

Vendor Selection Handbook

Marketing Automation not only automates, it analyzes and augments new solutions and processes. From email campaigns, lead nurturing and generation, advertising to social media management, automation has become inevitable.

A marketing automation system automatically delivers results only if it s managed efficiently and utilize optimally! One of the important aspects in Market

Vendor Selection Process		Check	Cent of Advise
1	Define Requirements		Include process beyond what you already do in order to widen the scope of your organization through automation
	a. Create a list of goals (related to financial values)	<input type="checkbox"/>	
	b. Define how the system will be used to accomplish goals	<input type="checkbox"/>	
2	Create and Research List of Vendors		The size of your organization does not reflect the size of your marketing program. Small companies can have complex marketing plans and vice versa.
	a. Identify and study various vendors	<input type="checkbox"/>	
	b. Match the scale of your operations with different buyer segments	<input type="checkbox"/>	
3	Check Vendor Features Against Use-Case Scenarios		Make sure that a few scenarios depict your most complicated processes, as it will highlight differences in different systems.
	a. Develop actual marketing scenarios based on your own needs	<input type="checkbox"/>	
	b. Run scenarios through best vendors to understand how they propose to execute them.	<input type="checkbox"/>	
	c. Compare and analyze vendor	<input type="checkbox"/>	
2	Verify with References		The criteria is not based on whether the reference is happy, it is more important to understand whether business situations are similar and how happy you are likely to be as well.
	a. Identify buyers who use a similar system	<input type="checkbox"/>	
	b. Gain information from them about how long it took to get started, the training required, the problems and how support was provided.	<input type="checkbox"/>	

Vendor Selection Process		Check	Cent of Advise
5	Signup for a Trial		You could probably allow vendors to handle demanding aspects of scenario demonstrations. However understand how it will function when you have to work on it yourself
	a. Try out how systems work with actual projects	<input type="checkbox"/>	
	b. Invest in training and execution	<input type="checkbox"/>	
6	Decide		The selection process could be long only if you have complex and very specific requirements. Otherwise selection should be a “means to an end and not a goal in itself.”
	a. Keep a deadline for your selection process	<input type="checkbox"/>	
	b. Make a decision based on objective analysis	<input type="checkbox"/>	
7	Invest in Deployment		When you lack in house resources or time, employ external consultants and agencies to execute marketing programs.
	a. Establish a formal description of buyer stages and build your system measure them	<input type="checkbox"/>	
	b. Utilize stages to build marketing programs propose to execute them.	<input type="checkbox"/>	
	c. Invest in training and content to executive plans	<input type="checkbox"/>	
	d. Build measurement systems to analyze results	<input type="checkbox"/>	

 **Sign up for a Free Trial and gain access to quality B2B data with Info CheckPoint.**