

MARTECH INTELLIGENCE REPORT

B2B

MARKETING AUTOMATION PLATFORMS: *A MARKETER'S GUIDE*

EIGHTH EDITION

A MARTECH TODAY RESEARCH REPORT

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Scope and methodology

This report examines the current market for B2B marketing automation platforms, and the considerations involved in implementing marketing automation software. It addresses the following questions:

- What factors are driving B2B marketing automation platform use?
- What capabilities do B2B marketing automation platforms provide?
- Does my company need a marketing automation platform?
- Who are the leading players in B2B marketing automation?
- How do I evaluate which platform is best for my business?

If you are considering licensing a B2B marketing automation platform, this report will help you decide whether or not you need to. The report has been completely updated to include the latest industry statistics, developing market trends and new vendor profiles and product updates.

For the purposes of this report, B2B marketing automation is defined as follows: The use of software and web-based services to execute, manage and automate repetitive marketing tasks and processes to more effectively market through multiple channels (i.e., email, mobile, social media, and websites). Marketing automation focuses on the definition, scheduling, segmentation and tracking of marketing campaigns, allowing the marketing and sales organizations to nurture leads with highly personalized content aimed at attracting and retaining customers.

The 13 vendors profiled in this report represent some of the choices available for B2B marketing automation platforms; they are not a comprehensive list of B2B marketing automation vendors. This report is not a recommendation of any marketing automation platform or company and is not meant to be an endorsement of any particular product, service or vendor.

This report was prepared by conducting in-depth interviews with leading vendors and industry experts in January, February and March 2020. These, in addition to third-party research, form the basis for this report.

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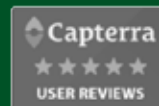
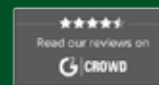


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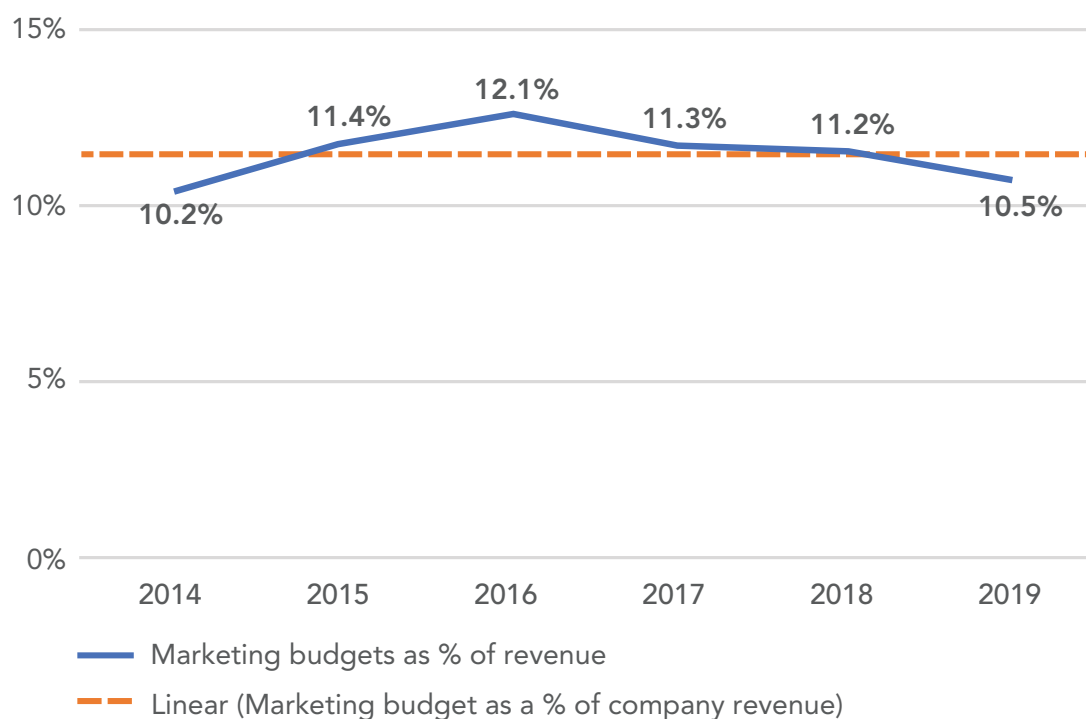
B2B marketing automation overview

Investments in marketing technology continue to be a priority for businesses across the board, as they strive to meet increased demands for personalization and a need to collect, authenticate and analyze rapidly increasing amounts of consumer data to improve the customer experience (CX).

Overall marketing budgets dipped slightly to 10.5% of company revenue in 2019 as compared to 2018, as CMOs and VPs of marketing operations continue to focus on ROI and efficiency, according to Gartner's annual CMO Survey for 2019-2020. Still, optimism for 2020 was high at the time of the survey, with 88% of CMOs stating they believed the future impact of the global economic environment would be positive, with more than half (53%) believing the impact will be strong.

The advent of COVID-19 wasn't foreseen at the time of the survey, however, and it has already had a significant economic impact globally.

Figure 1. Marketing Budget Evolution: 2014-2019



n = 342 (2019) N. America/U.K. respondents; n = 618 (2018); n = 375 (2016) n = 424 (2015)
n = 363 (2014)

Source: Gartner 2019-2020 CMO Spend Survey

Q. What percentage of your company's total revenue is allocated to its total marketing expense budget for FY 2019?

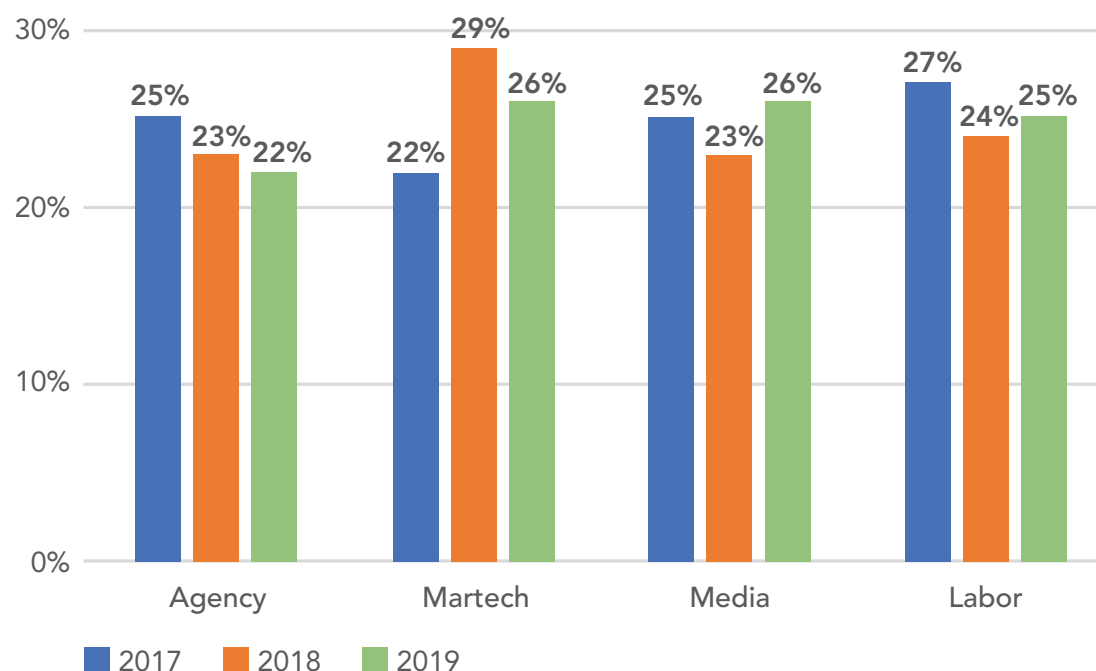
The advent of COVID-19 wasn't foreseen at the time of the survey, however, and it has already had a significant economic impact globally. That said, it remains to be seen how long the impact of the novel coronavirus will dominate headlines and mindshare, as containment or other factors could bring worry down to the level we see with the seasonal flu.

Digital marketing -- which has the ability to reach remote workers and the self-quarantined -- could benefit in the short term as people seek alternatives to in-person meetings and conferences. However, a general economic slowdown and continued uncertainty will certainly negatively impact businesses in general.

Martech still a budget priority

Though the proportion of the overall marketing budget going to marketing technology in 2019 slipped to 26%, as compared to 29% in 2019, martech continues to overshadow other areas of spending. Only media spending equaled martech investments, with labor costs (25%) and agency budgets (22%) attracting smaller amounts.

Figure 2. Marketing budget allocations across major resources



n = 326 (2019) N. America/U.K. respondents (2019); n = 605 (2018); n = 345 (2017)

Source: Gartner 2019-2020 CMO Spend Survey

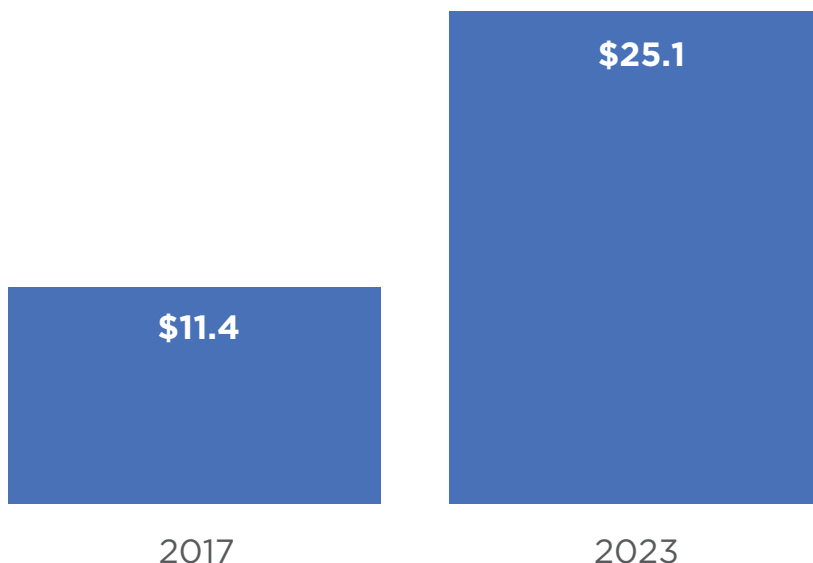
Q. How is your company's fiscal year 2019 total marketing expense budget being allocated to or spent on major resource categories?

Percentages may not add to 100% due to rounding

Marketing technology continues to be a priority investment for businesses across the board, driven by increased demands for personalization and a need to collect, authenticate and analyze rapidly increasing amounts of consumer data to improve the customer experience (CX).

Global marketing automation spending is projected to reach \$25.1 billion by 2023, up from \$11.4 billion in 2017, representing an implied annual growth rate of 14%, according to Forrester's Marketing Automation Technology Forecast, 2017-2023 (Global), published in April 2018 (see Figure 3).

Figure 3: Marketing automation spending to top \$25B by 2023 (\$ billion)



Marketing automation platforms form the backbone of marketing operations, increasingly serving as sophisticated marketing orchestration platforms.

Source: Forrester Data: Marketing Automation Technology Forecast, 2017-2023 (Global), Forrester.

MA platforms prioritize user experience

Marketing automation platforms form the backbone of marketing operations, increasingly serving as sophisticated marketing orchestration platforms. A range of platforms is available to marketers depending on their firm's size, budget and level of digital marketing sophistication.

The more basic functions of marketing automation have become somewhat commoditized, so platform vendors mostly look to differentiate their platforms based on the ability to scale, as well as usability, ease of implementation and customer experience.

Platform vendors are also looking to differentiate themselves by offering more support for increasingly sophisticated customers who have adopted the software and who are looking to justify the investment by proving ROI.

Vendors continue to expand training programs, as well as add-on professional services available to customers, to improve platform use. Online communities – for both customers and developers – have also become increasingly important to strengthen platform support, advocacy and market penetration.

Many marketing automation platform vendors have roots in email marketing, which continues to be a core function and is often the only function that customers use. However, the platforms offer an evolving range of features, including advanced lead management, account-based marketing (ABM) tools, predictive analytics and open architectures to support the growing martech ecosystem.

Marketing automation platform users have become more tech savvy, as marketing skill sets have evolved significantly in recent years. As marketing becomes ever more tech- and data-centric, this has led to the rise in prevalence of the Marketing Operations specialist, combining business operations and IT skills to clean, harness and democratize data.

The important role of third-party integrations

ABM is increasingly replacing persona-based marketing, leading the way for greater demand of ABM capabilities among marketing technology platforms, and driving a convergence of marketing and sales. Sales and customer service professionals frequently use marketing automation platforms to better understand how customers are reacting to products and service.

Most marketing automation platforms now have native integrations with CRM platforms, which is essential for ABM, as these three departments (sales, marketing, customer service) work together more to look at the entire customer experience.

At the same time, with marketing automation platforms in general prioritizing user experience and scalability, there has been less of a focus on building out new technology than previously predicted.

For example, personalization is one of the biggest trends driving marketing today. But while some marketing automation platforms do provide personalization capabilities, this is not an essential feature, and can be achieved using point solutions. B2B marketers should therefore not necessarily be put off if a marketing automation platform does not provide personalization as part of the platform.

Similarly, despite a lot of hype over the last few years, artificial intelligence (AI) and machine learning (ML) have not (yet) emerged as a significant trend in the B2B marketing automation space, although some platforms do include it.

Many marketing automation vendors offer “app marketplaces” that provide information and support for integrating with third-party software partners. This can be an important area of differentiation for vendors, because cultivating relationships with developers who create add-ons and integration tools adds to the overall utility of the software without requiring the vendor to develop such integrations themselves. If you're considering licensing a marketing automation platform, be sure to assess potential vendors' efforts in this arena.

