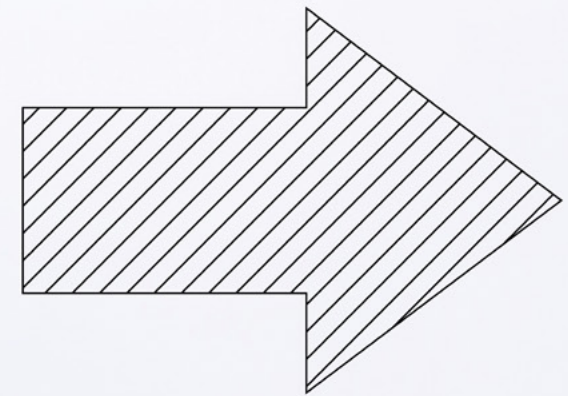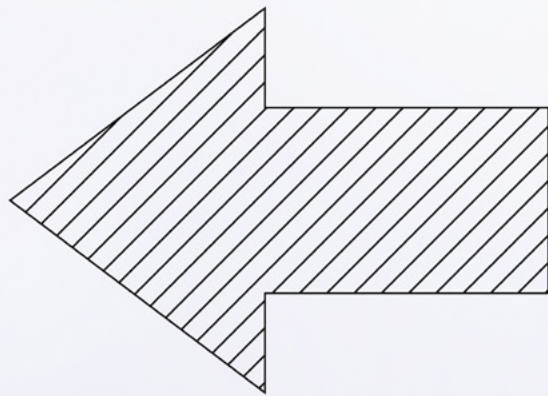# 3 STEPS

To Choosing the Right Marketing Automation Solution for Your Agency

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IN SEARCH OF THE PERFECT SOLUTION

Finding the right marketing automation solution for your agency can be a challenge. A good platform will help your agency be more effective. A great platform (one that meets your specific needs), can do much more – increase efficiency, improve intelligence, expand your reach, enable targeted real-time action, and most of all, create a key competitive advantage for your agency in a crowded marketplace.

If you've realized that you need marketing automation, it's probably because you're dedicated to continuous improvements in your clients' marketing programs. Maybe you've been running standard email programs and your clients are ready for more advanced campaigns. Or perhaps you want to prove the value of your work to your clients, so you need better analysis, as well as reporting that shows the results of your campaigns. Or maybe you're moving to the next level of lead generation, lead nurturing, and lead scoring, and you need a solution that can automate and streamline the process.

Whatever your motivation, it's important to consider your business needs before you begin. Review your processes, and look for the capabilities that will support them today – and to the next level, tomorrow. Evaluating marketing automation systems isn't comparing apples to apples; some provide every feature you'll ever need (and a few you'll never use). Others deliver a more modular approach, letting you add features and services as your needs expand. Some are relatively user-friendly, while others are more complex, requiring considerable resources, training, and time to get up to speed and maintain.

Let's take a look at some of the core competencies, options, and must-haves you'll want to consider if you're seeking a marketing automation solution.

THE TOP 5 BENEFITS FOR AGENCIES IMPLEMENTING MARKETING AUTOMATION

1   Prove the return on investment (ROI) your agency delivers to clients

2   Differentiate your services in a crowded market

3   Shorten the time it takes to create and execute client programs

4   Handle more projects and clients with less staff

5   Become a strategic, tech-focused partner to clients

STEP ONE: IDENTIFY YOUR BUSINESS NEEDS

Before you start looking for a vendor, take the time to evaluate and define your unique needs so that you can look for capabilities that support those needs and associated processes.

Your business needs might focus on specific types of marketing programs that drive revenue or provide desirable data to your clients, such as email nurturing or website visitor tracking. For example, you might need more sophisticated infrastructure, such as a database that makes segmentation easier.

In many cases, marketing automation can replace existing tools (paid and free) that you're already using, such as email marketing, social media management, surveys, etc.

- Take a look at your existing marketing tools and identify which of them could be replaced with a comprehensive marketing automation platform
- Examine your current project list and identify the programs that could benefit from marketing automation
- Figure out your staff resources and budget for implementing marketing automation

Once you've done that, you're ready to begin the selection process.

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My advice to other marketers who are considering marketing automation is to first take time to understand and identify what your needs are, the problems you're trying to solve, and to document those. Get a firm understanding of what you're trying to accomplish. Based on that, I suggest you look for a solution that addresses those needs.

I also strongly suggest reaching out to peers in your industry or in marketing who have implemented these programs. Getting feedback and advice from them as I was going through the process was really helpful for me.

–Brandee Johnson,
Senior Marketing Manager,
LEGO Education North America

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MARKETING AUTOMATION BASICS

Here are marketing automation basics that will support your clients' businesses and grow your own business as well. It's important to choose a solution that can evolve with you as your needs (and your clients' expectations) expand. The marketing automation solution you choose should, at a minimum, support:

- Asset creation, such as email messages, landing pages, and online forms
- The ability to leverage creative assets and templates across accounts
- Easy, minimal-click campaign creation, management, and scheduling
- Website visitor tracking, so you can quickly see where prospects go on the site – and what makes them convert
- Integration with other systems such as CRM, Google AdWords, webinar platforms, and social platforms
- Lead generation, lead scoring, and lead management capabilities
- Automated programs for lead nurturing, trigger email campaigns, and so on
- Scheduling and deployment of multiple campaigns for multiple users
- Campaign tracking, analytics, and reporting that aligns with what's important to you and your clients

