you rank for relevant keywords on major search engines and compare your overall performance to competitors.</p>			
<p>Basic Reporting The ability to access pre-built and build custom reports and dashboards to measure leads by source/campaign/month, email performance, landing page performance, web activity, and so on. Systems vary in report depth, such as the ability to use custom metrics and queries. Some systems let you create report subscriptions that automatically send updates to your team and executives.</p>			
<p>Multi-Touch Revenue Attribution Customers do not purchase your product because of just one campaign. Rather, marketing usually impacts a sale multiple times across multiple people. Multi-touch attribution is the ability to allocate credit (pipeline, revenue) among all the marketing activities that have successfully touched a sale as it moves through the revenue process. Some systems also provide a visual way to see all the marketing programs and touches that influence the contacts associated with a sale as it moves through the funnel.</p>			
<p>Program ROI Analytics This is the ability to measure and compare revenue performance by channel or program along metrics like revenue, pipeline, investment, ROI, prospects generated, etc. As a result, you can see which marketing investments generate the greatest return, and get visibility into how the marketing budget should be allocated going forward.</p>			
<p>Revenue Cycle Metrics These metrics analyze how leads flow through each stage of the revenue process, from anonymous to customer and beyond, so Marketing and Sales can adjust business processes to increase pipeline and revenue. Key performance metrics for each stage can include balance, flow, conversion rate, and velocity.</p>			

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RESOURCE MANAGEMENT

Some marketing automation systems include functionality for marketing resource management, helping to coordinate internal processes and increase marketing efficiency.



Budgeting

This can cover all aspects of managing marketing investments, including assigning top-down budgets to various groups and divisions, planning marketing spend across programs, tracking open-to-spend, ensuring budget compliance, coordinating workflows and permissions, and reconciling plans with actual invoices.



Calendaring






It can be tedious to maintain a marketing calendar across multiple groups and to communicate the calendar and activities to interested groups, such as Sales. This functionality is about managing the calendar for the entire marketing department, from promotions to content to PR and so on.



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Larger enterprises and more complex organizations may have needs for additional infrastructure capabilities such as security and integration.



<p>User Roles and Permissions Assign permissions that align with specific pieces of functionality or tasks. Example user roles include a role that gives the ability to create but not approve landing pages or emails, and a role that can create but not activate a campaign.</p>		<p>Sandbox A sandbox is a testing environment that isolates untested changes and outright experimentation from the production environment. This lets the enterprise test out changes to the production system with less risk.</p>	
<p>Secure Partitions / Workspaces This is the ability to give users access to only specified lead partitions and assets (e.g. campaigns, landing pages, emails, reports). This lets you create different organizational views that align with how your organization is structured, so different groups can use the system without risk of interfering with each other – while still supporting sharing as appropriate across functions and the demand center.</p>		<p>API/Integrations An application programming interface (API) is a specification that tells other systems how to call into the marketing automation platform to get data or perform an action. Other integrations allow the marketing automation system to trigger actions in other systems. In both cases, it allows the platform to interoperate with the other systems in the enterprise.</p>	
		<p>Ecosystem An ecosystem is a complementary set of solutions that amplify the power of the underlying platform. A strong ecosystem can help ensure that your needs will continue to be met even as you require additional capabilities.</p>	



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ADVANCED FUNCTIONS

As mentioned directly above (and noted by the word “**variance**”), functionalities for unique marketing automation categories may vary significantly across vendors. For example, two vendors may have CRM integration, but differ greatly in the level of depth and quality that they offer.

To streamline your evaluation process, here are some key capabilities you may not find in all systems. While the list isn't comprehensive, it will give you a sense of what you may want to look for.

Usability / Speed

- **An auto complete feature**—to suggest campaigns and field names when you enter specific values.
- **The ability to clone an entire marketing program**—while keeping multiple emails, landing pages, links, and segments intact.
- **Tokens**—that let you input your event location, date, and time once, and then auto-populate the fields into every relevant email and landing page associated with the event.
- **A pre-built library of best practice marketing programs**—including email and landing page templates, events like webinars and tradeshow, and lead scoring and nurturing workflows. This library should be included inside the application.

Email and Online Marketing

- **A/B testing**—so you can quickly and easily set up A/B testing for multiple landing pages or emails.
- **Dynamic content**—that contains text, graphics, or HTML, and can be personalized in a landing page or email, based on behavioral and demographic segmentation.
- **Progressive profiling**—to easily create dynamic forms that recognize known visitors, pre-populate any existing fields, and gather additional information to complete lead records.
- **Hidden form field population**—based on a URL parameter or a cookie without custom code. For example, you might capture the lead source and search keyword as a hidden field.

Social

- **Facebook registration page publication**—to improve your lead registration programs' EdgeRank inside Facebook.
- **Social campaigns**—including polls and voting, referral programs and sweepstakes. For example, you might reward \$100 to those who refer three friends to an event, or enter a user to win an iPad if they share the content you create.

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ADVANCED FUNCTIONS



Lead Management

- **Real-time, behavior-based trigger responses**—based on real-time behaviors, not just pre-set schedules. For example, if your customer visits a key webpage twice in one week, you might send him a special offer and alert the sales team immediately.
- **Advanced segmentation**—combine real-time triggers, demographic fields, and behavioral attributes in a single list.
- **IP lookup**—by inferred company and geocoding by zip code, state, region, and so on.
- **Multiple lead scoring models**—to track interest and engagement for multiple products or businesses.
- **Separate lead scores for lead demographics and behaviors**—according to the Marketo Benchmark on Revenue Performance, companies that implement this kind of lead scoring enjoy 23% better sales productivity and a staggering 33% higher revenue growth than companies that only use demographic scoring.
- **Decay score**—based on inactivity, sales recycling, or other behavioral triggers.

CRM integration

- **Sales campaigns**—which empower sales reps to send trackable marketing automation emails and add contacts to campaigns from inside your CRM.
- **Advanced data sync**—offers the ability to immediately synchronize your marketing database with CRM opportunities, activities, campaigns, and custom object information. Also makes those fields available for segmentation, scoring, and reporting.
- **Self-healing schema**—identifies and syncs changes to specific CRM fields, such as new field names or values, and automatically adds new custom fields.
- **Data triggers**—used to activate marketing workflows in real-time based on data changes in opportunities and custom objects in your CRM.

Other

- **Work groups**—to define groups of leads, campaigns, and assets that are only accessible for Marketing purposes by certain specified users.
- **Role-based access**—that allows only certain functions for certain users. For example, you might require manager approval for new campaigns, or limit access for customers and third party users.
- **Technical**—to ensure system uptime and email deliverability.



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ABOUT THIS GUIDE

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Written By:

Jon Miller
VP of Marketing, Marketo
@jonmiller

Additional Contributors:

Dayna Rothman
Content Marketing Manager, Marketo
@dayroth

Caitlin Roberson
Wordisseur

Designed By:

Davis Lee
Creative Director, Marketo

Lynn-Kai Chao
Graphic Designer, Marketo

Contact Marketo

North America: +1.877.260.MKTO (6586)

Europe: +353 1 242 3000

Australia/Asia: +61 1800 352 270

Email: info@marketo.com

Website: www.marketo.com

Blog: blog.marketo.com

Twitter: [@marketo](https://twitter.com/marketo)

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