



# The 2022 Marketing Automation Platform Buyer's Guide

7 Key Criteria to Inform Your Marketing  
Automation Platform Selection Process





# Introduction

Marketing is often known as the corporate communicator for the greater organization, and for good reason: Their emails, campaigns, and content are usually the first contact with customers and prospects. Marketers must be able to put their best foot forward from the very start—creating relevant messages to personas within your organization’s ICP, predicting needs throughout the buyer journey, and nurturing customer advocacy. They must also prove their impact as an invaluable contributor to the brand, revenue, and the business.

Marketing automation platforms and tools should be purpose-built to help marketers meet these challenges and objectives. A marketing solution should make marketing’s job easier by automating and simplifying what matters most to any marketer. Choosing the right platform can help you achieve great things for the marketing team: Overcoming operational roadblocks and unnecessary busy work, driving critical alignment with the sales organization, adding intelligence and automation to lead generation, and driving amazing, high-definition customer experiences throughout the customer journey.

Here are the seven critical buying criteria to consider as you engage in the selection process.

## Telltale Signs You Need a High-Performance Marketing Automation Tool

- You’re spending too much time on recurring manual tasks and not enough on deploying campaigns and nurturing prospects.
- Marketing teams have little to no influence on revenue and can’t properly measure or quantify their efforts.
- Platform users spend more time setting campaigns up than ideating and strategizing, and creative ideas are sometimes dismissed because technology can’t support efforts.
- You cannot pass quality leads to sales (or even define what quality leads are) and ensure sales teams know exactly which leads to follow up on.
- You don’t know who your high-value customers are or which campaigns most effectively engage them.
- Email campaigns and nurtures take months to deploy because of limited email or segmenting functionality.
- You’re not able to personalize campaigns at scale and have minimal or no AI insight.
- You don’t have a long-term plan for building great customer experiences that keep them engaged at every stage of the customer lifecycle.

# Can You Get Everyone on the Same Data Platform?

Siloed operations are perhaps the most debilitating challenge for organizations, whether within the marketing operation or across key stakeholders like sales, service, and finance. When critical customer data resides in different places, no one gets a consolidated view of customer history and activity, creating misalignment among teams that should always be on the same page.

Marketers use so many tools to do their job that there is enormous value in having a single, consolidated app. Think of that app as a swiss-army knife for marketing. Once leads are generated, they are easily attributed and shared in the CRM system where sales and service have full visibility.

## A Connected Platform has Vital Benefits:



### NO BUSY WORK

Automatically capture data and present it in context to everyone who needs it, rather than manually entering endless details.



### NO BLIND SPOTS

Instantly display all relevant information, including past, present, and even future predictive insights, rather than piecemeal views of the customer.



### NO ROADBLOCKS

A platform built around your needs and workflows, rather than settling for a standard solution with standard limitations.



# Is It Easily Configurable and Accessible?

No one wants to put a lot of time into tailoring a mission-critical app to meet their organization's unique needs. Unfortunately, it's their way or the highway with many marketing automation vendors. They have rigid configurations that force you to fit your workflows into their framework, or they're simply too complex to customize the way you want.

You know exactly how your business works. Your marketing automation software should fit squarely with how your team works, match your operational DNA and visual brand and be easy to configure to meet the individual needs of every user.

## It Should Be:



Flexible enough to help you distinguish your brand from competitors and build better customer experiences.



