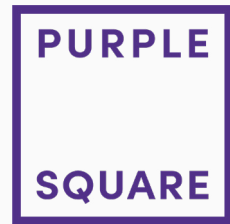


Tim Biddiscombe
Managing Director
Purple Square CX



MARKETING AUTOMATION VENDOR SELECTION & MIGRATION

**THE DO'S AND DON'TS OF CHOOSING THE RIGHT
MARKETING AUTOMATION VENDOR FOR YOUR BUSINESS
AND MIGRATING SUCCESSFULLY FROM ONE PLATFORM
TO ANOTHER**



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I'M IN INSURANCE

At the end of the magnificent movie *Twelve Monkeys* (directed by Terry Gilliam), the madman with the virus thinks he has escaped, and relaxes on the plane to savour his victory. The lady next to him engages him in the polite banal conversation only ever heard on aeroplanes, and we realise that she is Jones, one of the scientists that sent Cole back in time on his mission to stop the virus in the first place. When asked what she does for a living, she smiles and replies “I’m in insurance”.

While nothing could be further from the truth for both me and the time travelling scientist, as the Managing Director (EMEA) of Purple Square, a trusted advisor to the marketing departments of many FTSE 100 companies, that’s honestly how it feels to me sometimes.

To me, the art of marketing automation vendor selection boils down to the art of risk management, of anticipating issues before they become blockers, of solving problems before they hit the critical path of the project or program. To put it simply, you need to have foresight as good as everyone else’s hindsight.

The drive to have the best marketing automation system in your market or vertical is a never-ending arms race to win the biggest possible share of the customers wallet. Even if you make it first to market, with every new adaptation and improvement, your competitors will not be far behind.

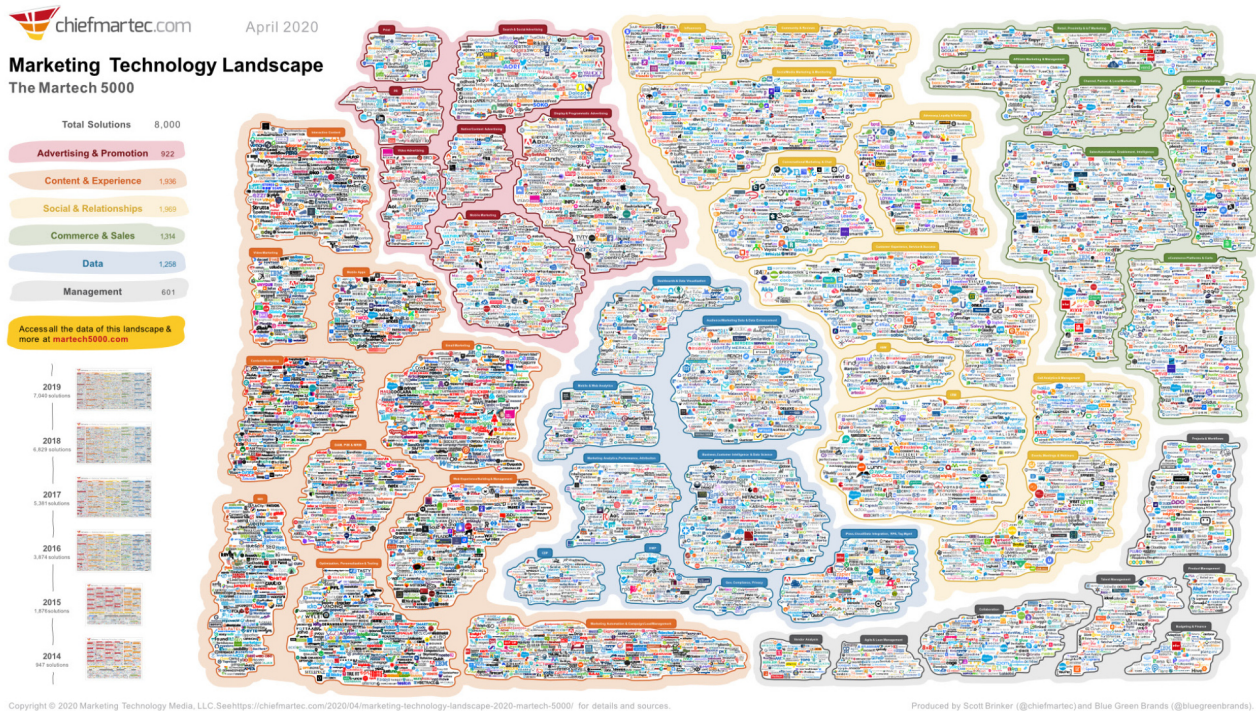
For that reason, we’re here today to look at the do’s and don’ts of migrating your marketing automation technology; things to look out for and things that are always more complicated than you initially think. The grass is always greener on the other side, but an objective look at just how green it is never hurts.

CHOOSING THE RIGHT VENDOR

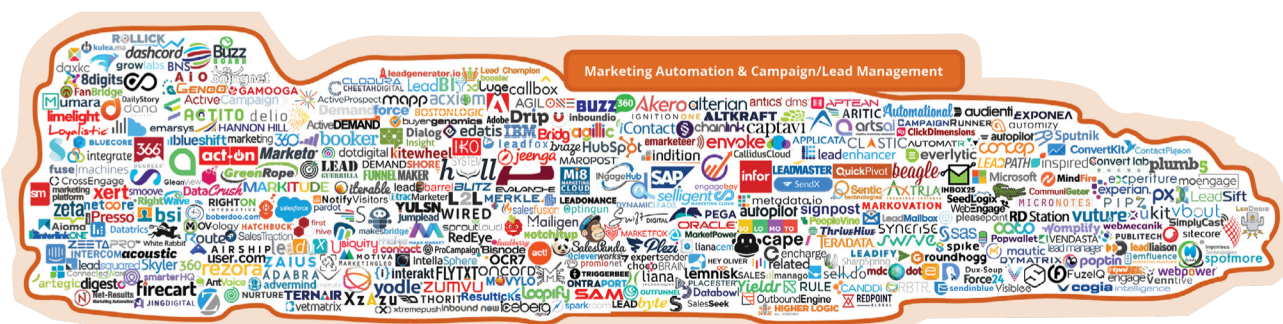
The checklist of features you want in a solution probably won't marry up to exactly what is available in a specific platform. While in some cases, it may be clear that a feature does or doesn't exist, in others it's important to understand the definitions that sit behind feature lists, to confirm they meet your specific requirements. For example, just how fast is a real-time capability? And of course, as is inevitable in every industry, there will always be some vendor salespeople that will tell you everything you want to hear. For these reasons, it is very important that you **don't take yes for an answer.**



There are a huge amount of technology vendors out there in the MarTech space. Don't take my word for it, check this beast of an infographic out.



