



The Marketing Automation Platform Buyer's Guide

Top 7 Things to Look for in a
Marketing Automation Platform





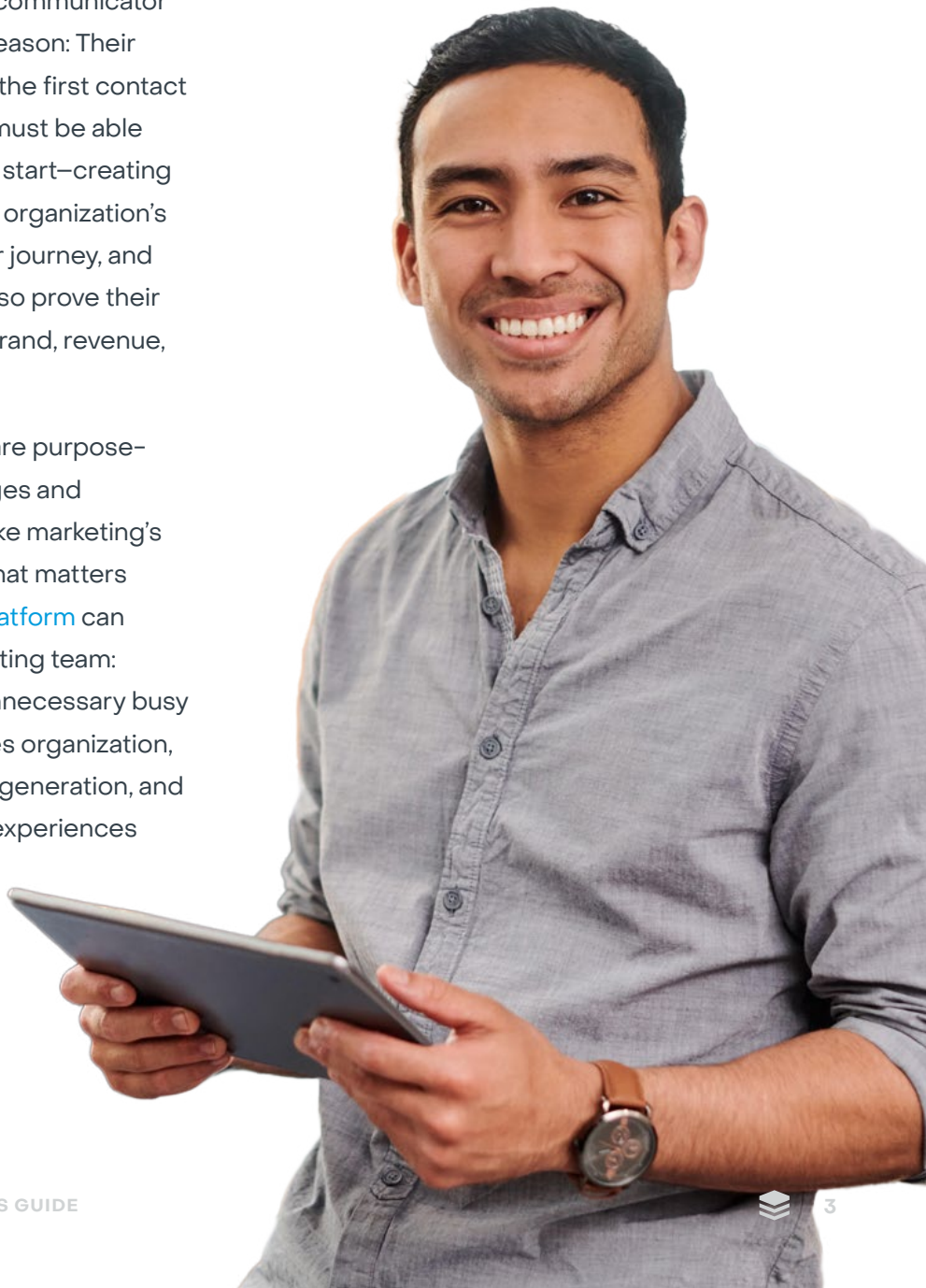
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Taking Your First Step—Recognizing the Need for a Marketing Automation Platform

