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Digital Marketing:
Selecting the right platform for your project

CMS, DMS, CXM, EMS... These are just a few of the acronyms that get thrown around by the vendors that are selling digital marketing tools.

It seems that in the bid to make themselves stand out in the crowd, each provider has created new and exciting terminology to make their offering seem different. It's an approach that I can sympathize with – after all, these solutions are all unique. But the lack of a true common vernacular makes the process of selection dizzying for the digital marketer trying to pick the right tool to meet their mission objectives. Our objective in this guide is to help standardize this conversation and establish a clear neutral ground where you can decide what options best suit your business.

The Key: Make sure that the process is about the needs of your project and organization.

It is agencyQ's belief that a large part of this confusion is because the problem is often looked at backwards. Frequently, the conversations are all about what a vendor or a specific partner can offer. That's not at all where the conversation should begin or end. At no point should the conversation center around a vendor's capabilities without framing them in the context of how those capabilities help achieve your specific business objectives. Let me make this very simple: Every vendor's solution can accomplish your project. It's not about them; it's about you. Your needs, your KPIs, your business.

To start with, we are going to ask you to evaluate five key areas and simply summarize your thoughts. Later, we will ask you to evaluate the priority of different features that are common in the available platforms. The combination of these two pieces of information will help you in the evaluation

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> **Steve Hamilton**
> SVP, Engagement Delivery
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process and should even be given to prospective vendors and partners to help make sure the conversation is focused on your needs. Please print this out and grab yourself a pen, and perhaps a cup of coffee, and let's go ahead and get started.

The Basics

Let's start with five categories of information about your project that will help to set the understanding of what your organization is hoping to accomplish by making an investment in digital marketing technology. Taking the time to gather this information will better prepare you to understand the full scope and impact of your proposed initiative and make you a more informed decision maker. The categories are:

1. Primary Stakeholders

2. Business Objectives

3. Technical Considerations

4. Budget

5. Feature Prioritization

1 - Primary Stakeholders

Our first objective will be to define who the primary stakeholders are. We believe that the number of individuals with *direct* input into the process should be limited to no more than six. This does not mean the rest of the organization is cut out of the process, simply that their input should be filtered through one of the designated primary stakeholders.

Each of these sponsors will fall into one of six broad categories. In many cases, an individual may fall into multiple. For instance, the head of marketing may serve both as the Executive Sponsor and as the Marketing voice.

Let's go ahead and take a moment to write down each stakeholder:

Name / Title	ES	M	S	T	O	LB

ES - Executive Sponsor, M - Marketing, S - Sales, T - Technical, O - Operations, LB - Line of Business

2 - Business Objectives

Now that we have established who the key stakeholders are, let's spend some time outlining why we are engaging in this project. Every project is unique, and understanding the desired outcomes is crucial in selecting the correct course of action. Let's break this into two pieces: what the desired outcome is and what the impact on the business will be. Keep these concise and measurable.

This form has purposely been limited to five objectives. Understandably, there are probably dozens that come to mind, but for clarity's sake, it's key to distill your list down to a small number of high-level goals.

Desired Outcome	Business Impact When Achieved

3 – Technical Considerations

In today's technology world, these platforms can't afford to live in a vacuum. Even if you don't intend to integrate multiple tools today, it's imperative that other tools within your overall operating environment are well understood. This will allow your team and partners to define a roadmap that allows for the best interoperability. Let's take a moment to catalog the other systems by major categories that tend to exist in the same orbit as Digital Marketing tools. It would not be uncommon for multiple platforms to exist in a category.

Category	Platform
Business Intelligence Systems (BI) BI tools identify, extract, and analyze data to help in a variety of business processes, particularly for enabling decision-making processes. These systems are wide and varied, but a good example of a BI tool would be a KPI dashboard.	
Customer Relationship Management (CRM) CRM systems are utilized to accumulate and track customer interactions and activities throughout the sales and marketing lifecycle. Salesforce is probably the best known, and most widely utilized, example of a CRM system.	
Customer Engagement Center (CEC) In many organizations, this functionality may be a direct part of your CRM platform (above). A CEC is a system utilized specifically to interact with requests/needs of your customers. Zendesk is a popular example of a CEC.	
Enterprise Resource Planning (ERP) ERP is a generic term that describes a broad category of systems that allow you to manage the business and automate back office processes.	
Knowledge Management Systems (KMS) KMS systems are used to organize knowledge and share it with individuals within the organization. An example of a KMS would be a corporate intranet.	
Transaction Processing Systems (TPS) These systems often take the place of order management systems. Any system dedicated to the process of receiving, fulfilling, or automating aspects of your customer transactions would belong here.	
Other	

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4 – Budget

We frequently run into situations where customers are hesitant to provide a budget for a project up front. There is a common fear that providing this information up front will result in proposals becoming unnecessarily bloated in order to fill the budget. This fear is understandable, although perhaps misguided. Any effort can be scaled according to need and budget. We've regularly implemented $500k projects and $10k projects – and it's amazing how similar the initial asks often sound.

