SELECTING AN
EMAIL MARKETING VENDOR

The top 10 questions marketers should ask when shopping for an email marketing platform

In the early days of email, online marketers would happily shoot out a thousand arrows in the hopes of hitting a lone bull's eye. But with today's buyer more self-educated and overwhelmed with marketing messages than ever, marketers must take advantage of advanced techniques and technology to ensure their messages are delivered, anticipated and welcomed by recipients. To reach customers today, successful marketers use strategies and tactics that include:

- Demographic segmentation and behavioral triggers
- Personalization and dynamic content
- Campaign automation
- Lifecycle campaigns
- Multichannel integration
- List, deliverability, permission and frequency management

Sound complex? It doesn't have to be, but it does require the right resources. For help meeting the channel's unique challenges and opportunities, many companies are turning to outside firms for their email services. But choosing an email service provider, or ESP, can be a complicated undertaking, and one that requires care.

Before you can begin evaluating email marketing vendors, you must first have a clear understanding of the current state of your marketing goals and related strategy. You must know what you need to accomplish now and in the foreseeable future. This means establishing a business case, clear goals, a timeline and budget, and being ready to proceed as soon as you select a vendor. Once you've accomplished the aforementioned and are ready to engage with vendors, consider asking the following questions:

1 WHAT FEATURES ARE CRITICAL TO THE SUCCESS OF YOUR PROGRAM?

Be honest about your needs. Avoid the temptation to adopt every bell and whistle you can imagine, and instead focus on the features you know will solve your current challenges as well as those you anticipate arising in the next 12 to 24 months. Look at whether a vendor offers a feature to solve your challenges, and how well and how quickly these features can be implemented. And don't get caught up in features that aren't critical to your organization's success, no matter how exciting they may sound. Also, make sure you're confident of a vendor's ability to meet your current and foreseeable requirements—the last thing you want to do is start all over again next year because the vendor you've chosen can't keep up with your growing needs.

2 WHAT TYPE OF SUPPORT WILL YOU RECEIVE FROM THE EMAIL MARKETING VENDOR?

It's important to understand the technical support offered by each email marketing vendor, and keep in mind that support should go beyond product "how-to" questions. Inquire whether you're expected to manage the implementation on your own or if you'll get some assistance from the vendor to guide you through the process. Product training is also imperative, so be sure to ask about the type of training—live or recorded—how often it's offered, and whether there are hidden costs associated with it. And look beyond the initial implementation phase.

Once the solution is implemented, you may have questions about best practices and strategy. Will your account manager still be available to advise you in these instances, and is there supporting documentation to leverage? It's also important to understand your account manager's background. While being technically inclined is important, the account manager should have an extensive marketing background in order to truly understand your needs and provide the best guidance possible.

3 HOW QUICKLY CAN YOU REALIZE A RETURN ON YOUR EMAIL MARKETING INVESTMENT?

You're evaluating email marketing vendors for a reason—you have an immediate need. Therefore, in discussions with vendors it's important to understand the implementation process, because the quicker your email tool is up and running, the faster you'll realize positive results. Some of the questions worth asking include:

- What's the average length of time for an implementation?
- Will the vendor guide you through the process based on your timeline, or will you be expected to adhere to the vendor's schedule?
- How many dedicated resources will be needed to successfully complete the implementation?

Request documentation outlining the process and inquire about who will be assisting from the vendor organization. Dig deeper to find out if the time frame provided by the vendor is for all features you require or if you're being given the time frame for a basic implementation. It may also be beneficial to request to speak with existing clients with similar implementations so you can investigate the experience from the standpoint of an actual user.

4 IS THE EMAIL MARKETING TECHNOLOGY EASY TO USE?

Every vendor will try to convince you its product is the most user-friendly on the market, so how can you truly evaluate ease of use? Start with the sales rep you're working with. Most organizations have product specialists on staff to take a prospect through in-depth product demos. However, if the product is truly easy to use, your sales rep should be able to take you through a high-level demo or product tour before bringing the product specialist into the process.

Once you do engage in an in-depth demo, pay particular attention to the details. Did the product specialist simply show you the beginning of the process and the end result without showing you the solution step-by-step? Or did the specialist only focus on the most "exciting" features the product has to offer, even if they weren't those most important to you?

