[](http://www.pedowitzgroup.com/)

Marketing Automation Platform Selection  
and Use Case

Company Name

Date

* Use Case #1: Marketing Enablement

1. The goal of this use case is to show how marketers will use the system on a daily basis to design and execute campaigns and programs that will deliver effective communications, increase efficiency, and provide actionable metrics.
2. **Build a batch campaign.** 
   1. Upload a list (from a spreadsheet) to be used in a batch campaign.
   2. Create an email, landing page and form in multiple languages – English, Japanese, and German.
      1. Talk to general multi-lingual support.
      2. Show how each element (email, landing page, form) can be created within the MA tool.
      3. Demonstrate how images can be uploaded for use in this campaign and reused in future campaigns.
         1. Can the MA tool link to [Company Name]’s existing asset management repository?
      4. Show how trackable links can be added to the email and landing page.
         1. Demonstrate how external links can be embedded and tracked.
      5. As an alternative, show how the landing page can be created by using “copy and paste” from existing HTML source code (i.e., designed outside of the MA tool). Show how CSS, HTML, and JavaScript can all be used in this manner.
   3. Add the campaign to a centralized campaign calendar.
      1. [Company Name] currently uses a centralized campaign calendar on SharePoint, can this be integrated? If so, what is the effort required?
   4. Create dynamic content on both the email and landing page using content substitution rules.
   5. Show progressive profiling on web forms.
   6. Perform an A/B split test on the email subject line using 10% of the list. Then apply the winning results to the remaining 90% of the list.
   7. Perform an A/B split test on the landing page for two weeks. After the two week testing window, show preference for the winning result in future page views.
   8. Show how to validate the campaign before launching.
      1. Include a preview of the audience (who qualifies for the campaign, who is suppressed from the campaign)
      2. Show how campaign suppressions can be verified at this stage (unsubscribes, preference center rules, blacklists, etc.)
      3. Show how to test emails for compatibility with common email clients and with mobile devices.
      4. Show how to test emails for deliverability (SPAM filter testing).
   9. Report on campaign performance (deliverability, open rates, click rates, conversion rates, opt outs, hard bounces, soft bounces, etc.).
   10. Report on and compare lead status before vs after the campaign.
3. **Build a lead nurturing campaign.**
   1. Add leads to a nurturing campaign if they click on an email and visit a related section of the website within a one week timeframe (e.g., clicked on an email targeted towards healthcare, and then visited the healthcare industry section of the website).
      1. Describe the MA tool’s general ability to trigger campaigns based on online behavior.
   2. Exclude any leads who are currently attached to an open/active Opportunity in CRM.
   3. Send an email from the leads’ assigned sales rep with a short form to register for an upcoming event.
   4. Show how the reply to, from, and email signature can be customized with sales rep information.
   5. After one week, send another follow up email. Send one version to leads who clicked through on the first email, send a different version to leads who did not.
      1. Describe the kinds of time-based triggers that are supported by the MA tool (e.g., relative time vs absolute time).
   6. Show how a perpetual, ongoing campaign is supported.
   7. Show how to validate the campaign works the way we intend before launching, including time-based elements.
   8. Demonstrate how additional channels can be integrated into a nurturing campaign (e.g., telephone, direct mail, social media, etc.).
   9. Show how this campaign and any related assets can be cloned, modified, and launched as a new campaign.
   10. Demonstrate how to properly turn off this campaign, should the program owner decide that it is no longer desired.