Big mergers are done; plenty of smaller ones on the horizon

The enterprise B2B marketing automation market is concentrated among a few cloud vendors, including Salesforce, Oracle and Adobe. In 2018, there were a number of acquisitions by Adobe and Salesforce in particular as they sought to consolidate their positions at the top of the market and broaden their offerings for B2B firms.

Adobe's biggest deal of 2018 was its purchase of rival marketing automation platform Marketo in September for \$4.75 billion; the firm also bought Magneto Commerce for \$1.68 billion in May. Meanwhile Salesforce acquired integration platform Mulesoft in May for \$6.5 billion, analytics provider Datorama in July for \$800 million, as well as interactive email outfit Rebel in October and CloudCraze in May for undisclosed sums (see sidebar).

More recently, we've seen the acquisition of Mautic by open source cloud platform Acquia for an undisclosed sum in May of 2019, only to have the parent purchased by Vista Partners in September for \$1B. Also in May, SugarCRM picked up Salesfusion and re-branded it Sugar Market, in a deal in which terms were not publicly disclosed.

Select marketing automation financial transactions

May 2019

- Acquia acquires Mautic (terms not disclosed). Vista Equity Partners later (Sept 2019) buys Acquia for \$1B

- SugarCRM buys Salesfusion (for undisclosed amount); rebrands it to Sugar Market. The acquisition followed the company's buy of Collabspot and preceded its purchase of Corvana. These units are now called Sugar Connect and Sugar Discover, respectively.

February 2019

- Mailchimp acquires Sawa (undisclosed sum)

January 2019

- Infusionsoft rebrands as Keap; launches CRM
- j2Global acquires iContact for \$49M

October 2018

- Salesforce acquires Rebel (undisclosed sum)
- Infusionsoft (now known as Keap) secures \$20M in Series E funding led by ORIX USA Corp.

September 2018

- Adobe acquires Marketo for \$4.75B

July 2018

- Salesforce acquires Datorama for \$800M

May 2018

- Adobe acquires Magneto Commerce for \$1.68B
- Salesforce acquires Mulesoft \$6.5B and CloudCraze (undisclosed sum)

Source: Third Door Media, Crunchbase

There was less deal-making activity among vendors serving the small and mid-sized business (SMB) market in 2018, although Infusionsoft, which targets small and rapidly growing firms, raised \$20 million in Series E funding in October before undergoing a rebrand (to Keap) in January 2019 and launching a new CRM tool.

In January 2019, Cision sold iContact to j2Global for \$49 million. Mailchimp bought graphic design startup Sawa in February for an undisclosed sum to enable users to more easily create on-brand campaign graphics.

There will likely be more acquisitions to come in 2020, as a number of smaller martech companies mature out of the venture-funded stage.

Will CDPs threaten marketing automation platforms?

Driven by the need to offer highly-personalized customer experiences, and to handle vast amounts of customer data that traditional CRM and marketing automation tools cannot, some marketers are turning to customer data platforms (CDPs), which enable marketers to capture, retain and analyze more granular data and create unified, shareable customer profiles.

CDP platforms are able to provide attribution, audience selection and real-time response capabilities, and some provide advanced analytics and the ability to expose individual customer profiles in real time for review by customer service and sales agents.

Though CDP platforms are still relatively new, adoption has been rapid and these tools could eventually pose a threat to marketing automation platforms as they provide some of the same tools and functionalities.

CDP providers in many cases are newer firms and it is difficult for marketers to know at this stage which providers to trust and which will survive in the long term. (See our report: Enterprise Customer Data Platforms: A Marketer's Guide for additional information on CDPs.)

ABM is increasingly replacing persona-based marketing, leading the way for greater demand of ABM capabilities among marketing technology platforms, and driving a convergence of marketing and sales.

Though CDP platforms are still relatively new, adoption has been rapid and these tools could eventually pose a threat to marketing automation platforms as they provide some of the same tools and functionalities.

B2B marketing automation platform features

Virtually every B2B marketing automation vendor profiled in this report provides tools for email campaign development and execution (including landing pages), as well as lead capture, scoring and nurturing. The platforms also typically provide centralized marketing databases and a basic level of reporting on web traffic, visitor behavior and campaign results.

Combined, the core features offered by most B2B marketing automation platforms profiled in this report include:

- Email marketing and landing page development;
- Lead management (i.e., capture, scoring and nurturing);
- Native CRM integration; and
- APIs or app marketplaces for faster martech system access.

The market is quickly evolving, as B2B marketers demand integrated marketing functionality that rapidly translates into bottom-line return. Vendors continue to add more advanced features to provide marketing end-users with the ability to build, track and manage campaigns across channels and/or devices, and monitor the flow of leads as they move from marketing to sales.

These features include, but are not limited to:

- Dynamic content generation (email, landing pages and/or website);
- Account-based marketing (ABM);
- Mobile marketing;
- AI-based predictive analytics; and
- Social/lead profile integration.

The following section discusses several of these core and advanced marketing automation capabilities in more depth (see Table 3).

Dynamic content creation

Virtually all marketing automation platforms provide the ability to create, send and measure personalized email campaigns. Where they differ is in how email, landing page and website content is created and personalized. Some vendors offer wizard-based campaign design or content templates, while others provide a more customized approach.

There are also differences in static vs. dynamically generated content, which adjusts on the fly as prospects interact with a website or form. Progressive profiling is often offered to pre-populate forms with known data and use a drip approach to capture additional prospect information each time they interact with campaigns.

Message deliverability is also an important factor to consider. Some B2B marketing automation vendors offer dedicated IP addresses to improve deliverability, and/or monitor deliverability by including ReturnPath or other email deliverability services. Email previewing is an advanced function but may be critical to marketers that want to reach their audience through mobile devices and see what their message will look like on smaller screens.

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Figure 4: Select B2B marketing automation platform features

Platform	Dynamic content creation	Lead management	Predictive Analytics (AI/ML)	Mobile marketing			ABM	Social integrated w/ lead profiles	Native CRM integration	Third-party software connectivity	
				SMS/ Push	In-app notifications	Remote platform access				API	App marketplace
Acoustic	Email /landing pages/site personalization	✓	✓	✓	✓	✓	✓	✓	MD, NS, SF, SU	✓	✓
Act-On	Email/landing pages	✓	✓	✗	✗	✓	✓	✓	IN, MS, ONS, SF, SU,	✓	✓
Autopilot	Email	✓	✓	✓	✓	✗	✗	✓	PD, SF	✓	✓
HubSpot	Email /landing pages/site personalization	✓	✓	✓	✓	✓	✓	✓	HUB, SF	✓	✓
iContact	Email/landing pages	✓	✓	✗	✓	✓	✓	✓	SF	✓	✓
Keap (formerly Infusionsoft)	Email/landing pages	✓	✓	✗	✗	✗	✓	✗	Built-in CRM	✓	✓
Mailchimp	Email	✓	✓	✓	✓	✓	✓	✓	BA, PD, SF, SU, TG, VT	✓	✓
Marketo	Email/landing pages/site personalization	✓	✓	✓	✓	✓	✓	✓	MD, SF	✓	✓
Mautic	Email/landing pages/site personalization	✓	✓	✓	✓	✓	✓	✓	CW, HUB, MS, PD SF, SU, VT, ZH	✓	✓
Oracle Eloqua	Email/landing pages/site personalization	✓	✓	✓	✓	✓	✓	✓	MS, OCRMON, OSC, SF	✓	✓
Salesforce Pardot	Email/landing pages/site personalization	✓	✓	✓	✓	✓	✓	✓	SF	✓	✓
Sugar Market (formerly Salesfusion)	Email	✓	✓	✗	✓	✓	✓	✓	BH, MD, SG, IN, NS, SF, SU	✓	★
SharpSpring	Email/landing pages	✓	✓	✓	✓	✓	✓	✓	SF	✓	✓

CRM abbreviations: Batchbook (BA), BH (Bullhorn), CW (ConnectWise), HUB (HubSpot), IN (Infor), Microsoft Dynamics 365 (MS), OCRMON (Oracle CRM On Demand), ONS (Oracle NetSuite), OSC (Oracle Sales Cloud), PD (Pipedrive), SF (Salesforce), SG (Sage CRM), SU (SugarCRM), Teamgate (TG), VT (VTiger), ZH (Zoho).

Source: Third Door Media

★ Expected to launch Summer 2020.

Lead management

Lead management comprises three functions: lead capture, lead scoring and lead nurturing. Leads are captured from a variety of sources that feed the marketing automation database, including (but not limited to) website visitors, social media, paid digital campaigns, email marketing respondents, trade show attendees and purchased third-party lists. Platforms will vary based on the ease with which additional lead sources can be captured, such as through an open API, or whether the platform offers landing page optimization.

Lead scoring assigns a value to each lead based on a predetermined set of rules or criteria. Traditional lead scoring models are generally based on two sets of data values: behavior (i.e., site purchases, browsing, social posts) and demographics/firmographics. Many B2B marketing automation platforms now offer predictive scoring, which can incorporate hundreds of data points by sourcing websites, social networks and internal systems such as the CRM and marketing database itself to calculate scores.

Lead nurturing is the process of keeping prospects engaged with the brand through periodic, personalized communications or campaigns until they are ready to buy. Marketing automation platforms may offer a number of pre-built nurturing steps or actions, as well as allow users to customize their content and process. These efforts are meant to build a relationship between the brand and its prospects, and drive interaction with sales if and when the prospect is ready.

Predictive analytics

Virtually all of the B2B marketing automation platforms profiled in this report provide a standard set of analytics that track quantifiable data such as website visitor activity, pages viewed, time spent on site, emails opened, content downloaded and campaign responses. More vendors are offering predictive analytics and models based on machine learning, which uses algorithms to process data and surface trends or insights that enable marketers to customize visitor experiences and marketing campaigns.

Several platforms have invested in artificial intelligence (AI) to go a step beyond machine learning and use technology to “mimic” human intelligence and recommend marketing actions or outcomes. These may include highly personalized website content or product recommendations based on analysis of consumption trends, on-site behavior, firmographics and CRM data. Other vendors rely on plug-and-play integration with predictive analytics tools to offer greater analytics and personalization capabilities.

Mobile marketing

Creating an engaging experience for mobile prospects and customers is a must-have capability. As a result, many B2B marketing automation platforms include responsive templates for email, landing pages and web forms. Several vendors integrate with email testing tools such as Litmus, to allow users to preview email marketing messages across email clients and devices.

More advanced mobile marketing features include SMS/texting, in-app marketing and remote platform management from mobile devices. In-app marketing features can include “push” notifications or ads based on geography (i.e., geo-fencing or beaconing) or during events. B2B marketing automation vendors have also expanded platform access to mobile users, moving beyond automated alerts and remote data collection to full platform management.

Virtually all of the B2B marketing automation platforms profiled in this report provide a standard set of analytics that track quantifiable data such as website visitor activity, pages viewed, time spent on site, emails opened, content downloaded and campaign responses.

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Account-based marketing (ABM)

Aligning marketing initiatives with sales teams has become a leading ABM priority for marketers. The goal is to target marketing programs to prospect or customer buying teams, rather than individuals who may have moved into new positions or firms. Many times, a B2B buyer is not a single person. The larger the purchase, the more people and departments are involved. B2B marketing automation vendors continue to add new ABM features to their platforms to enable this strategy, including enhanced account nurturing and predictive scoring capabilities.

Social/lead profile integration

Most of the B2B marketing automation vendors profiled in this report provide some level of social media publishing, sharing and tracking within the platform for networks such as Facebook, Instagram, Twitter and LinkedIn. Some platforms provide more advanced social media tools to monitor social posts and add social behavior to lead profiles, often using social engagement as a scoring factor. Other platforms enable the use of social media sign-on to capture social profile data and build lead profiles.

Native CRM integration

With more businesses seeking to align marketing with sales, native or out-of-the-box integration with CRM systems has become a critical feature for B2B marketing automation platforms. Salesforce, Microsoft Dynamics 365, Oracle NetSuite and SugarCRM are some of the most commonly available connectors.

Data is synchronized between the two systems and shared in both directions at frequent intervals. For example, data that is added by a sales rep to an account record in the CRM will be automatically added to the record in the marketing automation platform for marketing end-users to view and act upon, as well.

Third-party software connectivity

B2B marketing automation vendors continue to open their platform architectures through APIs and app marketplaces to offer customers access to an expansive array of third-party martech software systems. The app marketplaces provide faster “plug-and-play” access between the systems, although there may be additional fees to purchase the marketplace apps.

If a preferred martech app is not available on a marketing automation vendor's marketplace it doesn't mean that the two systems won't connect – it means that some customization will be required. API use does incur additional charges, generally on a per-call basis for each data download.

Proactive recommendations based on AI

Martech vendors in many categories, including B2B marketing automation, are working to incorporate functionality that smooths the workflow for marketers using their software. One significant focus is providing users with proactive recommendations or suggestions for best next steps based on aggregated data and historical usage patterns.

With more businesses seeking to align marketing with sales, native or out-of-the-box integration with CRM systems has become a critical feature for B2B marketing automation platforms.

Choosing an enterprise B2B marketing automation platform

The benefits of using B2B marketing automation

The proliferation of digital channels and devices has made it difficult for B2B marketers to accurately target prospects with the right messages, on the right devices, at the right times.

Prospects are managing more of the buying process themselves, creating decision short lists by researching brand websites and social channels without ever speaking to a sales rep. To be effective, B2B marketers must be creative, targeted and aligned with sales goals; they must also have greater visibility into buyer attributes and behaviors.

