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12 must-ask questions for picking the right platform

Picking the right marketing automation platform is a challenge for even the savviest organizations. These questions will help you cover all of the bases before you invest in new marketing tech.

BY JAMES A. MARTIN

Marketo. Eloqua. HubSpot. Act-On. With so many marketing automation platforms and services available today, how can you determine which products best fit your needs?

It all starts with research, of course, such as checking out reviews and product comparisons on G2 Crowd, TrustRadius, Capterra or Software Insider. Next up, talk to marketing colleagues about the platforms they use. It's also a great idea to create lists of goals, needs, and necessary tools.

Most of all, you need to ask marketing automation software providers lots of questions, and then ask those same questions of each individual vendor, so it's easy to make "apples-to-apples" comparisons.

These 12 questions, contributed by marketing professionals and other experts, can help you prepare the proper queries beforehand and form frameworks for evaluating marketing technology providers.

1. What about CRM integration? Does the information flow both ways?

Ideally, marketing automation platforms will integrate with Salesforce or another CRM platform, according to Adam Bockler, communications manager at Float. Ask about the specific CRM features available in the platform itself to determine if they're suitable. "Not everyone needs Salesforce, especially if you're a smaller company that needs to be focused more on selling the work and tracking deals than on creating incredibly detailed reports," Bockler says.

"A seamless integration between the CRM platform that the sales team is using and the marketing automation solution is essential and becomes increasingly important as the teams grow, and communication becomes more challenging," says Billy Cripe, CMO of Field Nation.

2. Any additional integration?

In addition to CRM, ask about the other tools and services that integrate with marketing automation platforms, and know which services are necessities. For example, HubSpot integrates with GoToWebinar, SurveyMonkey, Shopify, WordPress, Zapier and many others.

"Have a list of your must-have tools ready to go when talking integrations with providers, and check off each one they have," Bockler suggests. "If they don't have it, ask them if it's on their roadmap."

3. How does data flow in and out of the marketing automation system?

You will likely need to combine data that resides in the marketing automation platform with data from other systems, such as those dedicated to CRM, SEO, content management systems (CMS) and ERP. The goal is to form "a holistic picture and drive decision-making," according to Tom Berger, vice president of digital marketing at Progress. "The data should be easily accessible via application program interfaces (APIs) or scheduled exports in common formats."

4. How flexible is the reporting module? Can you export custom reports?

Weak reporting is still the Achilles heel of many otherwise great platforms, according to Micky Long, vice president and practice director of lead nurturing at Arketi Group, so it's important for organizations to drill down into tools' reporting features.

5. How does the platform measure success?

"Tracking, reporting, ROI — these are terms that weren't significant to marketers for a long time," says Lauren Littlefield, president of Field Public Relations. "It was easy to run radio and billboard ads, then hope for the best when the end-of-year revenue numbers became final. Now, through marketing technology, marketers and company leadership alike can analyze where their marketing is effective and where it isn't."

Littlefield says quality marketing automation platforms have flexible, customizable dashboards and reports that help to measure campaign success at a variety of different, granular levels. Organizations should ask marketing automation providers about success metrics and make sure they support the metrics that are most important.

6. What about migrating from the old system to the new one?

If you plan to migrate from a rival marketing automation platform, it's important to ask about the migration plan, according to David Chao, vice president of marketing and product strategy at ReadyTalk. "Listen for references that a migration from your current platform has been done before," he says. "The right provider will want to dig into your specific setup to assure a successful migration."

It's important to get a solid understanding of the resources required to migrate or update your system, says Gwen Knudsen, director of demand generation at LiveHive. "Understand whether you'll need to pay for additional resources or use some of your own, which may require you to pause other programs. You may also need to pull in reps from your IT department, sales operations, and marketing department. Get their input before making a decision to make sure it fits within their department goals."

8 **quick** questions for marketing automation vendors

- 1** What are the top three strengths of the platform versus competitors in the market?
- 2** What are the top three features existing customers ask for but aren't on the roadmap? And why aren't they?
- 3** What does the platform not do well?
- 4** How flexible are the platform's email and landing-page builders? Is HTML coding required?
- 5** What are the platform's limits on database size, email sent, forms and rules? How much does it cost to upgrade?
- 6** Is a full, free trial available? If so, what are the terms of use?
- 7** Is a contract required? If so, is the contract month-to-month or annual?
- 8** How secure is the system? How does the provider protect customer data?