4. **Segmentation - Create multiple segments/lists based upon the following attributes:**
   1. Demographic & firmographic data, including but not limited to:
      1. Geography
      2. Business Unit
      3. Industry
      4. Lead type (e.g., Customers vs. Partners)
      5. Custom CRM Fields
      6. Data pulled from [Company Name]’s segmentation data mart
      7. Account criteria (e.g., account revenue, target account status)
   2. Behavioral data, including but not limited to:
      1. Email Activity (email delivered, email response)
      2. Website Activity (key page views, sections of website visited, etc.)
         1. Both tracked natively within the MAP system and by BI tool
      3. Form Activity (submission, abandonment)
      4. Sales activity/history pulled from CRM
      5. Previous sales volume (e.g., all accounts who spent >$5M within the past 6 months)
      6. Margin (e.g., accounts with an average margin > 20% over the last year)
   3. Create a list based on hierarchical segmentation (e.g., build a list that meets account criteria, and then select the “best” two contacts at each account).
   4. Demonstrate the segmentation capabilities of your system.
      1. Show the system’s ability to support complex data segmentation models that work with data that exist in a one-to-many relationship between the account and the data to be segmented.
      2. Assume that various forms of account-related data (revenue, margin, and units split across time) will be used in conjunction with various marketing models (e.g., heat map, rad, buy power), and split out by multiple dimensions (time, geography, line of business, etc.).
5. **Create and manage multiple campaigns as part of a program.** 
   1. Demonstrate how to combine multiple assets into one or more campaigns as part of a program (i.e., parent-child campaign hierarchy).
   2. Aggregate and report on the campaign performance at multiple hierarchical levels.
   3. Aggregate and report on the campaign performance by verticals (business units).
   4. Demonstrate cross-campaign analysis and campaign ROI. Include reporting for campaigns which are part of different parent programs.
   5. Show sales rep follow-up by parent and child campaigns.
6. **Create a lead scoring program.** 
   1. Show how to create a lead-scoring program based on demographic, firmographic, and behavioral information.
   2. Show how accounts can be scored (separately from individual leads), to help prioritize target account lists, using similar criteria as lead scoring (i.e., firmographic, behavioral).
   3. Incorporate campaign response and social media activity into the lead score.
   4. Demonstrate incremental and negative scoring.
   5. Show how the lead score will be displayed to a sales rep using CRM.
   6. Show how leads scoring programs can be set by Business Unit, assuming that each lead and account is limited to one lead scoring program. Also show how leads and accounts could run through multiple, separate lead scoring programs.
7. **Show the analytics capabilities of your MAP.** 
   1. Show the built-in reports and dashboards.
   2. Demonstrate how to create a custom report and export it in Excel format.
   3. Run a campaign ROI report.
   4. Run a report on the results of a multi-touch, multi-channel campaign.
   5. Create a dashboard that shows conversion rates along the leads to opportunities funnel (i.e., waterfall model), from suspect to MQL all the way through opportunity and close.
   6. Run a report showing which marketing activities influence leads at various stages throughout the buying cycle.
   7. Show how prospect behavior can be tracked over time, to develop a predictive buying model.
   8. Create a report to show the original lead source for closed-won opportunities.
   9. Show a report that displays social media activity.
   10. Create a report that is scheduled to run every Monday morning and is sent via email to a distribution list (including to non-MA tool users).
       1. Can these reports be viewed on a mobile device?
   11. Can report, dashboard, and custom report creation be limited by user role?

