definitive results
Marketing. Automation. Success.

MARKETING AUTOMATION
PLATFORM COMPARISON

WHAT'S INSIDE?

Which Marketing Automation Platform Should We Choose?

Congrats – you're ready to take the next step in your marketing maturity by investing in a marketing automation platform. But which MAP should you choose? It's a question our team hears quite often, and it's a loaded one: the answer ultimately depends on you.

Whether you are ready to implement a marketing automation tool or are considering changing platforms, the process starts with evaluating your current operational status, your capabilities, your budget, and your needs.

What does your team look like?

When you implement or inherit a marketing automation program, it's important to first take a step back and examine your team. Do you have a technically-savvy, technology-interested team member? Better yet, do you have more than one? Even one team member who is really excited about a marketing automation platform can mean you will be able to take on a bigger platform.

Do you have enough people on your team to take on a robust new platform or do you need something you can jump into and very intuitively use well from day one? Do you have the budget and time to invest in growing your existing team to learn a new platform and adopt a new way of marketing? Do you have team members who

already know and love a specific platform out there?

Remember that when taking your team into consideration you should also consider the longevity of the existing team. You don't want to invest in one platform because a couple key team members know or love that specific MAP, and they leave six months after the implementation. Invest in a platform that works for your current team, but also one that will work for your team in the future.

What's the skillset to take on the new technology?

With a new marketing automation platform, you want someone who is genuinely interested in marketing automation. They should get excited about the amazing things it will do and how it will evolve your marketing efforts. They shouldn't be afraid of trying new features or watching some videos, reading articles, or asking others how to try new features.

If you have someone like this on your team, bring them in to your marketing automation search early so they'll feel empowered to hit the ground running with the new tool. If you don't have someone internally, this is the passion and knowledge Definitive Results can fill in for you.

What's your level of marketing maturity?

Before diving into your MAP search, take a bird's eye view of your current marketing efforts. Are you personalizing your communication at all? If so, how? Are you even executing digital marketing at all right now?

As part of your marketing maturity exploration, you'll want to look at – not only how your marketing is going, but how you're measuring

your marketing's effectiveness. Which metrics are you tracking, measuring, and reporting? With or without marketing automation, tracking, reporting, and optimizing key metrics are important to marketing growth.

Another thing to consider is whether you already have a MAP or if this is all brand new to your company. If you already have a MAP, why are you looking for something new? What's working or not working with your current MAP? Maybe you need a more powerful system to better reach your desired audience, or maybe, you need a less powerful system because you're not able to leverage all of the features you currently pay for.

How many contacts are in your system?

Most of the major platforms out there will price their instances based on the number of contacts (unique email addresses) you have. So this is an important stat to know.

Also, you'll want to weed out those unsubscribes and hard bounce backs, because there's no need to pay for those.

Beyond the obvious to eliminate from your count, when you start on your new platform, consider weeding out the inactive contacts so that you're starting with an engaged, interested base and growing from there – and saving yourself the money; you don't need to pay for contacts who won't appreciate your communications in the first place.

How many campaigns do you execute each week/month?

How heavy a user will you be of your instance? If you execute only a few campaigns per month and your maturity of campaign structure is pretty basic, you may want to start with a simpler MAP (see "The Core Four: Compared" on page 4). This will allow you to begin adjusting your organization to the technology and to begin thinking in a different way about your marketing.

However, depending on how quickly you want to advance, you may not want to waste the time and money on a more basic instance that you'll have to migrate from a year down the road. However, if you're the type of organization that is going to take a few years to adjust to a more basic platform, embrace it – don't pay more than you need to get some new functionality and give your team the time to learn, grow, and adapt, and THEN upgrade when you are ready for it and it will make sense to invest more in the technology.

How much content do you have (or are you willing to create) to support a more personalized marketing effort?

A more mature marketing strategy, like hyper-personalization or account-based marketing, will require more content. You can configure advanced campaign flows, but if you don't have the variety of personalized content, the fancy

footwork isn't going to produce the results. If you don't have content but are ready to invest the time/money into building the library of content you need, this is an effort that can be done in parallel to finding and implementing the right tool AND to configuring the tool to take your audience through the experience you've mapped out for them.

If you already have a wealth of content – GREAT! That means you're in a great spot to be able to leverage more advanced marketing automation features and give your audience a much more personalized experience. Remember, content development is an ongoing initiative, so even with a great library of content, you'll want to make time to develop new content while keeping your existing library up to date.

