

Marketing Automation Sample REP



Marketing Automation Request for Proposal

Choosing the right marketing automation system isn't easy. This is why we created this sample RFP, consisting entirely of actual questions from real RFPs submitted to Marketo.

The **12 key areas for marketing automation success** are:

- 1 Campaign Management and Lead Nurturing
- 2 Email Marketing
- 3 Lead Scoring
- 4 Landing Page Creation and Optimization
- 5 Social Media
- 6 Data Management
- 7 CRM Integration
- 8 Sales 2.0
- 9 Reporting and Analytics
- 10 Pricing, Implementation, Services and Support
- 11 Privacy and Security
- 12 Company Information and Infrastructure

Campaign Management & Lead Nurturing

Does your system have a drag-and-drop flow interface for easy campaign editing?

YES NO

Business reason: Ease-of-use contributes to greater efficiency and increased productivity of marketing operations. Also, this type of interface requires less training, as marketers are used to products like Microsoft PowerPoint that work with similar drag-and-drop technology.

Answer:

Does the system have an auto complete feature that suggests a campaign or field name for the marketer?

YES NO

Business reason: Marketers don't want to spend time looking up field names or remembering campaign names.

Answer:

Can lists and segments be created directly within the campaign module?

YES NO

Business reason: This type of comprehensive campaign module saves time by reducing the need to build segments in a different interface. Creating these lists and segments outside of the campaign module may cause an increase in errors.

Answer:

Does your system have the ability to split lists and add choices within flow steps?

YES NO

Business reason: The ability to add choices within a step offers enhanced segmenting capabilities, critical for high conversions and targeting. This also saves the marketer time and provides for more accurate campaign reporting.

Answer:

Does your tool have built-in A/B testing support for content and flow?

YES NO

Business reason: This eliminates guesswork in deciding which content and flow paths are most effective in driving leads and conversions.

Answer:

Can your system trigger a response to buyer behavior in real time, not just based on campaign schedule?

YES NO

Business reason: Real-time triggers offer immediate results and increased relevancy for campaign automation. According to the MIT Lead Response Management Study, the odds of qualifying a lead in 5 minutes versus 30 minutes decreases by 21 times. And from 5 minutes to 10 minutes, the odds to qualify decrease 4 times.

Answer:

Can your marketing automation tool trigger based on data changes in leads from (Insert your CRM system name) ?

YES NO

Business reason: Triggers based on CRM data changes offer comprehensive campaign targeting options.

Answer:

Can your marketing automation tool trigger based on data changes in opportunities from (Insert your CRM system name) ?

YES NO

Business reason: Triggers based on opportunities allow marketing and sales to coordinate activities in the sales cycle.

Answer:

Can your marketing automation tool trigger based on custom objects in (Insert your CRM system name) ?

YES NO

Business reason: One of the reasons CRM systems are so widely adopted is because of the ability to customize the application. Marketers should be able to interact with these customizations, triggering campaigns, adjusting lead scores, or creating sales alerts.

Answer:

Email Marketing

Does your system have support for HTML import?

YES NO

Business reason: Greater flexibility around design and creative efforts.

Answer:

Does your system require IT or services support to develop creative emails?

YES NO

Business reason: Dependence on IT reduces marketing productivity, resulting in delayed campaigns, fewer leads and lost opportunities.

Answer:

In your system, are emails shared across campaigns?

YES NO

Business reason: Reusing content saves time and fosters messaging consistency across campaigns.

Answer:

Can you customize email with lead, account and opportunity data in your system?

YES NO

Business reason: Relevancy and personalization enhance targeting and help build one-on-one relationships with prospects.

Answer:

Does your system have built-in A/B testing support?

YES NO

Business reason: This eliminates the guesswork in deciding which offer, message or creative asset is most effective in driving leads and conversions.

Answer:

Can we copy/paste from Microsoft products, such as Word, without adding extra formatting characters?

YES NO

Business reason: Many web-based tools require you to only paste clean text from Notepad, which makes creating emails and landing pages more difficult.

Answer:

Does your system accommodate for email signatures from your sales reps without creating different emails for each rep?

YES NO

Business reason: Personalized emails from sales reps ensure relationship building throughout the buying cycle.

Answer:

Can copies of templates be updated with changes to the master copy with your marketing automation tool?

YES NO

Business reason: Prevents redundant updating tasks and ensures data consistency across templates.

Answer:

Does your system provide deliverability services?

YES NO

Business reason: Ensures that messages reach inboxes, sender reputation is maintained and efforts are not wasted.