This is a very valuable piece of industry research called the 'Martech 5000', which is at the time of writing up to 8000 distinct industry solutions across the different areas that make up marketing technology.



Even if we zoom in to show just the marketing automation category that is the focus of this eBook, there are simply hundreds of contenders here, many of them highly viable and credible, who would absolutely love to have your business; so many that even at this scale you can probably only pick out a few recognisable logos if you are lucky.

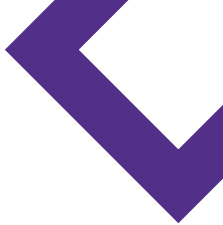
Gartner Magic Quadrant & Forrester Waves

In your quest to both justify and select the right marketing automation vendor should be the two industry reports published by Gartner (the [Gartner Magic Quadrant for Multi-Channel Marketing Hubs](#)) and Forrester ([The Forrester Wave for Enterprise Marketing Software Suites](#)).

The Gartner and Forrester reports are an excellent place to start in filtering down to a shortlist. You will find that you probably already deal with some organisations that offer services in the marketing automation space. Many vendors sit astride multiple Martech sectors, and a few can claim to cover almost all of them. Salesforce for example, known for their formidable CRM capabilities, also offer the Marketing Cloud alongside and fully integrated.

Both reports are the result of extensive research conducted by the two companies into the field of marketing automation and provide enormous amounts of insight and information as to capabilities, weaknesses and strategic goals that may or may not align with your own.





It's easy at a glance to see that Adobe and Salesforce occupy the coveted 'top right' spot of both reports, and as I'm sure you are very busy, it must be very tempting to look no further, but I encourage you to take the time to read the reports, and I do mean READ them. Don't just look at the pretty picture and think that makes you an expert - there is a wealth of valuable information that will inform your decision-making to be gained by dipping below the surface.

I strongly recommend you invest an afternoon in finding out exactly why a vendor is in the top right corner, for example, and do those reasons relate to areas you wish to be strong in yourselves.

One word of warning. The analysts preparing these reports do rely on information being shared with them; they work with the vendors to gather information, but sometimes that gets missed. We have seen in the past one analyst report stating that a particular platform lacked real-time capabilities, then later mentioned that they had not discussed a particular component (which just happened to be the real-time module!).

I can't promise it'll make you any more interesting at dinner parties, but it will sure help you make some informed decisions when it comes to your marketing automation technology stack.

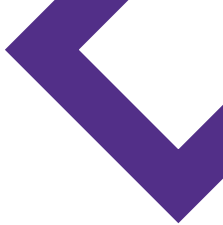


Look inside your own business

It is important also to know your organisation's own strengths and areas that need improvement. For this I've always been a fan of SOAR analysis.

SOAR ANALYSIS MATRIX





Like its predecessor the SWOT analysis, which I'm sure you are all familiar with and have completed more than a few times, SOAR contains analysis areas for Strengths & Opportunities, however Weakness & Threat are replaced with Aspirations & Results. The purpose of a SOAR analysis is to be more forward-looking, whereas a SWOT analysis is much more focused on where you are right now.

The benefits of doing an honest SOAR analysis will show you as a business where you are strong, and where you can focus on improvement. This will help you select a vendor that is strong in an area you wish to improve on, like content management or program automation.

When selecting a new marketing automation vendor, it can be all too tempting to only focus on the areas that you want to grow and expand into. These exciting features are often the driving force behind a migration. It's important to ensure the vendor you select is also strong in the areas you are already performing well in. There is nothing more demotivating to a marketing operations team (and detrimental to user adoption) than not being able to achieve the same level of function in the new technology than they could in the old!





How will the new tech fit in with the rest?

A key area of contention when selecting a vendor, is whether a new piece of marketing automation technology will connect to your other technical real estate.

In the modern world of open documented APIs, all things are possible, but it is important that you consider whether these connections are easy.

A common complaint I hear in the world of integration management during migration to new vendors is related to the failure to consider whether supported connectivity is one-way or two-way. One-way is considerably easier, but much less likely to achieve your business goals. Always read the small print when considering technical capabilities! Another is around velocity. If you need to make decisions or actions based on real-time activity, a feed that will populate data every hour or every day is unlikely to meet your requirements.

If the integration to your other systems (e.g., website, CRM system, AdTech, CDP) isn't fully supported out of the box at the velocity you need it, then another option is to develop Middleware. As the name suggests, Middleware is an application that sits in between your marketing automation solution and the endpoints you wish for it.

Ask yourself; will you buy in the resources (or draft internally from your IT teams) to develop Middleware layers to support the implementation and sub-applications that will need to be designed, tested, hosted, monitored, and maintained.

Developing an API (e.g., in Python) that moves data from A to B is relatively straightforward but doing it at scale in a robust manner with operational resilience, hosted with guaranteed uptime, no missed payloads and backups is something that generally requires a software development house to do it justice.

Without considering this carefully, it's entirely possible you could sign a 12-month contract with a vendor and still be tinkering with the supporting data layers when the time comes for renewal.

Many marketing automation vendors offer data routing solutions, such as Salesforce Mulesoft, Acoustic Exchange, or Unica Link. These services can take some of the load of data routing for you, but the endpoints must exist, or yet more development will be required, albeit potentially a simpler approach than a full Middleware deployment.

When considering new marketing automation platforms, understanding how, where and what else that platform needs to talk to, must form part of the decision making. An assumption that every platform talks to the rest of your operational marketing stack is high risk. Most gaps can be closed, but it may result in process changes and manual intervention, so factor that into your plans.

Sometimes an external pair of eyes can help you get the most out of the vendor selection process and ensure you make the right decision when it comes to which marketing automation vendor you select. For this we advocate a vendor selection activity, which is often driven by a third party (like say, Purple Square) who can provide an independent, vendor agnostic viewpoint, analysing and understanding your business needs, and comparing them to the available vendors for your budget.

Making the right decision for a marketing automation vendor is important and devoting the right amount of time and effort is essential. In fact, the old carpenter's adage comes in handy here:

**MEASURE TWICE,
CUT ONCE...**



THE BUSINESS CASE

The business case for a migration boils down to two things. The cost to move technology vs the long-term savings for the organisation.