Faced with these challenging market dynamics and increasing ROI pressure, B2B marketers at companies of all sizes can gain these benefits from a marketing automation platform:

- **Increased marketing efficiency.** Automating time-consuming, manual tasks around content creation, management and personalization; campaign scheduling and execution; data hygiene (i.e. duplicate or inconsistent data residing in various silos); communication with sales; and lead nurturing saves time and improves productivity.
- **Enhanced ability to generate more and better qualified leads.** Marketing automation can combine multiple criteria, including demographic, firmographic and behavioral data (pages visited, downloads, filled out forms) with a lead scoring system to generate and identify sales-qualified leads.
- **A multichannel view of prospect behavior.** Today's marketing automation platforms are integrating multiple channels and devices – including social media and mobile -- to create more comprehensive prospect profiles and holistic views of prospect behavior.
- **Better alignment of sales and marketing goals.** Marketing automation software can help align sales and marketing efforts to ensure that sales reps are working with sales-ready leads. By working cooperatively to set scoring parameters and define qualified leads, sales and marketing become one team. Marketing works on building relationships with early stage leads to enable sales to focus their efforts on the most highly qualified prospects.
- **Improved lead conversion and ROI.** Numerous studies have found that using a marketing automation system can increase conversions. Forrester found that B2B marketers implementing marketing automation experience a 10% increase in their sales-pipeline contribution. Marketing automation can result in a 15% increase in sales productivity as well as a 12% decrease in marketing overhead, according to tech research firm Nucleus Research.

The proliferation of digital channels and devices has made it difficult for B2B marketers to accurately target prospects with the right messages, on the right devices, at the right times.

B2B marketing automation platform pricing

Virtually all marketing automation platforms offer SaaS-based pricing, meaning software is licensed by the customer and hosted by the vendor. Several vendors targeting the enterprise market also offer on-site installation and implementation services.

Pricing is often based on the number of contacts in the marketing database, the number of email marketing messages sent each month and/or the number of users. Many vendors require annual contracts (although some offer month-to-month pricing) and may offer discounts in exchange for longer-term commitments.

The proliferation of digital channels and devices has made it difficult for B2B marketers to accurately target prospects with the right messages, on the right devices, at the right times.

Recommended steps to making an informed purchase

Understanding your current marketing processes, knowing how to measure success and being able to identify where you are looking for improvements, are all critical pieces of the marketing automation platform decision-making process.

The following section outlines four steps to help your organization begin that process and choose the marketing automation platform that is the right fit for your business needs and goals.

Step One: Do you need a marketing automation platform?

Deciding whether or not your company needs a marketing automation platform calls for the same evaluative steps involved in any software adoption, including a comprehensive self-assessment of your organization's business needs, staff capabilities, management support and financial resources.

Use the following questions as a guideline to determine the answer.

- 1. Have we outgrown our current marketing system?** Marketing automation is often a solution for companies that are growing rapidly and need to scale their efforts. If you have data in multiple databases that cannot be consolidated or are using an email system that can't deliver the level of behavioral targeting you need, it may be time for marketing automation.
- 2. What marketing automation capabilities are most critical to our business?** Identify and prioritize your software requirements and the key capabilities you'll need from the new system. Do your sales reps need real-time access to marketing data? Then native CRM integration is a must have. Do you have a sophisticated social media presence? Then social marketing management and integration will be important. By knowing what you need, you'll be in a better position to control the selection process and choose the platform that will most benefit the organization.
- 3. What kind of marketing automation platform do we need?** Marketing automation is not a one-size-fits-all solution; it's important to find the right fit. Nearly all companies offer the same basic capabilities for email, website tracking and a marketing database. Additional capabilities vary, however, so it's important to identify what you need. Is inbound marketing (social media, blogging, SEO) more important than outbound (email)? Are reporting and analytics the key features you need? Is lead scoring a crucial part of your marketing process? Do you need greater capabilities in audience segmentation and personalization?

Understanding your current marketing processes, knowing how to measure success and being able to identify where you are looking for improvements, are all critical pieces of the marketing automation platform decision-making process.

4. **What are our goals?** It is critical to know up front what your goals for the marketing automation system will be. Do you want to improve the quality of leads handed off by marketing to sales? Or increase revenue by increasing conversion at key stages in the buying cycle? Do you want to improve visibility into the buying and sales cycles to optimize marketing engagement? Or do you want to reach the growing portion of your leads that are mobile users? Bring key stakeholders together to establish the organization's goals.
5. **How will this platform integrate with our existing martech stack?** The odds are that you already have a martech stack in place, (e.g., several standalone tools for social media management, SEO, webinar hosting, etc.). You'll need to identify them all so you can ask the marketing automation vendor about integration. Many vendors offer app marketplaces, which provide faster access to the participating systems. Virtually all marketing automation vendors offer APIs, but they may be an add-on to the price of the platform.
6. **Does management support this purchase?** Every marketer should have an executive sponsor to secure support at the C-level. If you are not the ultimate decision maker for this purchase, you will need management to buy into the idea before you go any further. Present a compelling case that the benefits of new software vastly outweigh the costs. This could include converting more leads, making sales more efficient and improving campaign ROI.
7. **Do we have the internal skillset and staff necessary?** To maximize your ROI, staff will need training and a willingness to develop and execute new business processes. You may also need to consider several new hires. If your marketing and sales organizations have been operating in silos, they will need to work more cooperatively on lead scoring and routing systems, lead qualification definitions and more effective marketing collateral and communications. Identify someone in the organization who will take the lead on the selection process, as well as who will be using the system once it has been adopted.
8. **How will we measure success?** This is one of the toughest questions, and ties in directly to understanding why you are adopting a marketing automation platform. If your goal is to increase conversions, you'll need to know what your conversion rate is before automation in order to measure its impact. If it's to improve email efficiency, be prepared with metrics on open rates, clicks, etc. In addition to measuring against your marketing goals, it's wise to measure the depth and breadth of platform usage. Many marketers only use basic email capabilities, which ends up being a costly investment.
9. **Have we realistically assessed the cost?** Some marketing automation platforms are all inclusive, while others feature add-on tools and services that can significantly increase costs. In addition to the cost of the software license itself, consider the costs of ongoing services and training, as well as the indirect costs associated with getting staff up and running on the new system (i.e., more cooperation and data sharing between marketing and sales). If you don't have your own IT or design staff, be sure to ask questions about what these services cost on an hourly basis. For example, if the platform offers templates, find out how many, and how much it costs to customize template design.

Some marketing automation platforms are all inclusive, while others feature add-on tools and services that can significantly increase costs.

Step Two: Identify and contact appropriate vendors

Once you have determined that marketing automation software makes sense for your business, spend time researching individual vendors and their capabilities by doing the following:

- Make a list of all the marketing automation capabilities you currently have (i.e., email blasting), those that you would like to have (i.e., predictive scoring or recommendations) and those that you can't live without (i.e., plug-and-play CRM integration). This last category is critical and could help you avoid a costly mistake.
- Take your list of capabilities and then do some research. The "Resources" section at the back of this report includes a list of blogs, articles and industry research that will help. (Many of the vendors profiled in this report also provide whitepapers and interactive tools that can help.)
- Narrow your list down to the vendors that meet your criteria. Submit your list of the marketing automation capabilities you've identified and set a timeframe for them to reply.
- Decide whether or not you need to engage in a formal RFI/RFP process. This is an individual preference but be sure to give the same list of capabilities to each vendor to facilitate comparison.

Every marketer should have an executive sponsor to secure support at the C-level. If you are not the ultimate decision maker for this purchase, you will need management to buy into the idea before you go any further.

The most effective RFPs only request relevant information from the vendors and provide ample information about your business and its marketing automation needs. Let the vendor know how you plan to use marketing automation, including your high-level strategic goals and KPIs and how you will evaluate the success of your marketing automation efforts. Include details about timelines and the existing digital technology you have deployed.

When written properly, an RFP will facilitate the sales process and ensure that everyone involved on both sides come to a shared understanding of the purpose, requirements, scope, and structure of the intended purchase. From the RFP responses, you should be able to narrow your list down to three or four platforms that you'll want to demo.

The most effective RFPs only request relevant information from the vendors and provide ample information about your business and its marketing automation needs.

Step Three: Scheduling the demo

Set up demos with your short list of vendors within a relatively short timeframe after receiving the RFP responses to help make relevant comparisons. Make sure that all potential internal users are on the demo call, and pay attention to the following:

- How easy is the platform to use?
- Does the vendor seem to understand our business and our marketing needs?
- Are they showing us our “must-have” features?
- If we ask a specific question, can they demonstrate the answer on the call?

Other questions to ask each vendor include:

- How easy is it to integrate this software into my organization?
- What is the onboarding process?
- How long does implementation take?
- What kind of support and training are included in the base price?
- What does your partner and developer community look like?
- How do I maximize adoption in my organization?
- Will we have a dedicated account rep available to us?
- Do current customers utilize the full functionality?
- What new features are you focusing on for the coming year?
- Can we do a test run for a few days on our own (i.e., a free trial)?
- How do you protect and secure customer data? Do you have a roadmap for what you would do in the event of a hack?

Don't hesitate to ask for a demonstration of the specific capabilities that you have identified in your RFI/RFP. Consider requesting product demos showing basic tasks and demonstrating core reports such as:

- Create and edit a new email from scratch.
- Import and segment data.
- Base data management, cleansing and enrichment options.
- Create and edit a new landing page from scratch.
- Execute a simple campaign with an email, mailing list and landing page.
- See a report showing email opens, clickthroughs and landing page conversions.
- See a report showing web traffic and/or specific leads from an email campaign.
- ROI dashboards and reports at the organization and campaign levels.
- Campaign attribution options and capabilities.

This is an ongoing relationship; it's important to feel that your questions are being answered.

The most effective RFPs only request relevant information from the vendors and provide ample information about your business and its marketing automation needs.

Set up demos with your short list of vendors within a relatively short timeframe after receiving the RFP responses to help make relevant comparisons.

Step Four: Check references, negotiate a contract

Before deciding on a particular vendor, check out its online community and review sites, and speak with one or two customer references, preferably someone in a business similar to yours. The vendor should be able to supply you with several references if you cannot identify ones yourself. You can also ask around at conferences and networking events that you attend.

Use this opportunity to ask any additional questions, and to find out more about any questions that weren't answered during the demo. Make sure that the person you've been referred to is someone who is a primary user of the platform. Consider also asking these basic questions:

- Why did you license a marketing automation platform?
- Did you migrate to this platform from another? If so, how was the conversion process?
- Why did you select this platform over others?
- How long did the system take to implement?
- Has this platform lived up to your expectations?
- Did you receive the level of support you needed?
- What CRM system is this platform integrated with? Are you pleased with that integration?
- Were there any surprises that you wish you'd known about beforehand?
- Where have you seen the most success? The biggest challenges?
- How are you measuring your own success?
- How responsive is customer service?
- Has there been any down time?
- What is the most useful, actionable (favorite) report the platform generates?
- What do you wish they did differently?
- Why would you recommend this platform?

Although not all vendors require an annual contract, many do. Once you've selected a vendor, be sure to get in writing a list of what technology and support are covered in the contract. Ask about what kinds of additional fees might come up. Are there charges for custom design, and, if so, how much? What is the hourly charge for engineering services, and is there a minimum? What partner organizations are available to install and integrate the platform? If you need to train a new hire mid-year, what will that cost? Obtaining the answers up front – and having them in writing – will ensure fewer surprises or additional costs down the road.

Before deciding on a particular vendor, check out its online community and review sites, and speak with one or two customer references, preferably someone in a business similar to yours.

Conclusion

With martech budgets under greater scrutiny in the current environment, marketing leaders are expected to be able to demonstrate ROI for any new technology investment. Marketing automation platforms are a critical part of the martech ecosystem, offering numerous benefits by streamlining manual B2B marketing tasks, including lead management, email campaign development and landing page creation.

These platforms offer a wide range of advanced features, including AI-based predictive lead scoring and product recommendations, ABM and social media campaign integration. They also integrate seamlessly with many third-party CRM and other point solutions to offer extended capabilities. The key to ensuring ROI is to make sure the platform is easy to use and scale and is suited to your organization's goals. Platform vendors offer extensive training programs, online communities and strategic consulting services to encourage more comprehensive platform use and create a higher return on marketing automation investments.

To identify the marketing automation platform vendor that is the right fit for your organization, it is imperative that you understand your current marketing processes, recognize where you need to improve and know how you will measure success. By performing your due diligence in researching and interviewing marketing automation vendors, your search can come to a successful conclusion and result in greater long-term ROI and business productivity. ■

Vendor profiles

acoustic**Acoustic**

3 E 28th St., 4th Floor
New York, NY, 10016
T: 877-226-0934
acoustic.com

Key customers

Clorox
MetLife
Nationwide Insurance
PayPal
Ticketmaster

Key executives

Tom Heiser, CEO
Mark Simpson, Chief Strategy Officer
Jay Henderson, SVP Product Management
Norman Guadagno, CMO

Target customer

- B2B and B2C Fortune 1000 enterprises as well as mid-sized companies.

Company overview

- Acoustic was founded in 2019 after IBM Watson Marketing separated from IBM as a standalone company.
- 1,000-plus employees globally.
- Acoustic is a private company.
- In 2020, announced a partnership with SproutLoud to build an integrated add-on to Acoustic Campaign for local/through-channel marketing.

Product overview

- Primary Modules: Campaign, Content, Analytics, Personalization, Distributed Marketing, Exchange, and Lifecycle Pricing & Promotion.
 - Acoustic Campaign is the rebranded IBM Watson Campaign Automation (originally the Silverpop Engage platform, which IBM acquired in 2014).
 - Acoustic Campaign is the Acoustic Marketing Cloud's multichannel marketing automation platform that delivers engaging, personalized customer experiences.

CAPABILITIES**Lead Management**

- Acoustic Campaign provides lead management, scoring, and segmentation.
- Customer journey building and automation.