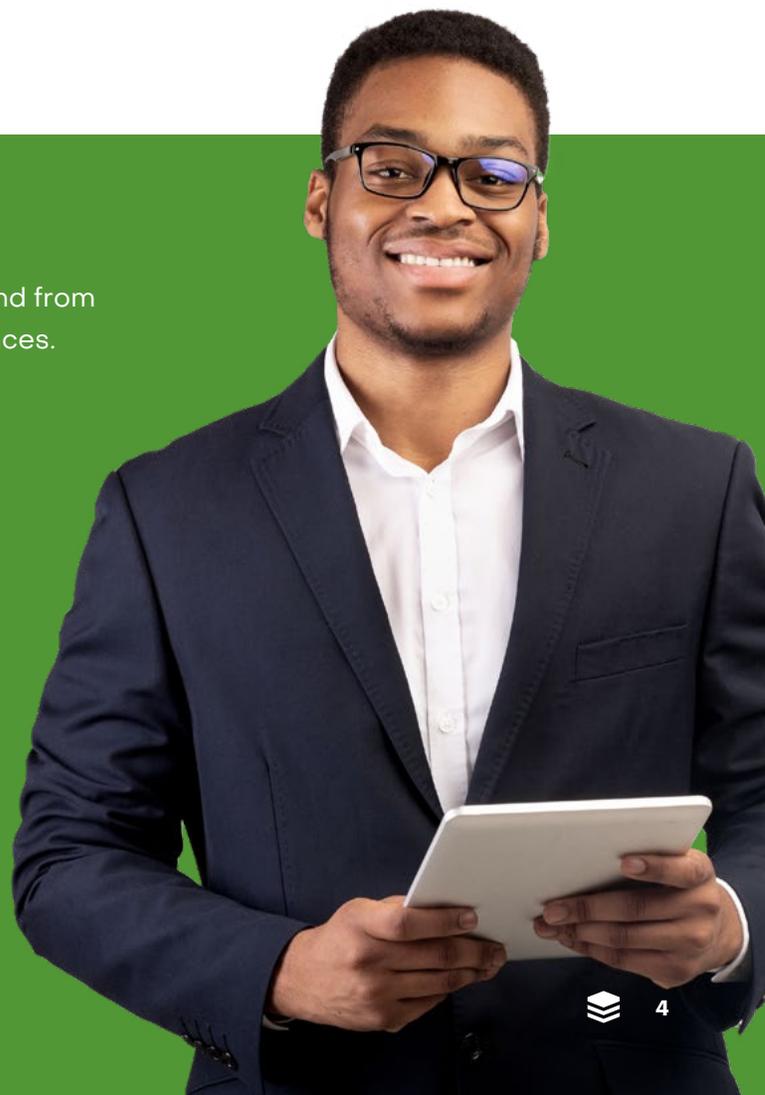
Enabling every aspect of marketing, including design, deployment, reporting, sales alignment, and customer engagement.



Easy to create, update and expand functionality without the need for a team of consultants or additional training.



Hyper configurable, interoperable with any database, and easy to track and measure across the operational spectrum.



# How Quickly Can You Build Engaging Campaigns?

Campaigns are the bread and butter for marketing, but most teams spend too much time filing tickets to have emails, landing pages, and lead forms created by a design, development, or IT groups. Creating content and campaign deliverables should be an easy process, and it should be a do-it-yourself activity, whether it's emails, conversion forms, surveys, webinars, or event pages.

Always be sure the tools you use have template and drag-and-drop functionality to enable easy design and quick but thorough QA, including responsiveness. They should also be flexible enough to allow your marketing teams to custom-code your features to match your brand and engagement objectives. And remember that when design, conversion tools, and analytics are all built on the same platform, it makes it much easier to personalize outreach, track success, and build continuous improvement into your process.

# Are You Able to Prove Revenue Against Marketing Efforts, and Does Sales Trust You?

Remember that marketing's alignment with the sales organization is a two-way street: You don't just throw leads over the wall and hope sales can close the deal. Instead, you must be fully engaged with sellers (and service teams). Sales, marketing,

and service must see prospects' engagement, products purchased, desired use case scenarios, how the installation went, any known service issues, future project plans, and predict additional needs based on shared information.

## When Every Team is Aligned with Integrated Tools, it Makes it Easier to:



Personalize future campaigns and outreach, promote better customer retention, and improve revenue uplift.



Automate the handoff process, starting with marketing engagement and enabling a seamless, automated transfer of the lead record to the right salesperson, including a history of engagement, interest level, context, and next steps.



