

A man in a blue and white checkered shirt is shaking hands with a woman in a grey sweater. They are in a professional setting, possibly an office, with a window in the background. The image is overlaid with a semi-transparent dark grey filter.

6 Tips for Finding Your Perfect Martech Partner

Introduction

Your company's revenue is on the line. Your relationships with sales and operations colleagues are at stake. Your goals as a marketing executive hang in the balance.

Choosing an agency partner should not be a lightly considered decision — especially when your future marketing budget is at risk. When assessing potential partners, finding a specialist is a given. Getting deeper into the discussion requires expertise on both sides. Achieving the due diligence necessary to find a long-term partner for this future-building relationship means you must do the work and find an impactful company. It's not enough for that company to be a specialist. The partner you choose must be a trusted expert and advisor.

Get started with this checklist for evaluating B2B marketing technology partners.

The right partner must have:



1. Vision

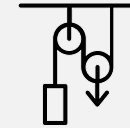
In clear detail, your partner can frame the narrative behind how they got to this point. How do they see B2B marketing technology expanding for you and your competitors? What do they think they can bring to the relationship for the short-term and long-term success of your campaigns? How can they advance your progression and accomplishment within your organization? Are they here to generate leads? Or are they here to create a process that moves current and potential customers toward more revenue and helps your firm grow into a new area of customer value?



Look for:



A narrative, not just a PowerPoint presentation. Partners must tell the story of their strategy.



A clear understanding of your company's pain points in generating leads, enhancing revenue and attributing marketing campaign results.



Project engagement process and strategy.



General client engagement process and strategy.



A strategic plan for your company's marketing technology process and the tactics to deliver it.



A partner mission statement: What is their vision for their own company?

2. A Track Record

The best partner has client stories (not just case studies) that highlight long-term, valuable relationships. They have won awards. They have an experienced management team that hires specialists who will be around long after the pitch.

Look for:



Awards from partner companies and industry associations.



Team bios of the executive team as well as team specialists.



The award applications that delve deeper into your potential partner's best work.



Their best work: Ask the general question, "What has been the highest impact project you have worked on?"



Testimonials from clients and partners.



3. Innovative Technology

Every potential partner will have technology. The one you pick will need to define their unique technology value proposition. They need a broad and deep demo of why their solution is built for growth. They need to present a comprehensive sales and marketing strategy. Will their technology be relevant in a year? Two years? Do they have a process for assessing and expanding their solution, set to align with new disruptions and market realities?

Look for:



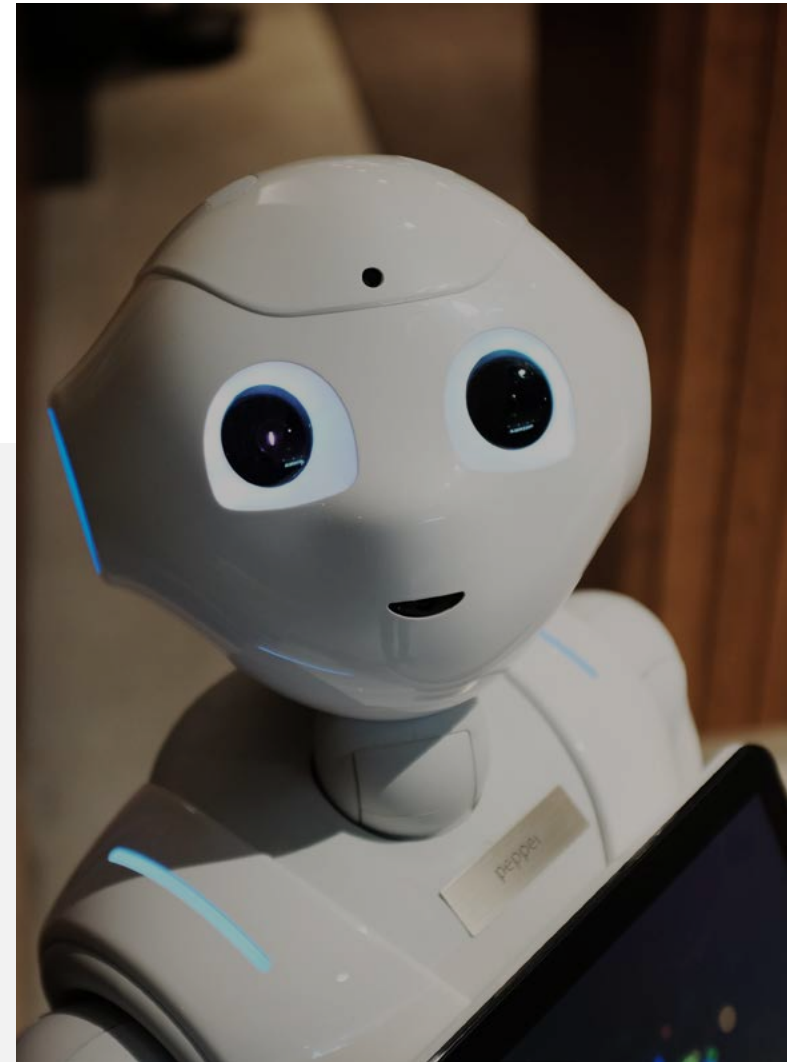
Architecture: It shows the deep details of a partner's expertise.



