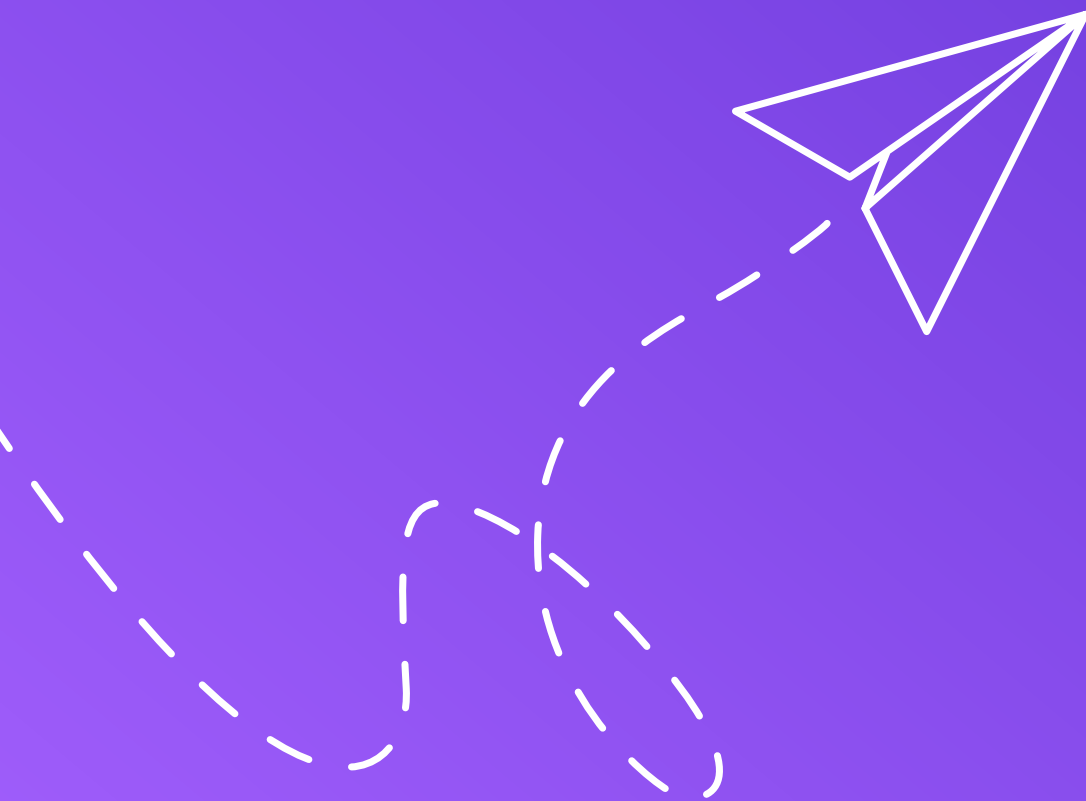


# How to successfully select your customer marketing platform

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A buyer's guide to making  
the complex simple



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***Tech and digital transformation is rewiring business models as well as the marketing discipline. Customer centricity and sublime customer experience is on everybody's lips and new opportunities to create a competitive edge for businesses are emerging as the MarTech stack is expanding. It can be challenging to identify the right software for your business, but it always starts with determining your business objectives and how the software can help you achieve them. This guide offers advice to help you sharpen and boost the process of selecting your marketing personalisation and automation software.***

The choice of a customer marketing platform with high complexity is often based on a selection process where you ensure that the platform lives up to a number of requirements, such as functionality, integration, data model capabilities and user-friendliness. Some organisations look at two or three platforms, while others check ten platforms. The extensive research is done with good intention, but when you look at so many complex platforms, there is a risk of losing the overview.

You may end up in a situation where you focus on what is easy to compare. But, unfortunately, these can also be the wrong – or at any rate, inadequate – criteria. It may be that you choose based on cost, UI, tech, that it is part of a suite and will, at first sight, be easy to integrate. But what if what you really need is something else?

This buyer's guide is compiled to assist you and to help qualify your search and decision process.



