



Checklist:

Questions to Ask Yourself When Choosing a Marketing Automation Tool



Will we be able to measure performance of marketing activities?

First, determine how you will define and measure marketing performance. Then pick the right tool(s) for the job. A robust marketing automation tool built to grow with your business and integrated with content creation, video platform, and other marketing tools you use (or might one day use) will give you the most power and flexibility to measure performance.



Can my marketing automation scale as I grow?

If your marketing automation tool grows with your business, you won't ever have to go through the hassle of switching solutions when your team needs more robust tools.



Will my marketing automation software increase marketing and sales alignment?

Marketing automation software that supports integration with your sales tools makes it easy for marketing and sales to share data, leverage reporting insights, and stay more aligned.



Will we be able to see more transparency into sales and marketing activities?

Automation tools built on a unified business platform will give you the most transparency into key data across your entire business – sales, marketing, and beyond.



Will we be able to improve the quality of leads that are passed from marketing to sales?

Giving your teams tools designed to facilitate communication is key to breaking down silos.



Will we be able to build email templates faster and customize them to our business?

Choosing a marketing tool with easy-to-use template builder functionality will let you build custom templates quickly. It can also foster efficiencies across your whole organization by ensuring that everyone building templates uses the same process.



Will we be able to nurture our leads?

Marketing automation tools that offer lead grading and lead scoring functionality can help you pinpoint the best leads to nurture. From there, automated lead nurturing makes sure each lead gets the right content based on their engagement history. Look for lead nurturing as part of any marketing tool you consider.

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