7. What's the true cost of using the system?

Hidden fees and costs associated with overages, training and implementation can greatly impact the overall price of a platform, according to Littlefield. "Be sure to understand every potential cost for your organization and how these possibilities affect the competitive aspect of pricing as you're vetting multiple vendors."

8. What about marketing automation support?

As with any service, a personal touch from a marketing automation software provider is important— but unfortunately isn't always available. "It's been typical for different managers to take over my account," says Float's Bockler. For example, his contact at a marketing automation software provider left the company, and then Bockler received a "generic email address" to use if he had questions or issues.

Ask specifically about telephone support — when is it available and how much does it cost? It's wise to pick a platform that offers solid, easily accessible phone support. "You will need it," according to Long.

9. Is it easy to add new users?

Ideally, you want the capability to freely add or remove users in your marketing automation systems as needed, says Bockler. Some systems have restrictions that let you only remove users when their contracts are up for renewal.

10. How long does it take to implement the new system?

Depending on the size of the organization and the condition of the data, implementation should take two to four weeks, according to Littlefield. Anything more or less should raise red flags. Variables that influence implementation time include the number of data sources and silos, team engagement, and the sophistication of systems and workflows.

11. Can the system manage full customer lifecycles, or only leads and prospects?

Marketing professionals must increasingly manage and determine entire customer lifecycles, or journeys, from unknown prospects to brand-loyal customers, Littlefield says. As such, it's important to ensure that marketing automation tools fit your specific needs. "Several marketing automation platforms focus solely on leads or prospects.

12. Does the platform support your mobile needs?

Mobile technology has never been more important to modern marketers, and it's crucial that you pick automation tools that meet your mobile requirements. "With more than 50 percent of responses coming from mobile, it's critical that email templates, landing pages and forms are supported," says Knudsen. "Ideally, getting a mobile responsive template shouldn't require additional resources." ■

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GE seeks one-to-one customer relationships

Modern automation technology is no panacea for today's many marketing challenges, but at CES 2016, GE's marketing manager suggested the right tools and tactics could help organizations win consumer trust.

BY MATT KAPKO

No silver bullet exists to solve the online marketing industry's many ongoing challenges. Despite recent advancements in advertising technology, it will face new and different hurdles in the future, according to Andy Markowitz, general manager of GE's performance marketing labs, who spoke during a panel discussion at CES 2016.

Regulators continue to put additional pressure on marketers as they draft new guidelines to help protect consumer data. Meanwhile, consumers create more roadblocks by opting out of tracking cookies or installing ad blockers.

"There are behaviors and regulatory issues that stand in the way" of even the best marketing cam-

paigns, he said. “We’re on a global race for permissions, so that we have the permission to talk to people.”

GE moves away from anonymous marketing

GE wants to distance itself from the anonymous component of modern marketing, to reduce wasteful spending and do away with irrelevant ads.

“I don’t think it’s ever going to be nirvana,” said Markowitz. “We are moving more and more towards a place where one-to-one relationships are going to be more the norm, even at mass scale.”

“We are not in the golden age of marketing, but really at the dawn at the age of accountability,”

-ANDY MARKOWITZ, GENERAL MANAGER, GE

That’s why marketing automation, software and technologies, which let marketers promote on multiple channels and automate repetitive tasks, have become such powerful and promising tools, according to Markowitz.

GE sees marketing automation as a “bullseye,” or a way to put “the right story in the hands of the right person at the right time based on what their behaviors are,” he said. And the storytelling component of marketing plays into the much larger goal of customer experience, according to Markowitz.

GE looks to LinkedIn, Marketo for marketing automation

The concept of increasing ad personalization and customization isn’t new, but it evolved in 2015 through a partnership between social network LinkedIn and Marketo, a marketing automation software company. The two companies worked together to develop a multi-channel path for engagement with prospective customers, because they saw too many modern systems that were not coordinated and didn’t target specific demographics, Markowitz says.

“Marketing automation almost gets you to this Amazon-esque experience,” said Markowitz. “I’m not saying that we’re there. It’s a long journey, but that’s the

expectation: to provide that dynamic environment.”