These are signs that the product is too laborious to demo and too cumbersome to use. If you've identified a process that's vital to your success, insist on seeing it step-by-step. On the flip side, is the product easy to use but thin on capability? Can you achieve deep levels of sophistication without having to sacrifice ease of use?

5 HOW STABLE IS THE VENDOR ORGANIZATION, AND HOW MATURE IS THE PRODUCT BEING EVALUATED?

When evaluating an email marketing solution, it's important to note both the maturity of the product and stability of the vendor organization. Do your due diligence. Your marketing emails are vital to your success, so you need to be sure the vendor you select is stable and has a sustainable business model with a solid future. Ask the following questions:

- How long has the vendor been in business?
- Is it profitable, and does it have a solid business model for sustainable long-term growth?
- How is the vendor viewed by others?
- Is it recognized as a thought leader in the space?
- Is the email marketing solution complete? Are all the core functions of email marketing such as dynamic content, relational tables, transactional messaging and robust reporting part of the product, or are they only available through third-party integrations and add-ons?

Drill down into the scalability of the product by understanding the future product road map. Find out how your ideas and suggestions are taken into consideration as future enhancements are planned.

6 WHAT ABOUT DATA SECURITY AND STORAGE?

The customer information, mailing history and behavioral database you've carefully grown over the years is vitally important to your business. So it's crucial that your ESP's data center is sufficiently secure and backed up. Ask how it handles data security and storage, and have your IT staff conduct a technology overview to check and confirm this for you.

7 CAN THIS SOLUTION INTEGRATE WITH MY EXISTING SYSTEMS?

Do you need your vendor's email marketing program to seamlessly tie into your other systems? An API (application programming interface) is the interface that a computer system or application provides to allow requests for service to be made of it by other computer programs and/or allow data to be exchanged between them. Be sure the vendor has a long history with respect to APIs and can point to their successful use by a significant portion of its customers. Also, make sure its APIs fit your technical standards, i.e., is it XML-based, or does it employ Web services or service-oriented architecture?

8 DOES THE VENDOR OFFER MULTICHANNEL MARKETING OPTIONS, AND HOW QUICKLY DOES IT UPGRADE ITS SOFTWARE AND SERVICES IN RESPONSE TO YOUR NEEDS AND NEW INDUSTRY REQUIREMENTS?

The marketing landscape is changing, and so are customer behaviors. In a world where social and mobile are growing rapidly and new concepts like location-based marketing are emerging, you should inquire about the vendor's expertise with other marketing channels. While you may only be interested in email right now, as your buyers' behaviors change, your needs will change too.

The same goes for features and functionality. It's important to know that the product can keep up with the constant changes happening in the industry. So, rather than focusing solely on a particular feature when evaluating a vendor's offering, try to get a broader sense of how frequently it enhances its product, particularly in response to customers' needs. Start by asking yourself:

- What capabilities do I need now?
- What capabilities will I need six months to a year from now?
- Will the vendor's current or anticipated product give me the appropriate capabilities as those needs arise?

Ask the vendor to describe its "road map" for anticipating and staying ahead of your email marketing needs. Finally, look deeper than the "major features" list. From a day-to-day productivity point of view, it's the hundreds of smaller features you use that will enable you to achieve your goals as much as, if not more than, the bigger ones.

9 WILL THE VENDOR BE ABLE TO DELIVER?

You put a lot of effort into your marketing emails and campaigns, but it will be wasted effort if they don't get delivered. So, it's important for you to ask your shortlisted vendors about their deliverability rates and system reliability. Note that just getting last month's performance report will not paint a complete picture. You should ask vendors to provide you with three to six months of performance reports. Watch for trends and any dips in the data.

10 IS THE PRICE REALLY THE PRICE?

For many vendors, the CPM (cost per thousand) only covers delivery—the total cost can be far greater. To get the true price, ask prospective vendors to lay out all costs up front. Better yet, ask for scenario-based pricing rather than just an á la carte list of charges. Consider all potential charges, such as image hosting, form hosting, database changes, deliverability management, viral messaging, customized reporting, set-up fees, access to APIs and deliverability monitoring. Also, factor in your scalability needs. It's not uncommon for companies to see volumes increase significantly as their programs grow. By obtaining itemized or scenario-based pricing, you can get a more accurate picture of how much your program will actually cost, and what to expect should your volume or service needs escalate.

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