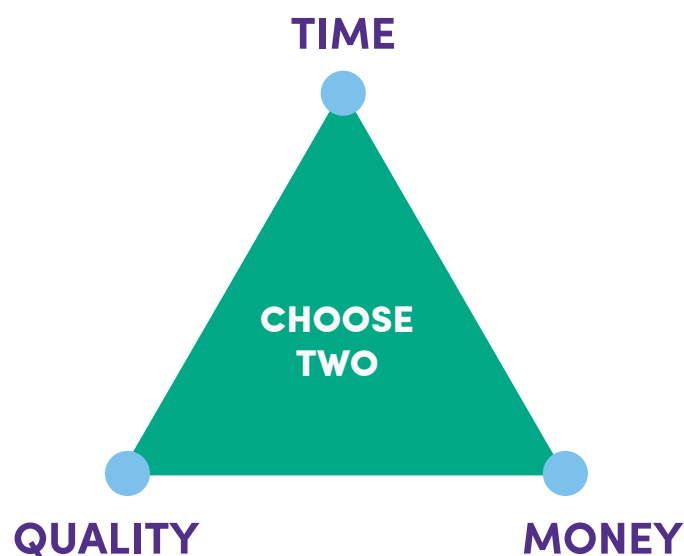
Why do companies want to switch technology vendors? Ideally the answer is for improved customer experience which results in improved ROI. Although it's not that simple, technology alone will not improve customer experience!

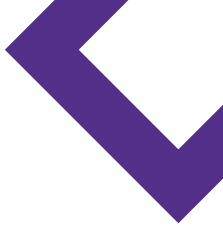
Cost saving therefore becomes a big part of the bargaining for marketing teams to get sign off on the migration and if you're not careful this can come at the detriment of the main driver - improved customer experience.

Time is the True Currency

It is very tempting for many large organisations, especially when under pressure to reduce their bottom lines, to try to save money when changing MarTech vendors; either with a cheaper supplier, or smaller, limited scope migration projects to move you from the old world to the new.

Never has the Production Triangle seemed truer than in a marketing automation migration exercise.





I hear a lot of talk about outsourcing migration exercises overseas for cost reasons. I wish them the best of luck. As one prospect once regretfully informed me, “it might take five times as long, but it is a third the cost”.

That is all well and good, however, I am a very firm believer that time is the true currency and the one we should pay most attention to. In any organisation, money comes and goes, ebbs and flows, but time and opportunities lost are gone forever.

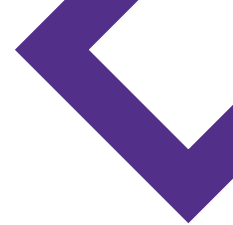
As well as longer projects, when offshoring resource, time zone considerations come into play - there are a great many strong technical companies based in Bangalore in Southern India where if you are on a European time-zone, 5pm in Bangalore is 1pm in Central Europe for example, which can lead to significant delays and scheduling problems.

Long, drawn out migration activities have two significant disadvantages often not factored into planning. The first is the double licensing costs organisations often end up paying as they exist in two vendor worlds for much longer than anticipated. And the second is the pressure on the marketing operations and IT teams to support a drawn-out migration activity while also maintaining BAU work. Operating in ‘migration mode’ for too long a period brings with it issues around team fatigue and a reluctance to execute the full, original dream for the new MarTech in an effort to just go live as soon as possible.

The risk we face with rapid, “minimum viable product”, migrations is that it becomes the norm. Achieving go-live with a platform does not necessarily mean delivering to the business case. It’s critical that go-live is seen as the start of the journey and not the target.

Cloud cost savings?

Another cost saving area I have seen to be the key driver in replacing marketing automation technologies is around architectural compliance, specifically to move technologies away from being hosted in your own business to being hosted in the cloud. This can be a double-edged sword. Yes, there can (not always I should add) be cost savings in moving to run your systems from the cloud, either by selecting Software as a Service (SaaS) vendors or running your own private clouds using providers like Azure and AWS. However, information security is key.



For any modern, forward looking B2C business, your customer data is your crown jewels, and keeping them 100% secure and free from intrusion, especially in the post GDPR world we live in now, is paramount.

Moving to the cloud business cases still require justifying the cost of the migration itself, both in terms of vendor licensing costs, implementation consulting activities and other areas, which we will explore further in a later chapter.

I'm sure you have a tight grip on your budgets, and a good relationship with your Financial Director but if this process is turning out to be more than you budgeted for, be prepared to answer some direct searching questions in the process.

While you are of course considering whether you can afford to move marketing automation vendors, you should also consider whether you can afford not to? What will you miss out on, ideally in terms of approximate lost revenue in staying with your incumbent provider?

I'm not trying to talk you out of migrating of course, consultancies like Purple Square exist to support such activity! However, the reality of internal discussions will always revolve around how renewing your software license with the incumbent provider is rarely going to cost more than the new vendor, especially when you factor in the required implementation consulting and content and marketing object migration exercise that will be needed.

I also recommend that you have some contingency budget - I promise you that based on 20+ years of marketing automation experience myself, coupled with the 250-person-years that exist within Purple Square as a whole, there will always be something that will come up during the project that you haven't thought about. As a conscientious implementation consultancy, it is our job to minimise this through a detailed discovery process, not to mention leveraging our experience, not just of the technology you are moving to, but also in the technology you are moving from - something which is overlooked so many times I should probably get it as a tattoo, or at least add it to my email signature.

The key justification that finance and procurement departments will be seeking boils down to: "What money will you save, and what will you make in the long term by committing to do this in the short term?"



TO RFP OR NOT TO RFP?

That is the question.

I get it, considering changing your marketing automation provider is a big step, not to be taken lightly. Procurement departments often advocate, recommend (or outright insist) on an RFx (Request for Proposal / Information / Bid / Quote etc), but it all amounts to the same thing; a competitive (and often time and resource intensive) exercise to select the right vendor for your organisation.

The RFx process can be a useful business to business (B2B) tool to select and negotiate with the third-party providers you should be shortlisting for consideration, in this case to provide marketing automation technology to your organisation.

Having been on both sides of the RFx process both as a supplier and requestor, I am not personally a fan of the process. In my capacity as MD at Purple Square, I am regularly called upon to contribute to responses, and every year I find myself naively saying “Now I know I’ve responded to the most complicated RFx out there”, only for the record to be broken again the very next year.

What may have started out as a genuinely well-intentioned exercise in allowing an organisation to qualitatively evaluate the merits of one supplier over another, has grown beyond all recognition. The modern RFx process can consist of dozens of documents, and hundreds of pages of content per vendor.

