

Raab Guide to Demand Generation Systems

Vendor Comparison: Usability and Special Features



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Overview

This report presents usability ratings and selected product features for vendors listed in the *Raab Guide to Demand Generation Systems*. It is intended to help buyers identify the products most likely to meet their needs, so they can examine these products in depth. The final choice will be based on many factors not covered in this study, including other features, technology, pricing and vendor background. Much of this additional information is in the complete Raab Guide, available at www.raabguide.com.

Contents

This report presents two sets of information.

- **Usability Scores** for simple and complex marketing programs. Simple programs are run by small marketing departments and promote to relatively few products and customer segments. Most business-to-business marketing programs are in this category. Complex programs are run by larger departments and target many different products and customers. This report gives separate usability ratings for simple and complex programs because their needs are significantly different and in some cases conflicting.
- **Special Features** selected because they are available in relatively few systems. Marketers who need a particular feature will want to focus on vendors that provide it. But bear in mind that: systems without the listed feature may do something similar in a different way; and you will also need many other features. This means your final selection process must still assess each vendor against a complete list of requirements. To give some sense of how many other items you might consider: this report lists twenty-two special features, compared with over 150 entries in the Raab Guide vendor comparison matrix.

How to Use This Report

One way to approach this report is to review the list of **Special Features** and check off any features you know you'll need. (Resist the temptation to include items that just seem "nice to have".) If you have several features checked off, then concentrate on the vendors who have them and don't worry about the usability scores: a system without the features you need is by definition unusable.

If none of the Special Features seems important, then many vendors can probably fit your requirements. You can now shift your attention to the **Usability Scores**. If you're not certain whether to use the simple or complex scores, review the **Complex Usability Items** in the **Usability Score Details**. Companies where many of those are important have complex programs. Other companies can probably use the scores for simple programs.

Next Steps

Once you have identified a set of vendors to consider, you will need to assess these in depth. *The Raab Guide to Demand Generation Systems* provides advice on how to do this, as well as detailed information about the individual vendors. See www.raabguide.com for more information.

Raab Associates also offers consulting to help with your selection project. Contact us at info@raabassociatesinc.com.

Usability Scores

Usability Score Summary							
	Eloqua	Manticore Technology	Market2 Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B
Simple Programs	8	10	10	10	12	8.5	9
Complex Programs	11	8.5	12	9.5	9.5	12	11

Usability is a combination of ease of use and fitness for purpose. Because marketing programs vary greatly, no single usability score can apply to them all. In addition, there is no agreed-upon way to measure usability, and many common techniques are complex and expensive.

To address these challenges, Raab Associates has selected a set of system features that we feel make demand generation systems easier to learn and use. Some of these apply to all types of marketing programs, some apply largely to simple programs and some apply largely to complex ones. We define a “simple program” as one run by a small marketing department executing a modest number of campaigns with few variations in products, offers or target markets. A “complex program” involves a large department, many campaigns and many variations. We have not quantified these definitions because factors such as industry and marketing sophistication also come into play.

The key to usability for simple marketing programs is setting up individual campaigns with a minimum of effort. Usability for complex marketing programs also requires coordination and reuse of materials across campaigns. Usability is also affected by the difficulty of understanding and controlling the flow of leads between campaigns. The optimum approaches to lead flow are different for simple programs and complex ones.

The **Usability Score Details** tables list the specific features that we believe are suited to each situation. For each feature, a vendor was rated as providing it fully (●, scored as a one), not providing it at all (○, scored as zero), or providing it partially (◐, scored as one-half). There are three detail tables: “shared” features that apply to both simple and complex programs; features that apply only to simple programs, and features that apply only to complex programs. Scores for shared features were added to both the simple-only and complex-only features to get the final simple and complex usability scores. These score components and calculations are shown below. The highest-scoring vendors in each group are highlighted.