Answer:

Is your SenderScore above 70? Please also include the website address where you publically list your SenderScores.

YES NO

Business reason: SenderScore above 70 generally indicates high-quality email deliverability services.

Answer:

Lead Scoring

Can lead scoring be done based on lead attributes and behaviors?

YES NO

Business reason: Greater accuracy of score helps better identify nurturing candidates versus "hot" leads for sales.

Answer:

Can lead scoring be based on activity data in the CRM?

YES NO

Business reason: Scoring on all data elements, including activity data, enables marketers to better gauge prospect interest and readiness.

Answer:

Can lead scoring be based on opportunity data in the CRM?

YES NO

Business reason: Scoring on all data elements, including opportunity data, enables marketers to better gauge interest and readiness of both leads and contacts.

Answer:

Can a lead score be recalculated based on a trigger event or schedule?

YES NO

Business reason: Activities and events contribute to a more complete understanding of prospect mindset.

Answer:

Can a lead score be automatically decreased due to inactivity?

YES NO

Business reason: Inactivity is just as important as activity in lead scoring and must be accounted for.

Answer:

Can you have multiple lead scores per lead?

YES NO

Business reason: Multiple lead scores gauge different levels of interest where useful, such as across product lines and categories.

Answer:

Can you have company-level lead scores?

YES NO

Business reason: Company-level lead scores enable targeting or segmenting campaigns by company.

Answer:

Can lead scoring be managed in the marketing automation tool, and can these scores be used for targeting or segmenting?

YES NO

Business reason: Managing lead scoring in a marketing automation tool enables targeting or segmenting campaigns by company.

Answer:

Are lead scoring rules managed by an administrator or by individual marketing users?

YES NO

Business reason: Lead scoring is an ongoing process that evolves over time. Marketers that rely on administrators to manage scoring rules will not adjust these scores frequently, making them less valuable to the sales team.

Answer:

Landing Page Creation & Optimization

Does the landing page creator have a drag-and-drop interface, or do all pages need to fit into predefined templates?

YES NO

Business reason: Ease-of-use contributes to greater efficiency and increased productivity of marketing operations .

Answer:

Does the landing page creator have support for HTML import and editing?

YES NO

Business reason: This provides greater flexibility around design and creative efforts.

Answer:

Are marketing assets shared across campaigns in the system?

YES NO

Business reason: Reusing content saves time and fosters branding consistency across campaigns.

Answer:

Do landing pages use templates, so that if the underlying template is updated all the landing pages that use it are updated?

YES NO

Business reason: This prevents redundant updating of tasks and ensures data consistency across templates .

Answer:

Can forms gather additional information from known contacts to help complete their lead record (often called progressive profiling)? Can this be done with the click of a button?

YES NO

Business reason: Building out lead profiles over time helps increase conversion rates while capturing valuable data. If this takes more than one click to implement, it is often skipped and the value of this data lost.

Answer:

Will landing pages from the system pre-populate forms with existing data?

YES NO

Business reason: Pre-population increases personalization and encourages form completion.

Answer:

Does the system have built-in A/B testing support for landing pages?

YES NO

Business reason: A/B testing eliminates guesswork in deciding which layout is most effective in driving leads and conversions.

Answer:

Will your company have custom branding and subdomains available at no extra cost?

YES NO

Business reason: This promotes greater brand consistency.

Answer:

Does the system allow for marketing asset management?

YES NO

Business reason: Uploading, storing and managing files in a central repository provides easy access to assets and promotes the reuse of these assets.

Answer:

Can email templates be created and used to reflect country-by-country differences in marketing regulations?

YES NO

Business reason: Different countries have different spam requirements. Creating templates for each ensure compliance worldwide.

Answer:

Social Media

Can the system create trackable URLs to capture social media lead sources? If so, can this be done without having to use shortened URLs in the marketing automation system?

YES NO

Business reason: Marketers need to understand the ROI of social media. Marketers don't want to be forced to use shortened URLs, as these have less successful results in social networks (LinkedIn, Facebook), in blog comments, and in forums.

Answer:

Does the system allow for social sharing functionality on landing pages and in emails?

YES NO

Business reason: B2B marketers get the most social media success by socializing their own content, both in emails and on landing pages.

Answer:

Does the system allow for social validation boxes or feeds on landing pages?

YES NO

Business reason: Social validation helps prospects reduce risk because they can see candid peer response. Landing pages need to be able to host this content without rendering issues.

Answer:

Will the user be able to trigger campaigns, including lead scoring, sales alerts and lead nurturing, based on comments in social media?