I shudder to think how many tens of thousands of hours are spent responding by the various competing vendors every year. It’s probably down to my working-class upbringing in a small town on the South of England, but I abhor waste, especially of time and resources (though I’m oddly less sensitive about money), and many RFx processes can end up being vortexes for consumption of time and resources.



I admire the external consultants that build a career from RFx management, but sometimes wonder whether it's always meeting the needs of the client or following a standard process. I recall the example of a System Integrator (SI) in Europe of my acquaintance who provided 32,000 hours (4,000 person days) of consulting to run an RFx process for a client for vendor selection. And that was before a vendor had been decided upon, and any work to move the company's strategic goals forwards had been started. In another life that's definitely the career I will pursue.

In addition to the complexity, RFx processes are too easily manipulated. Despite claims to the contrary, and borderline legal disputes, they can often be written with specific vendors in mind either subconsciously or consciously, which introduces bias which can be impossible to overcome.

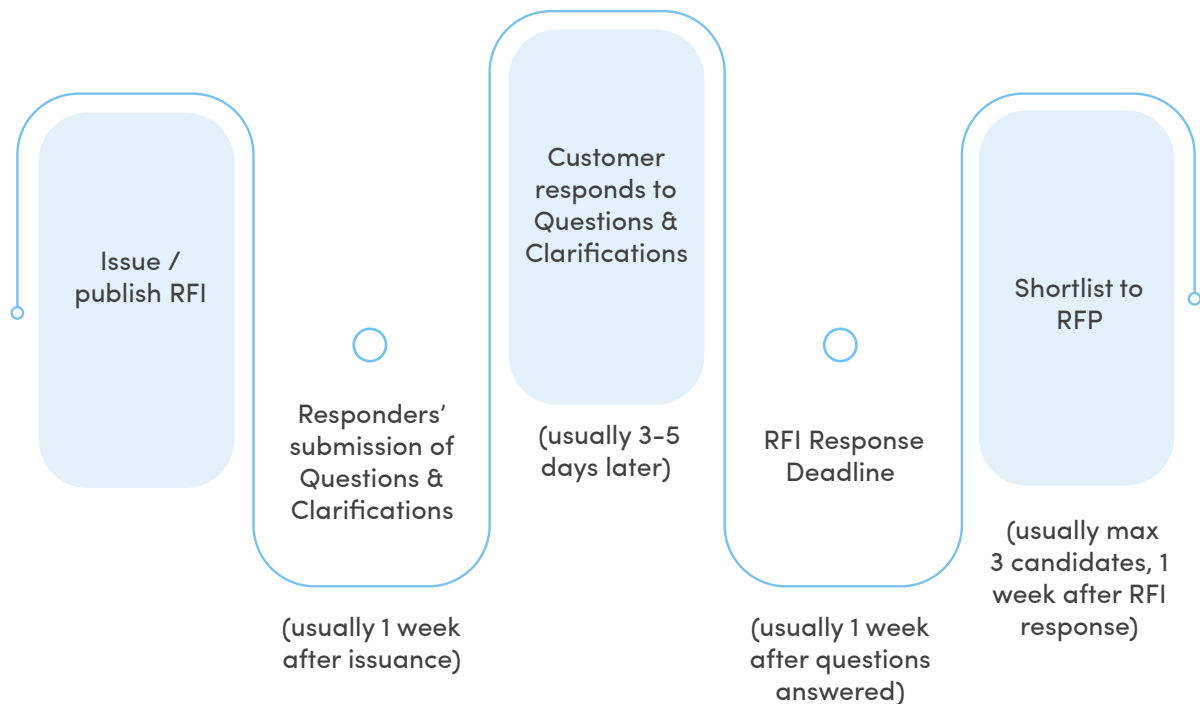
All that said, it can often be mandatory that an RFx process be followed. I recommend therefore to keep the complexity of the tender process as simple as humanly possible, for the sake of your own time and sanity, if not for the numerous responding parties.

Allow plenty of time for the stages. I appreciate that time is a factor, indeed I previously commented on it being a currency, but it is a rare RFx process that doesn't get delayed because reviews take longer than planned. This can happen particularly when you have a larger team of stakeholders/decision makers, and especially if you issue an RFx anywhere near to the traditional August or December staffing holiday times.

The two main steps or phases in the RFx process are often the Request for Information (RFI) and the Request for Proposal (RFP). If you do your homework using tools like the Gartner Magic Quadrant and Forrester Wave reports you can sidestep the RFI process altogether, as the intention of the RFI is to develop a shortlist of applicable candidate vendors for you to refine down to a final winner.

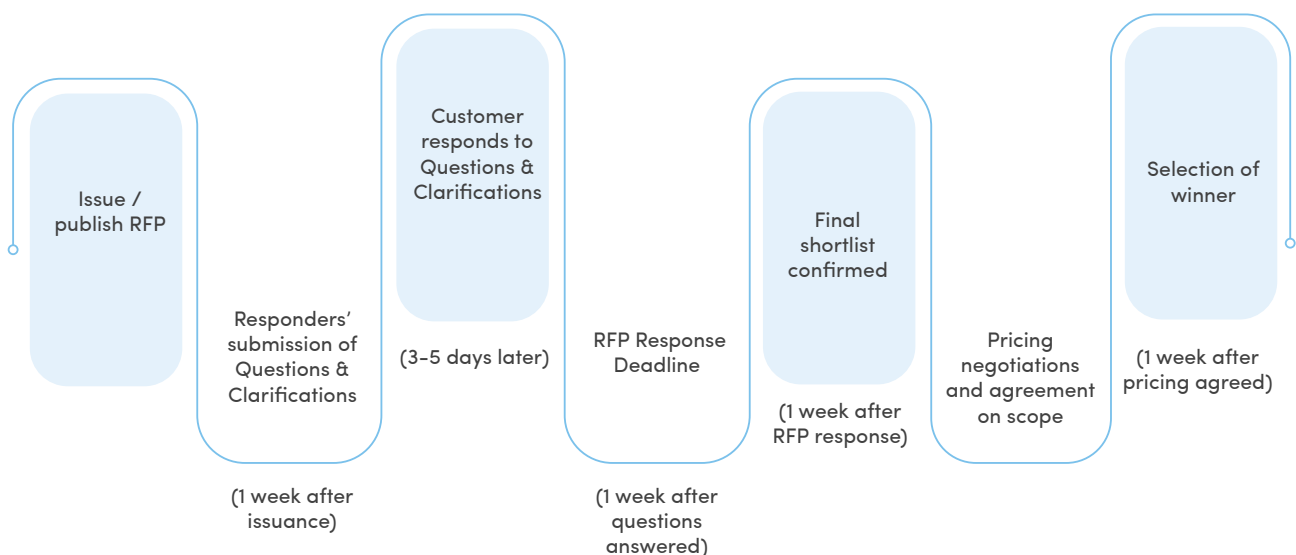
Let us assume for the sake of completeness that you intend to conduct the RFI and RFP process. These are the phases and timings you are likely to work with.