Marketing channels

- Acoustic Campaign lets users design campaigns across email, web, mobile push, SMS, social, and group messaging. Campaign connects to offline channels as well including fulfillment centers and call centers.

Collaboration and/or task management

- Acoustic Content lets teams collaborate while using a single repository for content.

Reporting and analytics

- Acoustic Campaign offers dozens of customizable reports that use customer behavior data across multiple marketing channels, including email, campaigns, social, and mobile.
 - Interactive dashboards with drill-down and configurable work areas are available for digital channels in the Performance Insights area of the platform.
 - Marketing Assistant works with both voice and typed commands to access campaign engagement and comparative (i.e. industry benchmarks) metrics.
 - Personalization (best-performing experiences based on real-time behaviors), inbox analysis, automation path analysis, and A/B/n testing are available.
- Acoustic Analytics is a bundle of distinct capabilities including:
 - Session replay, AI-powered anomaly detection, and struggle analytics.
 - Journey analytics across channels.
- Digital analytics for website and landing page performance.

Vendor profiles

acoustic**Acoustic**

3 E 28th St., 4th Floor

New York, NY, 10016

T: 877-226-0934

acoustic.co**Data privacy and security**

- Complies with:
 - CCPA
 - GDPR

Third-party software integration

- Integrates with CRM, web analytics, e-commerce and other marketing technology and advertising technology providers.
- Out-of-the-box integrations with Salesforce, Microsoft Dynamics 365, Magento, and Sugar CRM.
- API set available for customized CRM app development.
- Acoustic Exchange connects multiple applications in a marketing ecosystem through Acoustic's pre-integrated partner network across paid, owned and earned channels. Clients pay as the volume of events syndicated across solutions increases.
- The Acoustic Campaign partner network delivers complementary partner offerings and supporting services.

Developer programs and tools

- APIs let developers place content wherever needed to provide a consistent brand experience.

- Acoustic Content is available as a headless CMS, enabling teams to leverage the front end of their choice to build and deploy digital experiences.

Pricing and support

- Each module is priced separately. Most have more than one level of subscription pricing.
- Pricing is typically based on the size of the customer database for B2B clients, or the number of marketing interactions (email, mobile push, SMS, etc.) for B2C clients.
- While not required, the majority of Acoustic Campaign contracts are 12-month terms.
- Free 30-day trial available for some modules.
- 24/7 email and phone support included for all customers; Premium Support (including dedicated resources) is available for an additional fee; online support portals are available.
- Onboarding support is standard across all Acoustic customers.
- Experienced services organization provides technical integrations and strategic services.
- Web-based training is available and custom, on-site training is offered for an additional fee.

Vendor profiles



Act-On Software

121 SW Morrison St.,
Suite 1600
Portland, OR 97204
T: (877) 530-1555
act-on.com

Key customers

Avery Dennison
Synovus
Progressive Insurance
Truity Credit Union
Universal Funding Corp.
VMWare

Key Executives

Kate Johnson, CEO
Bill Pierznik, COO
Chris Masino, CRO
David Greenberg, SVP,
Marketing

Target customer

- Emerging growth and mid-market B2B companies across a variety of industries, including business and financial services, manufacturing, higher education, insurance, and technology.

Company overview

- Founded in 2008.
- Raised a total of \$74M in venture funding.
- 200 employees.
- Additional offices in Scottsdale, AZ, and Reading, U.K.

Product overview

- Lets marketers create "Adaptive Journeys" that derive insights and take action on their marketing data for more personalized engagement.
- Advanced Social Media module provides tools to produce, manage, nurture, and measure day-to-day B2B social media activities
- Create fully responsive emails and landing pages through an intuitive drag-and-drop interface.
- Open ecosystem for easier integration of the technology stack

Lead management

- Website Prospector lets users see and track which companies are visiting the website, how often, where they came from, what content they've viewed,
- Point-and-click lead management program, including lead nurturing, scoring and segmentation.
- Adaptive forms capture email and other information.
- Score leads based on social engagement and sends relevant email content based on social campaign activity.

Marketing channels

- Websites.
- Email.
- Landing pages.
- Customer relationship management.
- Publishes scheduled content to Twitter, Facebook, Google+ and LinkedIn.

Vendor profiles



Act-On Software
 121 SW Morrison St.,
 Suite 1600
 Portland, OR 97204
 T: (877) 530-1555
act-on.com

Reporting and analytics

- Standard reports track site visitor activity, including time on site and pages viewed, top referring sites, email responses, webinar attendance, landing page visits and forms submitted.
- Funnel reports allow users to define funnels based on business process, track prospects through conversions, measure overall flow and velocity through the funnel and compare results across time periods.
- Revenue attribution reports.
- Track Google AdWords campaign performance.
- Track email performance in real time.
- Analyze landing page traffic and performance.
- Web site visitor report analyzes traffic trends.
- Advanced Social Media Module provides an analytics dashboard to track acquisitions, engagement, audience, content, and advocacy.
- Engagement Insights (included in the Enterprise package, and available as an add-on to the Professional package) offers a templated approach using Google Sheets and Excel to provide real-time insight into engagement, shareable across the organization without manual configuration and customization.
- Data Studio (included in the Enterprise package, and available as an add-on to the Professional package) visualizes and exports data to business intelligence (BI) tools.

Data privacy and security

- COPA
- CCPA

Third-party software integration

- Native CRM integrations with Salesforce, Microsoft Dynamics 365, SugarCRM, Oracle NetSuite and Infor.

- Out-of-the-box integration with WebEx and GoToWebinar to send invites, track registrations and automate reminders/follow ups for online events.
- Act-On Anywhere provides email templates and Act-On tracking capabilities from Gmail and Outlook inboxes.

Developer programs and tools

- Act-On developer program lets third parties access APIs to create products for Act-On customers.
- CRM Customization Toolkit lets third parties implement two functions of Act-On CRM within their own custom-built CRM or other applications.
- API Developer Forum provides discussion group.

Pricing and support

- Two pricing tiers: Professional and Enterprise.
 - Professional starts at \$900/month for 2,500 active contacts and includes 3 marketing users, 50 sales users and 30,000 API calls/day.
 - Enterprise starts at \$2,000/month for 10,000 active contacts and includes 6 marketing users, 100 sales users and 30,000 API calls/day.
- No annual contracts are required.
- No free trials are available.
- Fast Track Onboarding is \$5,000.
- There are three support packages:
 - Silver is standard and included.
 - Gold (\$6,000) includes a dedicated support manager.
 - Platinum (\$15,000) includes a dedicated support manager and a customer success manager.
- Product Bootcamp Training.

Vendor profiles



Autopilot

28 O'Connell St.
Sydney NSW 2000 Australia
autopilothq.com

Key Customers

Patreon
Bitly
California Closets
Greenpeace
Sydney Children's Hospital
Range Me
Camplify

Key Executives

Michael Sharkey, CEO and Co-founder

Chris Sharkey, CTO and Co-founder

Peter Sharkey, CPO and Co-founder

Target customer

- SMBs and mid-market B2B and B2C marketers in the high-tech, SaaS, ecommerce, business services, and financial services markets, as well as not-for-profit organizations and charities.

Company overview

- Founded in 2012.
- Offices in Sydney, Australia and the United States.
- To date has raised over US\$30 million in funding, with backing from Blackbird Ventures, Southern Cross Ventures, and Salesforce Ventures.
- Over 4,000 global customers.
- 70+ employees.

Product overview

- Visual marketing software with an open, connected platform to help companies acquire, nurture and grow high-paying customers using email, web, SMS and direct mail channels.

CAPABILITIES

Lead Management

- Contact management to organize databases, manage leads, create custom fields and build dynamic or static segments and lists.
- Social media profile and lead data is automatically synchronized with contacts that are captured or imported into the Autopilot platform.

Marketing channels

- Email
- SMS
- Headsup
- Facebook ads
- Google Ads
- Postcards

Collaboration and/or task management

- Drag-and-connect canvas to create customer journeys from scratch or pre-built templates.
- Annotate and Collaborate feature lets users brainstorm or sketch on a virtual whiteboard.

Vendor profiles

**Autopilot**

28 O'Connell St.
Sydney NSW 2000 Australia
autopilothq.com

Reporting and analytics

- Behavioral insights with a real-time activity feed provides event monitoring for both known and anonymous visitors, pulling from Autopilot's universal tracking code that can be added to any online property.
- Channel engagement visible through a reporting center; embedded insights within the visual canvas editor.
- Sales funnel reporting on website visitors, conversions, leads, opportunities and closed/ won business.
- Email and Headsup performance reporting, with drill down to key metrics, time trends, click rates, users and URL (content) performance.
- Touchpoint, attribution and conversion rate analysis.

Third-party software integration

- Native integration with Salesforce, HubSpot and Pipedrive (CRMs), Twilio (SMS mobile messaging), Segment (event tracking), Zapier (app connectors), Slack (team messaging), OneSignal (push notifications) and Lob (print postcards).
 - Salesforce integration enables bidirectional synchronization of leads, contacts, and accounts.
 - Segment and Zapier integrate over 700 marketing technologies into Autopilot, including Shopify, Mixpanel, EventBrite, Wistia, Wufuu and GoToWebinar.

- Connects with more than 700 purpose-built tools to capture leads, segment databases and trigger highly personalized journeys (i.e., workflows).

Developer programs and tools

The Autopilot REST API lets developers:

- Send contacts from Autopilot to an app.
- Add contacts from an app into Autopilot.
- Trigger Autopilot journeys from an app.
- Keep unsubscribes in sync between Autopilot and an app.
- Enhance contact profiles with custom fields and data from an app.
- Get data from an app into and out of Salesforce using Autopilot's native integration.

Pricing and support

- Free 30-day trial. No credit card required.
- Pricing is based on number of contacts.
- No setup fees.
- Plans start at \$49/month for up to 2,000 contacts. Unlimited emails, chat and email support, and access to online training and knowledge base included.
- Expert set up and onboarding, and VIP support are also available.
- Optional add-ons include Salesforce CRM integration, activity streams, dedicated IP address.

Vendor profiles

**HubSpot**

25 First St., 2nd Floor
Cambridge
MA 02141
T: 888-482-7768
hubspot.com

Key Customers

Atlassian
DoorDash
Airstream
Wistia
VMware

Key Executives

Brian Halligan,
Co-founder and CEO
Dharmesh Shah,
Co-founder and CTO
JD Sherman, COO
Kipp Bodnar, CMO

Target customer

- B2B and B2C customers, mostly mid-market but also startups and small businesses.

Company overview

- Founded in 2006.
- 3,300+ employees.
- 73,400+ customers in 120+ countries.
- Publicly traded (NYSE: HUBS).
- European headquarters in Dublin; Asia-Pacific headquarters in Singapore; Latin America headquarters in Bogotá, Colombia.
- Additional offices in Berlin, Germany; Sydney, Australia; Tokyo, Japan; Paris, France; and Portsmouth, NH.
- Approximate Annual Revenue of \$674.9 million.
- In 2019 acquired PieSync, an iPAAS solution.

Product overview

- HubSpot Growth Platform is a full software stack for marketing, sales, and customer success, with a free CRM at its core.
 - HubSpot Sales Hub is sales productivity software for sales teams at growing businesses.
 - HubSpot Service Hub is a service tool for growing businesses that want to prioritize the needs of the customer.
 - HubSpot CRM is a CRM and growth tool for businesses that are just starting to formalize their sales process.
 - HubSpot CMS uses a personalization engine to customize the web site experience for each visitor.
- Mobile app provides platform access for both iPhone and Android users.
- Data is stored in the cloud.

Lead Management

- See everything about leads and customers in one place, automatically, to create frictionless experiences for customers.
 - Every interaction with contacts is stored automatically in a timeline, including calls, emails, meetings, and notes.
- Manage pipeline.
 - Real-time view of sales pipeline on a clean, visual dashboard.
 - Sort deals by name, owner, amount, or stage with custom filters.
 - Report on a team's performance against its quotas.

Data cleansing

- Clean up database with AI-powered duplicate management.
 - Learns as it's used.
 - Lists pairs of records that are likely to be duplicates.
 - Review and merge or dismiss pairs.
 - Considers name, email(s), IP-derived country, phone number, zip code, and company name when comparing two objects.

Vendor profiles

**HubSpot**

25 First St., 2nd Floor
Cambridge
MA 02141
T: 888-482-7768
hubspot.com

Marketing channels

- Manage all channels from one dashboard:
 - Email: Create email templates, automatically personalize subject lines and content for each recipient, and run A/B tests to improve open rates and clickthroughs.
 - Social Media: Monitor brand mentions and relevant conversations, track engagements automatically, and schedule social posts at optimal times.
 - Ads: Track ROI of Facebook, Instagram, LinkedIn, and Google advertising.
 - Blogging: Publish conversion-optimized content with tools that speed up creation, keep formatting consistent, and optimize for search.
 - Landing Pages: Launch landing pages that look perfect across devices, add forms optimized for completion in one click, and automatically change content based on who's viewing your page.
 - Calls-to-Action: Design CTAs, know who clicks which CTAs, and measure performance to optimize clickthrough rates over time.

Collaboration and/or task management

- Projects productivity tool lets users manage all work in HubSpot.
 - High-level and granular view of tasks, deadlines, and resources.
 - Integrates with all other HubSpot Marketing tools; no third-party tools or log-ins required.
 - ◆ For every task in a project:
 - ◆ Assign owners, set a due date, add attachments, and link to assets in other HubSpot tools including blog posts and site pages.
 - Turn any project into a template, creating a repeatable process for future marketing work.
 - Each template is like a marketing to-do list, walking users through

every step of common marketing projects: building a newsletter, creating a content offer, or redesigning a web site.