### **What is your business and marketing objective?**

To be in the driving seat in the process to select your new marketing software, you must know where you want to go. Before diving into the ever-expanding MarTech stack, consult your strategic business objectives and ask yourself what you need from your marketing software to support and achieve them.



### **Vendor research and evaluation**

Research the market and get an understanding of the technology options available. Screen and select a couple of vendors and evaluate their offering in light of your strategic objectives. Remember, it is not just a technology or a piece of software you are selecting, it is an ongoing relationship with the vendor to help you maximise the value of your customer relationships. Is there chemistry? Does the vendor understand your business?



### **Suite versus best-of-breed**

A suite, a combination of all your MarTech tools in one package, can sometimes look like the logical choice. You are opting for the promise of a 'one stop shop' where your future MarTech needs will be met within the same technology stack - you just need to add another piece of the suite's jigsaw puzzle to your ecosystem with the appropriate contract extension, and away you go, without the need for a separate evaluation of each additional component. However, as a rule of thumb, this might not give you the best overall package. After all, the best-of-breed solution is developed with a specific and highly specialised use in focus, the functionalities may offer a superior user experience. Often, as the best-of-breed vendor has worked with many clients and varying systems, the accumulated experience is reflected in a high degree of flexibility, enabling ease of implementation and fast-time to value.



### **Balance IT and marketing metrics**

When evaluating a software both the traditional IT metrics and the marketers' objectives and specific marketing metrics must be taken into consideration. The IT requirements should be part of the equation, but they are merely the foundation. On top of the traditional IT requirements, marketing has specialised criteria for their software, that must be evaluated on equal terms with the IT criteria.



### Request for proposal (RFP)

When writing the RFP (Request For Proposal), remember to ask questions from a marketing perspective, not just the classical “terms & conditions.” Relevant questions are, for example: How easy is it to configure a newsletter and a complex customer journey? Does the platform offer AI? How can I create personalised landing pages?

Having the vendor address your specific business objectives helps you qualify the product and facilitates a smoother process. Marketing should be in charge of the RFP to ensure the software enables marketing to do the stuff they want to. However, have the IT department tick off the tech specs, to ensure the platform integrates smoothly to your IT and business ecosystem.



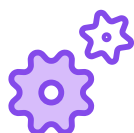
### Get a live demo

Have the vendor do a live demo of the product. You can only fully assess the capabilities of the product in a live demo, see if the vendor can offer to mimic and imitate your data model and your specific use cases. This will help you understand what it would be like to work with the platform on a daily basis: what does the UI look like? Is it easy to set up a newsletter, a customer journey and how can you deploy your content across channels – does it take customisation, HTML-coding and tinkering every time you set up a new flow? In other words, how adept at solving your marketing tasks is the product?



### Time to value

Analyse how long it will take to start up with the platform, what will be needed to execute on MVP (Minimal Viable Product), and what is needed to execute “the great vision”. For example, assess how fast it is to set up new segments / target groups, test and execute. Because if it does not work as intended, you will have to discard it and start over without it having cost too many resources - and if it works, then you must be able to automate it and go on to the next task.



### Integrations create optimal data streams

Data is the raw material for the data-informed marketing department and when selecting marketing software, you should think about data and integrations from a marketing perspective. You need access to quality data and your marketing software should be integrated into the relevant data sources or data warehouses in the ecosystems. This could, for example, be the website/e-commerce, the CRM system or similar. List what you need and let IT translate it into technical requirements.



### Data, analytics and actions

As communication is moving towards hyper-personalisation, the requirements for data and data handling capabilities are escalating. There are three crucial ingredients to consider:

- high-quality data
- analytics
- the ability to act upon insights, i.e. execution.

Understand how the software supports your need to leverage data in a continuous collect, analyse, and act process and whether there is an embedded AI functionality to help you make those actions smart ones as you move from rule-based marketing to truly data-driven marketing.



### Data model capabilities

The data model is the backbone for your ability to create high levels of personalisation. You need a flexible and operational data model that is directly connected to execution. Investigate how the platform’s data model supports the activation of your data.