Phase 1 - RFI

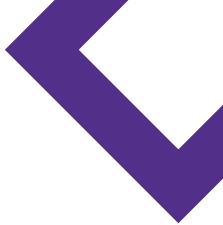


Total duration of phase 1 RFI (not including preparing documents) - 20 days/4 weeks

Phase 2 - RFP



Total duration of phase 2 RFP (not including preparing documents) - 30 days/6 weeks



Assuming you go with RFI followed by RFP, and assuming there are no major delays introduced, the full process can take upwards of three months. Consider whether your overall business case can justify the timings of an RFI followed by an RFP process.

Also, it's not uncommon for organisations to lose the will to live somewhere in between the RFI and RFP and not proceed at all, therefore, it's strongly recommended to select your favourite vendors based on your own research, then go straight into the RFP process for the likely candidates.

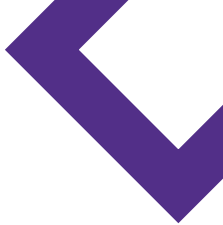


MIGRATION CONSIDERATIONS

So, you've made the decision to move, and selected a vendor to move to. The migration activity is an often-overlooked element of moving to a new technology, and consequently is tackled as an afterthought, under-planned, under-resourced and can end up incomplete as time on the old platform before license deadlines run out and kit is decommissioned.

On this point, it might seem obvious, but it's worth stating and restating that when changing your marketing automation provider, timing is everything. You don't want to be paying for two platforms (old and new) for a long period of time. A small amount is inevitable and unavoidable, for the migration work we are discussing here, and for testing and signoff of processes and functionality, e.g., your customer journeys and marketing programs of activity.





For an organisation to successfully migrate their marketing automation technology to a new provider, key areas of functionality must be explored in detail, audited, and documented. This can actually take place in parallel with the selection process, as in no way does it rely on selecting an actual vendor to proceed with.

Use of the incumbent marketing automation system will no doubt have grown a little organically, which I should add is perfectly normal, and to be expected, at least until the entire workforce is replaced with robots. In the high-pressure world of modern marketing, problems are solved, and needs met in the most expedient manner, which introduces a concept well known in IT, technical debt. A key functional area of assessment therefore is non-marketing activity being undertaken within the marketing platform, which can include data processing, manipulation and other ETL activity. The destination migration for this may not actually be the new marketing automation vendor if you want to start with a nice clean slate, but instead other destinations and data integrations could be considered.

CMS

If you use your marketing automation platform to host your content (as opposed to a fully-fledged CMS), that will all need auditing, exporting and importing into the new platform. This can be no small feat in a mature marketing environment. Such assets could number in the hundreds or even thousands, not to mention the different shapes and sizes that might be required for different uses (e.g., banners, hero images, mobile-friendly). Some clients I know require a dozen or more versions of every single asset to cover all eventualities.

If you have a third-party CMS, then you should of course ensure that there is a supported integration with your desired marketing automation platform before you sign on the dotted line.

All the major players tend to support each other's technology of course, but if you are going with a more niche provider either for your marketing automation or existing CMS, or perhaps if it is home grown by some bright spark in IT, then you may be in for turbulent times when you attempt to link up the two.



Workflows and Rulesets

Once you have an idea of your approach for content, the next big-ticket items are workflows and rulesets.

Workflows are the backbone of any marketing automation system; they vary from vendor to vendor, but they detail the logical groupings of your customers for inclusion in marketing activity. They could be standalone segments, customer groups, campaigns, or fully fledged customer journeys. In each of these categories exist the simple and the highly complex, the batch, triggered or real-time scenarios.

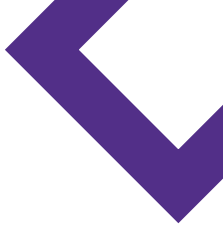
Rulesets are the reusable marketing objects that define your key logic to be used time and again. Common examples include country and language logic for personalisation splits into different languages, and the tried and tested RFV (Recency, Frequency & Value calculations) that so often determine offer value to the consumer. The overwhelming benefit of using rulesets is consistency; everyone in the business is speaking the same marketing language, figuratively speaking, when they use common rulesets.

Workflows and rulesets will of course need documenting, potentially taking the opportunity to review and ensure they are still accurate and viable, and migrating into the new system. Customer journeys need particular care during a migration as these live, always on programs require careful planning around switch off and switch on in the old and new system.

Have you thought about your Contact Preferences?

Many modern companies serious about their customer satisfaction, not to mention GDPR obligations, operate preference centres. These are where a customer gets to choose from a matrix of preferences by channel and product, which gives you the maximum ability to reach your audience, while giving them the maximum flexibility to choose to be contacted or not about any specific area.

While it can be tempting for the cynical marketer to add additional product areas, not to mention additional channels to a customer's preferences, care must be taken to not automatically enrol customers in new areas unless there are legitimate interests, as nebulous a concept as that can be. I recall one retailer telling me once many years ago



that they defined interest in beauty products by the logic “has purchased toothpaste”, which is a very low bar if you ask me, but who am I to judge.

Nevertheless, managing your exclusions and opt-outs seamlessly while transitioning to a new system is utterly essential. Other than general confidence in the new platform, this is the single biggest reason we always recommend a period of parallel running, so business critical processes like these can be tested end to end. Once you are happy with the testing, a cutover from old to new can happen at a time when all hands are on deck and eyes are glued to screens like they are in Mission Control watching the launch; and it’s definitely not 4pm on a Friday afternoon, the classic time for terrible things to go wrong with change management.

Old System / New System

One of the primary reasons to switch up your marketing automation vendor is to gain access to new functionality that leverages your strategic goals. Since these shiny new features are your focus, it can be very tempting to implement them on day one.

This can introduce significant risk to the migration process, as for the purposes of parallel running, how can you compare like for like if you’ve dived headlong into new functionality that cannot be replicated in the old system. You will get to the new functionality soon enough, but we always recommend having completed migration and decommission of the old technology before embarking on the new shiny features.