GE is still looking to find the right value proposition, and its objectives change drastically for each division within the company, according to Markowitz. However, GE was the first partner to use LinkedIn’s “joint nurture solution” with Marketo, and it used the tools to identify its site’s key visitors, develop them into leads and convert some into customers, he said.

The company also found some ancillary perks. “I think the cultural component of doing something like this yields benefits beyond just leads or sales,” Markowitz says.

The world of digital marketing evolves rapidly, and GE’s clients want to learn from and contribute to initiatives like the GE and Marketo pact, particularly after they first get involved, he said. “When we started doing this two-and-a-half years ago there was no one in GE who was touching marketing automation, and now there are 50 people,” he said. “That’s real cultural change.”

Automation gives GE’s marketing team a “reason for being,” and ultimately it provides the company with more opportunities to work with companies such as LinkedIn, Google and Facebook, according to Markowitz.

As marketing tech evolves, familiar challenges remain

It’s an ongoing challenge to pull all of a company’s marketing resources together, but ad tech companies now provide new paths to achieve more effective strategies, Markowitz said.

“There’s the marketing cloud and there’s the stack, and there are all these different metaphors for what it looks like,” he said. “There are actually scalable platforms that you can connect and put together that allow you to do that.”

A lot has changed in the world of marketing tech since Markowitz joined GE six years ago, but honing in on key metrics and attribution remains a pressing concern and consistent challenge.

“We are not in the golden age of marketing, but really at the dawn at the age of accountability,” he said. “I think that’s what all this technology brings us. This is building a marketing framework that works.” ■



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SURVEY

As technology upends their profession, marketers lag on automation tools

Not only are marketing professionals not investing in marketing automation technology, nearly half of them don't even know what it is, according to a recent survey.

BY TOM KANISHIGE

“Forty-four percent of the people who weren’t using marketing automation didn’t even know what it was.”

-MIKE SHARKEY, CEO, AUTOPILOT

Marketers are placing their bets on website, search engine optimization, branding and social media technologies -- not so much on paid advertising or, more importantly, marketing automation -- according to a 2015 survey from Autopilot, a marketing automation vendor.

In the age of digital marketing, marketers want to invest in online channels that enable them to have a direct conversation with the customer, yet there’s clearly room for improvement. Autopilot surveyed 327 U.S. marketing professionals and found that 65 percent felt their marketing department could do a better job staying in touch with customers.

You’d think marketing automation would help close this gap. After all, the technology promises to help marketing departments communicate with customer databases over multiple channels, mostly email but also social media and websites, and automate repetitive tasks.

Marketing auto what?

But this wasn’t the case: Only 13 percent of respondents said marketing automation was an investment priority. The simple truth is that marketers are undergoing a crash course in emerging marketing technology that is upending their profession, and their education is lagging.

“Forty-four percent of the people who weren’t using marketing automation didn’t even know what

it was,” says Autopilot CEO Mike Sharkey.

Autopilot claims companies that communicate with customers every two to four weeks, largely through marketing automation, generate twice the amount of leads. Yet almost half of respondents said they send at most two to three communications each year.

It’s a costly time for marketers who can’t separate sky-high promises from the nitty-gritty realities of new-fangled technology -- just ask any CIO about life on technology’s bleeding edge. When technology under delivers, marketers are quick to point the finger at technology rather than their use of it. Last year, VentureBeat Research found that 38 percent of marketing automation users were considering swapping out systems this year.

Marketer, heal thyself

All of this sounds eerily similar to a Forrester report in January that found a high rate of failure with social listening platforms, another core marketing technology. Forrester says many organizations switch platforms year after year, in hopes of finding the right tool. Never mind that the fault often lies in their lack of realistic expectations and understanding about the emerging marketing technology ecosystem.

The Autopilot report concludes that marketers aren’t feeling satisfied; maybe they have only themselves to blame. ■



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What the hell is the difference between ad tech and marketing tech?

Though most advertising and marketing pros won't admit it, a cloud of confusion surrounds the terms 'ad tech' and 'marketing tech.' In search of clarity, we queried a number of experts for their insights on the conundrum.

BY MATT KAPKO

What is advertising technology? What is marketing tech? Do the terms overlap, and why should ad or marketing professionals care?