1. **Show how offline activities are can be included in campaigns.**
   1. Demonstrate how offline activities such as sales phone calls, direct mail, and in-person event attendance would be tracked for each lead.
   2. Show how this data can be used for segmentation and reporting purposes.
   3. Show how offline activities, such as phone calls and direct mail, can be included as campaign elements. For example:
      1. Wait five days after email click through, and then follow up with direct mail piece.
      2. If lead fills out form, create a follow up task in CRM for sales

* Use Case #2: Sales Enablement

1. The goal of this use case is to show how a salesperson will use MAP on a daily basis to more effectively prospect and engage in activities that lead to higher conversion rates.
2. **Demonstrate the sales user’s view into the data captured and reflected by the MAP (i.e., someone who is not logging in to the MAP system).** 
   1. Demonstrate how sales users view (in CRM) any contact activity recorded by the MAP (e.g., campaign responses, emails received, web activity, etc.).
      1. Show how sales reps can “hide” all or some of the MA data in CRM.
      2. Do MA users have the ability to see if the sales team is using/viewing this data in CRM?
   2. Demonstrate how a sales user would add a lead to a specific nurturing campaign that is run via the MAP. Show how they would remove a lead from a campaign.
   3. Show how the sales team would have visibility into the centralized marketing campaign calendar.
3. **Show how new leads generated in the MAP would be routed to the appropriate sales rep through CRM.**
   1. How quickly do leads appear in the sales queue?
   2. How are reps alerted about new leads?
   3. Show how to send the form submissions to CRM.
      1. How long does it take for form data to appear in CRM?
4. **Email Integration.** 
   1. Show how a salesperson can send a single trackable email out of CRM and/or email client. Show how this will check against suppression/subscription rules.
   2. Demonstrate how a sales user can edit a pre-existing email template supplied by marketing and send to a list through CRM.
   3. Show daily reports a salesperson can receive outlining the results of their individual email programs. Show how marketing can run reports on the emails that their sales team is using.
5. **Sales Notifications**
   1. Show how sales reps can receive notifications when:
      1. A target account shows recent activity
      2. A new lead is assigned
      3. A lead hits a pre-defined scoring threshold
      4. A lead completes certain key activities (e.g., fills out a “contact me” form)
   2. Demonstrate how sales users can customize the types of notifications they receive from the MAP system.
   3. Demonstrate how a new lead can be kept "warm" through an automated follow-up email if the assigned sales rep doesn't engage the lead within a pre-defined time.

* Use Case #3: Data and Subscription Management

1. The goal of this use case is to show how data will be managed within the MAP, and how preference management can be used to drive higher conversion rates.
2. Show how subscription management would be handled within the MAP tool, incorporating data from [Company Name]’s subscription center (housed in the datamart).
   1. Show how mailing rules used by the MAP system will integrate with the [Company Name] subscription center (opt outs, poison list, subscription preferences). How quickly will the subscription rules take effect once synchronized with the MA tool (i.e., if a campaign is in progress when the synch happens, will leads be removed from the campaign)?
   2. Show how unsubscribe language can be customized to be [Company Name]-specific, and point to the [Company Name] subscription center.
3. How can rules be set around email frequency and recency (e.g., do not send more than one email per day and do not send more than three emails per week)?
   1. Show how a mailing can be set to override frequency rules (i.e., important customer communication that should be sent regardless of frequency/recency conflicts). Show how opt out rules can be overridden in special circumstances. Can this ability be restricted to certain user roles and permissions?
   2. How can we set priorities between emails and campaigns?
   3. How do we restrict an individual from running through the same campaign twice?
4. Demonstrate how to set rules for times/days of week to send emails. Show how geographical location can be taken into account when determining business hours.
5. Show how to exclude all leads and/or accounts with an active Opportunity in CRM from receiving email communications.
6. How are new leads deduped against the existing database?
   1. Can existing duplicates be identified and merged?

