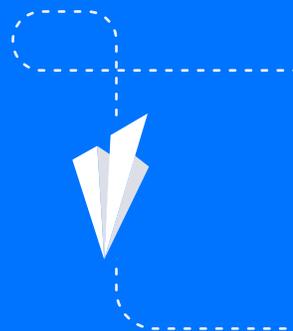




How to Determine ESP Function From Fiction

Simple Questions, Complex Features



Experience Matters

In 2018, **33% of consumers ended** relationships with companies because their experiences weren't personalized enough. Consumers have drawn a line in the sand and stated their terms: if your brand cannot satisfy my personal needs, there are plenty who will.

The alarm has been sounded and brands are feeling the heat. In fact, **85% of decision-makers** from major brands reported that they will suffer financially without a successful digital transformation over the next two years. Though the pressure is building, the future is anything but bleak.

Innovators and early adopters were quick to initially pounce on the principles and technologies powering the **growth marketing movement**, and their results continue making waves **across industries**. Now we're seeing the **latter majority of brands** follow suit investing in new technologies and focusing on enriching their customers' experiences.

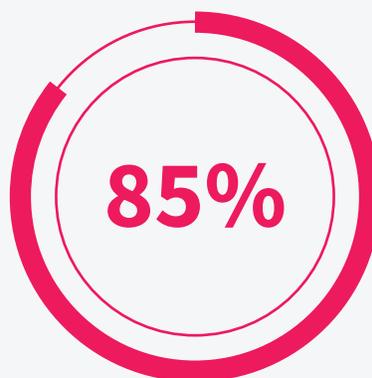
Do Right by Your Customers

Consumers spend **140% more** with brands offering great experiences. As brands modernize their tools in an effort to increase customer lifetime values, finding ways to leverage data, marketer intuition, and technology-driven capabilities is a top priority for marketing leaders.

Which leads us here. After weeks of **research, evaluation, and discussion**, the time has come: you've reached internal consensus and are shortlisting your final ESP vendors as you seek out your own digital marketing transformation.



of consumer relationships ended because their experiences weren't personalized



of decision-makers reported they will suffer financially if they cannot undergo digital transformation in two years



Consumers spend 140% more with brands offering great experiences

Dive Deeper Into Evaluation

As you delve into the tools you've selected, now is the time to explore the unique capabilities that each has to offer. To help you, we've identified three critical martech-specific lenses through which to evaluate your next potential ESP: **Flexibility**, **Usability**, and **Productivity**.

This guide is intended to help ensure you maximize the short- and long-term value of your next ESP. We've compiled sets of lens-specific questions concerning growth planning, data activation, and technology stack interoperability to help you choose an ESP that best suits your needs.

Each section drills into different operational categories with sample questioning to help you uncover how each ESP will actually deliver on their promises of enhancement. As you ask vendors about functionalities, carefully note their capabilities and built-in features that justify your investment in their technologies.

Iterable is the growth marketing platform that delivers world-class customer engagement at scale



Data Flexibility at Your Fingertips

Leverage Iterable's flexible data model, modern APIs, and universal webhooks to retrieve information from any source at virtually unlimited scale.



Unified Brand Experience

Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail, social and more throughout every lifecycle stage.



Sophisticated Journey Mapping

With Iterable's intuitive, drag-and-drop Workflow Studio, build activation, nurture and reactivation workflows that will maximize engagement through every stage of the customer journey.

Trusted by the world's leading brands



Flexibility:

How Will the Platform Complement My Stack?

What it means:

Flexibility encompasses the platform's ability to operate productively inside your existing technology environment. Flexibility goes beyond integration alone and characterizes how readily the platform ingests, activates, and feeds back data throughout your broader stack.

What to look for:

Flexible platforms will be easily recognizable by the technologies from which they're built. As a general rule of thumb, platforms founded upon a more modern architecture will be better equipped to accommodate the expansive nature of consumer data, and facilitate the insight-dependent demands of modern growth marketers in real-time.

For example, relational database structures are commonplace among legacy and cloud solutions. This was once the best way to store data when email marketing emerged. Unfortunately, this model disperses data across multiple tables—retrieving it requires slow, manual SQL queries returning static, flat data batches. If real-time marketing is a priority, this data model will not work for you.

Consider also how this data import/export model ripples through your multiple tool integrations: any time you're hoping to create and send campaigns, your source customer data will not reflect how their experience has changed while you've been awaiting your queried data.