That's a lot of questions but not a lot of answers. What do we do now?

Other questions you might want to ask when starting your search for a new marketing automation platform are: How much marketing do you do right now? How personalized do you want your marketing to get? What are your short and long term business goals?

Choosing a new marketing automation platform will take some time, but your due diligence up front will allow you to be more confident in your long term marketing automation efforts.

Still not sure which marketing automation platform is right for your team? We're here to help! At Definitive Results, our team eats, sleeps, and breathes marketing automation, and we're happy to talk through your current and future marketing automation needs and to see how we can partner with you to help you achieve your goals.

The Core Four: Explained

eloqua™

The biggest benefit of Eloqua is its flexibility. With the right technical resource, there isn't much you can't do to make this marketing automation tool work within your tech stack. You can truly automate your marketing with complex logic and workflows, create custom auto syncs, build personalized microsites, and have integrated customizable reporting and analytical tools. Users love the visual workflows in Eloqua. The more recent introduction of the email responsive design editor has improved the ease to create emails, however, users may still find it necessary to have HTML skills to create complex emails or landing pages.

HubSpot

HubSpot offers all of its features and capabilities through a single system with sales and CRM applications available as optional add-ons. The system does a little bit of everything, but doesn't do any one thing at a deep level. HubSpot's built-in social media features are one of its most attractive features. If you have a need for more than a basic workflow, you should consider the fact that HubSpot only allows workflows based on yes or no propositions.

Marketo™
An Adobe Company

Marketo ranks high on the list of MA platforms with its extensive options of out-of-the-box email and landing page templates. Without needing HTML skills, you can build, edit, and send advanced emails based on timing, user actions, or a defined sequence of events. Users can't control CRM syncs at the granular level and give up a tiny bit of "you can make the system do anything" in exchange for Marketo's ease of use. Other features including tokens, progressive profiling, and real-time lead scoring capabilities add to the long list of positives.

salesforce Marketing Cloud Account Engagement
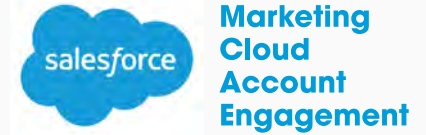
Marketing Cloud Account Engagement's automation rules make updating prospect records quick and painless. You can also configure multiple lead scoring programs based on prospect profiles. An attractive feature of Marketing Cloud Account Engagement for certain users is the Recycle Bin, which allows the resurrections of deleted/archived contacts back into the instance without losing all associated data and activity. Marketing Cloud Account Engagement offers a basic email template editor so HTML skills are needed to customize and create advanced assets.

The Core Four: Compared

Feature	eloqua™	HubSpot	Marketo™ (An Adobe Company)	salesforce Marketing Cloud Account Engagement
Landing Page, Form, & Email Creation	★★★★	★★★★½	★★★★	★★☆☆
Campaign Build & Execution	★★★★	★★★☆	★★★☆	★★☆☆
Blog, Website, & SEO Management	☆☆☆★	★★★★	★★★☆	☆★☆☆
Behavior Tracking	★★★★	★★★☆	★★★★	★★★☆
A/B Testing	★★★★	★★★½	★★★★	★☆½☆
UI Ease of Use	★★★☆	★★★★	★★★☆	★☆★☆
Lead Scoring	★★★★	★★★½	★★★½	★★½☆
Paid Digital Ad Management	★☆☆☆	★★★☆	★☆☆☆	★★☆☆
Reporting & Analytics	★★★☆	★★★★	★★★★	★★★☆
Dynamic Content	★★★★	★★★☆	★★★★	★★☆☆
Lead Nurturing & Lifecycle Management	★★★★	★★★☆	★★★★	★★★☆
Database Management	★★★★	★☆☆☆	★★★☆	★★☆☆
Customer Support	★★☆☆	★★★★	★★★★	★★★☆
System Updates & Communication	★★★☆	★★★☆	★★★★	★★☆☆
Multi-Team Use	★☆☆☆	★★½☆	★☆☆☆	★★½☆
Best for...	Large companies looking for an enterprise-level system and have the technical resources to use this powerhouse system.	Small businesses looking for an "all-in-one" tool that gives the very basic functionality of several different marketing systems.	Companies looking for a robust MA tool that is user-friendly, without devoting extensive technical resources.	Companies that are using SFDC and need an easy-to-integrate MA tool for basic lead gen, scoring, and campaign management.

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We Chose a Marketing Automation Platform, Now What?