### Omnichannel capabilities

If providing your customers with an omnichannel experience is part of your strategy, you need to verify that your marketing software is supporting this. Omnichannel differs from multichannel in its holistic customer-centric approach. You may use SMS, email and app push in your communication, but if they are not integrated, you will have an SMS activity, an email activity and an app push activity. It is not omnichannel. To provide a seamless omnichannel customer experience cross channels and devices throughout the customer journey, data must be consolidated and synced up. Regardless of the device or the stage of the customer journey, each interaction and touchpoint is captured to enrich the following communication, and the platform needs to be able to execute your communication on that basis.



### Integration to paid media

Does the platform integrate into paid media? Check if the software enables you to filter out existing customers from your acquisition campaigns on Facebook, Google and Adform and to mix 1<sup>st</sup> party data with 3<sup>rd</sup> party data to increase the efficiency of the ad spend.



### Do you need sparring to kick-start your work?

Depending on how experienced your marketing team is and the in-house resources available, consider whether you need help and sparring to kick-start your work in the platform or whether your team is on top of this. Does the vendor offer this kind of sparring, e.g through a partner ecosystem, or do you already have a partner to spar with to ensure maximum output and value?



### Check references

It is always a good idea to check references and talk to other clients to determine whether they are satisfied with the product and the services the vendor is offering. Make a few calls and ask the vendor if an existing client would be willing to meet and share their experience with the product.



### GDPR compliance

GDPR compliance is your license to operate and is therefore also highly relevant when selecting your data processing software. Require documentation that the vendor is GDPR compliant and supports your business in being so. Marketing software companies are defined as data processors and are as such obliged to be GDPR compliant. As a minimum the company should be ISO 27001 certified. Inquire how data can be tracked, retrieved and deleted.



### Onboarding & beyond

An important aspect is also how soon you can be up and running and have the product drive value to you. Is the vendor accessible to you after you have made the purchase and the software is installed? Do they offer training and support, and will they inspire you to utilise the platform to pursue your objectives the best possible way? Consider if you need to team up with a partner, to strengthen you on a creative or strategic level or simply to get the technical integrations right.



### Resources required to run the platform

Apart from the subscription fee, consider the total cost of ownership. What is the level of expertise needed by the people working on the platform? This impacts the cost of employing them as well as the ease of finding them. Additionally, the user experience and the ease of use, i.e. how efficiently you will be able to work in and operate the platform daily, affect the total cost of ownership.



### Future plans and innovation capacity

Probe the vendor's plans for the future: is it a flexible platform that can grow with your needs as your business evolves and as you get more ambitious? Is innovation a priority for the vendor since this also impacts your business and your competitive edge? And most importantly, what are your future plans and is the platform a true leverage to fulfil them?

## Do you know what you are looking for?

In our experience **fast time to value** is one of the most important issues to consider: How soon can you be up and running delivering your first results? This is important, both in terms of ROI, but also in terms of getting organisational buy-in for the marketing software and the changes in processes that it may produce.

Another important factor is the **ability to execute**. In a modern marketing department it is essential that marketers can make things happen themselves without involving the IT department and without being dependent on developers who need to code and customise. The platform must empower the marketing department and the ability to execute is the litmus test for this. This is often the difference between failure and success.

Feel free to reach out to us if you would like to hear more about how we can help you achieve your marketing and business objectives. Call us in Copenhagen, Stockholm or London or send an email to [contact@agillic.com](mailto:contact@agillic.com).

## **Copenhagen**

Gammel Mønt 2  
1117 Copenhagen K  
+45 70 25 28 25

## **Stockholm**

Jakobsbergsgatan 16  
Box 16404  
SE-103 27 Stockholm  
+46 706838303

## **London**

25 Eccleston Place  
London SW1W 9NF  
+44 7739 712 897

## **Zurich**

+41 79 960 7347



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## **About Agillic**

Agillic is a Nordic software company enabling marketers to maximise the use of data and translate it into relevant and personalised communication, establishing strong relations between people and brands. Our customer marketing platform uses AI to enhance the business value of customer communication. By combining data-driven customer insights with the ability to execute personalised communication, we provide our clients with a head start in the battle of winning markets and customers.