Usability Score Components							
	Eloqua	Manticore Technology	Market2 Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B
Simple-Only	2	4	4	6	6	2.5	3.5
Shared	6	6	6	4	6	6	5.5
Simple + Shared	8	10	10	10	12	8.5	9
Complex-Only	5	2.5	6	5.5	3.5	6	5.5
Shared	6	6	6	4	6	6	5.5
Complex + Shared	11	8.5	12	9.5	9.5	12	11

Usability Score Details

Shared Usability Items: These items apply to both simple and complex programs. They relate primarily to creation of marketing assets, such as emails and landing pages, and to execution of lead scoring.

Eloqua	Manticore Technology	Market 2Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B	item
●	●	●	●	●	●	●	Select marketing assets from shared libraries. Users can draw on existing libraries of marketing assets when setting up a campaign, rather than creating them from scratch. These assets can be modified or used as is.
●	●	●	●	●	●	●	Text search for assets. Users can enter a search string, such as a word or phrase, and get a list of all assets having that string in their name. This makes it easier to find specific assets without keeping track of their exact name or which campaigns used them previously. Again, although every system on this list has this capability, systems not listed might not.
●	●	●	○	●	●	●	Share marketing assets across campaigns. The same asset can be used in multiple campaigns without creating a new copy. This saves effort if an asset must be updated.
●	●	●	○	●	●	◐	Live templates for asset frames. Assets are built from templates with common elements such as headers, footers and styles. The bodies of the assets may differ. "Live" means that a change to the template is applied to all assets using that template, even if the assets are already deployed to a campaign. Like shared assets, this saves effort if a common element must be updated. Silverpop gets a half point because it can share templates for Web forms, but not emails.
●	●	●	●	●	●	●	Trigger lead scoring outside a campaign step. The system will update lead scores without users building explicit steps into their campaigns to trigger this update. This simplifies campaign creation and ensures that scores are always current. Most systems update scores automatically after a data change. Some update scores on a regular schedule instead.
●	●	●	●	●	●	●	Central definition of lead scoring rules. Scoring rules are defined in a central location rather than separately for each campaign. This saves effort and ensures consistency.
6	6	6	4	6	6	5.5	Total Score for Shared Items

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Simple Usability Items: These items apply to companies with simple marketing programs. Simple programs are managed by small marketing departments, include relatively few campaigns, and target small numbers of products, offers, and customer segments.							
Eloqua	Manticore Technology	Market 2Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B	item
○	○	●	●	●	○	●	Build a campaign as a list of stages. Users can build a simple campaign by defining a linear sequence of stages. This is a key feature for usability. The main alternative, laying out a campaign on a Visio-style flow chart, is harder for most marketers to grasp.
○	○	●	●	●	○	○	Build linear campaigns outside of a larger campaign structure. The linear campaigns described above can be created without embedding them in a larger campaign structure. This avoids complexity that is unnecessary for a simple marketing program.
○	●	●	●	●	◐	○	Define campaign schedules only at the campaign level. Individual stages within the campaign do not have their own schedules. This reduces setup labor, eliminates an item from the user interface, and makes it easier to understand how the campaign will function. Neolane is scored with a half point because it allows stage-level schedules but can be configured to hide the capability.
●	●	●	●	●	●	●	Decision rules are built with functions for specific data types, such as 'X Web site visits in past Y days'. This contrasts with generic rule building interfaces, which require users to know which field holds a particular type of data and may require complex specifications for calculations.
●	●	○	●	●	●	◐	Campaign stages send leads directly to sales. Campaign flows include stages that transfer qualified leads to sales. This makes the flow easier to understand than if transfer rules are outside of campaigns. Silverpop gets a half point because it has rules within each campaign that scan for opportunities, although these rules are not linked to particular stages.
○	●	○	●	●	○	●	Training time during implementation. This reflects the amount of training the vendors say they provide for end-users during system implementation. It is included here on the assumption that less training time indicates an easy-to-use system. Vendors providing less than one day of training are scored with a 1; those providing more than one day are scored with a 0. Scores are based on training for the simplest version of each system with complete functionality. In practice, vendors tailor the amount of training to the client's situation.
2	4	4	6	6	2.5	3.5	Total for Simple Items

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Complex Usability Items: These items apply to companies with complex marketing programs. Complex programs are managed by large marketing departments, include many campaigns, and target many products, offers, and customer segments.