We strongly advocate a crawl-walk-run approach to migration exercises, even if you already have the new prerequisite skills, having hired them in especially, or sailed through the eLearning yourself to get up to speed as quickly as possible. Exercise caution with the latter of course, as many times we have seen knowledge confused with experience, which can result in painful object lessons, though wisdom is usually the light at the end of that particular tunnel.

WHAT DOES A MIGRATION PROJECT LOOK LIKE?

I'm sure you're wondering by now, as I go on about all these do's and don'ts for marketing automation vendor selection and migration... if you do take the plunge, what can a project actually look like?

It's a fair question, with an unfair 'how long is a piece of string' answer, but I can at least give you a high level of what a project can look like, based on our experience of the 100+ times we've now supported this activity in one shape or another.

Let us look then at the key stages of a marketing automation migration project.



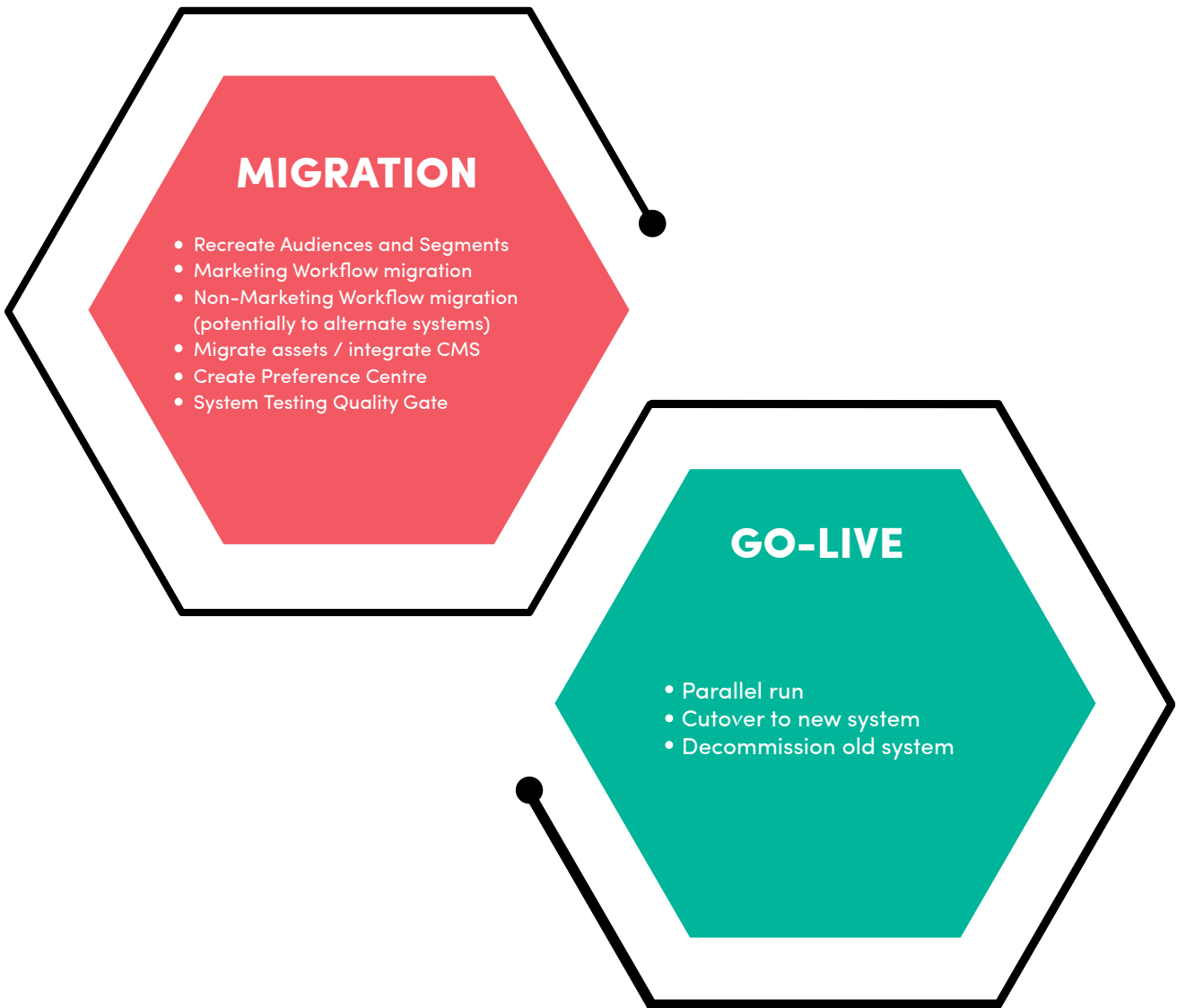
Marketing Automation Migration Project

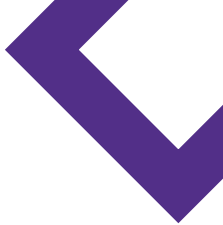
DISCOVERY

- Existing system audit – exercise caution if workflows are particularly complex
- Document Functional Requirements and Capability Analysis of destination system

NEW SYSTEM SETUP

- System provisioning (usually conducted by the vendor or approved third party)
- Administrative Setup
- User creation and roles
- Data / CDP configuration and integration
- Third party technology integrations (where supported)
- Channel integration (including returned responses e.g., opens/clicks)
- Channel specific setup e.g., Email IP
- Warming, App Push SDK, SMS short-code provisioning





As I'm sure you can see and appreciate, there is a lot to do and cater for in doing this properly to mitigate and minimise risk. Careful execution of these steps will ensure at the end you will have a successful deployment, capable of delivering ROI on the investment early in its lifetime.

Some tasks can be potentially postponed if time is a factor. Incumbent vendor renewal/termination dates are often a key driver, but to skip over tasks entirely is to invite failure onto the project.

Something not included in the above, and often overlooked is Project Management (PM). Some clients like to provide their own PM resource, to ensure the project is aligned with their preferred methodology, such as Agile, Kanban, Waterfall, PRINCE2 or the monolithic PMBOK (Project Management Book of Knowledge) that I cut my teeth on many years ago now.

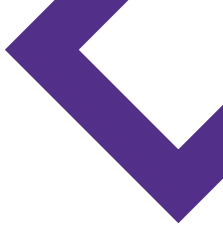
Whatever the preference, it is very important that the migration exercise has Project Management oversight. I hope the above list has given you a sense of the scale of activity. Some of the above might only take half a day to achieve, some many weeks depending on complexity and maturity of use of your current systems, but there is a natural order and dependencies involved that individuals owning their own small areas won't necessarily be able to appreciate. Consultancies like Purple Square can also provide Project Management on request, however who does it isn't as important as it actually happening.

