

## Evaluating marketing automation platforms: A checklist



■ Outdated functionality

■ Basic functionality

■ Advanced functionality



### User friendliness (for all levels)

- Heavy reliance on IT support to utilize most features and access insights
- Inconsistent ease of use, with some features requiring more manual and IT-assisted efforts than others
- Intuitive UI and marketer-friendly features across the platform, with no IT support needed except for custom requests



### Role-based access

- Extensive coding required to configure different user types and access permissions for various platform features
- Ability to configure basic user roles and platform access permissions for each business unit
- Ability to configure detailed user roles and platform access permissions across all entities in an organization



### Integrated information model (required information available at each step)

- Sophisticated hierarchical customer information model that cannot be easily built otherwise



### Findability

- Ability to create waterfall through easy access to, and navigation of, attributes organized based on organization-specific needs



## Cross-device/platform accessibility

- Accessible from desktop and limited operating systems only
- Accessible from all main operating systems but desktop only
- Accessible from not only mobile and desktop, but all main operating systems



## Modular or integrated solution

- Highly modular solution offerings, with multiple purchases required to access all omnichannel marketing automation functionalities
- Partially integrated solution, with several key functionalities offered out of the box and others accessible after separate purchases
- Fully integrated solution, with all key omnichannel marketing automation functionalities offered and operating as a unified whole out of the box



## Data integration

- Heavy IT support and time-consuming manual efforts needed to integrate with existing systems and channels for data consolidation
- Limited out-of-the-box integrations with different systems and channels
- Ability to consolidate structured data
- Support for batch processing and SQL databases
- Inability to integrate with multiple CRMs from a single solution instance
- Extensive out-of-the-box API offerings and support for multiple import methods for integration
- Ability to consolidate first/second/third- and structured/unstructured/semi-structured data
- Support for real-time and batch data processing as well as SQL and NoSQL databases
- Ability to integrate with multiple CRMs from a single solution instance



## Audience identity management

- Inability to support differentiate unknown from known audiences

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- Ability to identify returning audiences and create unified customer/lead profiles across limited channels
- Reliance on cookies only for identity resolution
- Ability to differentiate unknown from known audiences and identify individual customers/leads
- Ability create a channel/device-agnostic profile of each customer and continuously augment it through progressive profiling
- Utilization of device fingerprinting for identity resolution



## Data quality and management

- Lack of data deduplication within the same BU or at an organization level
- Support for basic deduplication to improve ingested data quality
- Built-in data deduplication, validation, rule-based cleansing, and indexing capabilities
- User-friendly attribute standardization and mapping features



## Audience segmentation

- No built-in segmentation functionality, or requires IT support and extended delay to generate audience segments
- Enables marketers to create audience segments and identify triggers/conditions for dynamic targeting, but is still time-consuming
- Enables marketers to create complex, large audience segments and contextual targeting triggers/conditions in minutes



## 360° customer view

- Lack of a single customer view
- Ability to deliver customer views with basic insights like demographics and campaign responses
- Ability to provide comprehensive individual customer views with insights on interactions over time, propensities, persona(s), lead score, and more

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## Persona definition and lead scoring

- Ability to create different personas and define lead scoring criteria to refine audience targeting



## Extensibility and scalability

- Ability to support the scaling of communication volume when needed



## Solution deployment

- Cloud deployment only
- Both hybrid and cloud deployment options available



## Security and compliance

- Availability of robust security measures across application, data, system, and infrastructure levels
- Regulatory compliance with major policies (e.g., GDPR, HIPPA, CCPA)



## Support for multiple communication channels

- Support for single channels (e.g., email)
- Support for several channels (e.g., email, mobile, and social)
- Support for most key channels (i.e., email, mobile, social, web, digital assistants, IoT devices, extended systems)



## AI reporting

- Ability to provide extensible, AI-based analytics

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## AI capabilities

- AI only applied in basic segmentation and communication, with limited persona-based targeting and engagement optimization capabilities
- AI is utilized in customer engagement optimization and analytics generation



## Campaign and customer journey orchestration

- Support for batch communications only
- Ability to create and execute pre-defined customer journeys and campaigns
- Support for omnichannel customer journey and campaign orchestration
- Ability to contextually adjust interactions and pathways based on audience behavior in real time



## Attribution measurement

- Lack of conversion and ROI attribution
- Support for only single-touch attribution
- Support for single- and multitouch attribution

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