YES NO

Business reason: Just listening in social media is not enough. The marketing automation system needs to be able to react to what is happening in social media.

Answer:

Data Management

Does the system de-duplicate leads on import?

YES NO

Business reason: De-duplication improves data quality.

Answer:

Does the system de-duplicate leads from forms?

YES NO

Business reason: De-duplication improves data quality at the point of lead capture.

Answer:

Can the system identify possible duplicates already in the system?

YES NO

Business reason: This is another precautionary measure against duplicates to maintain data quality.

Answer:

Can the system run batch de-duplication?

YES NO

Business reason: Improves data quality.

Answer:

Will the system sync new custom CRM fields automatically with no admin involvement?

YES NO

Business reason: Synchronization maintains data quality and keeps marketing and sales aligned. Having this done automatically allows marketers to deploy campaigns on new information quickly, without wasting time mapping fields.

Answer:

Do you have the ability to add leads or contacts to list based on attributes or behaviors?

YES NO

Business reason: Filtering and adding leads based on attributes and behaviors promotes more targeted campaigns.

Answer:

Is there advanced list segmentation based on any combination of demographic and behavioral attributes?

YES NO

Business reason: More comprehensive segmentation capabilities enhance targeting and relevancy.

Answer:

Are you able to implement batch data updates on any field?

YES NO

Business reason: Batch updates help keep data up to date in an efficient way.

Answer:

CRM Integration

Is there a bi-directional synchronization of data between the marketing automation system and the CRM every 5 minutes or less?

YES NO

Business reason: Synchronization ensures consistent up-to-date data to keep marketing and sales activities coordinated.

Answer:

Can you send leads to sales based on score or campaign rules?

YES NO

Business reason: This increases sales productivity by identifying hot leads more efficiently.

Answer:

Does the marketing automation system support an automated mapping of data model?

YES NO

Business reason: As sales operations adds fields and changes the CRM system, you will lose productivity if every change needs to be manually mapped to the marketing automation system. Automating this provides greater flexibility and increases productivity.

Answer:

Does the marketing automation system have the ability to assign leads to specific sales reps or queues? Can the system perform automatic reassignment or recycling of leads?

YES NO

Business reason: This lets marketing activities identify hot leads and escalate sales response directly.

Answer:

Does the marketing automation system have the ability to create tasks for sales?

YES NO

Business reason: This ensures that sales follows up on marketing-sourced leads.

Answer:

Can the marketing automation system add email sent from Salesforce.com or Microsoft Outlook to activity history in the CRM?

YES NO

Business reason: This helps maintain alignment between marketing and sales activities.

Answer:

Sales 2.0

Can the system perform lead prioritization based on score and urgency?

YES NO

Business reason: Prioritization helps sales focus on the hottest leads and opportunities.

Answer:

Does the system display the information that is most important to sales in an easy-to-understand summary to synthesize actionable insights from detail data?

YES NO

Business reason: Sales can understand the right message at the right time.

Answer:

Can the marketing automation system provide real-time sales alerts over email, RSS or mobile device?

YES NO

Business reason: Instant insight for mobile gives sales reps the information when they want it, where they want it.

Answer:

Can the marketing automation system send trackable email from Salesforce or Outlook?

YES NO

Business reason: Know instantly when prospects open or click your emails, or visit the website.

Answer:

Can marketing campaigns and workflows be published to sales?

YES NO

Business reason: Sales can benefit from the campaigns marketing creates, while marketing can track the results of sales marketing efforts. This saves marketers time from having to duplicate work inside the CRM system.

Answer:

Does the system provide anonymous web visitor analysis?

YES NO

Business reason: This analysis helps turn website traffic into relevant prospects.

Answer:

Can the marketing automation system integrate with information services, such as Jigsaw and LinkedIn?

YES NO

Business reason: This integration helps turn website traffic into relevant prospects.

Answer:

Reporting & Analytics

Are there standard reports for leads, emails, campaigns, and Web analytics?

YES NO

Business reason: Provides the essential reports for any B2B marketer.

Answer:

Do you have the ability to copy a standard report and save the custom version?

YES NO

Business reason: The ability to customize by a specific parameter (e.g. date range) enables marketers to drill down to desired levels of detail.

Answer:

Are email subscriptions available?

YES NO

Business reason: Automatic notifications increase awareness of campaign ROI and can identify areas for improvement.

Answer:

Does Web reporting include known and anonymous visitors?

YES NO

Business reason: Anonymous visitors yield valuable information about campaigns and should be taken into account.