"Ad tech and marketing tech are like peanut butter and chocolate," says Jake Sorofman, research vice president at Gartner. "Ad tech targets anonymous audiences, while marketing tech generally targets known customers."

If only it were so simple. The fact is all of the minute differences between ad tech and marketing tech aren't as important as what the technologies actually do. However, endless confusion on the topic exists in the tech and media markets. And while the definitions of the two terms aren't always clear-cut, some important divisions exist.

In an effort to chop through the mental fog that sometimes surrounds ad and marketing tech, we asked industry analysts, marketers and vendors for their takes on the differences between the two technologies.

What is marketing technology?

The tools that manage marketing processes, workflows, digital content and customer analytics are all part of the marketing technology ecosystem, according to Carl Doty, vice president and group director at Forrester Research.

Adam Kleinberg, CEO of advertising agency Traction, describes marketing tech as advanced CRM. Marketing tech targets existing customers and prospects that marketers already have on the hook, he says. "Sometimes you know who they are and sometimes they are just someone you've 'cookied,' but you have them in a database, you have a record of some degree of past behavior, and you can provide them with customized communications based on that."

Marketing tech covers all aspects of marketing, including CRM platforms, creative, design, SEO and even ad tech, according to Mike Rosner, chief revenue officer at Forensiq, an ad fraud detection and protection company. "Marketing tech is basically the creative, understanding the customer and [the] data science around optimization," he says.

What is advertising technology?

Technologies that enable the programmatic buying and selling of advertisements are commonly referred to as ad tech, according to Doty. The ad tech umbrella covers the vast databases of digital identities called demand-side platforms, and data management platforms, or the ad networks and exchanges that publishers use to sell their digital ad space, he says.

Ad tech lets organizations hone their focus on specific groups or individuals, according to Kleinberg. "If buying TV was like a nuclear bomb and buying websites was like a shotgun, then using ad tech is

supposed to be like having a sniper rifle," Kleinberg says. "There are a lot of problems with the scope on that sniper rifle, but that's the general idea."

The full foundation of ad tech is somewhat shaky considering the problems it can cause, Kleinberg says, who likens the tech to robots buying media. "Robots run on software. Software runs on logic. Logic has rules, and rules are made to be broken. This is why there is so much waste and fraud in the space."

The irony, of course, is that ad tech can potentially eliminate huge amounts of wasted ad spending, particularly with direct-response marketing, according to Kleinberg.