Of course, the right marketing automation solution for your agency should also support the programs you plan to implement in the future, which may include the ability to:

- Create and maintain lists dynamically
- Build and deliver personalized emails with dynamic content
- Support prospecting using coordinated messaging and campaigns across multiple social platforms

Plus: No matter how easy a system is, you'll need to learn how to use it. As you get comfortable with basic features, you'll begin to explore advanced options. Make sure the vendor has a "partner" mindset and provides accessible ongoing training and support. Also check on any awards or accolades the vendor has received. These demonstrate market awareness, competency, and industry leadership.
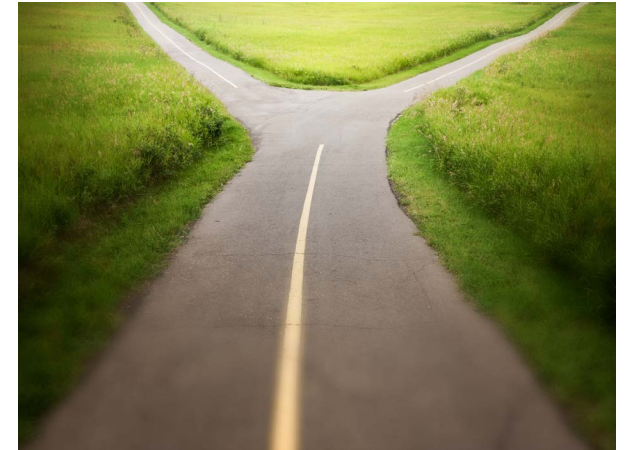
Check out the
Buyer's Checklist for Marketing Automation
to get tips on evaluating potential vendors and a handy checklist to help you choose the best marketing automation partner for your agency.

STEP 2: PRIORITIZE ADDITIONAL CONSIDERATIONS

It's essential to find a vendor who can also be a strategic partner, working with you to deliver the best possible experience for your clients. Here are just a few areas to think about when searching for a solution.

Cultural Fit: When you partner with clients, cultural fit and company size are important considerations. Are your goals aligned? Will you be a valued customer or an anonymous source of revenue? This is especially important if your agency will present marketing automation to clients as a part of your skillset. If something goes wrong with that vendor, it's your reputation that's on the line with your clients. You also want a vendor that's committed to continual improvement in its features and capabilities. Digital marketing isn't static; you could quickly outgrow a vendor that's not adapting to change rapidly enough.

Pricing and Profitability: Many agencies operate with very tight margins, making pricing and profitability an extremely important consideration. With some marketing automation vendors, your clients are required to buy their own instance before you can manage their system for them. This makes you less essential; your clients could decide to manage the system themselves. A better (and more profitable) model is to sell your campaign management services, while you manage the needs of all your clients together on your own marketing automation platform.

Go for a monthly pricing plan rather than locking into an annual contract. That way, as you gain or lose clients, you can scale your marketing automation solution according to your changing needs.

Agency-Specific User Interface: To really get the information you need – like real-time campaign data, on-demand reports, user-permission settings, and so on – you need to make sure the solution provides a dashboard that's optimized for an agency. That makes day-to-day operations much easier.

The right marketing automation solution should make it possible for agencies to leverage an economy of scale, so the more volume you buy, the more your costs go down. That way, you can make your services more affordable or improve your profit margins (or both).

Look for features such as:

- **Single sign-on.** Access all client accounts from a single log-in, including the ability to create and edit client campaigns immediately.
- **Account manager control.** Assign or remove your account managers from client accounts as needed.
- **Flexible accounts and contacts.** Whether you're onboarding or removing clients, you want the ability to rearrange, reallocate, and modify the number of active contacts in real time. You'll also want to provision agency-specific contacts for business development.
- **Shared marketing content and assets.** Save time, effort, and money by leveraging and sharing assets from past (and successful) campaigns with your client accounts, including templates, imagery, and messaging.

STEP 3: CREATE A CHECKLIST OF MUST-HAVE FEATURES IN A VENDOR

By now, you probably have a short list of vendors for consideration. Your list of essential traits in a business partner might well look something like this:

- Support for helping you win business with sales tools, product demonstrations to prospective clients, and more
- A culture that inspires sharing industry best practices and advice
- Dependable, friendly, responsive, timely, and knowledgeable tech support
- The technical and business expertise to support you as your clients achieve success and their needs grow
- Flexible terms to allow you to manage the ups and downs of your business
- Proactive communication on evolving tools or new features

The total cost of an automated marketing system can't be accurately calculated until enough time has passed so that return on investment can be measured against acquisition and maintenance costs. But there are still many cost-related factors to consider before you buy. For example, you'll want to weigh whether a yearly contract (usually lower cost) or a subscription model (usually more flexible) is right for you. You'll want to calculate the cost of add-on capabilities, administrative costs, support contracts, and the price of consultants and in-house training.

THE BOTTOM LINE

The best choice is usually the platform that fits comfortably inside your organization's culture, helps you fulfill your current objectives while being scalable enough to meet your organization's needs as it grows, and is easy for your team to use. If you've gone through the exercises in this guide, the choice should be getting clearer.

The time you spend up front assessing your business needs and evaluating vendors will return to you a thousand fold in the time you save once you've got the right marketing automation solution for your agency in place.

The best part? You'll be confident in your ability to present unique, differentiated automated marketing to your clients. It's an outcome that will benefit them – and you.

Acclaim for Act-On

See all of Act-On's awards & accolades...

About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

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