Scale: Technology partners must show that they can integrate growth.



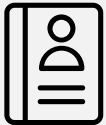
Team-level tech leadership with experience, expertise and team-orientation.



4. Deep Subject Matter Expertise

Just as a partner's technology should show depth and breadth, so should their people. There's a difference between a subject matter expert (SME) and an SME with in-depth knowledge and hands-on experience. And the best partner will have not only one specialist for an area of a marketing platform, but entire teams of specialists. Insist on that level of strategy and execution.

Look for:



Competitive knowledge: Deep expertise doesn't stop with a partner's own technology and positioning.



Pain point detail: Your partner should be able to articulate and understand your company's pain points on a deep level before it can advise on solutions.

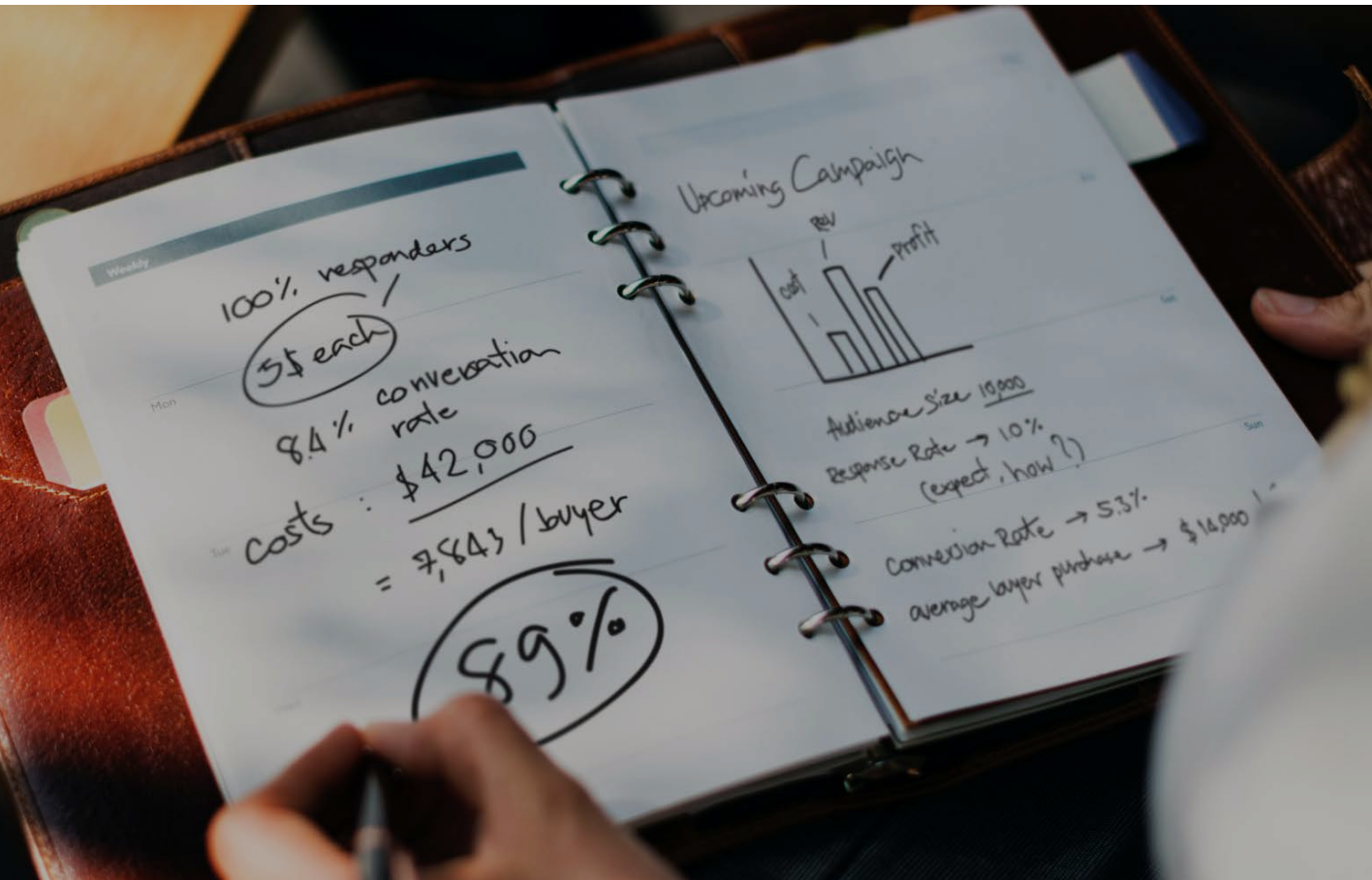


Platform knowledge: Does your partner have extensive knowledge of other platforms and solutions in your martech stack? Do they understand the role these tools play in all facets of your marketing strategy?



5. Proof Points

When you must prove value and performance to your CMO, will this partner provide the basics? Or will they provide metrics that give you and your team a growth opportunity? They must not only provide the metrics, but detailed insights and expertise that will allow you to turn this information into a strategic action plan.



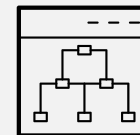
Look for:



Business goals: The partner should have both short-term and long-term measurable, results-based.



Impact: A good partner will measure marketing results. A great partner will plan for and measure impact on revenue and more comprehensive metrics.