Eloqua	Manticore Technology	Market 2Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B	item
●	●	●	●	◐	●	●	Explicitly direct leads from one campaign to another. Users can send leads directly from one campaign to a different campaign. Marketers running complex programs need precise control over flows among their campaigns. Marketo gets a half point because it can direct leads to lists that feed campaigns, but not to campaigns directly.
○	○	●	●	○	○	●	Linear campaigns embedded in larger campaign flows. Marketers can define a master campaign flow to link the small, linear campaigns. Each small campaign is a single marketing project that may have multiple stages, such as promoting, executing and following up on a Webinar. This approach makes the larger flows easier to grasp and lets the same linear campaign be used in several larger flows.
●	○	●	○	●	●	●	Integrated split testing. Standard features can compare different marketing treatments within a campaign. Tests may be built into the assets (automatically delivering alternate versions) or require splitting the campaign flow to deliver different assets.
●	◐	●	◐	○	●	◐	Rule-based content selection. Marketers can embed logic within an asset (email, Web page or survey) to deliver different contents depending on data associated an individual. This allows one asset to support different languages, products, customer segments, offers, and regions. Manticore Technology and Marketbright rely on scripting languages, which many marketers find difficult. Silverpop supports rule-based content for email but not forms.
●	●	○	●	●	●	○	Multiple scores per lead. The system can calculate and store multiple scores for a single lead. Different scores might relate to different products or business units.
○	○	●	●	●	●	●	Central rules transfer leads to sales. Leads are transferred to sales by rules that run outside of individual marketing campaigns. This ensures consistency and reduces workload. The rules typically execute on a regular schedule or are triggered by events such as a data change or score update.
●	○	●	●	○	●	●	Group-based security. Access to system functions and marketing assets is assigned to individuals or workgroups. This enhances security when different people are responsible for different products, regions, customer segments, etc. It also work easier by reducing the amount of information presented to each user.
5	2.5	6	5.5	3.5	6	5.5	Total for Complex Items

Special Features

Special Features: These are system features that are found in relatively few demand generation systems. Companies with specific requirements for these features will want to focus their attention on vendors that provide them.

Eloqua	Manticore Technology	Market 2Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B	item
Marketing Channels							
☐	☐	☐	☒	☐	☐	☐	dealer / channel management (register and co-promote with channel partners)
☒	☐	☐	☐	☐	☐	☐	publish and track RSS feeds (offers, etc. can be published as RSS feeds and the system can track who reads each item)
☐	☐	☐	☐	☐	☐	☐	capture costs of Pay Per Click advertising programs directly from the vendor
☐	☐	☐	☐	☐	☐	☐	online chat (display a button to request chat; monitor visitors and proactively offer a chat when appropriate)
☒	☐	☐	☐	☐	☐	☐	fax (relationships with broadcast fax vendors)
☒	☐	☐	☐	☐	☐	☐	call center scripting (agents can work from system screens)
☒	☐	☐	☐	☐	☒	☐	mobile (relationships with mobile message distribution vendors)
☐	☒	☒	☐	☐	☒	☐	track conversions and stages via URLs (define which Web pages are conversions in a sales funnel and track leads as they visit them)
☐	☐	☒	☒	☐	☒	☐	call vendor offers from external pages (display system-generated marketing offers on external Web pages, such as a company Web site)
☒	☐	☒	☐	☐	☒	☐	integrate with direct mail printer (directly transmit personalized marketing materials)
☒	☐	☒	☒	☐	☐	☐	events quantity limits, wait lists, reminders (specialized campaigns to manage online and real-world events)
Tailoring Messages to Individuals							
☐	☐	☒	☐	☐	☒	☐	select next action based on highest value (automatically send different messages within a campaign stage based on lead characteristics and behavior history)
☐	☐	☒	☐	☐	☒	☐	show highest-value offer on form (automatically display highest-value offers on a form based on lead characteristics and behaviors)
☐	☐	☒	☐	☐	☒	☐	rule-based form customization (display different content blocks in an

