

MARKETING AUTOMATION **BUYER'S GUIDE**



**10 CONCRETE STEPS TO PURCHASING THE RIGHT MARKETING
AUTOMATION PLATFORM FOR YOUR ORGANIZATION**

WELCOME TO THE MARKETING AUTOMATION BUYER'S GUIDE!

IF YOU'RE A B2B MARKETER LOOKING TO FIND
THE RIGHT PLATFORM FOR YOUR ORGANIZATION,
YOU'VE COME TO THE RIGHT PLACE.

Marketing automation software has become incredibly popular in recent years. With good reason, as it comes with a great promise: a daily life as a marketer that is **more about strategy and creativity than it is about mundane tasks.**

You don't want to spend your days manually following up with prospects and customers. Or setting up and sending out email blasts. Or handing off CSV files with leads to Sales. Or rummaging through spreadsheets for hours putting an effective report together.

What you want is to have **timely and relevant communications go out to prospects and customers automatically.** You want your software to pick the best leads from your funnel and send them on to Sales, automatically. And you want your data in front of you, organized, whenever you need it.

Automatically.

That's the promise of marketing automation. And that's why you're looking to buy a marketing automation platform.

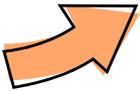
Buying marketing automation can be a challenge. There's a myriad of platforms out there, each claiming to make good on that promise of marketing automation.

Which one fits your business and use case? Who can you trust and how can you end up with something you'll actually be happy with?

If you follow the 10 steps outlined in this guide, you will discover **how you can make a purchasing decision that will have a lasting, positive impact on your work and your organization.**

To your success!

Henrik Becker
Director of Revenue

SEE MORE! 

SCHEDULE A DEMO OF NET-RESULTS

ABOUT NET-RESULTS

Hi, we're Net-Results.
We're the 1st choice of
people buying marketing
automation for the 2nd
time.

We talk to people like you,
B2B marketers, on a daily
basis. We know what you're
looking for in a marketing
automation platform. We
also know not every platform
fits every use case.

At Net-Results, we take a
consultative approach to our
sales process. Which means
we help customers make
a purchasing decision. We
don't just try to sell them on
our platform. We're honest
with whether or not we're
what a company needs. We
turn down customers that
are not a good fit.

The following pages are
intended to help you make
a decision. If at any point
you'd like to chat about your
use case, hit us up and we'll
tell you honestly if we'd be a
good fit.