Shifting your marketing efforts from manual processes to marketing automation is a big step. When you implement your marketing automation platform (MAP), you're going to impact a lot of people. This includes your marketing team, sales team, executives, and customers. A successful launch will require change management, learning, analytical thinking, creativity, a bit of courage — and good planning.

Once you've picked a marketing automation platform (MAP), create an implementation plan — don't dive in without one!

Get your team onboard.

This goes for ALL of your teams: Marketing, Sales, and your leadership.

For your marketing staff, automation will be a significant change for them. Every team is different. You may have staff who are chomping at the bit to automate campaigns. They'll need to learn how to use the MAP. On the other hand, you may have staff who are nervous, uninterested, or averse to automation. You'll need a way to get them onboard. Here are a couple of ways to do this:

Identify a marketing pain point. Maybe it's keeping new leads in your sales funnel, welcoming new customers, or following up with customers for reviews post-purchase. Each of these tasks can be automated. And each lets you quickly show holdouts how automation helps them do more with less time.

Recruit a leader. This is someone in your marketing team who can champion the MAP. This leader needs to connect their coworkers' responsibilities with the platform and advocate for automation. Someone in the team will have insight into each of their coworker's quirks, preferences, and interests — so they can tailor their advocacy accordingly.

Additionally, everyone involved needs to understand that there's an upfront cost to automation, in both time and effort. This goes for each time you implement a new automated campaign. The cost may feel greater for the first few campaigns, as your team learns what works best and how to use the MAP. However, it pays off as soon as your first automation goes live and that process is off your team's plate.

Start with a small project.

Admit it — you were thinking big when you were deciding to purchase a MAP or pitching automation to your leadership. After all, automation will revolutionize your marketing.

Now, it's time to think small. You can't automate your entire marketing efforts in one fell swoop. You'll start with one campaign. Ideally, your first campaign will have a good-sized audience. Maybe it's a general customer welcome campaign.

Think about what routine campaigns your marketing team already manages. How do they identify the audience? What formats and channels do they use? Collect content that's already created and in use. That's what you'll put in your first automated campaign. There's no need to reinvent the wheel when you're just starting.

Don't aim for perfection. One of the best things about marketing automation is that you can

perform testing and gather data on what works best – whether it's subject lines, intervals, or calls to action. You can use that data to make informed decisions to revise your existing automated campaigns and implement new ones. But you can't get that data until you've gone live.

Plus, don't try to use every feature at once. Your MAP may have every integration that you can think of. You don't need to go all-out for your first few campaigns.

Create a Quality Assurance process.

It's impossible to overstate the importance of testing your automated campaigns. You want to provide the best experience for your audience. Your MAP gives you the tools to do that.

But automation can go wrong. Automation provides consistency and reduces duplication of work – and it's these benefits that can also trip you up. It could be a single broken link in an email. Or your automation could never actually trigger, so your customers never see it. Worse, your automated campaign could include incorrect information or go to the wrong audience.

Your team needs to do QA testing rigorously before going live with each campaign. Likewise, each campaign deserves a maintenance plan. Is there content that needs to be updated periodically? You don't want your automated campaigns to be sending outdated information to your customers.

Use your data.

Once you go live with your automated campaigns, your MAP will start giving you data. This data can help you identify effective content, the best times to send emails, and the leads that are most engaged (and therefore more likely to become paying customers).

All of this data allows you to improve your marketing. But it can be overwhelming if you don't have a plan for how to use it or if you try to use it all at once.

After you start getting data from your MAP, decide how you want to use it.

Do you want to segment your audience and send more tailored campaigns? Do you want to replace underperforming content with new material?

Your marketing team should use your MAP's data to focus on campaigns that will result in meaningful engagement and get your company closer to its goals.

How can Definitive Results help?

Definitive Results is a team of professionals who are all excited to help your company succeed with marketing automation. Our team will help you select a MAP that meets your business's specific needs and support your future goals.

And we don't just help you pick one. We help you use it effectively. This includes planning for implementation, identifying campaigns that are candidates for automation, and understanding best practices for marketing automation.

Definitive Results is dedicated to progressing the world of marketing automation through the work of our clients. The client is our number one priority — our work is not about checking "complete" on a project, but creating a more knowledgeable, more empowered marketer. We are a work hard, play hard team — we know how to put the fun in our work!

CONTACT US

📞 1.855.658.4362

🌐 www.definitive-results.com

✉ info@definitive-results.com

in @definitiveresults

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