



# PLAYBOOK: HOW TO RESEARCH MARKETING TOOLS & TECHNOLOGY EFFECTIVELY

Presented by



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## Introduction

Introducing our marketing technology research playbook, designed to help businesses make informed decisions when choosing new marketing software. With a vast array of tools available in the market, it can be challenging to find the right one that fits your needs and budget. Our playbook aims to simplify the process by providing you with comprehensive information, including detailed processes, a helpful checklist, tool overviews, and more. By leveraging our tool, you can be confident that you are making an informed decision when it comes to choosing the right marketing software for your business.



# The Research Process

The world of marketing is fast-paced, and technology plays a critical role in driving success. Choosing the right marketing technology can be a daunting task, given the wide range of options available in the market. It's essential to take a structured approach to the research process to identify the right marketing technology solution for your business needs.

## Steps to Success

1. Identify needs and pain points
2. Research potential options and ask peers for recommendations
3. Consider the required integrations with existing tools and systems
4. Evaluate the features and capabilities of each option
5. Request demos to see the tools in action and test their usability
6. Evaluate the cost of each option, including any potential hidden fees
7. Consider the level of customer support offered by each vendor
8. Evaluate the security and compliance features of each tool
9. Check reviews and ratings on third-party sites
10. Consider the scalability and flexibility of each option
11. Consult with IT and legal teams to ensure the tool aligns with company policies and regulations
12. Make a decision and implement the selected tool
13. Provide proper training to team members on how to effectively use the tool
14. Continuously evaluate and update the tool as needed to ensure it meets the organization's evolving needs.



## The Research Checklist

### Follow these steps :

- Identify your organization's needs and pain points.
- Determine your budget for marketing technology.
- Research potential options online through review sites
- Ask peers in your industry for their recommendations and experiences with specific products.
- Create a shortlist of potential options based on your research.
- Request demos from each of the shortlisted companies to better understand the product and its features.
- Evaluate the costs of each option, including any additional fees or charges, such as implementation or training costs.
- Consider the level of customer support offered by each company.
- Review case studies and customer testimonials to gain insight into the effectiveness of each product.
- Determine the level of customization each product offers to meet your specific needs.
- Consider integration capabilities with current tools
- Assess the scalability of each product to ensure it can grow with your business.
- Consider any security or compliance requirements specific to your organization.
- Finally, make a decision based on the criteria that matter most to your organization and proceed with implementation.

By following these steps, you can feel confident that you're making an informed decision about the marketing technology tools you choose to invest in.

Remember to document your research and findings for future reference. Good luck with your marketing technology research process!

# Things to Consider

## **Business Needs**

Identify your business needs and the pain points you are trying to solve with the software. Ensure the software fits your company's size, industry, and business model.

## **Integration**

Check if the software can integrate with your existing tech stack. Integration with other tools can help you automate tasks, streamline workflows and improve overall efficiency.

## **Features and Functionality**

Evaluate the features and functionalities of the software to ensure that they meet your requirements. Consider if it has automation, analytics, and reporting features that can help improve your marketing efforts.

## **Ease of Use:**

Ensure the software is user-friendly and easy to navigate. This will help you save time on training and reduce the learning curve for your team.

## **Cost and ROI**

Evaluate the costs associated with the software and determine its potential ROI. Ensure the software is within your budget and the benefits justify the cost.

## Questions to Ask

These questions will help you evaluate the software and determine if it fits your business needs correctly. It's important to carefully consider each aspect of the software and compare it to other options in the market to ensure that you are making an informed decision.

1. What specific marketing problems can this software solve for my business?
2. What are required integrations with other tools and systems in my tech stack?
3. What features and capabilities does this software offer that align with my business goals?
4. How easy is it to learn and use this software? Will my team need extensive training?
5. How scalable is this software? Will it grow with my business and future needs?
6. How does this software handle data privacy and security?
7. What level of customer support is available? Are there additional fees for support?
8. What is the cost of this software? Are there any hidden fees or costs?
9. How does this software compare to similar products in the market?
10. Does this software have any restrictions or limitations that may affect my business needs?
11. Can I try a demo or free trial before purchasing the software?
12. How long does it take to implement this software and see results?
13. What is the level of customization available with this software?
14. Can this software be accessed remotely or does it require on-premises installation?
15. What are the minimum system requirements needed to use this software?