**Book a free 20
minute chat here.**

BOOK A CHAT

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10 STEPS TO PURCHASING A MARKETING AUTOMATION PLATFORM

1: CREATE A BUSINESS CASE

2: FORM A PROJECT TEAM

3: ANALYZE EXISTING WORKFLOWS

4: CREATE A LIST OF REQUIREMENTS

5: CREATE A LONG-LIST OF VENDORS

6: FIRST DEMO ROUND AND SHORTLIST

7: DIG DEEPER WITH THE SECOND DEMO ROUND

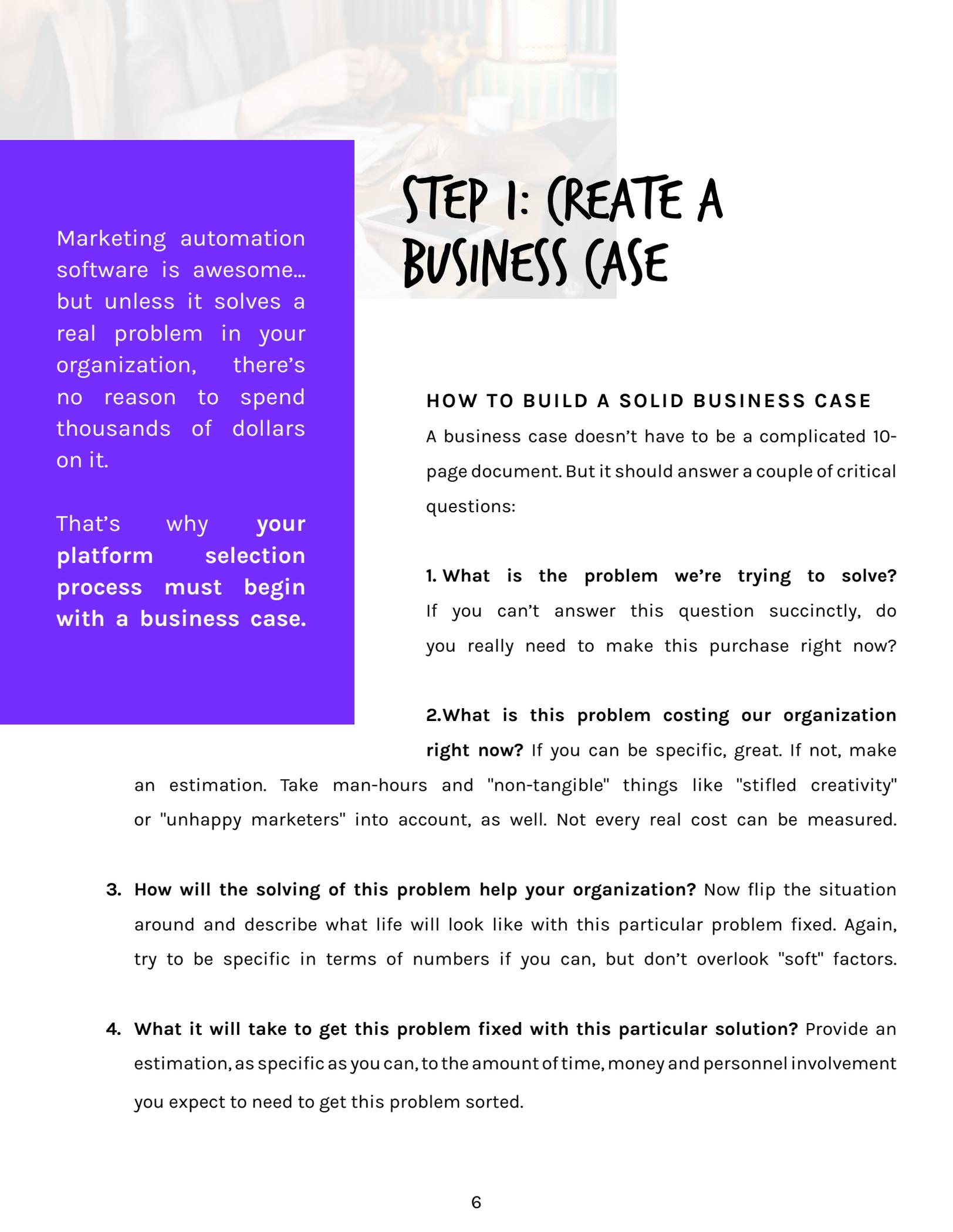
8: TEST DRIVE

9: SEAL THE DEAL

10: FLYING START

NOTE: It's not absolutely necessary to follow each and every step in this guide in order to make a good purchasing decision. Pick the steps that make sense for your situation and the type of organization you're in.

(If you're strapped for time, we recommend picking steps 1, 4, 7, 9 and 10.)



Marketing automation software is awesome... but unless it solves a real problem in your organization, there's no reason to spend thousands of dollars on it.

That's why your platform selection process must begin with a business case.

STEP 1: (CREATE A BUSINESS CASE

HOW TO BUILD A SOLID BUSINESS CASE

A business case doesn't have to be a complicated 10-page document. But it should answer a couple of critical questions:

1. What is the problem we're trying to solve?

If you can't answer this question succinctly, do you really need to make this purchase right now?

2. What is this problem costing our organization right now?

If you can be specific, great. If not, make an estimation. Take man-hours and "non-tangible" things like "stifled creativity" or "unhappy marketers" into account, as well. Not every real cost can be measured.

3. How will the solving of this problem help your organization?

Now flip the situation around and describe what life will look like with this particular problem fixed. Again, try to be specific in terms of numbers if you can, but don't overlook "soft" factors.

4. What it will take to get this problem fixed with this particular solution?

Provide an estimation, as specific as you can, to the amount of time, money and personnel involvement you expect to need to get this problem sorted.

THE NEXT STEP...

Building a business case forces you to think hard about what you really need. A good business case builds trust with executives and other decision makers within your organization. It shows them you're not just trying to get a shiny new toy - you're attempting to solve a real business problem.

