

Marketing Automation RFP and Planning Guide



A Publication of





An RFP should help your company identify the right partner to support your marketing goals for many years to come.

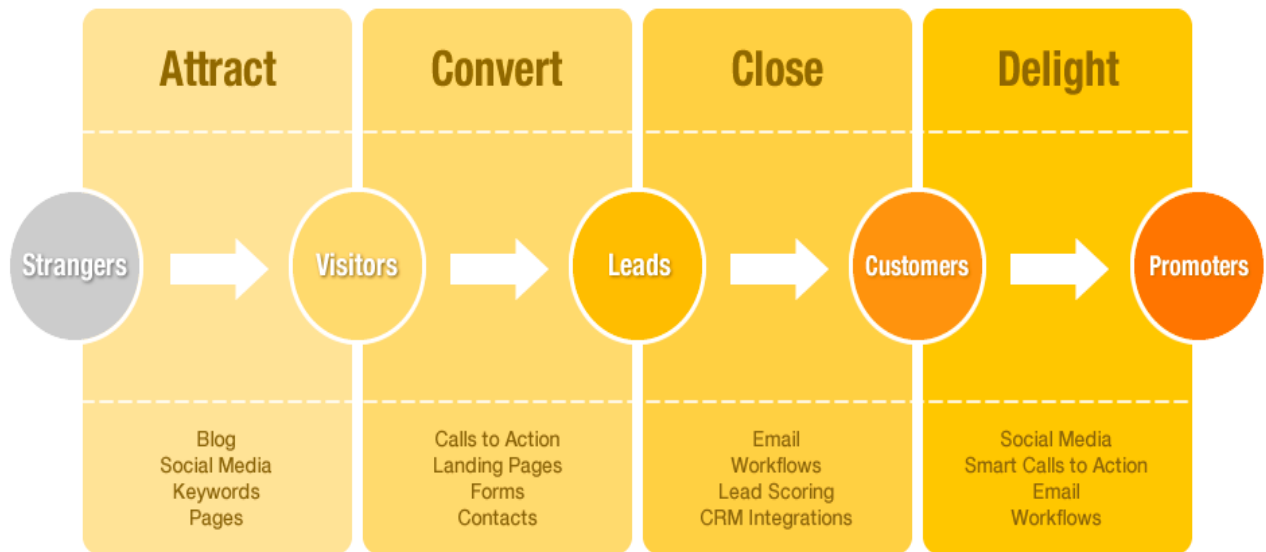
Finding the right marketing software partner for your company can be a challenge. To succeed, you need a comprehensive understanding of your organization's needs, cross-functional support, and a process to get you to the finish line.

This sample RFP will help you think through the various components of a successful marketing partnership, align on the key questions and concerns for your end goal, and choose a long-term, results-oriented marketing partner who understands your challenges and has a solution to solve them.



An Inbound Approach

Inbound Marketing Methodology



by HubSpot

Before you get started crafting your RFP, take a comprehensive look at your marketing goals and your plan to achieve them. Do you have tools to attract, convert, close and delight customers along with a mechanism to measure the impact of your efforts? Taking a cumulative view of your needs will help you choose the right partner with the right tools to increase your leads, customers, and ultimately revenue.



Buying for the Present—and the Future: Attracting New Customers for Long-Term Success

1. Email open rates are trending down, with consumers saying they are overwhelmed by email and tools like Gmail's Priority Inbox that make it easier to tune email out. What specific solutions does your company offer in this space to help us increase the power of our offering so we are seen, read, and heard by our leads?
2. Can we segment users by how they found our company? For example, can we create a workflow specific to users who found us using a specific search term or through LinkedIn?
3. If our marketing is successful, prospects will ideally be coming back to our website through many different channels (organic search, social, links from news outlets) and landing on many different pages. Does your platform offer a way to maintain consistency of targeted messaging across my entire website, not just in emails and on landing pages?

MARKETING AUTOMATION **FACT**

25% of all email lists expire every year, so even if you have a significant list to start, generating new leads is critical to your marketing automation strategy.





Attracting New Customers, Continued

4. How does your software interact with popular social media networks?
5. Please briefly explain what tools and expertise you offer to build a world-class marketing automation program, as well as how you have helped clients similar to ours solve for the email expiration challenge.
6. Does your platform offer guidance on optimizing the timing of social media postings to maximize their performance?

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Converting Visitors to Leads

1. We want to build a personalization vehicle that helps facilitate the customer experience—what tools does your company provide to enable customer experience beyond email?
2. Can we personalize calls to action, banners, or messaging based on where a lead is in our funnel?
3. Do you offer progressive profiling?
4. How many steps does it take to create calls to action? Do we need additional design or tech support to customize CTAs?
5. How easy is it to build and maintain landing pages? Can we import custom landing pages or create our own without additional support?
6. Does your email and landing page platform use a templating language that allows a designer to create fixed styles for elements like images, text & headings for a non-technical user to work within? Is there a limit to how many of these templates can be created?
7. How easy is it to build custom forms? How many steps are required?

MARKETING AUTOMATION **FACT**

A recent Google survey found that 52% of consumers said that a bad mobile experience made them less likely to engage with a company. Given the importance of mobile in the future, make sure it's part of your chosen partner's marketing platform.