DRESS FOR THE SYSTEM YOU WANT

In this chapter we look at the roles that can go into running a successful marketing automation system that provides real, measurable value and ROI to your business. This is by no means the only way it works; I have seen almost as many different team configurations as I have seen different organisations, yet there are some commonalities in those who do it well that I will try to shine a light on here.

To start with, during the migration itself from old to new system, the three roles you should ensure you have, whether you are resourcing internally or looking to get a consultancy to help you are:

Business Analyst(s) (BA)	The BA is the linchpin of a successful migration. The only person who speaks all languages. Marketing, Senior Leadership, IT, Database CDP, and can effectively translate between them. The BA chairs and documents the Discovery phase and supports the TA throughout in ensuring timely availability of information, assets, workflows, and everything in between, so they can be successfully recreated.
Technical Architect(s) (TA)	A good TA has seen it all before, and you can normally see it in their eyes. In this case, they have seen what works and what doesn't, and they have a strong understanding of the system you are moving from and the system you are moving to. Too often the system you are moving from is overlooked, which can add significant risk to a project.
Project Manager (PM)	I've already gone into the PM role at some length, so I won't belabour the point, but the key here is that the role acts not just to manage the project, but as an intermediary to the internal client resources needed to make the project successful, be they IT, Marketing, DBAs, Leadership etc.

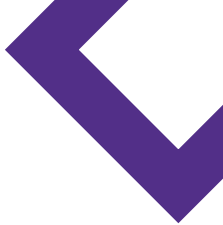


Onto the winning team, I'm sure that's the bit you are much more interested in. Please bear in mind, I don't know your vertical. Well, I probably do, and in some detail, but I'm not writing specifically for it here, so if you'd like a little more specificity to help you along, feel free to get in touch, it is after all what we do.

Digital Marketing Manager	<p>The person who is overall accountable for the day-to-day operations of your marketing system. Usually reports into the CMO or Marketing Director.</p> <p>Reviews the performance of campaigns and programs, manages scheduling, and usually has final send approval.</p>
Marketing Executive	<p>The blue-sky dreamers. The Exec's role is to come up with new marketing campaigns that will serve your organisation and its brand. They will often be driven by specific senior leadership brand awareness imperatives, and other times be dreamt up (sometimes literally in my experience) themselves to try new things that may or may not work. Usually executed on small samples to help you understand much about your ever evolving customer base and what motivates them to buy from you.</p>
Campaign Analyst	<p>The technical user of the system. This is the person who will take a brief from the Exec, and turn it into a fully formed workflow, ready to be executed and turn an idea hopefully into some ROI for your company.</p>

There are other roles I haven't elaborated on here, as we'd be here all day, but of course a successful marketing operation reaches into Legal, Creative, Senior Leadership, Analytics, possibly even third-party organisations who might look after areas including machine learning, subject lines, or smart segmentation to name just a few of the clever providers out there.

Normally a team will already exist, hard at work on the soon to be replaced system, and probably exhibiting varying degrees of enthusiasm about learning something new. In their shoes 20 or so years ago, I was never unhappy to get a new skill to add to my CV, but you never can tell how keen people are going to be about an upcoming change. I encourage you to review the team and look to see who is performing well in what role and consider if a change of some kind couldn't make the team stronger and more effective as a whole.



I'm not advocating anything drastic, but I do firmly believe that everyone who joins and everyone who leaves a business should increase its average awesomeness, and that's all I'm going to say about that.

It is tempting to hire in skills for the new technology and I have seen this go very well. I have also seen this go very badly, and on the face of it, when it does go badly it is because the people with the skills often only know how to use the system a certain way and can exhibit inflexibility to adapt to the way you need them to work. Such rigidity is unlikely to work in your organisation, except in the edge case where they come from an environment that matches yours exactly. As I said, small hope of that. All I can advise is, if you do decide to hire in skills for your new marketing automation vendor, ensure they have experience of multiple environments so they can exhibit some basic adaptability needed for you to make the best use of their no doubt expensive time.

The other point I would add is, it is much easier to train people in marketing automation software than it is to train people to be a good cultural fit for your organisation. I wouldn't go so far as to say that when you've seen one marketing automation system you've seen them all, but there is so much commonality in how they work, that aside from the occasional step change as when Customer Journeys became more of a 'thing', or the rise of the CDP (which is all anyone is talking about at the time of writing), the learning of a new piece of software if you are familiar with something similar, even one less complex, isn't that big of a thing really.

A strategy sometimes adopted by marketers is to reverse engineer the marketing programs of the companies they admire, or at least are fiercely in competition with. The same could be said of team structures as well. After all, if the marketing programs are compelling and to be envied, they must come from somewhere - the minds of a high functioning team of individuals.



SHOULD YOU STAY, OR SHOULD YOU GO?

Given how much money vendor software licenses, implementation consultancy and asset migration can set you back, even after aggressive price negotiation, it is worth spending a little time re-evaluating your current vendor.

Hear me out. I'm sure over the past chapters you've been focused on the blue skies of new vendor territory, almost able to smell the green grass on the other side. But we owe it to ourselves to ask the difficult questions before someone else (i.e., someone in finance or procurement) does.

Questions like:

Are there irreconcilable differences with the current vendor?

Ask yourself why you are looking to change? Often it can stem not from the positivity of doing more and better with a fresh start technology but highlight the negativity of a relationship not working as it should. Have you discussed the issues with the vendor? Are they working to get better, to be better?

Are you fully aware of your current marketing automation vendor's technical roadmap? It might be the reason you are looking for a new vendor are changes they plan to introduce. Some vendors are clearer than others about their technical roadmap, but it's normally something that can be obtained through clear and open communication.

What are your current vendors core values?

