

Marketing Automation Capabilities Compendium

COE marketing directors share that clarifying Marketing Automation capabilities can be challenging. Information from vendor websites varies, making it challenging to compare features across systems. Given the lack of standardization, units struggle to assess whether a vendor's claims are unique, key differentiators or common among available options. Many vendors use the same broad terminology to describe functionality and, without a deeper understanding of available options, it can be nearly impossible to determine if a software package will address an institution's goals.

This capabilities compendium organizes the essential categories of marketing automation functions and lists the key features within each category.

Each feature profile includes a definition of what it accomplishes for a user or within the system, an example of how a COE unit might benefit by using the feature, and an assessment of how common that particular feature is across marketing automation systems available to higher education institutions.

Use this guide to determine what features are of greatest import to your institution, whether those features should be used as distinguishing factors when selecting a vendor, and whether a vendor can support particular features especially relevant to your institutional goals.

Feature Categories



Lead Management: The organization, tracking, filtering, and segmenting of prospects by different categories and characteristics.



Content Creation and Management: The ability for a marketing automation system to support the development of new marketing material and promote that material publicly.



Analytics and Reporting: The ability for a marketing automation system to provide data and results around marketing efforts that help to inform marketing spend and resource use.



Email Marketing: The ability of a marketing automation system to manage and deploy comprehensive, email-based marketing initiatives.



Integration and Cross-Functionality: The ability for a given marketing automation system to integrate with other existing software and replicate functions found in other software systems.



Design, Ease of Use, and Support: The extent to which a marketing automation system and included features are easy to navigate, understand, and customize.



Planning: The ability for a marketing automation system to provide tools that help a marketing department set deadlines and budget resources.

Frequency Categories

Standard: This feature is a defining element of marketing automation systems. Every marketing automation system should have this basic functionality.

Variable: Functionality, depth, and ease of use may vary among vendors, though most will provide at least basic functionality.

Differentiator: These features help to differentiate vendor products and marketing automation systems from one another. They are not widely available.



Lead Management

These features address the ways that marketing automation systems track, monitor, and sort individual prospects. Each feature helps to clarify the prospect's warmth (e.g. likelihood of enrollment) or otherwise conveys to marketing staff the actions and activities undertaken by prospects.

Feature	Definition	Use Case	Frequency
Lead Database	Consolidates all known prospects into a central location that provides easy access to additional information about any given prospect	Increases richness of prospect profile by pulling all known behaviors; helps to organize prospects in a central location accessible to all staff	Standard
Lead Scoring	Collects various prospect behaviors and assigns them a point value, culminating in an overall score that determines the prospect's warmth; behaviors include email interaction, website visits, webinar views, social media shares, submitted forms, and landing page interaction	Helps institutions segment leads by sorting based on scores, giving a sense of what prospects are ready for more aggressive contact and what prospects still need softer nurturing	Standard
Visitor Source Information	Identifies where each visitor to the main institutional website comes from (e.g., affiliate site, banner ad, email click-through)	Enables more effective ad targeting by showing institutions the sources that most frequently bring visitors to the website	Standard
Lead Segmentation	Divides prospects into micro-segmented groups that can then be distinctly targeted through marketing campaigns	Divides prospects into program-specific groups, ensuring that prospects receive marketing communication that's most relevant to their potential interests	Variable
Hot Prospect Alerts	Notifies staff when a prospect has been especially active or increased warmth status to a point that may merit further contact from the institution	Helps institution prioritize outreach to individual prospects and capitalize on a prospect's search momentum	Variable
Social Media Profiles	Incorporates a prospect's social media behavior into their overall lead profile, informing segmentation and lead scoring	Gives a more complete picture of a prospect's interest and draws out information about a prospect that otherwise might go unseen	Differentiator



Content Creation and Management

These features address how systems enable marketing and recruiting staff to promote content via different advertising channels and formats.