Inform lead quality based on historical data, AI-powered lead scoring, and predictive analytics.



Empower sales to use their best judgment on how to follow up. That's what they're good at: applying their skills to approach and engage a lead optimally, in their own way.



# Can You Use Information and Insights to Your Advantage?

There's a ton of customer data in your CRM system. When marketers can view every relevant interaction and historical activity, they have an opportunity to turn that data into insights that can help optimize lead quality, marketing activity, and sales engagement. The right CRM system collects key events like product anniversaries, changing sales reps, resolved service cases, and relevant communications that can all help determine how a rep should follow up. For example, how a customer interacts with service (such as the number of tickets related to a certain product) helps marketing and sales create the most relevant touchpoints for education and upsell throughout the customer journey.

As marketers need to prove more revenue attribution, they must gain insights instead of performing analysis. AI-powered predictive lead

scoring allows teams to distance themselves from monthly scoring model analysis and instead automatically creates and maintains customer profiles based on brand engagement. Interactions such as opening an email, clicking a link, visiting a specific web page, downloading content, and paid search and social marketing influence the lead score in varying ways (visiting a product pricing page would yield a higher score than a product overview page, for example). AI scoring models are dynamic, constantly changing with business rules to stay fresh and current.

Better quality leads generated by key customer insights can also improve your ability to run more effective nurture campaigns, such as email triggers based on specific customer attributes or activities and targeted campaigns based on changing lead scores.

# Are You Ready to Take the Plunge into AI?

The power of AI is ushering in a new world for marketing automation systems, but it isn't always easy to evaluate AI capabilities and how they'll impact your marketing organization. It's important to select a vendor with a future-proof AI roadmap, one whose AI features are purpose-built into the infrastructure of the CRM platform. Your goal should be to invest in a company at the leading edge of real AI functionality, not just hype and a buzzword.

Modern marketing automation tools often come pre-packaged with embedded analytics to help you generate customer insights quickly, so why build out AI functionality on your own? Once you've enabled AI capabilities, they should be easy for users to master without being a data science expert. The easier it is to use, the easier it is to reap the benefits.

## Predictive, Data-driven AI Informs you What Customers Want and What They Need, Including:

-  Intelligent lead scoring to identify the most promising leads and increase conversions.
-  Personalized recommendations and next-best action throughout the customer journey.
-  Cross-sell & up-sell opportunities based on predicted needs to drive revenue growth.



# Does Your Platform Scale with Your Business?

Your marketing automation platform itself must integrate easily with other technology systems and grow with your business. Choose a highly scalable platform so that you won't run into an artificial ceiling with needed functionality.

## The Platform You Choose Should:



Be open, extensible, and built with APIs that can accommodate the tools that matter most to marketers, such as social integration, search, webinars and events, surveys, and other vital campaign assets.



Handle unlimited users (to scale with your business) with transparent pricing and without extra charges for necessities like integrations and onboarding.



Have no tactical limits, such as how many emails you can send without pricey workarounds.



Provide a fixed cost structure that does not require paying extra for essential features such as analytics, event management, or social media integration. Other hidden "extras" to look out for include support, reporting, per-user charges, and upgrade fees.



Include a commitment from your vendor to take responsibility for implementation, alleviating the burden and cost of outside consultants and integrators.





# Conclusion

The right marketing automation platform can be instrumental in driving better marketing results. Still, it can also mean more overall demand and revenue across your business with stronger sales alignment, high-definition customer experiences, and enhanced insight for every key stakeholder across sales, marketing, and service. A fully integrated platform and set of processes ensure no blind spots, no busy work, and no roadblocks to keep your organization running on all cylinders.

Allocating the right resources to your selection process will empower your marketing team to put their best foot forward as they welcome customers into a long and prosperous journey with your brand.



# Revolutionize Your Marketing Automation Platform

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## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow [@SugarCRM](https://twitter.com/SugarCRM).



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