Reporting and analytics

- Reports track channel performance, conversion assists, time-to-completion, and reverse funnel analysis.
- Users can benchmark traffic, conversion, and inbound links for up to 10 competitors.
- ROI tracked via multiple sources such as organic and paid search, referrals, social media, email marketing, direct traffic, and other campaigns.
- Monthly reports are delivered automatically and can be customized.
- A reporting add-on provides customizable dynamic dashboards for both sales and marketing.

Data privacy and security

- GDPR compliant.
- Certified by TRUSTe for Enterprise Privacy.
- Product is hosted by trusted data center providers AWS and Google Cloud, that maintain SOC 2 Type II, ISO 27001, and many other security certifications.

Third-party software integration

- Salesforce AppExchange partner.
 - Includes bi-directional synchronization and closed-loop ROI reporting, allowing users to set custom criteria to score leads and determine which leads are automatically sent to Salesforce.
 - Users can build segments on any combination of HubSpot and Salesforce data and personalize email content using Salesforce field data.
- Native integration with apps including Zoom, Shopify, Slack, Stripe, YouTube, Workplace by Facebook, Vidyad, Wistia, Zendesk, SlideShare, and GoToWebinar.

Vendor profiles

**HubSpot**

25 First St., 2nd Floor
Cambridge
MA 02141
T: 888-482-7768
hubspot.com

- 400+ certified integrations with other tools.
- The CRM and all three Hubs draw on the same database and see a single view of contacts

Developer programs and tools

- Robust app partner program currently features 400+ integrations across marketing, sales, advertising, customer service, and support.
- Developer resources include open APIs and extensive API documentation.

Pricing and support

- HubSpot CRM is free and includes contact management, contact website activity, Gmail and Outlook integrations, and prospects.
- Free level of Marketing Hub, Sales Hub, and Service Hub.
- An annual contract is required for paid plans.
- Tiered pricing plans for HubSpot Marketing Hub based on the number of database contacts.
 - Free includes all features of HubSpot CRM plus forms, email marketing, list segmentation, basic reporting dashboards, and Facebook Messenger integration.
 - Starter starts at \$50/month and adds live chat, conversational bots, forms, list segmentation, and more advanced email marketing.
 - Professional starts at \$800/month and adds marketing automation, smart content, A/B testing, and custom reporting, and more to the Starter package.
 - Enterprise starts at \$3,200/month and adds revenue attribution, partitioning, single sign-on, predictive lead scoring, and more advanced reporting to the Professional package.
- HubSpot Sales Hub is offered in four

tiers:

- Free includes live chat, conversational bots, team email, and Conversations inbox.
- Starter starts at \$50/month and adds email tracking and notifications, sequences, calling, meeting and email scheduling, and deal pipelines to the Free package.
- Professional starts at \$500/month and adds rotation automation, workflow extensions, 1:1 video creation, quotes, and Salesforce integration to the Starter package.
- Enterprise starts at \$1,200/month and adds playbooks, eSignature, single sign-on, quote approvals, and calculated properties to the Professional package.
- HubSpot Service Hub is offered in four tiers:
 - Free includes ticketing, live chat, calling, and Conversations inbox.
 - Starter starts at \$50/month and adds canned snippets, email templates and sequences, tickets closed reports, rep productivity reports, and time-to-close reports to the Free package.
 - Professional starts at \$400/month and adds ticket status, ticket routing, task automation, multiple ticket pipelines, knowledge base, NPS surveys, and reporting to the Free package.
 - Enterprise starts at \$1,200/month and adds playbooks, goals, hierarchical teams, single sign-on, Slack integration, and webhooks to the Professional package.
- HubSpot CMS is available as a standalone offering that starts at \$300/month and includes landing pages, blog and content creation tools, SEO and content strategy tools, live chat, conversational bots, calls-to-action, smart content, and forms. CMS Onboarding is required for a one-time fee of \$1,000.

Vendor profiles



HubSpot

25 First St., 2nd Floor
Cambridge
MA 02141
T: 888-482-7768
hubspot.com

- HubSpot's duplicate management tool is available to all Professional and Enterprise HubSpot accounts, across hubs.
- All pricing is for a minimum number of database contacts. Fees apply as the number of database contacts grow.
- Onboarding is required for Professional and Enterprise customers at \$250 and \$3,000, respectively.
- HubSpot also offers a variety of professional services options that range in price depending on services.
- Email and phone support are limited to paying customers. Free users can get help in the HubSpot Community or on Twitter.
- Phone support available 7 a.m. to 8 p.m. EST.
- HubSpot Academy is a free how-to site offering customers guides, webinars, brainstorming worksheets and inbound certification courses

Vendor profiles

**iContact**

2121 RDU Center Dr., 4th Floor
Morrisville, NC 27560
T: (877) 820-7837
iccontact.com

Key customers

Hofstra Law School
Kaiser Willys Auto Supply
Mississippi Gift Co.
Spiritline Cruises

Key executives

Geoff Alexander,
President & General Manager

Andrew Pearson,
VP, Sales & Marketing

Shawna Vandenheuvel,
VP, Services

Josh Tracy, VP,
Customer Support

iContact representatives weren't available to provide updated information for this profile before the publication deadline. The information here is based on the company's previous profile but may have minor updates to reflect publicly-available information.

Target customer

- Mid-market companies, nonprofits and educational institutions.

Company overview

- Founded in 2003.
- 150-plus employees.
- Six rounds of funding totaling \$54M.
- Acquired by j2Global, parent company of BusinessWire, for \$49M in January 2019.
- Additional office in Beltsville, MD.

Product overview

- *iContact Pro* integrates email marketing, campaign management, automated workflows, landing pages, social media integration and analytics in a cloud-based solution.
- Key features include:
 - Segmentation and targeting.
 - A/B testing.
 - Drag-and-drop landing page and email editors.
 - Behavioral tracking.
 - Lead scoring.
 - Campaign management.
 - Custom Objects.
 - Salesforce Sync.

Social media integration

- Social CRM tracks and records multichannel customer engagement (and sources), including email, social media, landing pages and website visits.
- Dashboard publishes across Facebook, Twitter and LinkedIn.
 - Monitors Twitter and Facebook feeds side-by-side.
 - Tracks number of social shares.
 - Segmentation based on social profiles and publicly available social demographic information.
- Drag-and-drop preferred social icon rail into HTML email template with WYSIWYG email editor.

Vendor profiles

**iContact Pro**

2121 RDU Center Dr., 4th Floor
 Morrisville, NC 27560
 T: (877) 820-7837
iccontact.com

Reporting and analytics

- Main dashboard provides view of all recent activities including opens, clicks, unsubscribes and bounces.
- "Aggregated activities summary" report reviews the results of overall activities (e.g. emails, landing pages, social posts) by week, month and year.
 - Includes data export/chart feature.
- Detailed "sent message" report shows how contacts engaged with individual messages.
 - Message heat maps show where people clicked.
 - Can compare multiple messages side-by-side to identify trends.
 - Includes data export feature.
- Campaign reporting groups like activities together.
- Social engagement reports highlight contact actions based on brand social media posts.
- Automation analytics track the current status of contacts in user workflows.

Third-party software integration

- *iContact for Salesforce*, an add-on email marketing product that operates within Salesforce, to create, send and track email campaigns with no HTML required.

- Native integration with Google Analytics.
- Integrates with hundreds of martech apps through Zapier partnership.
- API available.

Pricing and support

- Pricing for *iContact Pro* starts at \$99/month for 2,500 contacts.
- U.S.-based Customer Success Manager (CSM) included in Pro platform purchase.
- Email, chat, and phone technical support (including Spanish language customer care) available five days/week from 9 a.m.-6 p.m. (ET).
- Annual or monthly contracts.
- Free trials are available.
- Four tiers of add-on premier services packages available (Bronze, Silver, Gold and Platinum), including increasing numbers of weekly or quarterly account strategy calls and custom strategic services projects.

Vendor profiles

**Keap**

1260 South Spectrum Blvd.

Chandler, AZ 85286

T: 866-800-0004

keap.com

Key customers

Keeping Current Matters
LeftFoot Coaching Academy
Milkhouse Candles
Money Finder
Rock and Rapid Adventures
TITIN

Key executives

Clate Mask, Co-founder and CEO

Scott Martineau, Co-founder and Chief Marketing Officer

Kaja-Anne Jezycki,
General Counsel

Target customer

- Small businesses with two to 25 employees.

Company overview

- Founded in 2001.
- 550 employees.
- Raised more than \$140M in venture funding.
- Investors include Bain Capital Ventures, Goldman Sachs, Signal Peak Ventures, ORIX Growth Capital, Allure Ventures, Arthur Ventures, and Mohr Davidow Ventures.
- \$100M+ annual revenue.

Product overview

- Keap centralizes customer information in a suite of tools including:
- CRM.
- Sales automation.
- Marketing automation.
- E-commerce.
- Payments.
- Analytics.
- Mobile solutions.

Lead Management

- Contact management.
- Contact segmentation (tags).
- Saved searches, filters, and contact lists.
- Tasks.
- Web forms.
- Landing pages.
- Company records.
- Lead scoring.
- Customizable dashboard.
- Pipeline management.
- Campaign Builder.

Data cleansing

- Automated list management for email engagement monitoring.
- Data migration services.
- List hygiene services.

Vendor profiles

**Keap**

1260 South Spectrum Blvd.

Chandler, AZ 85286

T: 866-800-0004

keap.com**Marketing channels**

- Email, SMS, phone, affiliates.

Collaboration and/or task management

- Automated reminders, task management, workflow management, invoices, billing and payments management, appointment scheduling, order forms.
- Gmail and Outlook Syncs.

Reporting and analytics

- Marketing Reports
 - Conversions by sales stage, lead source, and other criteria.
 - Form completion, email open rates, and click-throughs.
 - Marketing and campaign performance.
 - Contact action.
- Sales Reports
 - Revenue by a lead source, contact interests, products, and other criteria.
 - Activity history and sales generated by each rep on the team.
 - Projected revenue based on current efforts.
 - Activity and revenue from referrals.
 - Custom opportunity reports by owner, sales stage, and activity.
- Order and Billing Reports
 - Sales, receivables, payments, credits, and subscription revenue.
 - Income by lead source, product, or invoice.
 - Customer lifetime value.
 - Orders, failed credit card, and unpaid invoices.
- Admin Reports
 - User logins, leads added, contacts added, and updates.
 - All tasks by user, type, due date, completion status, and associated notes.

Data privacy and security

- PCI DSS.
- Third-party data center providers must have recently completed a Service Organization Controls (SOC) 2 Type II audit.

Third-party software integration

- Keap Marketplace includes 250 small business service and technology ecosystem partners, apps, integrations, content, and pre-built marketing campaigns.

Developer programs and tools

- The Keap Developer Community provides information on available APIs.
- PartnerEdition lets certified partners and developers create and deploy campaigns to their own customers' apps.
- Keap Marketplace lets anyone share or sell re-usable solutions to Keap customers in an online marketplace.

Pricing and support

- Keap product lineup includes:
- Keap Grow: \$79/month (+expert coaching)
- Keap Pro: \$149/month (+expert coaching)
- Infusionsoft by Keap: \$179/month (+expert coaching)
- Free trial available.
- Support is included with every subscription and is available via live chat 24/7 or via phone during regular business hours in the U.S., U.K., and Australia.
- Expert Coaching is an individually tailored consultative service.

Vendor profiles

**Mailchimp**

675 Ponce de Leon Ave. NE

Suite 5000

Atlanta,

GA 30308

Mailchimp.com**Key customers**

Dollar Shave Club

GitHub

Magnolia Market

Chronicle Books

TEDTalks

UrbanSitter

Key executivesBen Chestnut,
Co-founder and CEODan Kurzius, Co-founder and
Chief Customer OfficerJohn Foreman,
Chief Product OfficerTom Klein,
Chief Marketing Officer**Target customer**

- Every type of business, ranging from Main Street to Fortune 100 companies. Most customers are small businesses, particularly in the commerce and technology industries.

Company overview

- Founded in 2001.
- Mailchimp is the trading name of its operator, Rocket Science Group.
- Privately owned. No VC funding.
- Over 1,200 employees.
- Additional offices in Brooklyn, NY, Oakland, CA, and Vancouver, BC, Canada.

Product overview

- All-in-one marketing platform for businesses with an emphasis on growth marketing.
 - Facebook, Google, Instagram (organic social posting, ads, remarketing).
 - Postcards.
 - Automations.
 - CRM.
 - Email.
 - Shoppable landing pages.
 - Websites (beta).
 - Domains.
 - Reporting and analytics.

Lead Management

- Lead generation.
 - Pop-up and embedded forms.
 - Ads.
 - Smart features:
 - ◆ Address finder.
 - ◆ Lookalike audience finder (ads and postcards).
- Lead management.
 - Tags.
 - Segments.
 - Audience dashboard.
 - Archive contacts.
- Lead nurturing.
 - Email.
 - Facebook ads.
 - Instagram ads.
 - Landing pages.
 - Google remarketing ads.
 - Signup forms.
 - Postcards.
 - Customer relationship management.
 - Web sites.
 - Organic social posting.

Vendor profiles

**Mailchimp**

675 Ponce de Leon Ave. NE
Suite 5000
Atlanta,
GA 30308
Mailchimp.com

Marketing channels

- Mailchimp provides marketing tools for:
 - Email.
 - Facebook ads.
 - Instagram ads.
 - Landing pages.
 - Google remarketing ads.
 - Signup forms.
 - Postcards.
 - Customer relationship management.
 - Websites.
 - Organic social posting.

Collaboration and/or task management

- Integrations give users the option to connect the collaboration and task management tools of their choice to the Mailchimp account.
- Mailchimp has a network of experts who collaborate with small business owners to assist with marketing, development, and design projects.