Feature	Definition	Use Case	Frequency
Landing Page Creation	Allows easy creation of special program-centric pages accessible only via targeted emails or banner ads	Reinforces the effectiveness of targeted banner ads and targeted emails by directing prospects to a related and equally narrowly targeted page after they click through	Standard
Banner Ad Creation	Allows easy creation of targeted banner advertisements that map to broader online ad campaigns, targeting the appropriate prospects based on web behavior	Helps send a consistent message to prospects and ensures that prospects who visit the institution's website will continue to see material promoting the institution as they browse other websites	Standard
Webinar Support	Allows easy facilitation and hosting of webinars, tracking prospect attendance and feeding the information into prospect profiles	Allows institutions to use webinars as a proxy for prospect engagement and determine what content and timing is most effective for different types of prospects	Variable
Social Media Marketing	Enables pre-scheduled campaigns to run through social media outlets, reaching followers across social media networks	Expands selection of available prospects by capitalizing on channels beyond the website and email	Differentiator



Analytics and Reporting

These features provide insight into what marketing efforts and campaigns are providing return on investment and what content is proving most effective at moving prospects closer to enrollment.

Feature	Definition	Use Case	Frequency
Website Visitor Tracking	Shows which prospects are visiting the website, how they spend time on the site, how often they return, and what their browsing patterns are	Helps prioritize which webpages prospects should be directed to or which pages should be promoted more prominently; informs a prospect's profile before they officially identify	Standard
Dashboards and Reports	Allows users to view lead activity, channel activity, information by time period and date range, email results, web results, and more	Provides comprehensive insight into the effectiveness and operations of marketing efforts at large	Standard
Campaign ROI	Provides a report of the cost and value of marketing campaigns, assessing the leads and conversions generated by a campaign relative to the investment	Gives insight into whether specific marketing campaigns are worth continued investment and where resources can be re-allocated	Variable
A/B Message Testing	Enables multiple sets of emails to be sent to groups of prospects to determine what content, timing, subject lines, and calls to action prove most effective at encouraging prospect engagement	Helps institutions deduce the most effective message content and tone for different demographics and programs, leading to improved click and open rates	Differentiator
A/B Landing Page Testing	Enables multiple sets of landing pages to be pushed out to a large group of prospects	Helps determine what content, calls-to-action, designs, and formatting lead to greatest conversion	Differentiator
Asset Usage	Demonstrates how frequently marketing materials are used and by which campaigns	Informs future marketing spend	Differentiator
Marketing Attribution and Revenue Reporting	Breaks down each part of a marketing campaign to assess what components are most effective at driving engagement from prospects	Helps redirect marketing spend to more effective channels and content	Differentiator
Organic Search Monitoring	Allows competitor rankings to be tracked with an organic search keywords report	Provides ideas for page optimization and keyword use to improve an institution's search ranking	Differentiator
Paid Search Monitoring	Allows insight into prices paid for keywords and the relative popularity of various search terms	Provides ideas for keyword purchase by identifying competitive advantages and disadvantages	Differentiator



Analytics and Reporting (cont.)

Feature	Definition	Use Case	Frequency
Predictive Modeling	Uses lead scores and other internal data to predict lead behavior	Helps anticipate prospect behaviors, allowing for marketers to proactively plan next steps in outreach	Differentiator
SEO Page Audits	Determines how your webpages perform with regard to including highly ranked search terms	Provides ideas for rewriting web content and aligning your message across platforms	Differentiator
SEO Analytics	Assesses how highly ranked your institution is for the most relevant keywords across prominent search engines	Provides insight into competitor marketing efforts and what keywords may be worth pursuing	Differentiator
Social Media Analytics	Gathers insights into how content is shared across social media and how known prospects engage with social media content	Helps identify the most relevant social media networks on which to establish a presence, depending on the demographics of potential prospects	Differentiator



Email Marketing

These features address how marketing automation systems automate email communication and reach prospects via outbound marketing channels.