## Popular Software Review Sites

G2 Crowd: <https://www.g2.com/>

Capterra: <https://www.capterra.com/>

TrustRadius: <https://www.trustradius.com/>

Software Advice: <https://www.softwareadvice.com/>

FinancesOnline: <https://financesonline.com/>

GetApp: <https://www.getapp.com/>

Crozdesk: <https://crozdesk.com/>

Trustpilot: <https://www.trustpilot.com/>

Serchen: <https://www.serchen.com/>





## CRM and Automation Tools

CRMs help organizations manage customer interactions and improve relationships with customers. They provide a central repository for customer data, allowing teams to track interactions, sales history, and preferences. This information is valuable for understanding customer behavior and tailoring marketing strategies to meet their needs.

Tool	Description	Pros	Cons
<a href="#">Agile CRM</a>	A cloud-based CRM system that includes sales, marketing, and service automation, social media integration, and email marketing.	Affordable, customizable, robust reporting	Overwhelming interface, some features require additional fee
<a href="#">HubSpot CRM</a>	HubSpot is a popular all-in-one inbound marketing software that includes tools for email marketing, landing pages, lead management, and analytics.	<ul style="list-style-type: none"><li>User-friendly interface, free version available, integrates with many other tools.</li><li>More than just a CRM, it is an all-in-one solution</li></ul>	<ul style="list-style-type: none"><li>Can be expensive</li><li>Limited reporting capabilities.</li><li>Limited customization options</li></ul>
<a href="#">Marketo</a>	Marketo is a marketing automation software that includes email marketing, lead management, and analytics.	<ul style="list-style-type: none"><li>Robust lead management features</li><li>Advanced reporting and analytics</li><li>Customizable landing pages and forms</li></ul>	Steep learning curve
<a href="#">Microsoft Dynamics 365</a>	A cloud-based CRM software that includes sales, customer service, and marketing automation features.	<ul style="list-style-type: none"><li>Familiar interface for Microsoft Office users</li><li>Scalable for businesses of all sizes</li><li>Advanced analytics and reporting capabilities</li></ul>	Integration with third-party systems can be complex
<a href="#">Pardot</a>	Pardot is a marketing automation software that includes email marketing, lead management, and analytics. A marketing automation platform designed for B2B companies.	<ul style="list-style-type: none"><li>Strong lead generation and scoring capabilities</li><li>Dynamic content personalization.</li><li>Powerful lead scoring and nurturing features</li><li>integrates with Salesforce</li></ul>	<ul style="list-style-type: none"><li>Limited landing page customization</li><li>Can be expensive, limited integration options with non-Salesforce tools.</li></ul>
<a href="#">Salesforce</a>	Salesforce is a popular CRM software that includes sales management, marketing automation, and customer service features.	<ul style="list-style-type: none"><li>Wide range of third-party integrations</li><li>Scalable for businesses of all sizes.</li><li>Highly customizable</li><li>Strong community support</li></ul>	<ul style="list-style-type: none"><li>Steep learning curve</li><li>Expensive pricing model</li><li>Need a dedicated resource to manage to get the full potential</li></ul>
<a href="#">SugarCRM</a>	An open-source CRM system that offers sales automation, marketing automation, and customer support.	Customizable, flexible, strong community support	More difficult to set up, some users report glitches
<a href="#">Zoho</a>	A cloud-based CRM software that includes sales, marketing, and customer service features.	<ul style="list-style-type: none"><li>Affordable pricing model</li><li>User-friendly interface</li><li>Advanced reporting and analytics features</li></ul>	<ul style="list-style-type: none"><li>Limited customization options</li><li>Limited reporting features, slow customer support</li></ul>



# Sales Enablement and Engagement

Sales enablement and engagement tools help teams connect with customers at every stage of the buyer's journey. Providing relevant content, personalized recommendations, and seamless buying experiences, these tools help drive sales and build stronger customer relationships.