That might seem a strange question, but it's important to evaluate, and understand how philosophically aligned you are with your tech vendors. For example, Purple Square's core values are:

We are responsible

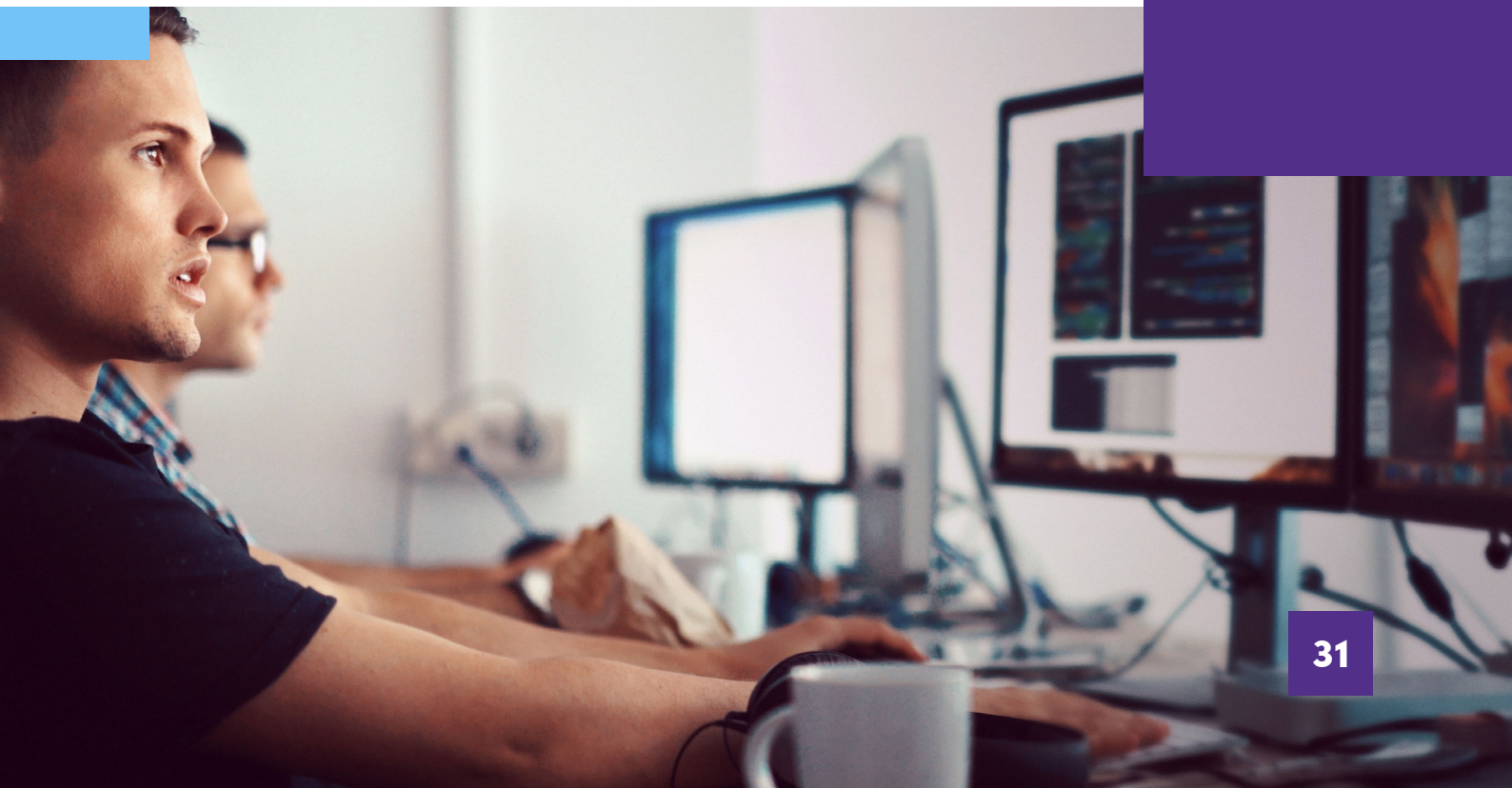
We inspire others

We strive for excellence

We act with integrity

We reverse engineered these by looking at our best and brightest to identify what it means to be 'Purple'. We apply these principles not just to our hiring of new staff, but to the tech vendors, business partners and clients that we work with. It's good to enjoy working relationships after all with people who feel the same way as you , and great things will come of it.

Back to the question in hand, does your supplier have broadly compatible core values to your business? It's not a bad question to ask as part of the RFx process either, thinking about it.





Is there an outage or failure to deliver that you can't quite forgive your current vendor for?

It is unrealistic to think that problems never happen, even in an industry called marketing automation, where the very mantra of automation is to get the same result every time without excessive human intervention.

It's not uncommon for vendor technology outages to cost clients' money. An outage of marketing automation can delay receipt of important messages and in industries like retail and gaming where offers are fast moving and transient, too late is worse than not at all.

But consider this, have they fixed systems so the outages can't happen again? Or does it perhaps still feel like your marketing automation capability has a ticking time bomb attached that you can't see the countdown for?

Will switching be worth the cost?

Conservatively speaking, it could cost three to five times more to change marketing automation vendors than it would to stay where you are, when you factor in the costs for implementation, configuration, training, asset and workflow migration, on top of the license cost. That in itself shouldn't be a compelling reason to stand still, marketing automation vendors are in the same arms race as you, competing for a share of your marketing budget the same way you compete for a share of a customer's wallet. New versions, new functionality, new customer communication channels are emerging all the time, and as the Gartner and Forrester reports can show you - not every marketing automation vendor is equal in terms of what they can offer you.

Measure twice, cut once

We've covered a lot of ground here. I hope it serves to help a little in planning your marketing automation vendor selection process. And the planning is key, as I mentioned, Measure Twice, Cut Once works as well for migration projects as it does for carpentry.

As I've said before at least once or twice, moving your MarTech unprepared can be a risky proposition; engaging a vendor agnostic consultancy with a quarter of a millennium of person-years of relevant experience might well be all the insurance policy you ever need.

Why not give us a call to discuss? If there is anything I or the Purple Square team can do to help you, please reach out to us at letstalk@purplesquareconsulting.com.

Tim



How can Purple Square CX help?



Evaluating your current marketing technology?

Marketing Automation
Health Check



Picking a vendor?

Marketecture Review



Ready to migrate?

Consulting &
Implementation

About the Author

Tim has been helping clients with marketing-shaped technical problems for more than 20 years now, so you could say it's in his blood. As Managing Director for Purple Square CX, he leads a team of highly skilled experts to deliver cutting-edge, scalable, and robust solutions for our clients, partners, and software vendors.

Outside of work Tim enjoys filmmaking (solving problems of a very different nature!), writing and travelling.

About Purple Square CX

Purple Square CX help the world's biggest brands maximise their marketing automation potential. We provide a range of services supporting leading Marketing Technology platforms, including Adobe Experience Cloud, Salesforce Marketing Cloud, HCL Unica and Acoustic Campaign, Pega, mparticle.

These services include strategic and technical consulting, implementation services, training, and managed services in the form of campaign delivery and application management.



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