Feature	Definition	Use Case	Frequency
Email Drip Marketing	Also known as batch email marketing, this allows email campaigns to be planned out with if/then sequences, sending customized emails to groups of prospects based on their open and click interactions with each email	Allows for prospect behavior to consistently inform and shape the contact they receive from the institution, progressively segmenting prospects into distinct groups receiving the most relevant content and calls to action for each	Standard
Triggered Emails	Sends immediate, real-time emails to prospects who engage in certain activities or actions, such as clicking on a specific link	Enables instant communication to capitalize on a prospect's moment of interest and demonstrates that the institution is aware of a prospect's interest	Variable
Mobile-Optimized Emails	Ensures that email content and calls to action translate to a mobile format, rendering them easy to read and click through	Optimizes content for an environment in which prospects are increasingly more likely to browse	Differentiator
Multiple Email Addresses per Record	Allows for one prospect to have multiple associated email addresses	Ensures that prospects will receive communications, which may be relevant for prospects for whom an institution cannot be sure contact information is current	Differentiator
Multiple Records per Email Address	Multiple profiles can be associated with the same email address	May be useful for reaching families or prospects who may share an account	Differentiator



Integration and Cross-Functionality

These features identify the extent to which marketing automation integrates with existing software platforms on campus or performs the same functions as other software packages.

Feature	Definition	Use Case	Frequency
CRM Integration	Automatically syncs with existing CRM systems to link a prospect's CRM record to their marketing and recruiting activities being tracked by the marketing automation system	Helps marketing, recruitment, and enrollment management staff seamlessly manage a prospect, improving handoffs between each division, increasing transparency into the prospect's status, and reducing effort around information sharing	Variable
Real-time Alerts	Activity by an individual prospect, such as opening an email or visiting the website, triggers an alert to a marketing representative using the CRM	Helps staff stay aware of individual prospects and provides context for a prospect's rising warmth	Variable
App and Plug-In Functionality	Allows integration with other third-party applications beyond CRM systems	Capitalizes on prospect and funnel data housed elsewhere and reduces the need for acquisition of existing functionality within the marketing automation system	Variable
Built-In CRM Functionality	Includes features commonly found in CRM, such as account management, call and email logging, and individual case records	Eliminates need for acquisition of separate CRM system	Differentiator
Mobile CRM	Allows access to prospect records via mobile device	Increases flexibility, convenience, and access to record of prospect interactions	Differentiator



Design, Ease of Use, and Support

These features address how easily marketing automation systems can be customized by users and the level of external support provided to users with questions about system functions.

Feature	Definition	Use Case	Frequency
WYSIWYG Builders	Short for "What You See Is What You Get," allows users to create straightforward content without HTML or otherwise advanced coding skills	Ensures that minimal technical skill and training is required to develop content within the system and that content developed will function and appear as expected and intended	Standard
User Community	Provides message boards and forums for system users to discuss their experience with the system	Leverages the network of other institutions using the software and allows users to benefit from the experiences and insights of experienced users	Standard
Customer Support	Provides implementation support and access to vendor staff for questions about the system (may require additional fees), as well as training for system users on campus	Helps users extract value out of complicated feature sets and software functionality that otherwise would go unused	Standard
Custom Fields	Allows staff to modify and edit tables and reports within the system, beyond the standard template	Helps institutions track unique prospect activities or design different types of lead-tracking metrics for different programs	Variable
Customized Dashboards	Allows creation of customized reports and the combination of existing reports that can be viewed together	Improves ease of identifying marketing channel effectiveness and ROI	Variable



Planning

These features help marketing departments organize and plan long-term departmental initiatives.

Frequency	Definition	Use Case	Frequency
Budgeting	Plans out marketing spend and investments	Gives increased transparency and insight into available marketing resources	Differentiator
Calendaring	Manages a calendar for all marketing functions, including content creation and campaign timing	Gives all staff with access insight into important deadlines without having to manually communicate	Differentiator