Answer:

Do you have advanced Web reporting, including IP lookup and geocoding by zipcode, state, region, etc.?

YES NO

Business reason: IP lookup capabilities decrease level of visitor anonymity.

Answer:

Can you drill-down to individual visits?

YES NO

Business reason: The ability to drill down to specific clickstream paths offers increased visibility into levels of prospect interest and trends.

Answer:

Can Web reports measure visits to external Web pages?

YES NO

Business reason: Taking external Web pages into account provides a more comprehensive understanding of prospect behavior and more options for targeting.

Answer:

Is aggregated data by time period available?

YES NO

Business reason: This allows marketers to identify trends across segments or behaviors for more informed decision making.

Answer:

Pricing, Implementation, Service & Support

Can you provide full transparency of pricing and any additional costs that may be incurred from implementing a marketing automation solution, including, but not limited to, training, support, emails, etc.

YES NO

Business reason: Transparency of pricing model means marketers can budget more effectively and not be victim to the "let's make a deal" approach.

Answer:

Is your pricing based on database size?

YES NO

Business reason: Pricing based on database size is predictable, unlike pricing based on transactions.

Answer:

Do you provide a dedicated success manager and training program to help you go live?

YES NO

Business reason: A dedicated success manager aids in short implementation time, meaning marketers can get up and running quickly for fast results.

Answer:

Do you have an online support and best practices center? Can other product users contribute? Is it monitored by a staff member?

YES NO

Business reason: A valuable Web self-service area is essential to getting the most out of the product, accessing helpful resources, and interacting with experts and customers.

Answer:

Are there additional costs for CRM integration?

YES NO

Business reason: Inclusion reduces total cost of ownership.

Answer:

Are there costs for training? What happens if more training is needed at a later date?

YES NO

Business reason: Inclusion reduces total cost of ownership.

Answer:

Are there costs for support? Do you provide tiers of support, and if so, what are the levels and cost of each?

YES NO

Business reason: Inclusion reduces total cost of ownership.

Answer:

Please provide a typical timeline for implementation:

YES NO

Business reason: The faster you implement marketing automation, the faster you can achieve ROI on your purchase.

Answer:

Can you provide details of any available, optional services that your company provides?

YES NO

Business reason: Services will help you make the most of your marketing automation tool when moving past the basics, or when you need business process help.

Answer:

How frequently does your company have new product releases and how is training done on new features and functionality? Will there be a cost for additional training?

YES NO

Business reason: Marketing automation is an evolving technology. Your company should be able to take advantage of all features of the marketing automation solution without additional costs when new enhancements arrive.

Answer:

Privacy & Security

Does the application have role-based access for customers and third party users?

YES NO

Business reason: Different team members have different responsibilities. While all of marketing may work in the marketing automation system, there needs to be a way to limit access by role.

Answer:

Does the application have the ability to lock down site sections and permissions by role (e.g. giving copywriting agency ability to edit but not approve content)?

YES NO

Business reason: Your contact database is one of your company's most valuable assets. Permissions by role allow you to have users access specific areas of the system without giving everyone access to your database.

Answer:

Company Information & Infrastructure

Please provide your company details, including registered company name, address & registration number:

Answer:

Please provide your primary contact details in relation to this activity, including contact name, role, telephone & email details:

Answer:

Please provide a company overview:

Answer:

Please describe your organizational structure including the names and titles of key team members:

Answer:

Please provide information on any current industry standards or accreditations you have obtained and any industry awards won in the last two years:

Answer:

Please describe your technology capability (systems, software, servers, quality, performance measurement systems and reporting):

Answer:

Can you provide details of laptop/desktop software requirements?

Answer:

What web browsers does your system support?

Answer:

How do you inform customers of outages, upgrades and maintenance?

Answer:

What is the uptime availability of your product?

Answer:

What is your commitment to R&D as a percentage of your total expenditure dedicated to improvements?

Answer:

What is the number of upgrade cycles per year?

Answer:

About **LeadMD**

LeadMD combines the resources of a digital marketing agency with revenue focused sales and marketing alignment strategy, all through the use of on-demand cloud technology. Creating, managing and converting quality leads in higher numbers is how we enable our clients to out perform their competitors and out market their peers.

The most effective way to engage more prospects and convert better leads is through Conversational Marketing. At LeadMD, we will help your team leverage email and online channels to build buyer trust and engagement through cutting edge technology such as Marketing Automation. When your focus is on building a demand generation process that truly drives revenue, it's time to engage LeadMD and fix your funnel.

