



Six Mistakes to Avoid In Selecting a Marketing Automation System

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Marketing automation systems have reached that magical moment when people start to want one without knowing exactly why. That's largely a good thing: most marketing departments can indeed benefit from the broader capabilities, higher productivity, and more precise measurement of marketing automation. But it also means that many buyers are moving toward a purchase decision with little concrete guidance. Here are some errors to avoid along the way.

1. Buying Because Everyone Else Is Buying

As your mother said at some point: You wouldn't jump off a bridge just because everyone else did, so why should you buy a marketing automation system just because they do? (Ok, maybe not those exact words.) But Mom was right. The reason to buy a marketing automation system is because you know you need it. This means you must define how you'll use it, what benefits you'll get, and what financial value those benefits provide. Some possibilities include:

- generate more leads by allocating your budget to more productive programs
- identify the companies of anonymous Web site visitors and reach out to likely contacts
- save Web production costs by creating your own landing pages and surveys
- send better-qualified leads to sales by using nurture campaigns to prebuild relationships and lead scoring to decide who is ready for sales contact

2. Choosing the System with the Most / Best / Coolest Features

We all love bells and whistles and flashing lights. But a feature you don't need is worse than useless because it adds cost and complexity that reduce the value you get from a system. The trick is figuring out which features you do need. That requires understanding how you're going to use the system, which you hopefully figured out as part of your purchase justification (see above). To quote Mom again: I'm not nagging. Some day you'll thank me for this.

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3. Considering Only the Industry Leaders

If there's one thing everyone loves as much as bells and whistles, it's an industry landscape chart with the leaders in the upper right quadrant. It seems so logical to simplify your search by limiting it to a few leaders: after all, they must be the best choices, right?

Not really. There are lots of ways for companies to become leaders. Having the best product is only one of them – and probably not the most common. But even if the industry leaders really do have the “best” product for some mythical average user, they may not have the product that's best for your own, distinctly non-mythical requirements. The good news is that once you've defined those requirements, it's pretty easy to build a checklist and assess a large number of vendors against it. You can do that through a brief, written Request for Proposal; through a quick phone interview and online demo; or by looking up the answers in a report like Raab Associates' *B2B Marketing Automation Vendor Selection Tool* (see www.raabguide.com for details).

4. Saving Time by Skipping Scenarios

Let me make this perfectly clear: there's just one right way to select software, and that's to have vendors walk through scenarios based on how you plan to use it. That is, you need to design some sample campaigns or other processes and watch the vendor execute them. That way you get to see the features you really need and not be distracted by the ones you don't. Building those scenarios is time consuming but remember that you'll run these campaigns anyway once the system is installed. So you're actually doing the same work, only a little bit sooner. This will ultimately speed your implementation as well as helping to ensure you select a system that actually does what you need.

5. Ignoring References

Many buyers don't call vendor references on the theory that they're all hand-picked fans who won't say anything bad under any circumstances. That's probably true unless the vendor's sales team is outstandingly inept. But references tell you what kinds of companies have previously succeeded with the system – so they're important evidence in assessing whether the vendor is a good fit for you. And even happy references can provide concrete information about what worked well and not-so-well, how long it took to implement, what preparations were required, what kinds of surprises they had, and what they'd do differently. This is all helpful both in your general planning and in forming a judgment of whether you're equipped to succeed with their particular vendor.

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6. Spending Too Little

I'm not talking about the price of your system: by all means, find the lowest-cost option that meets your needs and then haggle if you like. But don't save money by not training your staff, prepping your data, designing sound programs, or creating strong content. Those are the investments that really determine whether you get value from your marketing automation system. If you skimp on them, your project will fail regardless of how much or how little you spent on the software itself.

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