In order to create a business case, you will most likely need to interview folks in other departments. Take note of whom you speak to when building your business case - you will need a list of stakeholders later on!





EXAMPLE BUSINESS CASE

The following is a short version of an actual business case that led to a marketing automation software purchasing decision here at Net-Results.

CONTEXT

This particular company sold a SaaS (software-as-a-service) product to recruitment agencies.

PROBLEM

The marketing team at this company had no access to a central customer database. They literally had to walk over to the IT department and ask for a CSV file whenever they wanted to send out an email blast.

This was a huge problem, as the company had no way to keep in touch with prospects or customers on a regular (let alone automated!) basis. Therefore, the conversation rate from free trial to customer was low. On the other end of the funnel, churn (especially in the first year) was high.

COSTS TO THE COMPANY

1. It required multiple hours of individual time investment for both marketing and IT personnel to execute even a simple email blast.
2. No automated emails went out to free trial users. There was no way to stay in touch and, as such, a high likelihood of losing out on deals.
3. No means of following up with leads in the future. Even if a prospect's timing changed, there was no way for the company to notice that.
4. No means of setting up automated content marketing in order to generate more free trials.
5. The lack of execution ability hindered the marketing team's creative spirit. There were spending all their time on mundane tasks and had virtually no time left to be strategic about their work.

GAINS TO THE COMPANY

THE PROPOSED SOLUTION

1. Putting in place a marketing automation platform as a central database would save literally days of time every month.
2. The IT team would not have to be involved anymore for helping to create database dumps or code landing pages.
3. The customer expected to raise conversion rates by 5% by putting an automated email follow-up for free trials in place.
4. By regularly communicating with existing customers, churn was expected to drop by 5% in the first year.

cost of problem vs cost of solution

CONCRETE CALCULATIONS

1. The company generated about 700 leads every month. Each lead averaged \$200/month.
2. About 35% of them turned into a paying customer.
3. Churn rate in the first year was a whopping 60%.

Loading those metrics into a spreadsheet, here is what would happen if they could increase conversions by 5%, and also reduce churn by 5%:

	Leads	Conversion Rate	Customers	Churn	Customers after 12 months	Total value / month	Total value / year
Current Situation	700	35%	245	60%	98	\$19,600	\$235,200
New Situation	700	40%	280	55%	126	\$25,200	\$302,400

That's a difference of 28 customers with a total of \$67,200 from a single month. The full 12 months of leads would then represent a value of \$806,400 that the company was missing out on.

This was just the monetary aspect and didn't even take the countless man hours that would be saved, the level of increased productivity, or the creativity boost for the marketing team.

Suddenly, marketing automation became an absolute no-brainer for management.

STEP 2: FORM A PROJECT TEAM

Once your business case has been accepted, it's time to form a project team. Buying marketing automation usually involves multiple departments and stakeholders.

Without stakeholder support, you'll inevitably end up spinning your wheels somewhere in the purchasing process.

SETTING UP YOUR PROJECT TEAM

Make a list of every department that's involved in this purchase. Armed with your (accepted) business case, you can now approach every department. Ask who will be involved with the project and add them to your list. Make it clear which role everyone will be taking in the project, as well as their interest in the project.

By including decision makers across the involved departments, you make sure that the selection process takes everyone's interests at heart.

FOR EXAMPLE...





FOR EXAMPLE

Role 1: Management

Interest: increase revenue, be able to prove marketing ROI, better steer the business based on numbers.

Role 2: Marketing

Interest: automate mundane tasks, insights into which channels are adding to the bottom line, more time for creativity and strategy. Offer a better customer experience.

Role 3: Sales

Interest: increase the quality of SQLs, spend less time chasing dud leads. Better insight into the funnel and a lead's history with the business.

Role 4: IT

Interest: software should match the existing IT-landscape. Compliancy, security and flexibility when it comes to integrating with existing systems.



It's entirely possible your team will look very different from this. Or that you won't need to involve as many stakeholders at all. It all depends on your particular business. However, these roles are based on what we commonly encounter when talking to our prospects and customers.