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							email or Web page based on user-defined rules)
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Eloqua	Manticore Technology	Market 2Lead	Market bright	Marketo	Neolane	Silverpop Engage B2B	item
Marketing Administration							
☐	☐	☐	☐	☐	☒	☐	project schedule (manage a schedule of tasks related to executing a campaign)
☐	☐	☐	☐	☐	☒	☐	calculate costs from unit cost x volume (calculate campaign costs for line items based on cost per unit and selection or response quantity)
☐	☐	☒	☐	☐	☒	☐	campaign cost detail (capture line items for costs and revenues within a campaign; track different types such as budget, plan, estimated, actual, etc.)
Content Management							
☒	☐	☐	☐	☐	☒	☐	expiration dates (assign expiration dates to marketing assets; warn users if an expired asset is still in use)
☒	☐	☒	☒	☐	☒	☐	item-level security (assign access rights to specific marketing assets by individual user or user group)
☐	☐	☒	☒	☐	☒	☒	check in/out, version control (manage asset creation to ensure only one person at a time is making changes; allow users to review and recall old versions)
Database Management							
☐	☐	☒	☐	☐	☐	☐	separate analytical (cube) database (copy operational tables into a separate database for reporting and analysis)
☒	☐	☒	☐	☐	☒	☒	custom tables (allow users to add custom data tables to the standard data structure)

About the *Raab Guide*

The *Raab Guide to Demand Generation Systems* compares leading vendors on more than 150 specific items and explains when and why each of those items matter. Here are just a few of the questions you'll be able to answer:

- which systems support the marketing channels I use?
- which are best suited for simple marketing programs?
- which can handle the most complicated campaign structures?
- which can easily manage multi-lingual campaigns?
- which products can be customized to store the data I need?
- who already has clients in my industry?

The Raab Guide is based on painstaking research into each system, backed by Raab Associates' decades of technology evaluation experience. This ensures that you receive accurate, complete information needed to quickly decide which vendors are best suited to your situation.

The 160+ page Guide includes descriptive summaries and screen shots of the vendor systems, providing insights that checklists alone cannot deliver. You also get a step-by-step selection methodology explaining how to make the best choice in the least time possible. Interested in vendors not in the Guide? No worries: Guide checklists give you a solid framework to gather and organize information about any demand generation product.

In short, the Raab Guide gives you one package with everything you need to jumpstart your selection project and quickly reap the benefits of your new demand generation system.

Contents include:

- background: what demand generation systems do and how you benefit
- step-by-step selection process, including mistakes to avoid
- comparison matrix summarizing 150+ system and vendor attributes
- explanation of key features and how they differ among systems
- detailed vendor tables with narrative summaries and extensive information on each product

About Raab Associates Inc.

Raab Associates Inc. helps marketers make the most of today's marketing technologies. Each engagement starts with a thorough assessment of your company's business situation. We then work with you to identify the solutions best suited to your unique combination of needs and resources. We continue to work with our clients through deployment to ensure that each project meets its objectives and lays the foundation for future growth.

Raab Associates draws on a combination of practical experience and technical knowledge. We continually scan the horizon for developments that can help our clients to gain competitive advantage. We combine an insatiable curiosity about new possibilities with a concrete understanding of the day-to-day business realities. This ensures that our clients receive sound advice and hands-on assistance with their toughest marketing technology issues.

David M. Raab has more than thirty years experience as a marketer, consultant, author and analyst. He has consulted with major firms in financial services, health care, telecommunications, publishing, consumer goods, technology and other industries. Mr. Raab has written hundreds of articles on marketing issues and addressed audiences in North America, Europe, Asia and Australia. His book *The Marketing Performance Measurement Toolkit* was published in March 2009 by Racom Communications and is available from www.racombooks.com

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