Tool	Description	Pros	Cons
<a href="#"><u>Bigtincan</u></a>	Provides content management, training, and analytics for sales teams. It helps sales reps to find, share, and track the performance of content.	Extensive content management capabilities, user-friendly interface, and powerful analytics.	Expensive pricing, limited customization options, and some users have reported slow performance.
<a href="#"><u>ClearSlide</u></a>	Offers content management, analytics, and communication tools for sales teams. It integrates with other sales tools such as Salesforce and includes features such as email tracking and meeting scheduling.	User-friendly interface, strong analytics and reporting, integrates with other sales tools.	Limited customization options, some features require a higher-tier subscription.
<a href="#"><u>Highspot</u></a>	Provides tools for content management, sales training, and analytics.	User-friendly interface, personalized content recommendations for sales reps, integrates with many other tools.	Expensive pricing, limited customization options, and some users have reported slow performance.
<a href="#"><u>MindTickle</u></a>	Sales readiness and enablement platform that helps sales reps to improve their skills and knowledge. It provides training, coaching, and gamification features to engage sales reps and track their progress.	Easy to use interface, extensive training and coaching capabilities, and powerful analytics.	Expensive pricing, limited customization options, and some users have reported slow performance.
<a href="#"><u>Outreach</u></a>	A sales engagement platform that automates and streamlines communication with prospects.	User-friendly interface, advanced automation features, customizable outreach sequences.	Can be expensive, limited reporting options.
<a href="#"><u>Seismic</u></a>	Sales enablement platform that provides content management, analytics, and automation for sales teams. It helps sales reps to create personalized content and deliver it to prospects and customers at the right time.	Powerful analytics, flexible automation capabilities, and extensive content management features.	Expensive pricing, some users have reported slow performance, and requires IT involvement for setup.
<a href="#"><u>Showpad</u></a>	Sales enablement platform that provides content management, training, and analytics for sales teams. It helps sales reps to engage with prospects and customers by providing them with the right content at the right time.	User-friendly interface, powerful analytics, and robust content management capabilities.	Expensive pricing, limited customization options, and some users have reported slow performance.



# Business Intelligence and Analytics

Business intelligence and analytics platforms provide valuable insights into customer behavior, market trends, and campaign performance. By analyzing data from multiple sources, teams can make data-driven decisions and optimize marketing strategies for maximum impact.

Tool	Description	Pros	Cons
<a href="#"><u>Adobe Analytics</u></a>	Adobe Analytics is a web analytics platform that provides real-time insights into website traffic and customer behavior.	<ul style="list-style-type: none"><li>Advanced data visualization capabilities</li><li>Robust customer segmentation and targeting tools</li><li>Integration with other Adobe products</li></ul>	<ul style="list-style-type: none"><li>Expensive pricing model</li><li>Steep learning curve</li></ul>
<a href="#"><u>Domo</u></a>	Cloud-based platform that provides real-time data insights. It offers features such as data visualization, dashboard creation, and predictive analytics.	Easy to use interface, flexible data modeling, and extensive data connectivity options.	Limited customization options, expensive pricing, and some users have reported slow performance with large datasets.
<a href="#"><u>Google Analytics</u></a>	A web analytics service that tracks and reports website traffic.	Free to use, customizable reporting options, integrates with many other tools.	Can be overwhelming for beginners, limited customer support.
<a href="#"><u>Google Data Studio</u></a>	Free data visualization tool for creating custom reports and dashboards using data from Google and other sources.	Free, easy to use, integrates well with other Google products.	Limited customization options, some users report slow performance.
<a href="#"><u>IBM Analytics</u></a>	IBM Analytics is a business intelligence platform that includes data analysis, predictive analytics, and reporting features.	<ul style="list-style-type: none"><li>Advanced analytics and data visualization capabilities</li><li>Integration with other IBM products</li><li>Supports a wide range of data sources and file types</li></ul>	Expensive pricing model
<a href="#"><u>Looker</u></a>	A business intelligence and data analytics platform that offers a wide range of visualization options.	<ul style="list-style-type: none"><li>User-friendly interface, customizable dashboards, powerful data modeling capabilities.</li><li>Integrates with many data sources, strong community support.</li></ul>	Can be expensive, requires technical knowledge to set up and use.
<a href="#"><u>Power BI</u></a>	Data visualization tool for creating interactive reports and dashboards.	Integrates well with Microsoft products, affordable, powerful features.	Limited customization options, can be difficult to set up.
<a href="#"><u>QlikView</u></a>	Business intelligence platform for creating custom reports and dashboards.	<ul style="list-style-type: none"><li>Highly customizable, good data visualization options, scalable.</li><li>Powerful data analysis capabilities, intuitive user interface, and flexible deployment options.</li></ul>	Can be expensive, steep learning curve. Limited data connectivity options, requires IT involvement for initial setup.
<a href="#"><u>SAP BusinessObjects</u></a>	Enables organizations to gain insights from their data. It provides a suite of tools for data visualization, reporting, and analytics.	Robust features for data analysis and visualization, extensive data connectivity options, and high scalability.	Steep learning curve, expensive pricing, and requires IT involvement for setup.
<a href="#"><u>Sisense</u></a>	Enables organizations to analyze and visualize their data. It provides a drag-and-drop interface for dashboards, reports, and analytics.	User-friendly interface, powerful data modeling and visualization capabilities, and extensive data connectivity options.	Expensive pricing, requires IT involvement for setup, and limited customization options.
<a href="#"><u>Tableau</u></a>	Data visualization tool for creating interactive dashboards and reports.	Easy to use, highly customizable, integrates with many data sources.	Can be expensive, steep learning curve.