Reporting and analytics

- Mailchimp's advanced analytics monitors real-time marketing data across channels and provides growth, engagement, and revenue reports for users.
- Campaign reports analyze clicks, opens, and revenue.

Data privacy and security

- Mailchimp's legal team partners with developers and engineers to make sure Mailchimp's products and features comply with applicable international spam and privacy laws.
- Retains a law firm in the UK to consult on EU privacy issues.
- Undergoes annual verification with a U.S. based, third-party compliance reviewer under the Privacy Shield verification program, and it has certified compliance with the EU-U.S./Swiss-U.S. Privacy Shield Frameworks.
- Member of the ANA, ESPC, OTA, and

MAAWG.

- Mailchimp corporate attorneys and legal compliance manager are active members of the International Association of Privacy Professionals (IAPP) and collectively hold the certifications of CIPP/US, CIPP/G, and CIPP/E.

Third-party software integration

- Shoppable landing pages through a partnership with Square.
- Native integration through connected sites with ShoppSync, WooCommerce, BigCommerce, Magento, Magento 2, PrestaShop, Big Cartel, Drupal Commerce, Miva, and Ubercart.
- Marketplace access to hundreds of third-party apps and web services.
- Custom integrations through API with Google Analytics, EA Pro Reports, Glew Ecommerce Analytics, and Power BI.

Developer programs and tools

- Developers use Mailchimp API 3.0 to sync email activity and campaign stats with their databases, manage audiences, view and control automation workflows, and test calls and endpoints before pushing to production.
- The Mailchimp API is designed to help create custom solutions or integrate with RESTful APIs. The REST architectural style is an integral part of API 3.0.

Pricing and support

- Mailchimp offers tiered pricing based on number of subscribers and emails sent per month.
 - **Free Plan**
 - **Essentials Plan** starts at \$9.99/month.
 - **Standard Plan** starts at \$14.99/month.
 - **Premium Plan** starts at \$299/month.

Vendor profiles

**Marketo (an Adobe Company)**

345 Park Avenue
San Jose, CA 95110
T: 408-536-6000
adobe.com

Key customers

CenturyLink
Charles Schwab
GE Panasonic
RingCentral
Roche

Key Executives

Shantanu Narayan,
Chairman, President and CEO,
Adobe
Aseem Chandra,
Digital Experience SVP Product
Marketing, Adobe
Suresh Vittal, Digital Experience
VP of Product & Technology,
Adobe
Brian Glover, Director,
Marketo Engage Product
Marketing, Adobe

Target customer

- SMB to enterprise-level B2B marketers and some B2C considered-purchase marketers in a variety of industries, including technology, business services, healthcare, financial services, education, manufacturing, and telco.

Company overview

- Parent company Adobe founded in 1982.
- 22,634 employees.
- More than 13,000 customers around the world.
- Marketo acquired by Adobe in October 2018.
- More than 50 Adobe offices around the world including in San Jose, San Francisco, Lehi (Utah), Seattle, Atlanta, Denver, Portland, Dublin, London, Paris, Tel Aviv, Tokyo and Sydney.
- Annual revenue of \$11.171 billion in FY2019.

Product overview

- Cloud-based Marketo Engage features 10 major capabilities for:
 - Marketing automation to create, automate, and measure campaigns across channels
 - Account insights and profiling to identify the right target accounts using data and AI.
 - Email to engage customers with relevant conversations in minutes.
 - Mobile to communicate with customers using mobile devices.
 - Social integration to identify potential and current customers.
 - Targeted, personalized display ads.
 - Dynamic interactions with customers on a web site.
 - Marketing analytics to prove and improve business impact.
 - Predictive content.
 - Marketo Sales Connect to coordinate sales and marketing.

Capabilities

- Lead Management
 - Marketo Engage:
 - ◆ Provides landing pages and progressive forms.
 - ◆ Users can develop and qualify potential buyers with personalized nurturing campaigns and scoring capabilities.
 - ◆ Prioritize the best leads with quality and urgency ratings.
 - ◆ Integrations with Salesforce, Microsoft Dynamics, SAP, and other CRM systems to increase lead management effectiveness.

Data cleansing

- Marketo Engage natively performs basic data cleansing.
 - Data deduplication feature finds and merges duplicate users in the database.
 - Users can set up automated workflows for data normalization.
 - More advanced data deduplication and data cleansing enabled through turnkey integrations with a number of LaunchPoint partners, including RingLead, ReachForce, Strikelron, and CRMFusion.

Vendor profiles

**Marketo (an Adobe Company)**

345 Park Avenue
San Jose, CA 95110
T: 408-536-6000
adobe.com

Marketing channels

- Email.
- Mobile push notifications and in-app messages.
- Direct mail.
- Social media.
- Digital advertising.
- Web sites.
- E-commerce sites.
- Webinar and conference services.
- Video/interactive applications.
- Tradeshows, seminars, and events.

Collaboration and/or task management

- Task management included natively from within the application Command Center or from the Tasks section of the Live Feed.
- Tasks can also be managed from within CRM systems.

Reporting and analytics

- ROI reports include multi-touch attribution and aggregate impact of marketing on the revenue cycle over time, including conversion rates plus flow and velocity through the funnel.
- Executive dashboards feature revenue cycle analytics identifying real-time metrics and trends.
 - Bizible by Marketo offers complete attribution across every marketing and sales touchpoint, a variety of attribution models, and connectors to paid media channels.
 - Performance Insights identifies programs and channels that deliver the highest marketing ROI.
 - Success Path Analyzer monitors key performance metrics for each stage of the customer journey.
 - Revenue Modeler defines customer journey stages and monitors how potential customers move through the funnel.
- Advanced Report Builder features a pivot-table UI for ad hoc reporting on channel and campaign performance, including attribution and ROI.
- Opportunity Influence Analyzer

demonstrates cross-channel marketing activities that influence deals to understand each marketing touchpoint's influence.

Data privacy and security

- SOC 2-Type 2.
- GDPR.
- CCPA.
- HIPAA.
- ISO 27001 certified.

Third-party software integration

- Native integration with Microsoft Dynamics 365, Salesforce, and SAP C4C.
 - Supports two-way synchronization.
 - With CRM credentials, custom objects and fields can be synched automatically.
 - Additions/deletions to CRM framework such as fields or objects are automatically updated in Marketo.
- Turn-key integrations available for Oracle NetSuite, SugarCRM, and Zoho.
- Partner ecosystem of data integrators and digital agencies includes Accenture Digital, Deloitte Digital, DigitasLBi, Informatica, Mulesoft, Talend, and Software AG.
- LaunchPoint app marketplace includes 550 marketing apps and services covering analytics, content marketing, events, mobile marketing, social media, video, sales tools, and digital marketing and advertising.
- Additional integrations available through Webhooks, SOAP, and REST APIs.

Developer programs and tools

- Developer program provides access to documentation around the Marketo API.
 - Getting Started.
 - REST API.
 - Lead Tracking (through Munchkin code).
 - Webhooks.
 - Web personalization.

Vendor profiles



Marketo (an Adobe Company)

345 Park Avenue
San Jose, CA 95110
T: 408-536-6000
adobe.com

- Marketo Mobile Engagement (MME).
- Email scripting.
- Client Libraries.

Pricing and support

- Pricing based on the size of the marketing database, plus any additional infrastructure requested, such as advanced security, high volume APIs, high volume email infrastructure, or advanced database features.
- Annual contract required.
- No free trial available.
- Five pre-built bundles for the Email Marketing, Account-Based Marketing, Consumer Marketing, Lead Management and Customer Base Marketing solutions.
 - All solutions include Marketo Engagement Platform, which helps marketers build customer relationships by enabling personalized interactions.
 - Any product/module not packaged in the solution can be purchased as an add-on.
- Products/modules are typically priced on a single scaling factor, such as database size, number of marketing users, number of mobile activities, or number of web site visitors.
- All Marketo subscriptions include access to customer success managers.
- All customers receive 24/7 web portal support.
- Global phone support is available with paid support options.
- Professional services packages are available for implementation and consulting services.
- Premium-priced support services include access to named support professionals, accelerated service-level response, and sessions for proactive mentoring and business review.

Vendor profiles

**Mautic by Acquia**

53 State Street 10th Floor

Boston MA 02109

T: 844-373-2128

acquia.com**Key customers**

Lonely Planet

Shake Shack

Liverpool Football Club

Jeweler's Mutual Insurance

Key executives

Mike Sullivan, CEO

Dries Buytaert, Co-Founder and CTO

Chris Andersen, CFO

Lynne Capozzi, CMO

Target customer

- IT and marketers.

Company overview

- Founded in 2007.
- 1,000+ employees.
- Additional offices in Atlanta and London.
- Acquia was acquired by Vista Equity Partners in September 2019.
- Acquia acquired Cohesion in September 2019.
- Acquia acquired AgilOne in December 2019.
- Acquia acquired Mautic in May 2019.
- Five additional offices in the United States: New York, San Francisco, San Francisco, Austin, Portland, OR and Washington, D.C.
- International offices in the U.K., Australia, Germany, France, India, Japan and Canada.

Product overview

- Acquia's Mautic is a fully-featured marketing automation platform that enables organizations of all sizes to send multi-channel communications at scale, and simultaneously personalize the experience for individual contacts.
- Mautic enables marketers to gather important contact information, optimize and replicate campaigns, and ultimately, report on results. Mautic's modern and flexible design provides team members the freedom to move quickly and adapt easily to changing business needs.

Lead management

- List Segmentation: Mautic enables brands to keep all of their marketing contacts in a single database and organize them into any customized segment, category, or tag that aligns with a marketing mission, strategy, or program.
- Consistent View of Contacts: Mautic can connect to any relevant contact management database in a customer's technology stack to help them gain a complete view of their prospects and customers across the entire lifecycle.
- Deliver Personalized Messages: Using demographic and behavioral data that's been collected, brands can build tailored campaigns with personalized messages to drive interest and engagement.
- Deep Bi-Directional Integrations: Mautic seamlessly integrates with many top CRM solutions, as well as Customer Data Platforms (CDP).

Data cleansing and normalization

- Mautic integrates with a number of best-of-breed data cleansing solutions, such as FullContact and Clearbit, which enables marketers to extend their collected data and validate it via 3rd party solutions.

Vendor profiles

**Mautic by Acquia**

53 State Street 10th Floor

Boston MA 02109

T: 844-373-2128

acquia.com**Channels**

- With Mautic, organizations can orchestrate seamless, one-to-one customer experiences across any digital channel, including website personalization, browser-based alerts, email, SMS, mobile push notifications, social media, ad tech, direct mail, or emerging channels like voice, beacons & physical signage.

Collaboration/task management

- The addition of Mautic's marketing automation and campaign management capabilities to Acquia's Open Digital Experience Platform drives one-to-one customer experiences across any digital channel. Built on two thriving and well-respected open source communities, Drupal and Mautic, Acquia's Open Digital Experience Platform lays the foundation for next-generation experiences.

Analytics & Reporting

- Mautic offers detailed analytics and reporting capabilities, from quick-view dashboards personalized by user to deep dive read-outs on the real-time performance of any campaign or individual marketing element (e.g. email, landing page, form, etc.).

Data security

- Mautic enables customers to be fully compliant with GDPR, CASL, and has received EU Privacy Shield certification.

Integrations

- Mautic offers hundreds of third party tool integrations and plugins out of the box. And because Mautic is an open, API-driven platform, it offers customers unbounded freedom to connect with any solution their business needs to drive sales and marketing growth and create a comprehensive digital experience.

- CRM integrations include Salesforce, HubSpot, Pipedrive, SugarCRM, Zoho, and Microsoft Dynamics.
- CMS integrations include Drupal, WordPress, Joomla!, Typo3, Concrete5, and Pulse.
- Workflow tool integrations include GoToWebinar, GoToTraining, GoToMeeting, Gmail, Zapier.
- Social Media: native integration with Twitter, and integration with Oktopost enables data sharing with all major platforms (facebook, twitter, linkedin, instagram).
- Data Enrichment integrations include: FullContact, Clearbit, iContact.
- Email integrations include: Sendgrid, Sparkpost, MailChimp, Outlook.com, Postmark, Amazon, mailjet, mandrill, outlook.
- eCommerce integrations include woocommerce.

Pricing and support

- Mautic offers the ability for prospects to try a free self-serve sandbox, as well as free 60-day trials for qualifying companies.
- Mautic subscriptions include hands-on implementation and onboarding sessions tailored to each customers' needs, and these services are included in its annual subscriptions at no additional cost.
- Pricing begins at \$12,000 US per year, or \$1,000 US per month for smaller implementations of less than 50,000 contacts. Prices increase above \$100,000 per year for larger implementations with millions of contacts.

Vendor profiles



MARKETING CLOUD

Oracle Eloqua

500 Oracle Pkwy.
Redwood Shores
CA 94065
T: (855) 695-4418
oracle.com/marketingcloud/products/marketing-automation

Key customers

Cetera Financial Group
Dell
Eaton
Juniper Networks
Mack Trucks
Thomson Reuters

Key executives

Christopher Donato,
SVP, North America Applications
Shashi Seth, SVP, Oracle
Marketing Cloud
Pierre Custeau,
VP Product Management
Steve Earl, Senior Director,
Product Marketing

Oracle representatives weren't available to provide updated information for this profile before the publication deadline. The information here is based on the company's previous profile but may have minor updates to reflect publicly-available information.

Target customer

- B2B or B2B2C enterprise, mid-market or SMBs in multiple industries including high tech manufacturing, higher education, professional services, financial services and insurance, automotive and entertainment verticals.