Attribution complexity: The right partner will demonstrate a sophisticated, multi-touch attribution strategy.

6. Integrity

The right partner must have one goal: Make clients successful. They should provide you with strategic, results-based advice. You need to have a sense of trust that they will deliver, regardless of changes in the market or in technology. Moreover, you need to believe that they will be with you for long haul, as your needs and goals evolve.

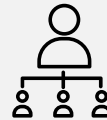
Look for:



Revenue: Will that partner impact revenue?



Process: Were they on-time, orderly and prepared?



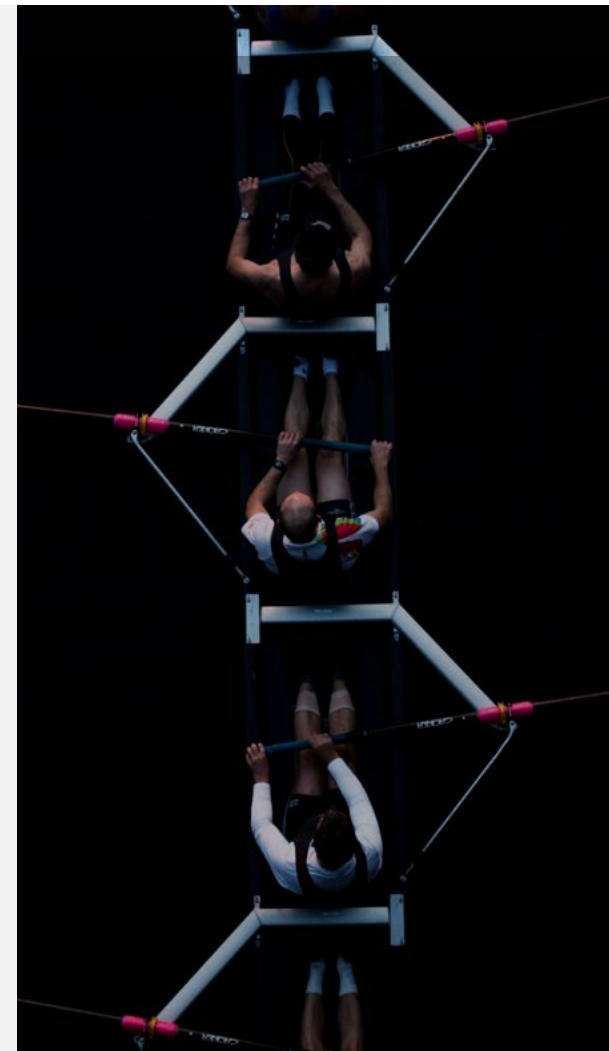
Team: Did the team change during the RFP process? Was the leadership consistent and on-point about the technology and the strategy?



Command: Did the partner have a deep sense of your business, your company's pain points and how your company wants to grow?



Journey: Did they communicate a sense of a journey? Did they present a plan for engagement and implementation? Did they present a plan that included a start-to-finish solution?



Bottom line, the partner you choose for marketing measurement, attribution and strategy must be able to prove marketing impact. They will create value, have highly-trained teams and operate in a spirit of collaboration.

Consider these important questions: When you report your marketing campaign results to the CMO, are you comfortable that your marketing measurement partner will make you the leader you want to be? Will they deliver the results you envision? Those answers will define how you pick the right agency for a critical relationship.

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