## Project Management & Collaboration

Collaboration and project management software helps teams work together efficiently and effectively. By providing a platform for communication, task tracking, and project management, these tools help teams stay organized, reduce confusion, and complete projects on time and within budget.

Tool	Description	Pros	Cons
<a href="#"><u>Asana</u></a>	Allows teams to track tasks, deadlines, and projects in one place. It includes features like calendars, timelines, and progress tracking.	Easy to use, highly customizable, integrates with many other tools, includes mobile app.	Can be overwhelming for new users, some features require a paid upgrade.
<a href="#"><u>Basecamp</u></a>	Allows teams to collaborate on tasks, deadlines, and projects. It includes features like to-do lists, message boards, and document sharing.	User-friendly, highly customizable, affordable pricing.	Limited reporting features, some features require a paid upgrade.
<a href="#"><u>Microsoft Teams</u></a>	A messaging and collaboration platform that allows teams to communicate and collaborate in real-time, as well as share files and hold video meetings.	integrates well with other Microsoft products, scalable, offers many features.	can be overwhelming with too many channels, some users report slow performance.
<a href="#"><u>Monday.com</u></a>	Allows teams to track tasks, deadlines, and projects in one place. It includes features like customizable workflows, time tracking, and progress tracking.	User-friendly, highly customizable, includes mobile app, strong reporting features.	Can be expensive, some users report slow performance.
<a href="#"><u>Slack</u></a>	A team collaboration platform that offers messaging, file sharing, and integration with other tools.	User-friendly interface, customizable notification settings, integrates with many other tools.	Can be overwhelming for large teams, limited video and voice calling capabilities.
<a href="#"><u>Trello</u></a>	A visual collaboration tool that uses cards and boards to track tasks and projects. It includes features like checklists, due dates, and labels.	User-friendly, highly customizable, includes mobile app, integrates with many other tools.	Limited reporting features, can be less effective for larger teams or complex projects.
<a href="#"><u>Wrike</u></a>	A project management tool that allows teams to track tasks, deadlines, and projects in one place. It includes features like Gantt charts, calendars, and real-time collaboration.	Highly customizable, includes mobile app, strong reporting features.	Can be expensive, steep learning curve, some users report slow customer support.

## The Wrap Up

By following the steps and utilizing the resources provided, you are well on your way to finding the perfect martech tool for your business.

Remember, researching and selecting a new tool can be daunting, but it doesn't have to be. Take your time, gather all the necessary information, and consult with experts when needed. Doing so can ensure you make an informed decision that will benefit your business in the long run.

We hope this playbook has been helpful in guiding you through the research process. If you have any questions or need further assistance, don't hesitate to reach out to us.



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# About The Revital Group



The Revital Group is a team of B2B marketing and sales operations consultants who specialize in helping companies achieve greater efficiency, improved collaboration, and sustained business success. With a focus on simple solutions with big results, we work closely with our clients and a network of strategic partners to provide expert guidance and support in a wide range of industries.

Our team of experienced consultants deeply understands the unique challenges faced by businesses in these industries, and we can help streamline sales and marketing operations, optimize processes, and drive revenue growth. Whether it's misaligned goals, inconsistent messaging, or inadequate technology, we provide customized solutions tailored to your specific needs.