»» FOR EXAMPLE, FOR MANAGEMENT

1. **Ideal situation?** We know exactly what the marketing team is adding to the bottom line. We have better insight into our sales funnel and can steer on numbers, not just gut feeling.
2. **What's in your way?** We currently have no way to track marketing ROI. We can't link marketing to sales, so we don't know what's drive those opportunities.
3. **Ready to be changed?** Yes, marketing automation software reports should give us the information we need. Integration with CRM should allows us to report across the entire funnel. High priority.



FOR EXAMPLE, FOR MARKETING ««

1. **Ideal situation?** We've set up lead nurturing programs that automatically qualify the best leads and hand them over to sales.
2. **What's in your way?** We don't have a system that can automatically send out emails. We don't have a direct connection to the sales CRM.
3. **Ready to be changed?** Yes, marketing automation software should allow us to do both of these things. High priority.

STEP 4: (CREATE A LIST OF REQUIREMENTS)

Now you know which processes you're going to improve, it's time to think about functionality.

Requirements lists are like shopping lists. If you don't have one, you're going to end up with all kinds of stuff that "looked yummy". In marketing automation software land, if you're not sure what you're buying, you'll end up paying for a lot of things you don't really need.

HOW TO (CREATE A SHOPPING LIST:

Sit down with your project team once again. Simply let everyone list out the functionality they think they need.

Let everyone distinguish between "needs" and "nice-to-haves". You will inevitably end up having to make choices when buying your marketing automation platform - this is how you know where you can make compromises.



FOR EXAMPLE...

Example for IT

1. We need to ensure data security between platforms.
Need: SOAP API functionality.
2. We don't want to have to figure everything out ourselves.
NTH: extensive development documentation.

Example for Marketing

1. We want to make our communications as relevant as possible.
Need: deep segmentation abilities.
2. We'd like to track video clicks and views.
NTH: Wistia or Vimeo integration.

Combine all of these into a single requirement list. Use that when you go out shopping. You'll be thankful you did.

If a candidate platform does not have a functionality listed as "need" by any of your stakeholders, it drops off your list.

STEP 5. (CREATE A VENDOR LONG-LIST

Now that you really, really know what you want and need, it's time to go out and look for software vendors.

Where do you find them?

- 1. Google.** Search for terms like "marketing automation platform" and you'll get a long list of vendors. Look at their websites, see which ones seem to be fitting for your **market segment, industry and use case.** Also try and find third-party (industry) reviews, as well as "how we did it" blog posts, such as [this one](#).
- 2. Review sites.** There's a myriad of websites out there that collect authentic user reviews. These are invaluable when you're researching whether a platform fits your

use case. Be sure to check both the positive and the negative reviews. Some sites we like:

- a. [G2 Crowd](#)
- b. [Capterra](#)

- 3. Ask your network.** Chances are you have people in your professional network that have purchased a marketing automation platform before. Since they have no stake in your decision, their advice can be invaluable.

You should end up with a list of about 5-10 vendors that you believe will be a good fit.

Congratulations, you now have a long-list!

As a way for you to start off your research off with, we've put together a handy comparison chart. It compares some of the major vendors when it comes to pricing, features, support, etc. Get it right here:



GET THE CHART



STEP 6: FIRST DEMO ROUND & VENDOR SHORTLIST

Armed with your longlist, start sending out demo requests to the vendors. Since everyone's busy, consider doing these initial demo calls by yourself to keep things moving.

That's where you can book your demo with us!

[BOOK A DEMO](#)

Your goal here is not to learn everything about every platform. You're here to confirm if a vendor deserves to be moved to your shortlist. That's when you bring in the stakeholders again and really dig deep.

This initial demo is where vendors make a first impression. It's where you ask hard questions and see what kind of answers come back. It's when you find out what kind of support they have and get a feel for the company for yourself.

Your goal is disqualification. You want to find out which platforms definitely don't match your plans, so you can focus on those that do.

SO, WHAT DO YOU LOOK FOR IN A DEMO?

