SharpSpring

Top 10 Considerations When Selecting a Marketing Automation Platform

You've decided to implement a marketing automation platform...great! Here are 10 things your agency should seriously consider before signing on the dotted line.

1 Does the vendor's business model/pricing empower agencies to make marketing automation a profit center?

If you pick the wrong platform, marketing automation can eat up a significant portion of your client's budget, leaving less room for your agency's retainer. You'll want a platform built around the needs of agencies to help you create higher-value relationships, generate monthly recurring revenue, and prove your ROI. Look for a provider that lets you reinforce your brand by rebranding the platform interface, domain, login screen and notifications. The vendor should treat you like a partner, including sending you new business referrals.

SharpSpring's agency partner program:

- *As little as 1/10th -1/20th the cost of competing solutions.*
- *Free for your agency to use in its own business development.*
- *Month-to-month contract – stay as long as you are generating ROI.*
- *You decide what to charge your clients, or even whether to charge them.*
- *Agency support is 100% free.*
- *Rebrandable interface, domain, login screen, notifications and more.*
- *Single sign-on – manage all your clients in one spot and with one login.*
- *Flexible architecture – we integrate with hundreds of technology providers.*

2 Does the vendor lock you into long-term contracts and huge upfront fees?

Today's agencies need flexible contract terms to reflect their ever-changing business landscape. As such, you should be able to leave at any point if you don't feel like the platform is the right fit for you or your clients. A month-to-month commitment ensures you can do so. If you are being asked to sign for a year or pay in advance, it's a red flag.

SharpSpring only has month-to-month agreements – no annual contract is required. Stay as long as your are generating the ROI you want. More than 1,100 agencies choose us over and over again every month.

3 Are you going to be charged every time you pick up the phone for support?

Support should be free – period. Some providers view support as a cash cow and hide fees in fine print, so beware. Ask about the response times of the support team and and if there is a dedicated person you can call when necessary.

SharpSpring support:

- *Agency support is always 100% free and unlimited. No surprise bills at the end of the month.*
- *Your agency is assigned a customer success manager.*
- *Support is available by phone and email.*
- *100+ training videos that provide expertise on demand.*

4 Is the platform highly rated by users?

Check out reviews from other agency professionals and marketers to get credible insights into how the platform will perform for your agency. Reviews from actual customers are invaluable endorsements and validation, minimizing risk in the process.

SharpSpring consistently gets high ratings on review sites, often much higher than competitors.

- *Software Insider: 9.4/10*
- *MarTech Advisor: 4.7/5*
- *Trust Radius: 8.5/10*
- *Software Advice: 4.0/5*
- *Capterra: 4/5*
- *G2Crowd: 4.3/5*
- *Crowd Reviews: 4.6/5*
- *Get App: 4.23/5*

*Ratings as of Feb 23, 2017

5   Is the platform feature-rich and are new features added regularly?

True marketing automation platforms have key features that drive results. Make sure the platform you select delivers on the most important and frequently used features and that the vendor is continuing to add new functionalities to stay current.

Email marketing	Campaign management	Landing page builder	Lead scoring
Time- and event-based automations	Form builder	Advanced segmentation	Analytics and reporting

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6   Are there hidden fees or limits you'll soon bump up against?

Understand what features are included and what you'll have to add on. Some vendors like to charge extra fees for additional platform features, so check the fine print. Carefully review plan limits – on contacts, emails, page impressions and more. You don't want to be penalized for growth or nickel-and-dimed. Is a CRM included? If not, that will be an expensive extra.

SharpSpring agency licenses include 100K contacts each – 10x what some other providers offer – plus unlimited users and 25K emails/month per license. SharpSpring also includes a full-featured CRM. Many platforms don't, so you'll need to add in that monthly cost for a true comparison.

7 Does the platform integrate with other tools or is it a closed proprietary platform?

A solid platform will have its own 'ecosystem' of technology providers that it integrates with – either natively, through plug-and-play, or using tools like Zapier or PieSync. A system can't be all things to all users, but it should play nicely with others.

SharpSpring has an open architecture, so it can integrate with countless other technology platforms. In addition, SharpSpring has native integrations with Salesforce, GoToWebinar, WebEx and Google AdWords. Visit SharpSpring's App Marketplace for a full list of integrations that extend the power of marketing automation.

8 How soon after onboarding can you generate meaningful results and ROI?

A powerful platform is great, but you shouldn't need six months of training or be required to attend a 'university' to start generating results, both for your agency and clients. Is the interface intuitive and can you quickly convert current clients to the platform without a lot of red tape? Is there in-app contextual help available in case you get stuck? Remember that training doesn't really end – think about future hires and new client training.

SharpSpring onboarding includes six informative sessions with a dedicated Onboarding Specialist, plus unlimited support along the way (& beyond). Many agencies convert existing clients to the platform and land new clients before onboarding is complete. In-app contextual help with docs and videos helps you achieve success as you become increasingly proficient over time.

9   Do the built-in reports meet your business needs?

You'll want easy access to reports that quantify the bottom-line impact of your campaigns – for your agency and your clients. Ask to see a sample, and shop it around internally to account execs and even a few clients to make sure it's going to be impactful. If you need a digital scientist to create or read reports, you probably should think twice before buying.

SharpSpring reports are robust, easy to export, easy to digest and totally rebrandable. So easy... wait for it... even a caveman can do it.

10   Does the platform scale based on your growth?

Some vendors offer only closed platforms that require you and your clients to stay within the app. For instance, you may be required to use their CRM. If you outgrow these platforms or if you're unable to integrate other best-in-class tools, you'll be hard-pressed to generate additional value – not to mention the uphill battle of migrating data.

SharpSpring grows with you and your clients. It offers a free, built-in CRM, but also natively integrates with Salesforce, the #1 CRM on the market.

SharpSpring

We Built Our Entire Company Around Marketing Agencies Like Yours.

Higher Value
Relationships

Monthly Recurring
Revenue

Prove your value
to your clients

Adding marketing automation to your agency's services can help you grow your business. Learn more about SharpSpring today.

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