Company overview

- Oracle is a global provider of enterprise cloud computing solutions, including software as a service, platform as a service, infrastructure as a service and data as a service.
- Founded in 1977.
- 138,000-plus employees.
- Publicly traded (NYSE: ORCL).
- Acquired Eloqua in December 2012.
- *Oracle Eloqua* is part of the Oracle Marketing Cloud product suite, which also includes *Oracle Responsys* (B2C cross-channel marketing), *Oracle Content Marketing* (formerly Compendium), *Oracle Data Management Platform* (formerly BlueKai), *Oracle Maxymiser* (testing and personalization), *Oracle Social Cloud* (social media solutions suite) and *Oracle Infinity* (digital analytics).

Product overview

- Oracle Eloqua is an open marketing automation platform that connects marketing, CRM, and other third-party data to orchestrate personalized, intelligent customer experiences.
 - Native capabilities also include adaptive campaign management, lead management, targeting and segmentation, content marketing, and sales enablement tools.
- Key components include:
 - *Campaign Canvas*: Marketers can easily create a sophisticated nurture or cross-channel campaign in minutes, by utilizing the drag-and-drop interface. This allows for a much faster way to optimize campaigns over time.
 - *Lead Management*: A simple, powerful solution for real-time automated lead scoring across multiple campaigns and business lines that provides deep details about prospects.
 - *Program Canvas*: Program Canvas' easy to use drag-and-drop whiteboard allows you to build out data management workflows and integrations that simplify data transformation and normalization while 'listening' for changes and triggers actions within programs.
 - *Targeting and Segmentation*: Leveraging behaviors, preferences and digital body language into one accessible profile lays the foundation for elegant, granular segmentation. With over 50 custom attributes to use for segmentation, marketers are better equipped to ensure they are delivering the right message on the path to purchase.
 - *Content Marketing*: Collaborate and plan across teams and regions with workflows and projects to align content to a persona or sales stage. Promote content with the in-app social promotion tool for faster exposure of content or access content to share from any device or platform with internal content portals.

Vendor profiles

ORACLE®**MARKETING
CLOUD****Oracle Eloqua**

500 Oracle Pkwy.
Redwood Shores
CA 94065

T: (855) 695-4418

[oracle.com/marketingcloud/
products/marketing-automation](http://oracle.com/marketingcloud/products/marketing-automation)

Social media integration

- *Social Suite* collection of apps included in the platform.
- Social landing page apps are accessible directly within the Oracle Eloqua landing page editor. Additional social sharing and widgets are available.
- Social data apps are available on the Oracle Eloqua AppCloud and allow users to access and manipulate social information either externally or within the Oracle Eloqua database.
 - *AddThis Content App* allows Marketers to support AddThis sharing tools in Eloqua landing pages and sharing engagement can be measured in their AddThis account.
- Native integration with Oracle Social Cloud allows users to publish directly to social properties from the Campaign Canvas campaign builder interface and execute social advertising campaigns.

Reporting and analytics

- *Insight* is the platform's real-time analytics and reporting tool.
- Dashboards track and measure campaign engagement, cost and activity; email clickthroughs, bounces and trends; form conversion and abandonment; and landing page performance, trends and visitor demographics.
- Features closed-loop reporting to tie campaigns to pipeline and revenue growth.

Third-party software integration

- Supports native bi-directional integrations with Oracle Sales Cloud, Oracle CRM On Demand, Salesforce, and *Microsoft Dynamics 365*. Additional integrations are available through a partner or *Oracle Integration Cloud Service for Netsuite*, SugarCRM, SAP CRM and Infor.
 - REST API available to integrate with other enterprise systems such as ERP, content management and data warehouses.
- *AppCloud* provides access to 500-plus app partners with over 700 integrations, including LinkedIn Sales Navigator, Microsoft Outlook for Sales Tools, WeChat, AddThis, Cvent, Certain, Demandbase, Lattice, WebEx, GoToWebinar, CloudWords, Pinterest, LookBook HQ, SnapApp and LinkedIn.
- Marketers can also leverage the *AppCloud Development Framework* to create apps to access third-party data and content sources across the enterprise.

Pricing and support

- Three pricing tiers based on the number of users and database contacts: Basic, Standard and Enterprise. Specific pricing models are not publicly disclosed.
- Add-on professional services available for companies that need additional help onboarding or customizing the software for their business needs.

Vendor profiles

**Salesforce Pardot**

50 Fremont Street,
Suite 300
San Francisco, CA 94105
T: 800-NO-SOFTWARE
pardot.com

Key customers

Zoom
VMware
Amazon Business
Southwest Cargo
T-Mobile
Paypal

Key executives

Adam Blitzer, Executive VP and
General Manager, Marketing
Cloud, Commerce Cloud, and
Community Cloud
Michael Kostow, SVP & GM,
Salesforce Pardot

Target customer

- SMBs to enterprise-level organizations across all verticals and geographies.

Company overview

- Founded in 2007.
- Purchased by Salesforce in 2013.
- Salesforce has offices in more than 30 countries.
- Product overview
- Salesforce Pardot aligns marketing and sales teams to generate more pipeline, empower sales to close more deals and grow customer relationships at scale. Salesforce has brought constant innovation to market through Marketing Analytics to help marketers understand and improve marketing ROI, Artificial Intelligence to unlock the next level of productivity and effectiveness, and Account-based Marketing (ABM) to target and grow key accounts.

Lead management

- Ability to quickly identify the best leads and determine when leads are sales-ready by allowing users to do the following:
 - Identify who is interested by scoring prospect interactions
 - Find the right customers with objective grading
 - Determine prospects with key buying personas using artificial intelligence
 - Prioritize sales outreach at a glance
- Einstein for Marketing can be used to monitor and analyze data from Pardot and Salesforce to prioritize work for sales and marketing teams. With enough data behind the scenes, Einstein shows what type of prospects most often engage with assets in the form of straightforward scores and insights.
- Marketing can pass Salesforce Pardot qualified leads over to Sales and identify those that need further nurturing. Sales teams can focus on the hottest leads, which helps shorten the sales cycle.

Data cleansing and normalization

- Deduplicates leads upon import and from forms and can automatically deduplicate data by email address using Salesforce functionality. In addition, data matching and optimization are handled within Salesforce.
- Data hygiene is also supported via partner apps. For example, Openprise directly integrates with Salesforce Pardot and automates critical data management processes, including data onboarding, normalization, cleansing, and enrichments.

Channels

- Supports email marketing capabilities, including step-by-step engagement journeys. Users can enhance journeys with mobile, social, and advertising and mobile messaging via Marketing Cloud and the Salesforce AppExchange

Vendor profiles

**Salesforce Pardot**

50 Fremont Street, Suite 300
 San Francisco
 CA 94105
 T: 800-NO-SOFTWARE
pardot.com

Collaboration/task management

- Provides deep insights into what prospects are interested in so users can nurture them more effectively, pass them to the right rep at the right time, and identify the cross-sell and upsell opportunities that are most likely to convert.
- Ability to manually or automatically pass leads to sales for nurturing.
- Users with the appropriate permissions can add scoring components to their assets or insert score modifications into automation rules or Engage campaigns.
- Automation features can create tasks and set priority status. Additionally, users can use demographic data to create a grade value for prospects to define how good of a fit they are for further prioritization beyond score. Clicking into the insights score value at the prospect-level provides a more detailed breakdown of scoring. The prospect activities table includes a score for each individual activity.
- In addition to out-of-the-box functionality, users can develop a custom lead assignment engine on the Salesforce platform to support more complex lead assignment requirements.

Analytics & Reporting

- Salesforce Pardot provides analytics and reporting for both account and individual levels, including forms, pageviews, content downloads, emails and social interactions. It also provides reporting for webinar metrics, video metrics and paid search through LinkedIn, Facebook and Google.
 - Out-the-box reporting that allows organizations to understand engagement history across leads, contacts, campaigns and accounts without configuration.
 - Also enables third-party data sources, helping users get a single view of their data on a single platform.
 - Specific reporting and analytics provided include:

- ♦ Engagement (forms, landing pages, emails)
 - ♦ Marketing influenced pipeline & revenue
 - ♦ Campaign ROI
 - ♦ Days to close
 - ♦ Multi-Touch Attribution (first, even, last touch)
- In addition to included Salesforce Pardot reports, customers can also create an unlimited amount of their own customized reports/dashboards.
 - ♦ Email reporting includes information on delivery rate, opens, clicks, bounces, forwards and spam complaints.
 - ♦ Closed-loop reporting with CRM allows marketers to filter reports within the CRM and create custom reports for trend analysis, cohort reporting and marketing ROI forecasting.
 - ♦ B2B Marketing Analytics (Add-On): Consolidates Salesforce Pardot, Sales Cloud and third-party data sources (such as Google Analytics, HG Data and Bombora) enabling users to instantly view and report on metrics.
- B2B Marketing Analytics is included in Salesforce Pardot Plus & Advanced Editions with Salesforce Professional and above. Comes with four out-of-the-box dashboards: Marketing Manager, Engagement, Pipeline, Multi-Touch Attribution, and Account-Based Marketing Dashboard. Analyzes multiple data sources to improve campaign performance and marketing ROI. B2B Marketing Analytics also has an app for iOS and Android app.
 - Salesforce Engage (Add-on): Helps build tailored campaigns with marketing- curated content and close deals faster. Salesforce Engage enables sales reps to see real-time prospect engagement and know exactly when to reach out.

Vendor profiles

**Salesforce Pardot**

50 Fremont Street, Suite 300
 San Francisco
 CA 94105
 T: 800-NO-SOFTWARE
pardot.com

Data security

- Salesforce Pardot has certifications and standards for complying with various regulations:
 - Customers can download documents from the [Security & Compliance Documentation Portal](#) (SOC2, ISO 2700x, etc.)
 - [GDPR resources](#)
- The [Salesforce Pardot Trust Site](#) provides details on how we protect customer data and real-time information on system availability and performance.

Integrations

- A variety of connectors are available to sync Salesforce Pardot with third-party applications, like webinar services, social media networks, and Google Ads. Connectors pass data back and forth between applications, which enables users to manage formerly disparate marketing channels from Salesforce Pardot.
- Available apps can be seen in the [Salesforce Pardot App Center](#). In addition, apps from Salesforce AppExchange can be leveraged from Salesforce Pardot through the Salesforce CRM integration.

Pricing and support

- No free trials.
- Annual contracts required.
- Support includes several touchpoints, from implementation to dedicated Pardot Success Specialists resources after clients go live to provide strategy and best practices guidance.
- Standard Success Plans are available at no cost to all customers. Ongoing support opportunities include:

- **Journeys:** Expertise and guidance on how to get started or achieve common business objectives by consolidating the best resources and delivery channels into a streamlined path for customers.
- **Circles of Success:** These interactive group discussions offer customers an open forum to learn best practices from each other and Salesforce experts.
- **Trailblazer Communities:** A forum to ask questions, share ideas, and engage with Salesforce experts.
- **12x5 Support:** Access to Salesforce experts through 12x5 Standard Support. Response times start at two business days for severity 1 cases. Cases can be submitted by logging a case through Help & Training.
- **Trailhead:** Online learning program offers a fun training experience for admins, developers, and business users.
- **Ask a Pardot Expert:** Join office hour session calls to speak with Pardot Specialists about best practices in a group setting
- Premier and Premier Plus Support Plans are available at additional costs. More details can be found on the [Success Plan center](#).
 - Premier Support includes 24/7 support, developer support and more.
 - Premier Plus Support additionally includes Salesforce-certified administrative support.

Vendor profiles

**SharpSpring**

5001 Celebration Pointe Ave.,
Suite 410
Gainesville, FL 32608
T: 888-428-9605
sharpspring.com

Key customers

Steadfast Results
Core Integrated Marketing
mXtr Automation
LaFleur Marketing
Funnelbud
Phobos & Actor

Key executives

Rick Carlson, CEO/ Founder
Travis Whitton, CTO/ Founder
Michael Power, CFO
Thomas Duffaut, COO

Target customer

- SMBs and marketing agencies, including digital marketing, advertising, web design and public relations firms. Top verticals include creative, technology, professional/ financial services, legal, manufacturing, healthcare, education and travel/hospitality.

Company overview

- Founded in 2012.
- 230+ employees.
- Acquired Perfect Audience, a digital advertising platform, in Q4 2019.
- Publicly-traded (NASDAQ: SHSP) provider of affordable marketing and sales automation delivered via a cloud-based Software-as-a Service (SaaS) Platform.
- Used by over 2,000 agencies and 10,000 businesses worldwide.
- Additional office in Buckhead, GA.

Product overview

- SharpSpring is a cloud-based sales and marketing platform built for marketing agencies and small to mid-sized businesses that rivals top competitors with its features, functionality and performance. SharpSpring provides a comprehensive suite of tools that allow users to track the complete buyer's journey with end-to-end ROI, while delivering targeted communication at critical conversion points along the way.

Lead Management

- SharpSpring's CRM, a contact manager for opportunities and pipelines, includes the following features:
 - Life of the Lead: A historical record of each contact's engagement with your brand, from first site visit to every form-fill and beyond.
 - Multiple Device Tracking: Monitor lead behavior across every known mobile, tablet and desktop device.
 - Visual Workflow Builder: Flexible triggers and branching logic to engage leads at critical points in the buying journey.
 - Buyer Personas: Segment leads based on interests and behaviors with custom meta-profiles of each ideal customer type.
 - Dynamic lists/advanced segmentation: Leverage rules-based automation to group and segment contacts for specialized outreach and lead management.
 - Email Designer/Smart Mails: Create attractive, professional emails using drag-and-drop functionality.
 - Activity Feed: Access a bird's-eye view of the most active leads — when they're opening emails, viewing media, visiting tracked pages, and more.
 - Sales Dialer: Quick, high-volume outreach designed to increase conversions with fully integrated dialing, call recording and automated transcriptions.
 - Meetings: Ability for prospects to self-schedule appointments.
 - Real-time Notifications: Immediate notifications when leads engage for lightning-fast sales outreach.