- 1. Class.** Let's start with the basics. The sales rep should be genuinely interested in your company and use case. He or she should be asking you questions and letting you talk. They should be polite and patient. We most likely don't have to tell you the signs of a bad sales rep as you've probably experienced them for yourself but to reiterate: if a sales rep is pushy and is more interested in their commission than your well-being, that's a telltale sign to skedaddle. It's unlikely the rest of the company is any better.
- 2. Does it do what you need it to do?** Keep your "need" requirements close and ask to see how the platform handles them. Make notes of specific requirements met or not met.
- 3. Training & support.** Marketing automation software is complex. Even if you're a tech-savvy marketer, you will still need help figuring things out. You will also need to get trained up on the nitty gritty for the platform that you choose. Ask what the vendor will do to train you and how they will continue to support you. (Example: do they push you towards documentation or do you get live calls?)
- 4. Pricing.** A lot of marketing automation vendors employ complicated pricing plans. Some of them don't even list out their pricing on their website (and you know what that means 💰💰💰). Ask the sales rep to explain their pricing model. You need to be thorough here. Oftentimes, vendors will make you pay extra for certain functionality, for phone support, for CRM integrations, etc. Nothing hurts your business case like unexpected extra costs that you need to explain to management.
- 5. Free trial.** Ask if you get to test drive the software before purchase. (Would you buy a car without first driving it around? Same rules apply here.)



MADE IT THROUGH ALL THE DEMOS?

Congratulations! You've probably learned a lot. You most likely have more questions.

At this point, it's smart to report back to your project team. Shed some light on which demos you liked and why you liked them. Either you, or you and your project team, should move 2-4 vendors to your shortlist.



»» STEP 7: DIG DEEP WITH THE SECOND DEMO ROUND

Remember those processes you wrote down in step 3 of this guide? This is where they come in handy.

Now that you have a shortlist, **plan follow-up demos with those vendors.** Aim to have specific questions answered in those demos, based on the processes from step 3.

This step is where it makes a lot of sense to invite stakeholders on the call with you, so they can ask specific questions regarding their area of expertise and use case.

At the end of this demo round, once again gather the project team. **Pick a maximum of 3 vendors to test drive.** If you pick more, you might get overwhelmed (but if you're feeling cocky, go for it!).



BOOK A DEMO

Grab your Net-Results demo here!



STEP 8: TEST DRIVE

Before you pull the trigger on a purchase, **you need to have spent time in a platform.** Preferably in a fully functional version of the software.

That sounds straightforward. But it's not always. That's why we had you ask for free trials during the first demo round (remember?). **Some vendors do not offer free trials** and all you'll have to go by is third-party experiences of the platform. It's up to you to decide whether that's enough for you to make a decision off of.



WHAT DO YOU LOOK FOR WHEN YOU'RE TESTING OUT A SOFTWARE PLATFORM?

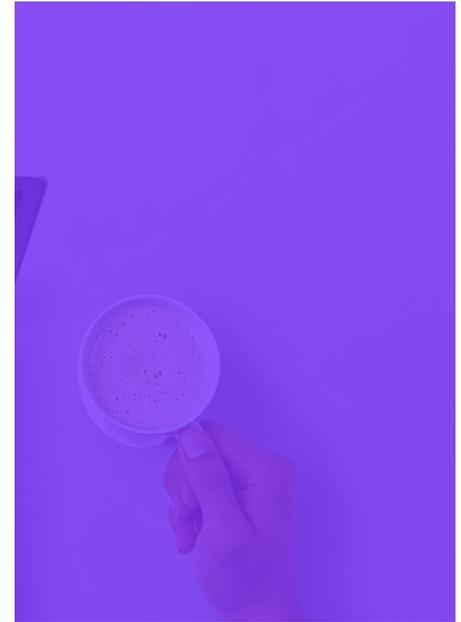
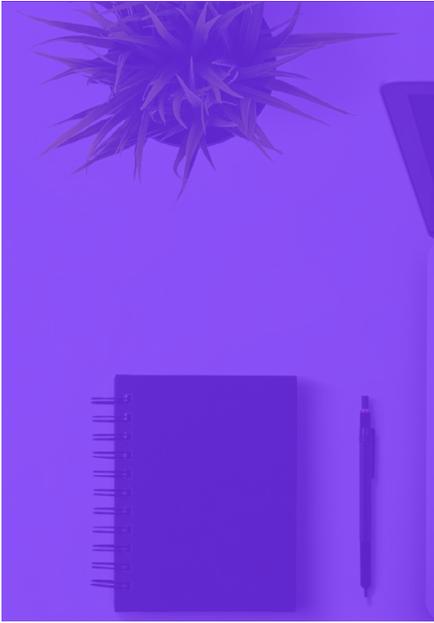
1. Is everything in the right place? Does the interface make sense to you? Will everyone else on your team find it makes sense as well?
2. Look at the things you will be working with a lot: email, form and landing page builders, for example.
3. Put together a campaign and see how it goes.
4. Take a look at the segmentation and lead scoring engines to get a feel for how granular you can get.
5. Look at the reporting modules. Will they allow you to report on the things you need to know?

