

3 Important considerations before you buy marketing automation software

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About the Author: Marie is a marketing executive and founder of Marketing CoPilot, an award-winning digital marketing agency that has helped hundreds of companies in the tech and manufacturing sectors turn their websites into lead generation and sales machines. Marie focuses today on the digital transformation of the sales and marketing function. She is a frequent speaker on this topic and will lead a panel discussion at the CRMUG Summit 2019 on the topic, *Which Marketing Automation Tool is right for you?*

People don't plan to fail – they just fail to plan.

This statement is so true when it comes to purchasing software for a business. What SaaS companies (software as a service) have duped us all into believing is that by removing the barriers to purchasing software (online sign up, free trial, no on-premise set up, pay as you go, etc.) is that you can have any software you want today and be up and running tomorrow.

WRONG! The act of choosing and purchasing the software is the easy part. The act of identifying people, process and adoption is the part that sinks most software purchases. The tough part that takes the most time and patience is changing business processes, identifying who will use the software and how the software will change the business.

Whether your organization has already implemented or is on the verge of implementing marketing automation (MA), you have high hopes that your MA will be successful. Many marketing automation investments fail primarily because there is no inbound lead strategy. Your definition of success likely centers around the ability of your marketing automation tool to help nurture and generate more leads and increase sales magically when you send emails but so much more needs to be happening for this to be successful.

What is the purpose of marketing automation?

Marketing Automation (MA) software is designed to add a layer of automation to your lead generation, lead nurturing and site behavior analysis activities. It is designed to save your marketing and sales team time, minimize the chances of leads falling through the cracks, automate lead nurturing processes and increase your lead conversion rate. This is of course, the Wikipedia answer to “why marketing automation software,” but in fairness, the same could be said for a CRM system.

What is the real value of marketing automation software?

Quite simply, it's twofold:

1. It's to meet Chris. Chris is the person visiting your website right now. She/he is the person who is looking for a solution like yours and she/he wants to understand what your company offers and why she/he should do business with you. HubSpot calls it the contact record. I call it the first step in getting to know a prospective customer and it's something that the CRM or other tools in your business just can't provide.
2. Analytics. You can have all your data in one place to track the performance of your marketing funnel and prove to your management team that your salary is money well spent.

Instead of having to manually sort through reams of data and/or monitor emails, analyze and qualify leads, and notify the appropriate sales and/or marketing people to perform lead nurturing or conversion tasks, MA software can automate all of these steps.

3 Important steps to consider *before* you purchase marketing automation software

1. Create your execution plan first

In the case of marketing automation software, you need to consider whether your inbound lead strategy involves a few or a multitude of sales and marketing tactics/channels. Your content marketing strategy (value proposition, buyer personas, buyer map, keyword strategy) should determine which channels your leads are on and the content they are looking for within each of these channels.

Do you know where your leads are sourcing information and what kind of information, they are looking for at each stage of the buying process? This is what should make up your content strategy and this should be decided before you purchase software. Knowing what your goals are with your program and what you want to accomplish just gets harder after the software is purchased. Build the plan first so you aren't disappointed with the results after the software is installed.

2. Decide who is going to be using it

This year I have already spoken with five companies that are going to consider changing their marketing automation software. The primary reason is that they either don't have the right in-house or external resources to run the system. Too many companies I speak with made decisions based on cost, technology direction or a previous regime who liked the idea of the software but didn't stick around to get results. Before you make any decision, decide who owns the management of the software and what this means to short term execution and long-term strategic direction. For example:

- Does the team owning it and running need technology or development support or is the expectation that they can set it up and run it on their own?
- Does it need to integrate from a data perspective to other systems and if so who owns this process?
- Who is going to access it on a **DAILY** basis – yes it should be used daily and are the power users able to integrate the software into their daily activities? If you agree with things like the contact record above, then you need to ensure that users can do what they need to do.

3. Create your analytics report for Management *before* you purchase the software

So, what does this mean? Too many times we wait to see what the software is going to provide in terms of reporting. We look to the software to decide what our goals should be and how we run reports, but this is a broken way to look at it. What we should do is a whiteboard session with management and ask them about the business goals for the year and how we are going to track those goals as a company. Here's an example that applies to marketing automation:

- We need 10 new deals and 10 deals from existing clients to make our numbers for 2019
- We need 80 sales conversations that get to proposal stage to close 20 deals
- We need 400 online conversations happening with people who match our buyer persona and in various stages of buyer understanding to achieve 80 sales conversations
- We currently have a list of 4,000 engaged people that will drive these 400 conversations
- We need 5,000 new visits a month to various places in our web presence to maintain an active list of 4,000

Get the team in your session to agree on the actual numbers and then reverse engineer a monthly report to show how you are going to track information to reach these goals. Do this before you look at software. This will allow you to focus on what you need. Make the goal suit the system.

Just like all your sales and marketing assets, you must analyze how well your Marketing Automation is performing on a regular basis and continue to evolve the workflows and content being utilized. Then determine why certain pieces of content are performing significantly better than others. Is it the subject matter, tone, layout, text formatting (long paragraphs vs. bullet points), format (blog post vs case study or whitepaper), type of image, use of video or a combination of two or more of these variations?

Software can track and measure all of this. If you stick to these three criteria you can't go wrong. You will purchase the right product, for the right plan and right people at the right time in your business.

If this makes sure, make sure to come to Orlando in October and listen to our panel discussion ***Which Marketing Automation Tool is right for you?***

Currently within the Dynamics 365 environment there are several types of products a company can choose to use as a marketing automation platform. With the recent introduction of Dynamics 365 for Marketing join us for a lively panel discussion on which product works best in which situation whether it's Dynamics Marketing, ClickDimensions, Hubspot or other marketing automation platforms that can be used. I will be the panel host and our panelists include: Rick McCutcheon from Full Contact Selling, Felix Robataille from XRMVision, and Thomas Manders from Coffee + Dunn.