Vendor profiles

**SharpSpring**

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sharpspring.com

Data Cleansing and Normalization

- CRM Migration Tool: Streamline the migration process for contacts, accounts, opportunities and more.
- Import Tool: Save time importing contact lists directly into SharpSpring.
- Email Engagement Tools: Identify and weed out unengaged leads to protect domain reputation and optimize email deliverability.

Channels

- Email, web, display, social, mobile

Collaboration/task management

- Agency-focused Client Management and Billing Console: Multi-client management with single sign-on, sharable templates, and other client-management tools.
- Rebrandable Platform: Customizable interface, domain, login, and notifications.
- Sales Optimizer: Control and streamline the quality and cadence of all sales communication with sales automation.
- Task Manager: Users can instantly view and execute all scheduled tasks assigned to them to maximize efficiency.
- Content Calendar: Plan and schedule emails, social posts, blog content, and more with full visibility across the team.
- Pipelines: Comprehensive pipeline management for sales teams coupled with powerful sales automation.
- User Roles: Organize sales & marketing teams while streamlining their user experience in the platform.
- Publishing Permissions: Select which users can kick off high-impact email and social campaigns.

Analytics & Reporting

- Custom Reports & Cloud Dashboards: Build customizable reports to handpick and highlight data that matters most. Save reports in a portable dashboard and display them anywhere with cloud dashboards.

- Traffic Sources & Web Insights: Gain insight into site traffic to know where every lead is coming from.
- Campaign Reports: Measure ROI on marketing efforts for an end-to-end view of lead capture to sale.
- Email Reports: Access a full overview of email performance with insight on open rates, clickthroughs, and delivery.
- Google Ads: Link Google Ads accounts to track web usage from Google Analytics.
- Sales Performance Reports: Track the health of opportunities and sales pipeline effectiveness.
- Sales Activity Reports: Stay on top of sales team progress with a breakdown of which scheduled tasks have been completed or rescheduled during a given period.

Data security

- GDPR
- SOC 1 type 2
- PCI

Integrations

- Offers native or third-party CRM integration, universal CMS compatibility, an open API, and integrations with hundreds of applications.
- Notable native integrations include Perfect Audience, Salesforce, Google Ads, Litmus, Shutterstock, Webex, GotoWebinar, and more.

Pricing and support

- Free trials available through agency partners.
- Month-to-month pricing is available.
- Offers free and unlimited training, dedicated account management, technical support (via email, phone and live chat), and exclusive user communities. Agencies can also extend SharpSpring's support and training to their clients for \$100/month.
- A typical SMB customer can expect to pay between \$550 and \$1,250 per month.

Vendor profiles


Sugar Market (formerly Salesfusion), a SugarCRM company

10050 N Wolfe Road, SW2-130

Cupertino, CA 95014

T: (877) 842-7276

sugarcrm.com/solutions/

sugar-market/

Key customers

Seco Tools

Paylocity

Mutual of America

Jonas Software

The Adecco Group

Cireson

Key executives

Craig Charlton, CEO

Clare Dorrian, CMO

Logan Henderson, GM

Marketing Automation

Clint Oram, Founder & Chief

Strategy Officer

Target customer

- Small to medium-sized enterprises, typically with headcount between 100-2,500 full-time employees and a marketing organization of 5-15 people (may be a division or region of a larger organization). Serving both B2B and B2C customers across a variety of industries with strong experience in software, manufacturing, professional & financial services, and recruitment.

Company overview

- SugarCRM was founded in 2004, while Salesfusion (now Sugar Market) was founded in 2007.
- 350 employees.
- SugarCRM Inc. acquired Salesfusion in May 2019, which was rebranded as Sugar Market, a key pillar of the Sugar CX suite of products and services.
- International offices in USA (Cupertino, NYC, Denver, Atlanta and Raleigh), Mexico, UK, Germany, Austria, Czech Republic, Denmark, Finland, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland and Australia.

Product overview

- Sugar Market allows clients to attract more website visitors and gain visibility into how their audience interacts with digital assets. Conversion-focused landing pages can be created, as well as emails and forms with intuitive, drag-and-drop builders. Clients can qualify leads with multi-step nurture campaigns and sophisticated lead scoring models. Sugar Market allows users to easily uncover which tactics are working—and where improvements are needed—to refine campaigns and constantly deliver results.

Lead management

- Sugar Market offers the inbound functionality needed to programmatically pull people into the funnel using various prioritization and scoring techniques. A combination of social publishing, SEO optimization, website landing page and form creation tools with tracking, identifying, capturing and assigning new prospects based on user defined lead flow criteria.
- As new prospects are acquired, users can track their engagement and assign them a corresponding lead score, allowing them to use this information to add them to an appropriate nurture program designed around their identified interests, buyer persona or specific behaviors.
- Once a lead reaches a predefined threshold, it's automatically routed to the right salesperson inside the CRM. This helps prioritize sales outreach around more mature leads.
- Hot leads are pushed to sales as a window inside the CRM along with the lead's journey. Every email they've opened, event they've attended, webpage they've visited and so on is captured on the contact record. Your sales team will be able to quickly assess each contact's interests and customize their conversations around

Vendor profiles


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sugarcrm.com/solutions/

sugar-market/

them.

- If during sales outreach, the salesperson identifies that the lead isn't ready to buy, sales has the ability to directly influence their journey from there on. They can push those leads back to marketing for further nurture, even adding them to specific campaigns, all from inside the CRM. This give and take between marketing and sales unifies them around common workflows and data, creating a significantly better experience for your buyers. It also offers a unified voice across an entire sales and marketing organization. The core features are:
 - Landing Pages & Forms - Utilize reverse IP forensics and easily add lead routing and automation rules. Deliver typical drip campaigns or take actions based on a prospect's behavior or actions. Sugar Market supports conditional logic, including ability to jump steps between nurture campaigns or within a campaign. List of actions are available including ability to add a follow-up task for sales.
 - Lead Scoring – Measure engagement and prioritize Sales outreach with lead intelligence scoring based on demographics and engagement data, including lack of engagement over time. Scoring can be based on any behavior tracked by Sugar Market, as well as any data field replicated from the CRM. Sync scores to CRM for sales visibility.
 - Account Based Marketing - Includes account scoring, account engagement and reporting.
 - Nurture Campaigns – Automated, tailored messages sent to prospects throughout their buyers' journey. Prebuilt webinar and events management.

Data cleansing and normalization

- Sugar Market has a Mass Update Contacts function that references reports, allowing customers to use

complex criteria when segmenting their contacts to perform mass updates.

All new Sugar Market customers have their database automatically verified via third-party validation tools which removes any mistyped or invalid email addresses.

- Each contact within Market has a 1:1 mapping with CRM contact information to ensure all data is up-to-date and the system supports auto-deletion criteria to automatically cleanse the database based on customer requirements.
- Market enables a Mass Update Contacts function that references reports, allowing customers to use complex criteria when segmenting their contacts to perform mass updates.

Channels

- Web - Inbound marketing tools including web page and form builders with best practice templates to engage prospects to opt-in to learn more. Website SEO auditing tools can compare users' websites to their competition.
- Email - Sugar Market revolutionizes the way marketers can create emails by offering templates, drag-and-drop builders or a code-your-own option that offers lots of flexibility. Send a single email campaign or create multi-stage nurture campaigns and have confidence that it has reached your recipient with sender reputation management and deliverability testing features.
- Events - Create and manage both online and offline events on the same platform. Events management module integrates with the leading virtual webinar platforms: WebEx and Go-To-Webinar. Manage multi-session events with a unique parent event and child session setup. Leverage pre- and post-event surveys in your events. Promote events across channels and track how each drives interest and registration.
- Social Media - Social media management capabilities to schedule posts, manage accounts and monitor brand reputation across social media

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platforms

- Google Adwords - Launch Google paid search campaigns straight through the Sugar Market platform.

Collaboration/task management

- Lead scoring allows users to automatically assign scores to leads based on actions that are valuable to business goals. Sugar Market's lead scoring capabilities allow for unlimited scoring profiles and indefinite scoring time frames, including firmographic and demographic information, purchase details, intent and more.
- As prospects are acquired, users can gauge their readiness to buy based on their score and pass prioritized leads to Sales via CRM integrations. Sales reps can be alerted to nurture steps and then collaborate with marketing from within Sugar Market iframes within their CRM. For example:
 - Form entries
 - Page visits
 - Ad clicks
 - Email opens
- Sugar Market's integration with all major CRMs via an open API gives sales one-click access to all relevant lead information, as well as the ability to route leads back to marketing if they aren't ready to convert. Sales can also select pre-built campaign emails within Sugar Market from the CRM and send to their contacts. This capability enables integrated and coordinated omni channel marketing campaigns leveraging emails, phone calls, social media and google ads for example.

Analytics and reporting

- Fully interactive dashboards allow users to easily build and source data from any marketing initiatives. Well-designed and colorful charts, and wide array of filters offer flexibility to create optimal viewing experiences to review data easier.
- All dashboards are completely mobile

responsive, giving users access to results anywhere, anytime. Pull from any data set—marketing campaigns, forms, lead scores and CRM values—to track ROI and success metrics specific to business objectives.

- Drag-and-drop and point-and-click capabilities permit clients to easily create reports. Flexible data visualization tools allow you to view data however you find most useful, whether it's a bar or line graph, area or pie chart, or even a map or funnel report.
- Advanced Analytics includes dashboards and reports to track marketing performance as part of the platform.
 - Actionable insights are accessible to the entire organization and enable users to:
 - ♦ Monitor trends through custom interactive dashboards for birds-eye view and filtering for granular insight.
 - ♦ Reveal new depths of data by slicing and dicing reports.
 - ♦ Utilize the visualization engine to create sharable charts, dashboards, and reports across the organization.
- In addition to the fully customized report writer, the most popular requested reports are provided as standard so clients can get started quicker.

Data security

- GDPR
- Consent & Double-Opt In for Emails
 - Double Opt-In for Form Submissions - Users are able to specify whether they want an opt-in email with an opt-in link to automatically be sent after a form submission.
 - Opt-In for Other Forms of Contact Creation - Sugar Market includes opt-in verification in all the places

Vendor profiles



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sugarcrm.com/solutions/sugar-market/

on the platform where contacts can be manually uploaded which include imports and uploads of individual contacts.

- Control of Data
 - Requesting Access to Data - Sugar Market allows clients to build custom reports pulling in the most personal data that customers could ask for (name, email, etc.). You can export these files into an appropriate machine-readable format.
 - Modification of Data - Contact level data is held within the contact card, where you can view their personal data. You can edit this data currently at any point for an individual contact.
 - Right to be Forgotten (Delete Data) - A process is in place to take inbound delete requests from our clients that Sugar Market will execute on behalf of our customers.
 - Cookie Consent - Sugar Market has implemented the ability for customers to indicate whether they want to prompt cookie consent for each new visitor to a landing page built with Sugar Market. A standardized banner appears at the top of each page where cookie consent is indicated that will prompt a visitor to either accept or reject cookies.
- Withdrawing Consent
 - Email Opt-Out - Currently, on the Sugar Market platform, you can view the opt-out status of a contact. If one of your customers' requests to opt-out, you can easily change the opt-out status of the customer to "yes" in their contact details. Your customers can also opt-out via any email

communications you send them through an unsubscribe link in the emails you send out.

- Change Cookie Preferences - On every landing page built in Sugar Market where cookie consent is specified, we have added a way for users to edit their cookie settings. They'll be able to change their setting at any point to either accept or reject cookies.

Integrations

- Native, bi-directional integration with: Salesforce, Microsoft Dynamics 365, Infor CRM, Oracle NetSuite, Sugar Sell, Sugar Professional, Sugar Enterprise, Sage CRM, Bullhorn.

Pricing and support

- Free trials are available.
- Pricing is based on the number of contacts and starts at \$1,000/month (no annual contract required).
- Onboarding includes technical set-up and CRM integration, as well as one-on-one live training sessions. Unlimited support for all customers' needs – via phone, email and chat – regardless of account size. At the end of this initial onboarding a customer is able to send out their own email campaigns and run their marketing activities.
- Access to an in-house, Professional Services team for project-based support.
- The Sugar Market Marketing Concierge program is available for those customers who would like us to complement their Marketing team. We offer a marketing automation managed service which deploys marketing automation campaigns on customers' behalf.

Resources

Websites

www.digitalmarketingdepot.com
www.marketingland.com
www.martechtoday.com
www.searchengineland.com
www.crunchbase.com

Blogs

<https://blog.cdpinstitute.org/Blog>

Articles

"Gartner Predicts 2019: In Search of Balance in Marketing" by Chris Pemberton.

"Marketer 4.0: Emergence of the tech-savvy martecheter," published by IBM.

"Five predictions for B2B marketing in 2019," by Peter Isaacson, Marketing Land.

"The most significant martech deals of 2018 and what they mean for the landscape," by Robin Kurzer, MarTech Today.

"What can you do with a customer data platform?" by David Raab, founder and CEO of the Customer Data Platform Institute.

"Everybody's Talking About Customer Data Platforms," by Matt Cannel, Director of Demand Generation at Lytics.

Research reports

CMO Spend Survey 2019-2020 published by Gartner.

Forrester Data: Marketing Automation Technology Forecast, 2017-2023 (Global), published by Forrester (April 2018).

Data Versus Goliath: Customer Data Strategies to Disrupt the Disruptors, published by Forbes Insights (in association with Treasure Data, June 2018).