Converting Visitors to Leads, Continued

8. Does your email tool allow customization for the appearance and content of the unsubscribe page?
9. How is your software priced and how does that change based on the volume of email we send or the number of contacts we have in our database?
10. Given the importance of mobile, what technology powers the mobile optimization of your landing pages? Are they built using responsive design technology?

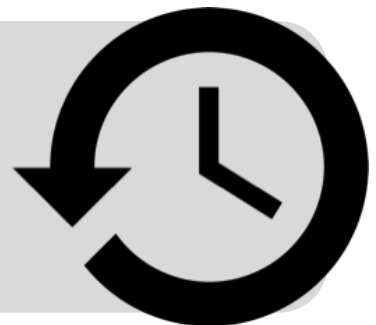


Closing: Turning Leads Into Customers

1. How can your platform interact with our existing CRM?
2. Does your tool help with lead intelligence so that our sales team is armed with a comprehensive record of the lead?
3. How often does your platform sync contacts with our CRM?
4. Can your system automatically notify our sales team when a lead interacts with our site (e.g. downloading an ebook)?
5. Can we create campaigns based on a trigger? If so, how many steps does it take to set up? How many campaigns can be created at once?
6. Do your analytics allow us to better understand where we typically lose prospects and what channels and tactics are working hardest for us on conversion?

MARKETING AUTOMATION **FACT**

Research shows that 35-50% of sales go to the vendor that responds first, so CRM integration is critical to lead nurturing campaigns.





Delight: Creating Marketing People Love

1. Does your social media tool have the ability to connect the accounts of multiple users?
2. Does your platform allow posting to LinkedIn groups?
3. Can we target events based on social media utility? For example, can we invite folks with >1000 Twitter followers to attend an event?
4. Do you offer workflow tools that make it easy to clean up our database on a regular basis?
5. What metrics exist within your platform to measure the impact of your program?
6. Can I view the impact of a specific campaign so that I can understand which efforts were the most successful in attracting, converting, closing, or delighting a customer and replicate those strategies?
7. Does your tool allow us to use keyword research to inform our content strategy?

MARKETING AUTOMATION **FACT**

According to IDC, sales + marketing misalignment can cause a typical company to underperform by 10% in annual revenue. Maximize your sales and marketing integration by choosing a vendor that can provide analytics on your entire marketing platform.





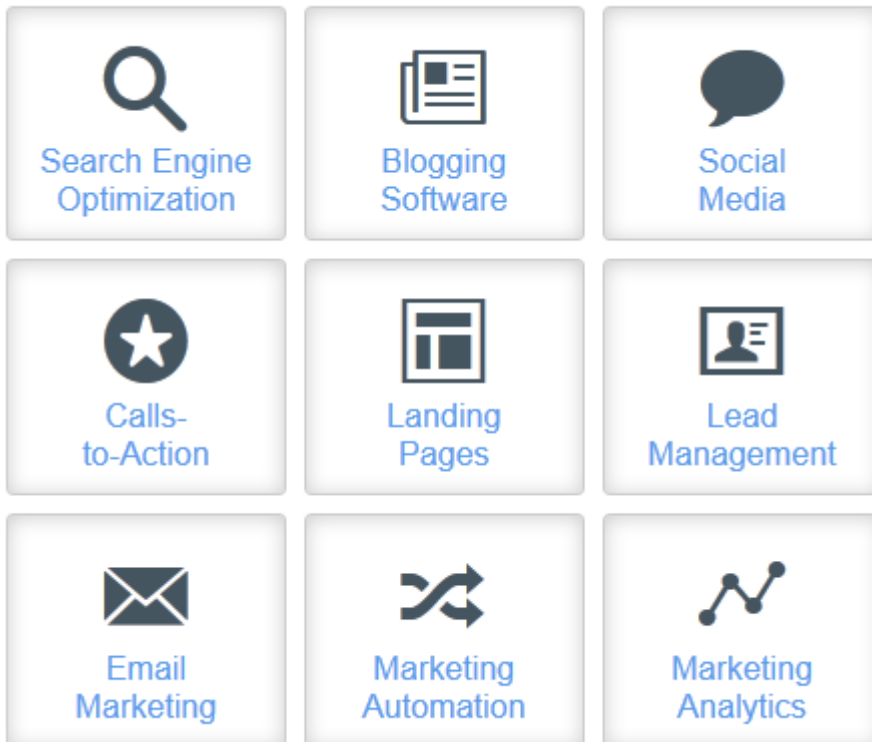
The Power of Partnership: What You Can Expect From Your Vendor

- 1) How and on what terms could my team interact with sales and support at your company?
 - 2) What resources would my marketing team have access to throughout our engagement with your product?
 - 3) During what hours is your service team available for critical support?
 - 4) We want our marketing team to stay current on the latest developments and trends in SEO, blogging, social, marketing automation, and lead management—does your company offer resources (a marketing library, webinars, etc.) on industry trends and updates so my team can stay current on best practices?
 - 5) How does your offering differentiate you from others in the space? Why do you believe that will help our company specifically achieve our stated goals?
 - 6) How often does your company release new features? Do you take an agile development approach to your product roadmap so customers benefit from innovation on an ongoing basis?
 - 7) Does your company have a strong install base of quality customers?
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HUBSPOT: ALL-IN-ONE MARKETING SOFTWARE

HubSpot brings your whole marketing world together in one powerful, integrated system.



See How it Works: hubspot.com/demo