The bottom line is that budget is a necessary evil, so you should do yourself a big favor and define it up front. This will help perspective vendors and partners properly frame their proposed solution in a manner that makes sense for your business. And to make matters more complicated, the budget is not only what it will take to build/deploy the platform of choice. You also must consider the ongoing expenses of maintaining it.

First – Understand the lifetime value of your project

In its simplest form, this means defining, in plain dollars and cents, how much gross financial impact the initiative will have over its anticipated lifetime. That may or may not be easy, depending on your business model and the specific nature of the project, but creating a model to understand this is imperative.

This can get complicated, but you will need to at least make an initial estimate. This certainly will not be a highly accurate outcome, but the goal is to get to a solid estimate of a reasonable budget. You should also ask any prospective vendors or partners to help you conduct a more detailed ROI analysis of the proposed project. We will gladly do this for any prospective client, and it's reasonable for you to expect any partner to assist you in this way.

Second – Understand the total cost of ownership

Too often, we speak to prospective customers that are hyper-focused on the initial cost of launching a new initiative, but haven't put enough thought into the budgetary needs of supporting and maintaining the resulting system. In our experience, a healthy digital marketing initiative doesn't have an end date, just a launch date. Be sure to include ongoing costs in your budget. We believe in transparently stating these costs in every proposal that we create.

- **First year costs** – With any new system, the first-year costs will almost always be the most significant. This is where you incur any upfront licensing and implementation expenses. However, check with your accounting experts, because these expenses can often be capitalized over the expected life of the resulting system. You will need to estimate how much you are willing to spend on these upfront investments, which typically include the following:

    o **Licensing Costs** – Obtaining all software involved in final initiative.

    o **Implementation Expenses** – Professional services executing on the proposed solution.

    o **SaaS Fees** – Recurring costs for Software as a Service (SaaS) subscriptions (if applicable).

- o **Operating Expenses** – Things like hosting, marketing spend, and ongoing support should be counted toward what you can expect to spend on a monthly (or quarterly) basis.

- **Additional year costs** – Not all projects have additional years, for instance, a microsite initiative may live for just a matter of months. However, most do, and it's important to know what can be expected:

  - o **Maintenance Fees** – Any software licensed as part of the project will generally incur yearly maintenance fees to stay current with updates and support.

  - o **SaaS Fees –** Same as above, these can be expected to carry on at a steady rate for the life of the project.

  - o **Operating Expenses –** Like above, most of these expenses will carry on at a steady rate for the life of the project. However, make sure to clarify if any additional operating expenses are recommended for subsequent years.

Based on these broad categories of expenses, be prepared to communicate your project budget in the following terms:

Category	Budget
Initial Implementation **(Licensing Costs + Implementation Expenses)**	
Annual Expenses **(Maintenance Fees, etc.)** Many factors can impact the final number here, but this should generally be expected to be 20-25% of the initial implementation expenses.	/ Year
Ongoing Operational Expenses **(SaaS Fees + Operating Expenses)** Ongoing operational focus is critical. This should be expected to be about 10-15% of the initial implementation per quarter, but may be higher or lower depending on the specific nature of the project.	/ Quarter

5 – Required Features

Features are what you'll hear the most about from any CMS vendor's sales team. However, it's important to understand that you are unlikely to utilize every feature of any given platform. Further, the reality is that a large percentage of the features are relatively common across all the major platforms. Everybody has workflow capabilities, for example. Sure, there are differences, but the core functionality is incredibly similar. After all, there are only so many unique twists that can be put on a content approval workflow. The key to selecting the right tool starts with understanding what features are most important to you.

To begin the process of this assessment, we have outlined some of the most popular features commonly found in enterprise-level digital marketing solutions. Simply complete this chart and share the results with your partner or vendor to assist in the assessment process. In fact, we recommend that you share this prior to receiving any demo or proposal to ensure that it is properly positioned to address your needs.

The following list outlines common features, but also provides ten blank lines to define any unlisted functionality that you find meaningful. In this exercise, functionality will be assessed as belonging to one of the following categories:

- **Must Have** – The features in this category represent the Minimally Viable Product (MVP). Solutions that do not deliver on this subset would not deliver on the appropriate business results, and therefore, would not be worth deploying. Proposed systems incapable of meeting this MVP standard would be disqualified from consideration.