* Use Case #4: Technology and Infrastructure

1. The goal of this use case is to show how the MAP will support [Company Name]’s unique technology requirements.
2. **General Application**
   1. Hosting Security
      1. What level of security does the hosting infrastructure provide?
      2. What other security audits are conducted and how frequently?
      3. What pen tests are conducted and how frequently?
   2. Custom fields for leads and other objects
      1. What are the limitations on field types and lengths?
      2. Are there size limits for data being pushed through the API?
      3. Are custom fields available for reporting?
      4. What is the process for adding custom fields? Can the customer perform this themselves?
   3. Custom objects
      1. Are custom data objects, including custom tables, available? Can they be linked to lead records?
      2. Can data in custom objects be used for marketing segmentation and marketing campaigns?
   4. In general, how customizable is the application? Describe the kinds of customizations that can be made to meet [Company Name] requirements, if not currently on the roadmap.
      1. Who implements these types of customizations (i.e., [Company Name] or the MA vendor)?
   5. Data availability
      1. For how long is data stored in the MAP system?
      2. Describe how data can be archived.
      3. Describe how data can be used in another MAP system (i.e., if [Company Name] switched vendors in the future).
3. **Data Model**
   1. Please describe your data structure. What are the entities/objects? Maximum number of fields/types? Unique identifiers?
   2. Please provide an entity-relationship diagram that describes how the various entities/objects tie together.
4. **Technology Integrations**
   1. Describe the initial integration between the corporate website and the MAP system.
      1. What effect does the integration have on page load speeds?
      2. How would the MAP system integrate with additional [Company Name] web properties?
   2. Describe the out-of-the-box integrations that are available.
   3. Describe how the MAP integrates with CRM.
   4. What data integrations are considered real-time? What integrations are not considered real-time and what is the timing associated with each?
   5. Can the integration support large-text (32k characters) fields?
   6. Do you offer an API that can be used for custom integrations?
      1. If so, what technology (e.g., SOAP, REST)?
      2. How is it secured?
      3. Are there limits/overages to the data that can be passed via the API?
      4. Can access be customized to support read-only to full CRUD privileges?
      5. Can multiple role-based privileges be created and managed?
   7. Can your system initiate integration calls to other systems as well as receive integration calls?
   8. Are standard integrations available through third-party services such as Cast Iron, Boomi or Pervasive?
   9. What integrations are available with databases such as Oracle and Microsoft SQL Server?
   10. Describe how the application integrates with Omniture.
       1. What kind of raw data would the tool typically pull from Omniture?
       2. How can aggregated Omniture data (from the data warehouse) be used for segmenting lists, triggering campaigns, and overall reporting?
       3. Will the MA website tracking script interfere with the Omniture tracking script?
   11. Does the application integrate with third-party landing page tools (e.g., LiveBall)?
   12. How would the MA tool interact with third-party lead generation programs (e.g., TechTarget)?
   13. Demonstrate how is data imported and exported out of the system.
       1. What data can/cannot be imported/exported?
       2. What file formats are supported?
       3. Can data exports be scheduled and run automatically?
   14. Describe how to migrate existing data from our previous MAP system(s).
   15. How will the system integrate with [Company Name]’s existing data cleansing application?
       1. Currently using <data cleansing platform> for cleansing, and Initiate for mapping and deduping. Describe how the MAP system would integrate with these systems.
   16. How would the system integrate with [Company Name]’s single sign on capabilities (<SSO platform>)?
   17. How would the system integrate with CRM’s single sign on capabilities so that a user logged into CRM can access the MAP system without logging in again?
   18. How would data collected from a predictive analytics tool be incorporated to help trigger campaigns in the MAP?
5. **Client Configuration Management**
   1. Do you offer a development (sandbox), training, and/or quality assurance (QA) environments in addition to the production environment?
   2. How is the configuration moved (promoted) from one environment to the other? Is a workflow available?
   3. Are environment versions archived? If so, can an environment be rolled back to a previous version?
   4. Can an environment version be exported to and imported from remote archives?
   5. Describe the audit trails available for changes and actions within the system.
      1. Are configuration changes auditable at the field level?
      2. Are configuration changes auditable at the record or object level?
   6. Can configuration changes be rolled back to a previous version?
   7. How is source control handled?
   8. What skillsets are required to perform client customizations, (i.e., JavaScript, HTML, proprietary language)?
6. **Ongoing Maintenance/Support.**
   1. What is the typical release cycle?
   2. Describe how upgrades are implemented.