Combined 'marketing and ad stack' compounds confusion

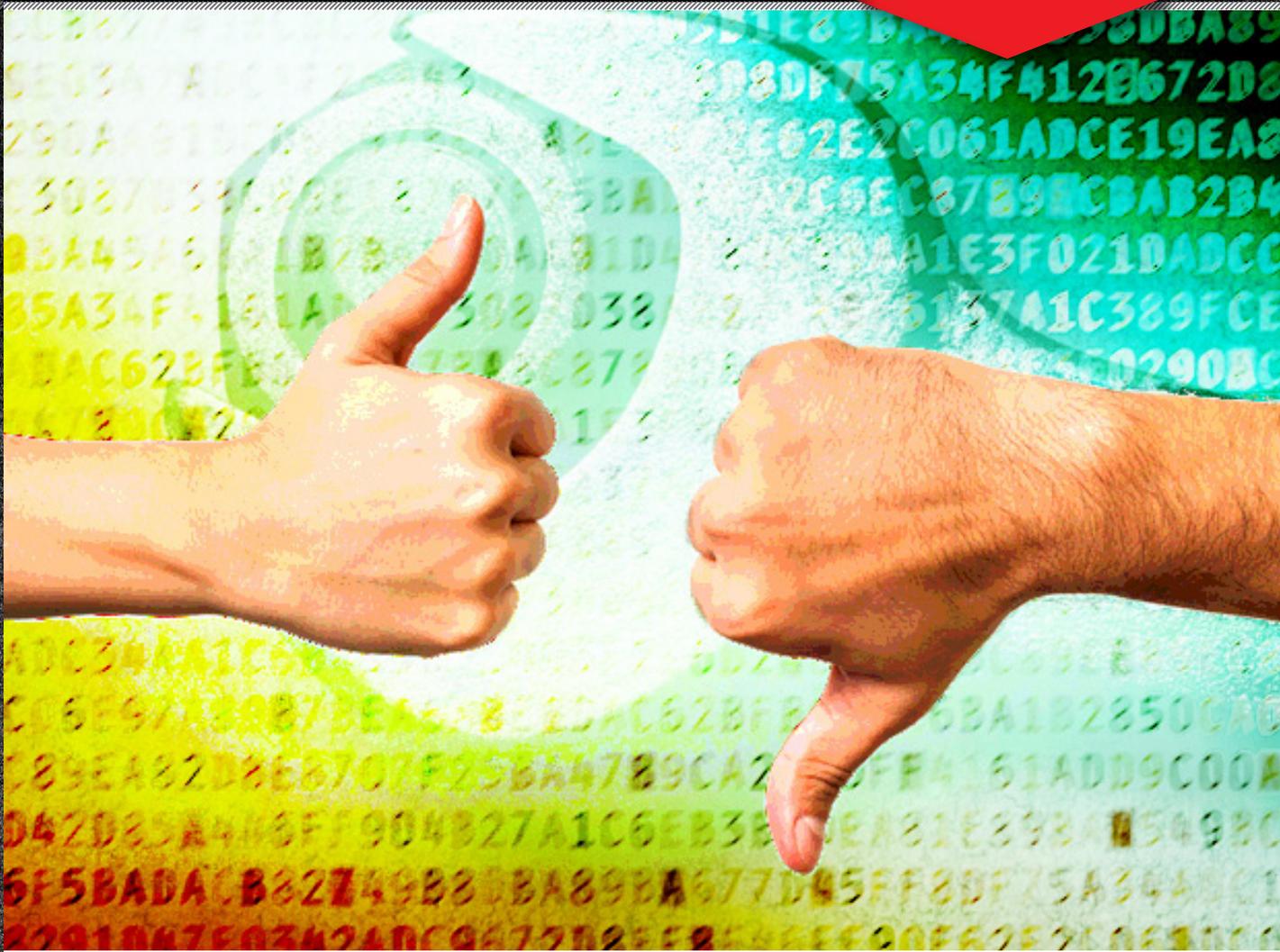
Large marketing cloud vendors, such as Adobe and Oracle, acquired ad tech companies and integrated the features into their own products to build a "full marketing and advertising stack," a trend that's expected to continue, Doty says. "What's happening in the market now is a consolidation across these categories."

For this reason, ad tech and marketing tech are in some ways one and the same. They share commonalities, and much of the confusion over the difference relates to the fact that advertising is the most visible form of marketing, according to Vish Sastry Rachakonda, CEO of digital marketing firm iQuanti.

"[Ad tech and marketing tech] are both broadly based terms used to describe an assortment of technologies and data sources" and "they are both fundamentally aimed at reaching the right audience with the right message at the right time and place," Kleinberg says.

The overlap occurs in the use of customer, or potential-customer, data for single interactions versus long-term strategy, according to Rosner. The struggle over ownership of that data, and how it should be used, is largely responsible for the confusion that hangs over ad tech and marketing tech, he says. "If data equals power, who owns it amongst the key stakeholders: CTOs, CIOs, CMOs?"

As long as this question remains unanswered, the overall value and effectiveness of both ad and marketing tech will remain at issue. ■



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Top 4 tools and why users love (and hate) them

Digital marketers weigh in on their favorite marketing automation tools, and spotlight pros and cons of each. Some of the picks were the usual suspects – HubSpot and Hootsuite – while others were surprises.

BY JAMES A. MARTIN

1) HubSpot

HubSpot's marketing platform received the most votes (nine) by far. Pricing starts at \$200 a month.