- **Should Have** – This category is for features that are desired and would deliver significant business value, but are not strictly necessary to meet the stated business objectives of the project. Proposed solutions that do not meet functionality in this category would not be disqualified, but would be regarded unfavorably.

- **Could Have** – These are features that could be beneficial, but do not deliver clear and meaningful business value within the context of the currently envisioned project. Solutions delivering these features may be regarded favorably with all other factors being equal, but these will generally not factor into the assessment.

- **Don't Need** – These are features that do not deliver any foreseeable business value. Capabilities within these feature groupings will not factor into the assessment.

Web Content Management

Feature	Must Have	Should Have	Could Have	Don't Need
WYSIWYG Editor Provides a seamless editing experience in the browser that incorporates standard formatting features and pre-defined styles. Allows users to insert images and videos as well as creating links to internal or external content.				
Spell-Checker Allows content editors to avoid misspellings and typos using a spell-checking tool that's integrated into the editing experience.				
Online Forms Capture visitor contact details and generate leads for your sales team. Allow for creation and publishing of online forms without programming.				
Versioning and Archiving The system makes sure that all previously published content is still available. A new document version can be created automatically whenever you make changes to a document. It is possible to compare versions side-by-side and roll back to a previous version.				
Tag Management / Taxonomy Categorization Makes your content easier to find and navigate by allowing for relationships between content to be easily established through a defined hierarchy. Allows for the creation of relationship between content items for easy contextual display.				
Event Calendar Allows you to display content in a calendar style. Very useful for displaying events, but also for news, articles, blog posts, or any other document type that contains a date field.				
Files, Images, and Video Management Easily manage and publish documents (such as .doc, .pdf, and .ppt files), images, and videos to your website.				
Friendly URLs Eliminates the use of extra parameters (such as ?id=1234) in URLs to make them friendly for search engines, social media posts, and advertising campaigns.				
Online Image Editor Allows content editors to resize, rotate, convert, or trim images directly from the browser, without using specialized software.				

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Feature	Must Have	Should Have	Could Have	Don't Need
Responsive Images Management Automatically transforms image sizes depending on pre-defined parameters. Avoids the need to manually edit images or accept wasted page load time for larger than necessary image sizes on smaller screens.				
Search Engine Optimization (SEO) Enforces and supports standard to fulfill SEO requirements and maximize organic traffic.				
Workflow Allows administrators to track, manage, and approve all content throughout each stage of the publishing process – from creating to publishing, and revising to archiving.				
Multilingual Content Allows you to manage websites in any number of languages easily and without the need for fully separate sites.				
Multi-site Management Allows for centralized editing and shared content and assets between multiple online properties.				
Mobile Website Support Allows for device detection and control over separate web page layouts for different device profiles.				

E-commerce

Feature	Must Have	Should Have	Could Have	Don't Need
Product Variants Define variants that customers can use to customize your products to fit their needs, for example: color, size, style, etc.				
Bundled Products Allows for products to be sold in groups, with the option of giving a discount if bundled items are purchased together.				
Downloadable Products (E-products) Set up non-physical products that the user can download upon completion of the checkout process.				

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Feature	Must Have	Should Have	Could Have	Don't Need
Donations Gives users the option to donate to a fund or charity of your choice during the checkout process.				
Coupons / Discounts Allows you to set rules-based discounts (using either custom or predefined rules) that automatically apply during the shopping process.				
Multiple Currencies Allows for the option of payment in different currencies, including automatic conversion during the checkout process.				
Online Payments / Checkout Build a single-page checkout that is easy to use and tailored to your business.				
Paid Membership Gives you the option to add a paid membership to the site, where users can pay for a subscription or a recurring service.				
Shipping Providers / Calculations Create a shipping module that automatically calculates shipping costs within your interface. Customizable with different rates and providers.				
Shopping Cart Provide users a virtual shopping cart in which to "store" their goods while they shop and review their purchases before completing checkout.				
Taxes Calculation Automatically calculates taxes based on location and other pre-set rules.				
Product Recommendation Recommends similar products, products the user might like based on their suggestion, or products other users were also interested in or ultimately bought after browsing whatever the current user is browsing.				