   3. What is the support mechanism for custom changes?
   4. What is your SLA around uptime?
   5. Describe available support options (availability and SLA for each).
      1. Is contextual support available within the application itself?
      2. What live phone support is available?
      3. What email support is available?
      4. Is support available through a community portal?
      5. Is support 24/7? If not, what are the support team hours?
   6. Describe how issues can be reported to your support organization.
      1. How can [Company Name] track the status of issues that have been reported?
   7. How is ongoing Account Management handled?
7. **Scalability, Performance and Deliverability.**
   1. Demonstrate your ability to support high-volume clients (500 global marketing users, 15-20K sales users).
   2. Demonstrate your ability to support a large contact database (15-20 million contacts, 4 million accounts). What is the largest contact database that your tool currently supports?
   3. Do you offer a dedicated IP address for email servers?
   4. Do you offer multiple dedicated IP addresses for email servers? Can each IP be dedicated to a specified type of mailing? (i.e., customer mailings vs. prospect mailings)
   5. Show us the live application, demonstrating the speed and performance of the following items (ideally this should be shown throughout the demo):
      1. UI of the tool
      2. Batch campaigns
      3. Landing page with multiple elements and graphics
      4. Segmenting a large list with multiple criteria
   6. Demonstrate your ability to support high-volume web traffic (i.e., landing page availability and speed).
8. **System Administration**
   1. How does the user access the application?
      1. If browser-based, which platforms and versions do you support?
      2. Can access be restricted by IP address?
      3. Can user access be audited (i.e., are user logins and IP addresses tracked)?
      4. Is the password policy configurable?
   2. Show what user roles are available and how system usage can be restricted by role. Is a super user role available? Are roles customizable?
   3. Does the application have built-in user provisioning/deprovisioning? Does it integrate with CRM or any HR applications?
   4. Please show how a super-user interacts with the application across the following areas:
      1. Email creation
      2. Build/configure new campaign logic
      3. Real-time activity based decision logic and program routing.
      4. Build Landing pages/Forms
   5. What are the skills required to utilize the configuration tools?
   6. What languages are available for the User Interface (i.e., localization of the application)?
9. **Error Handling**
   1. How are errors identified and classified as they are encountered?
   2. Can errors be distinguished between levels (e.g., Warning versus Failure/Error)?
   3. Can first points of contact be designated for each error source? Is the designation global?
   4. Can multiple contacts be designated as first points of contact?
   5. How are notifications sent (e.g., email, SMS, phone call)?
   6. Which processes can be monitored at key integration points and notifications be sent on error conditions?
   7. Can data processing that resulted in errors be corrected and run again?
   8. Are reports/dashboards available regarding errors?
   9. Is there a status dashboard that displays the overall health of the system?
   10. Are RSS feeds available for monitoring system health and/or errors?
   11. Describe error handling related to a live campaign. (e.g., what happens if a landing page is down?)
10. **Implementation Best Practices**
    1. Given what you know so far, please describe your recommendations for implementation.
       1. Recommended staffing and resource skillsets
       2. Initial thoughts on timelines
       3. Various roles of the customer in implementation activities
       4. Migrating from a previous MAP system
       5. Initial thoughts on testing timeline & scenarios
       6. Recommended approach for testing data feeds & exports
       7. Do you support a phased approach to launching the application?
       8. What non-[Company Name] resources are recommended for implementation and deployment?

* Use Case #5: Best Practices and Thought Leadership

1. The goal of this Use Case is to demonstrate how your company teaches and reinforces best practices and highlight your position as an industry thought leader.
2. **Training** – demonstrate available offerings, both online and offline. Specify which offerings require an incremental cost.
3. **User Groups** – show schedule of user groups and availability by geography.
4. Documentation – demonstrate available documentation on best practices, application knowledge; what can be downloaded for offline reference (PDF).
5. **Community Portal** – demonstrate any type of community or social media site that allows sharing of content and ideas.
   1. What information is open to the public vs. what is restricted to customers only.
   2. Is there an SLA for questions submitted to the community portal?
6. **Thought Leadership** – provide examples of your thought leadership as it relates to demand generation and MAP. Please include thoughts around:
   1. Social Media and Mobile
   2. Analytics and Reporting
   3. Dashboards and Visual Data Representation
   4. Product Roadmap

* Use Case #6: Customer Examples

1. The goal of this Use Case is to showcase your company in the best light possible. Show us your best stuff and some of the creative ways your customers have used your application to achieve outstanding results. Inspire us!