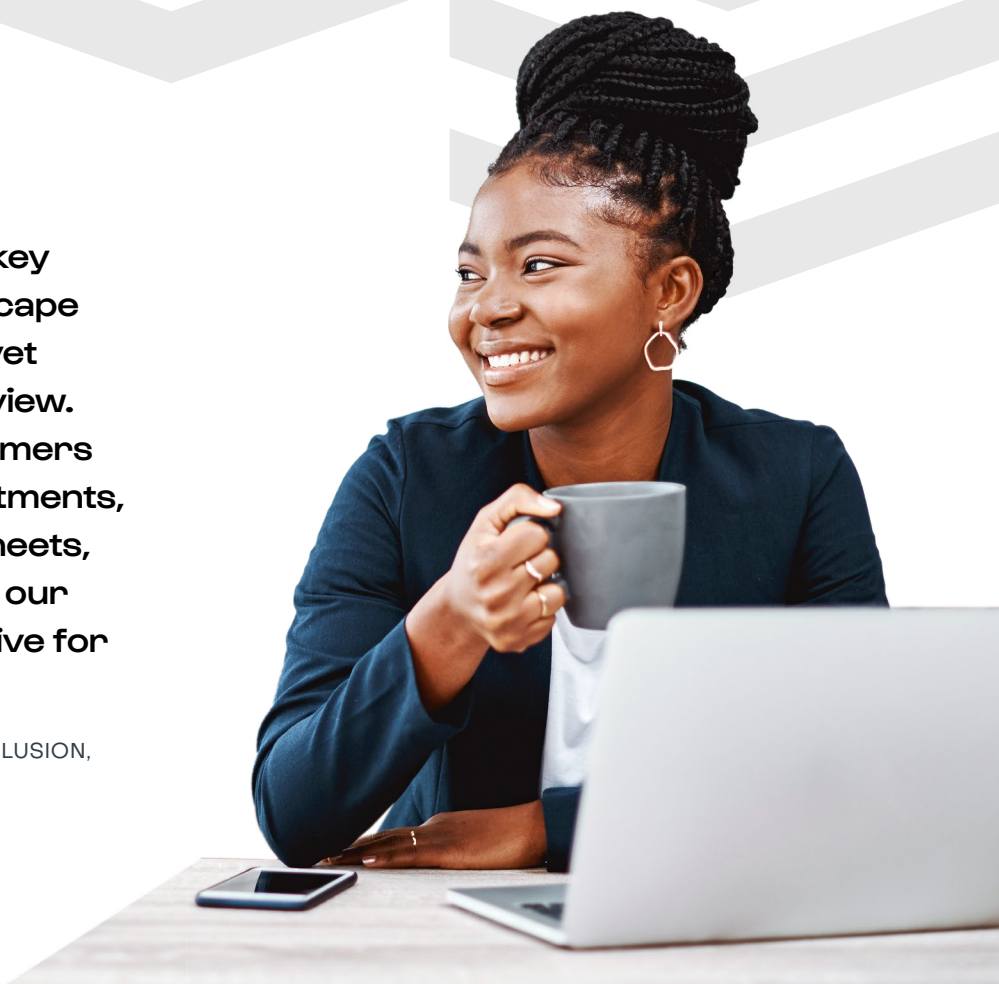
Marketing is often known as the corporate communicator for the greater organization, and for good reason: Their emails, campaigns, and content are usually the first contact with customers and prospects. Marketers must be able to put their best foot forward from the very start—creating relevant messages to personas within their 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 are 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.




“We understood that building a deeper understanding of customers was going to be key to embracing the new landscape we found ourselves in, and yet we had no single customer view. Information about our customers was spread between departments, systems and excel spreadsheets, so achieving a single view of our customers was a key objective for us.”

—KRIS S., DIRECTOR COMMUNITY CARE & INCLUSION,
WESLEY MISSION QUEENSLAND



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.
- Your email marketing efforts are not delivering desired results due to limitations in personalization, segmentation, or engagement tracking.
- You find yourself investing more time in campaign setup than strategic planning. Thus, innovative ideas are occasionally disregarded due to technological limitations.
- You're having trouble segmenting your audience and delivering valuable content to the right people at the right time.
- You cannot personalize campaigns at scale and have minimal or no AI insight.
- You don't have an established plan for building long-term relationships or the ability to maintain engagement throughout the customer lifecycle.
- You currently lack the ability to significantly impact revenue, and your efforts remain challenging to measure or quantify effectively.
- You're unsure if your marketing efforts adhere to data privacy and regulatory requirements.



7 Key Questions to Ask During Your Marketing Automation Platform Selection Process



Can You Get Everyone on the Same Data Platform?

Siloed operations are perhaps the most debilitating challenge for organizations, whether within marketing 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

Automated and predictive lead scoring, sharing key insights in near real-time, and AI-powered insights to help improve lead quality.



NO BLIND SPOTS

Better alignment of data, metrics, and KPIs across the organization, as well as agreed-upon definitions of what good leads are and when handoffs should happen. You should be able to pull from any data set, including marketing campaigns, forms, and lead scores, to reflect the metrics that matter most.



NO ROADBLOCKS

When everyone has a complete view of every customer, they get a shared understanding of customer expectations and can deliver on the promise of a high-definition customer experience.

“Connecting our marketing data to our (CRM) platform was key for us to be effective and allows for easy targeting based on our full set of CRM data.”