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Online Marketing

Feature	Must Have	Should Have	Could Have	Don't Need
Email Marketing An integrated way to reach users through email and see instant results through open rates and clickthrough numbers.				
Newsletters Enables content to be sent to email audience on a regular basis.				
Banner Management Create, edit, and display static and rotating banners – no technical knowledge or technical team intervention needed.				
Web Analytics Gathers information about your users, including page views, campaigns, conversions, visits, referrals, etc., which you can use to optimize your strategy and make your website perform better.				
A/B Testing Serve users different messages, newsletters, designs, and versions to see what resonates, then use the analytics results to inform future designs.				
Contact Management Capture and track leads' information and movements throughout your site. Manage personas and analyze how visitors use your site.				
Content Personalization / Personas Uses user analytics such as demographics, behavior, and context to cater information and content toward different types of users. Personalized content and experiences lead to more engaged users.				
Integrated Campaign Management Allows for control over several campaigns at once, including assets, email marketing, reporting, tracking, and optimization. Manage campaigns from one dashboard and see results quickly and easily.				
Lead Scoring Qualifies leads using personalized criteria – rank information around demographics and behavior and leads are automatically scored based on your criteria.				
CRM Integration Marries digital marketing and sales to provide a more holistic view of customers and potential customers.				

Feature	Must Have	Should Have	Could Have	Don't Need
Social Marketing Create marketing campaigns surrounding your business's social channels. Automatically publish, promote, and see analytics for each channel and overall.				

Intranet and Collaboration

Feature	Must Have	Should Have	Could Have	Don't Need
Document Management Store documents within the tool, allowing for features such as workflow, editing, and versioning. These documents can be published or archived.				
Departmental Sites Enables each department to have its own site within your intranet where information and content most pertinent to that group can live.				
Workgroups Build teams within the system that can then message, run their own forums, have their own calendar, and control their own content libraries.				
SharePoint Integration Share files, libraries, lists, images, and other content from SharePoint directly on your website.				

Online Communities

Feature	Must Have	Should Have	Could Have	Don't Need
Blogs Publish, customize, and organize blog posts. Manage several blogs at once and incorporate multi-user publishing.				
Forums Allow website visitors to participate in conversations, build peer networks, and communicate with other visitors.				

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Feature	Must Have	Should Have	Could Have	Don't Need
Message Boards Enables users to leave feedback through comments and content rating abilities.				
User Profiles Enables users to enter information about themselves and keep a repository of information stored on your site.				
Friends Users can make connections through your site. Once friend requests are accepted, users can message and take other actions that are unavailable to non-friends.				
Private Messaging Users can message each other within your site, without sharing personal information (email or phone number) and without involving any users besides the ones messaging.				
Social Media Integration Integrates social media elements, such as sharing and posting abilities, as well as opportunities to gather information about visitors from their social media presence.				
User Generated Content Allows users to create their own content on your site and share with others. This fosters a sense of community, while also allowing authorized users to edit and create without going through the backend.				
Abuse Reporting Enable users to report those who are behaving inappropriately in the online community. These reports alert the administrators.				
Bad Words Filter Prevents users from posting spam, illegal content, or inappropriate language in various sections of your site.				

Search

Feature	Must Have	Should Have	Could Have	Don't Need
Full Text Keyword Search Searches an index of data instead of the raw data, allowing for faster and more accurate search results.				

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Feature	Must Have	Should Have	Could Have	Don't Need
Synonym Rings Website users can choose to include synonyms in searches to expand the search and include more relevant terms.				
Search Faceting Allows users to apply filters so that the returned results are as narrow and relevant as possible.				
Predictive Search Search results and suggestions will display as the user types, so that they can see whether their keywords are relevant and will give them what they're looking for.				
Typo Tolerant Search will still return relevant results even if the visitor has made a typo or typed something incorrectly.				

Other

Feature	Must Have	Should Have	Could Have	Don't Need
Cloud Support: Azure / Amazon Allows for content creation, editing, and publishing from and within the cloud. Choose from IaaS, PaaS, or a combination of the two.				
User Authentication Require users to log in or prove their identity before accessing parts of or the entire website.				
Customizable User Roles Changes displays of content and navigation depending on who is accessing the site. Users can be assigned one or many roles and various permissions.				
API Access to System Data Enables you to access data and content within the system programmatically for use in other contexts.				
Content Staging and Synchronization Provides a way to review all content before publishing. Content is synchronized between the local environment and the live server, so changes won't go live without approval.				

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Feature	Must Have	Should Have	Could Have	Don't Need
Accessibility Standard Enforcement Requires accessibility compliance before content is published. This feature will ensure that your website is accessible and 508 compliant before it reaches users.				
Maps Integration Option to integrate maps into your website, so that users can see where you're located, find directions to your business, or find the closest location to them.				

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