Why marketers love HubSpot 

Great all-in-one platform. "HubSpot is the best all-in-one marketing platform I've found. It not only does a great job with marketing automation but with social media, content marketing and CRM. All data is in

one place, which helps anyone who uses the platform become a better marketer.” — *Darin Berntson, founder, Bernco Media*

Boosts website traffic. “Honestly, HubSpot changed my life. I was working for a startup tech company that was starved for awareness and leads. How do you ‘get found’ when you’re new and surrounded by large, established competitors? We adopted HubSpot, started blogging, optimizing Web pages, creating premium content and calls to action. Our website traffic shot up by three times and our contact database grew by six times in just three months.” — *Bill Peatman, business writer, Alaniz Marketing*

Better understanding of audience behaviors. “We can manage contact history on the macro and micro level. That means I can see the entire prospect and customer base, segments and groups, and the individual customer’s history. This helps our team understand audience behavior from one tool and lets everyone (sales, marketing, customer service) see the same picture.” — *Curtis Peterson, digital marketing manager, SmartFile*

Intuitive interface. “The software makes my work easier because the whole site is intuitive. If you can do one thing, you most likely can adapt it to the whole site. Everything you do in HubSpot can make a difference in your conversion rate and leads.” — *Christina Kay, PR specialist and inbound marketing consultant, Bluleadz*

“The easy-to-use interface allows you to aggregate all your marketing efforts in one place, giving you numerical-proven insights into exactly what is and is not working. The depth that the information goes into in the platform is simply invaluable. It drives everything that our team does.” — *Erin Wasson, vice president of marketing, UrbanBound*

Solid reporting. “HubSpot provides closed-loop reporting, making it easy to know which marketing activities are effective. With HubSpot’s tools, I know which activities are most effective during particular time frames.” — *Adam Bockler, communications manager, Float Mobile Learning*

HubSpot’s room for improvement Contradictory approach toward content.

“HubSpot speaks out of both sides of its mouth when it comes to content quality. I’m working a pretty serious segment — biotech and medical device manufacturing. You have to know what you’re talking about to be credible. HubSpot acknowledges the need for high-quality educational content — people aren’t looking to be sold when researching online. But they also offer \$10 bloggers for hire and canned ebooks, which to me contradicts that message.” — *Alaniz Marketing’s Peatman*

Poor access to data. “Let me do SQL queries. Let me tie my data together. HubSpot has gates in front of the data, as many of these companies do. That makes it easier to use, but I’d love the ability to do better analysis and create better segments by giving me access to manipulate my data in new ways.”

— *SmartFile’s Peterson*

Sales and CRM capabilities aren’t fully realized. “HubSpot is one of the first automation tools that’s spending more time building out the sales and CRM section of the platform, but they still have a little way to go. I believe that connecting marketing automation and sales is one of the most powerful things you can do for your business. It allows you to get the full picture when viewing your marketing analytics and see your real customer acquisition cost by traffic source. One of the things we are looking forward to is a CRM mobile app for HubSpot.” — *Caleb Edwards, founder, CEO, GreenHouse Agency*

Not as many features as competitors.

“HubSpot is wildly overrated. It has a nice interface but it has one-third the functions found in Marketo. HubSpot has done an A+ job of marketing themselves and building community. To me, it is a cult, not an enterprise-grade marketing tool. Their low-end \$200 offering is almost not functional enough for Marketing 101. I’ve used it for startup clients with small budgets, and it’s only slightly better than nothing.” — *Susan Roberts, managing director, Strata Consulting Services*

2) Hootsuite

Hootsuite (five votes) is a freemium social media management dashboard that lets you write a single status update and post it simultaneously to multiple networks, as well as measure reactions.

Paid plans start at \$10 a month.

Why marketers love Hootsuite

Streamlines social media management. “I don’t believe in using automated tools for all social media, because social media should be real-time engagement. However, in terms of driving programs and promoting specific content and ensuring consistent communications, Hootsuite is an invaluable tool that enables me to manage and report on social media engagement.” — *Erika Goldwater, vice president of marketing, ANNUITAS*

Saves time. “Hootsuite allows us to push content out to multiple social sites, which saves us a significant amount of time. It also allows us to auto-schedule our future social media updates. This lets us plan much of our marketing ahead of time as well as when the content needs to go out. We also use their reporting features frequently.” — *Mark Tuchscherer, president, Geeks Chicago*

Hootsuite’s room for improvement

Better Instagram integration. “Instagram is our fastest-growing channel, so naturally we were excited when integration was announced between Hootsuite and Instagram. Much to our disappointment, we quickly learned that while we could use Hootsuite to schedule Instagram posts, that really only means we would receive a push notification (basically a reminder) from Hootsuite, which then prompts us to open the Instagram app and publish the image. Sure, the reminder is helpful at times and allowed us to distribute posts across multiple channels at the same time. But Hootsuite doesn’t truly automate the process with Instagram.”