—CHRIS B., DIRECTOR OF MARKETING,
EMA

Is It Easily Configurable and Accessible?

No one wants to put a lot of time into tailoring a mission-critical solution to meet their organization's unique needs. Unfortunately, it's their way or the highway with many MAP vendors. They have rigid configurations that force you to fit your workflows into their framework or are 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 needing a team of consultants or additional training.



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

“Sugar Market’s services give us a team to consolidate, store, and streamline our data, hold our reps accountable for their qualified leads, and create a defined cadence for the sales process. Sugar Market’s services program gives us a team of experts to drive our campaigns with minimal effort on our part, increase our brand recognition, open up doors, and create new opportunities.”

—SCOTT C., CHIEF EXECUTIVE OFFICER, CATARACT STEEL

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 design, development, or IT groups. Creating content and campaign deliverables should be an easy process and a do-it-yourself activity whether it's emails, conversion forms, surveys, webinars, or event pages.

Always be sure the tools you use have templates 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 processes.

“Email personalization has bolstered the effectiveness of our marketing outreach. Sending personalized emails through Sugar Market generated a quote request for a \$30,000 project on day one. Results like that confirm we’ve made the right choice.”

—BARRY M., MARKETING MANAGER, [STRONGWELL](#)

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

Marketing is often not fully connected to the revenue-won engine, meaning sales usually get all the credit. Today's marketers must go beyond building a brand and generating leads to proving their marketing investment to revenue and contributing their efforts to customer retention.

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, and much more!

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 way.

“Our previous solution was solely email marketing focused and we wanted to move beyond that to encompass the full customer journey which Sugar Market helps us do through its capabilities and CRM integration.”

—CHRIS B., DIRECTOR OF MARKETING,
[EMA DESIGN AUTOMATION](#)

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.

“We are looking into using it for touch point marketing and potentially lead scoring. In between receiving a lead and booking the move we’re looking to do more outreach to our customers using Sugar to send them marketing emails.”

—ELIZABETH D., MARKETING AND BUSINESS SYSTEMS ANALYST, [CLANCY RELOCATION & LOGISTICS](#)

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, paid search, and social marketing help 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 and 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 Generative AI?

Generative AI can act as a digital assistant, freeing up time and resources, enabling employees to focus on higher-value activities. According to a [recent report by McKinsey Digital](#), about 52 percent of the value that generative AI could deliver applies to customer operations, marketing, and sales. The researchers indicate that generative AI has the potential to revolutionize the way organizations use and interact with their CRM by automating work activities that absorb 60 to 70 percent of employees' time today.

Generative AI for Marketing takes marketing automation and personalization to the next level, maximizing impact through creation of ultra-relevant, personalized marketing campaigns, landing pages and emails, automatic translation, and smarter segmentation.

[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.

Generative AI helps you accelerate key Marketing processes, including:



Enhanced Personalization

Utilize Generative AI for impactful campaigns, blogs, and emails that connect with customers effortlessly.



Automatic Translation

Quickly generate new content in multiple languages and translate existing text using Generative AI.



Smarter Segmentation

Create precise segmentation lists for targeted campaigns, removing friction and boosting engagement.

“The generative AI revolution is here, and midmarket sales, marketers and customer service pros can’t afford to be left out of the equation. Since most businesses are looking to AI to transform experiences and drive greater productivity, SugarCRM’s generative AI announcement is the latest evidence of our commitment to make AI accessible to all and to maximize usability for a next-level CRM user experience.”

—CRAIG C., CEO, SUGARCRM



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 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.

"From the very beginning, we wanted our CRM to accompany our growth and be at the heart of our development! Our site is the face that the public sees, but our CRM is the heart of the company around which the whole business revolves."

—DAVID H., CMO & CDO, AGRICONOMIE



Revolutionize Your Marketing Automation Platform

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.

“We chose SugarCRM’s open software because it provides incredible ease of use for staff at every level of our organization, enabling them to engage with customers and stakeholders effectively. SugarCRM offers a flexible, user-centric tool that supports our shift towards a customer centric strategy.”

—KRIS S., DIRECTOR, COMMUNITY CARE & INCLUSION, [WESLEY MISSION QUEENSLAND](#)



Kick-Start Your Marketing Transformation Today

Learn what SugarCRM can unlock within your organization.
A better solution is just a click away.

GET DEMO

About SugarCRM

SugarCRM is a CRM software that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence so they can achieve a real-time, reliable view of each customer. Sugar's platform provides leading technology in the sales automation, marketing automation, and customer service fields with one goal in mind: to make the hard things easier. Thousands of companies in over 120 countries rely on Sugar by letting the platform do the work. Headquartered in the San Francisco Bay Area, Sugar is backed by Accel-KKR.

For more information about SugarCRM, visit www.sugarcrm.com.