You should end this phase with another project team meeting. Present your findings and experiences. Gather everyone's opinion. And make a decision!

DID YOU KNOW?

All Net-Results free trials come with a full onboarding experience by our customer success team. That's right, we'll teach you how the software can solve your problems, before you've paid us a dime. That's how we roll.

[GET A FREE TRIAL](#)



STEP 9: SEAL THE DEAL

At this point, you should ask your sales rep for a definitive quote based on your use case. You can add this to your business case and submit all of it to management.

» TIPS FOR WORKING OUT THE FINAL DETAILS

- 1. Consider an annual contract.** This is a larger financial commitment, which can feel scary (particularly to finance!). The reality, however, is that marketing automation doesn't happen overnight. You need an ongoing commitment from management in order to get longer term results. An annual contract, as opposed to a monthly one, gets you the security you need to make this happen.
- 2. Check the fine print.** Once again, make sure there's no surprises on that proposal. Additions, database overages, support fees, and other hidden costs - this is where they show up, as sales rep don't always like to mention these. Also take care to look at the terms for ending the contract, training & support and basically all the things "when things go wrong."
- 3. See if there's wiggle room.** Especially if your company is larger, vendors will be eager to get you on board. If you're not up for negotiating, get someone who is involved! It could save you a lot of money.

STEP: 10 GET OFF TO A FLYING START

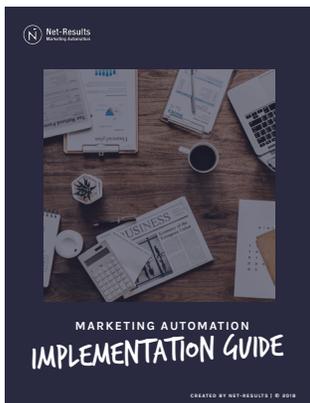
So, how do you use marketing automation in conjunction with the customer's journey? **As prospects and customers interact with your content, you can use marketing automation to help them take the next step.** Based on the things they've read, seen or otherwise interacted with, the software can determine the next step. Whether that's an email, SMS or even a piece of print.



HERE ARE SOME TIPS FOR MAKING BOTH OF THOSE THINGS HAPPEN

- 1. Fix marketing bottlenecks.** Your marketing funnel most likely has bottlenecks. Being able to fix something that was really bugging people (whether that's in marketing, sales or IT) will build trust of the purchase throughout the entire business. Before you dive into the deep end of marketing automation, try and get a few wins in!
- 2. Determine your customer journey.** Deciding which content to send to whom and when to send it is crucial to successful marketing automation. That's why it's invaluable to determine what the phases of your customer's journey with your business (including the part after the sale!) look like.
- 3. Take care of Sales.** Ultimately, your job as a marketer is to get quality leads to Sales. Most marketing automation tools have a myriad of ways to do this. Remember the processes we talked about in step 3? Make sure you get Sales what they need to be successful, too.
- 4. Set up lead scoring.** Lead scoring is crucial to generating quality leads automatically. You're not going to be checking all of those leads manually, are you?

WE COULD TALK A LOT MORE ABOUT THESE THINGS... AND IN FACT, WE HAVE!



In our Marketing Automation Implementation Guide you'll find the exact worksheets, exercises and questions that we use for our own customers. We'll walk you through all four of the abovementioned topics that are crucial to your marketing automation implementation.

All free! Get it right here.



DOWNLOAD THE
IMPLEMENTATION GUIDE

or schedule a free Net-Results demo!

SCHEDULE A DEMO