—*Ryan Worthen, owner, Reel Special Productions*

(Note: Instagram currently doesn’t permit posting from third-party tools, but Hootsuite offers “several handy time-saving features” for social teams that use Instagram, according to Marketing Land.)

3) Pardot

Pardot (four votes, and a few honorable mentions) is a B2B marketing automation platform that was acquired by Salesforce in 2013. **Pricing starts at \$1,000 a month.**

Why marketers love Pardot

Solid, all-around marketing tool. “We purchased Pardot in place of MailChimp after we implemented Salesforce. We can now track visitors coming to our site, manage customers and prospects between Salesforce and Pardot, create targeted drip campaigns, and quickly create and duplicate landing pages and dynamic forms. It’s really amped up our marketing abilities.” — *Emily Verner, director of digital marketing, Great Eastern Energy*

Dramatically boosts organic search results, email subscriptions, and more. “We adopted Pardot in 2011 to establish a formal process for

attracting and following-up with leads. Since implementing Pardot and Salesforce, developing buyer personas, defining our content strategy, and creating a lead scoring and grading model, we have experienced a 53 percent increase in organic search; a 40 percent jump in regular email subscribers; a 23 percent increase in leads assigned to the sales team; and 129 percent year-over-year growth in content conversions.” — *Shellie Hutchens, marketing director, Mediacurrent*

Best mix of DIY tools for small marketing teams. “Pardot helps us punch above our weight and play in the major leagues. We looked at Marketo,

HubSpot, and Eloqua and ultimately settled on Pardot because it had the best mix of DIY capabilities for a small marketing team and the native integration with Salesforce we really needed to be successful.”

Billy Cripe, CMO, Field Nation reports the following benefits since implementing Pardot: 123 percent increase in volume of leads; 237 percent increase in Sales Qualified Leads (SQLs); 241 percent jump in sales forecast dollar values; and 20 percent increase

in sales team productivity. — *Billy Cripe, CMO, Field Nation*

Pardot's room for improvement

Weak customer support. “Pardot’s customer support is lackluster. We had a designated rep for the first two months, and now I can only get support via email. I would love it if they followed Salesforce’s lead by offering chat and phone support.” — *Verner*

4) Marketo

Marketo (three votes) is an “engagement marketing platform” that offers email marketing, inbound marketing, lead generation and other tools. Pricing starts at \$895 a month.

Why marketers love Marketo

Integrates easily with other tools. “I use Marketo daily to manage and execute campaigns, build segmentations, and run my monthly reporting. Because Marketo is easily integrated with so many third-party tools, such as Google Analytics, GoTo-Meeting, and WordPress, it’s considered the hub for most of our marketing activities. I take advantage of the automation capabilities to make my daily work easier. From building a webinar program at once and letting it run (including confirmation, reminder, and follow-up emails) to rule-based nurture programs, Marketo gives me the ability to set it up once and walk away. And the integration of Marketo with Salesforce is the best I’ve seen and the easiest to maintain.” — *Gwen Knudsen, associate director of demand generation, LiveHive*

Solid tools for scoring leads. “Marketo’s lead scoring has given me a level of automation that normally would require hours of manual work. Instead of sending leads in batches, leads are funneled to the sales team once they reach a certain score in real-

time. Sales then takes those leads and puts them down their own ‘nurture path,’ using their own sales acceleration tool.” — *Knudsen*

Marketo's room for improvement

Dated interface. “Marketo does everything a marketer could ever want. But it’s like wrestling a bear to tap into that functionality. The user interface must be based on some old piece of software from the 1990s.” — *Strata Consulting Services’ Roberts*

“Marketo’s user interface is outdated. I find their training difficult because the program’s delivery platform isn’t user friendly.” — *Joey Baird, director of digital marketing, Sparxoo*

Lackluster reporting. “The biggest area of opportunity I see for Marketo is around reporting, such as multi-touch attribution and closed-loop reporting. Marketing teams want to know what the winning formula was for a campaign and an opportunity. Visibility into that on Marketo can be cumbersome and manual.” — *Knudsen* ■