Why this matters:

Your next platform's ability to store data and make it actionable will dictate how capably your team can communicate relevantly with customers. Marketers need all the different layers of their data compiled and ready for use if they hope reflect their customers' real-time experiences.

If your ESP lacks robust integration capabilities, prepare to encounter compounding data activation challenges—you'll be resigned to manually breaking out data from multiple silos. Considering marketers build their custom stacks from more than **7,000 different tools**, subsequent campaigns will require significant time and resources to just get off the ground. If this sounds eerily like your current process, you may not be making the upgrade you initially thought you were.



61%

of marketing decision-makers say improving marketing efficiency is the primary objective of their MarTech utilization strategy ([Ascend2](#))

8 Questions to Ask About ESP Flexibility

Platforms with the flexibility needed to sustain the demands of scaling marketing programs will demonstrate a first-class approach to data management.

Such platforms will prioritize how they compile, exchange, and mobilize data that add to engagement-rich campaigns.

Category	Concepts to Explore	Features & Functionality to Investigate
Integration	1. What should we expect during the data migration process?	<ul style="list-style-type: none"> How will the solution optimize our user data structure? How is product catalog or inventory data managed? How are business-critical campaigns migrated and launched?
	2. How readily does the platform integrate with other tools and data sources?	<ul style="list-style-type: none"> What else does the platform integrate natively with? How robust are the platform's APIs? What data transfer options does the platform support?
	3. How does the platform ingest and store data?	<ul style="list-style-type: none"> Which technologies are used for data warehousing? How flexible is the platform's data storage schema? How does the platform store and recall metadata?
	4. Are there limitations concerning data?	<ul style="list-style-type: none"> Does the platform have data storage limitations? Are there constraints pertaining to data expiration? What associated data or API fees should be expected?
Activation	1. What levels of personalization are possible?	<ul style="list-style-type: none"> What are the platform's real-time capabilities? How does the platform support dynamic content? Are additional consumer messaging channels supported?
	2. What segmentation capabilities currently exist?	<ul style="list-style-type: none"> How granularly can audiences be segmented? Does the platform support dynamic segmentation? How quickly can the platform query audience segments?
	3. What is the availability of customer profile data?	<ul style="list-style-type: none"> What is the process for querying customer data? How readily is new data integrated into campaigns? How are user profile and event updates handled?
	4. How does the tool expedite lifecycle marketing efforts?	<ul style="list-style-type: none"> How does the platform support the advancement of each customer's journey? To what degree can the platform accommodate behavior-based decision-making? How does the platform incorporate data from our servers to personalize?

Usability:

What Can I Reasonably Do With the Platform?

What it means:

Usability speaks to the platform’s campaign management capabilities and the degrees to which your team can elevate messaging efficacy when efficiently creating and launching compelling email campaigns.

What to look for:

Evaluate usability by determining how effectively each platform facilitates campaign creation, deployment, and results. As you demo different platforms, envision how integrating each one fundamentally changes your campaign delivery process.

Think about how the platform can automate specific functions or manual processes associated with your campaign creation strategy. Similarly, ask your team members how each platform presents new ways to evolve current email deliverables. The right ESP will present new real-time email personalization and message triggering opportunities that simply aren’t possible with legacy systems.

Why this matters:

Much of the highly-engaging marketing we encounter today is rooted deeply in personalization—delivering the right content at the right time on the right channel is only possible when comprised from a much larger customer data “story.”

Understanding how each platform manages your customer data-rich ecosystem through native integrations, webhooks, APIs, data feeds, or partnerships will help you separate fact from fiction when delivering 1:1 personalization across your customer database’s entirety; if your new ESP hinders you from doing more with the resources you already pay for, it probably won’t be the upgrade in usability your team needs.

\$1 / \$6

\$1 of every \$6 spent by CMOs is invested in innovation, despite doubts in the skills and capabilities available to support these programs. (Gartner)



8 Questions to Ask About ESP Usability

Platforms scoring high in the usability category will enable your team to bring enriched campaigns to market faster.

Look for campaign creation features and functionality that speak toward enhancing user empowerment, agility, and scalability.

Category	Concepts to Explore	Features & Functionality to Investigate
Creation	1. How simple or complex is the campaign creation interface?	<ul style="list-style-type: none"> How functional is the drag-and-drop editor? Are both WYSIWYG and HTML editing supported? How easily can cross-channel journeys be created?
	2. How quickly can you build and send a campaign?	<ul style="list-style-type: none"> How do users build audience segments? How intuitive is the template creation process? Does the platform support proofing and device previews?
	3. What level of detail can be built into campaigns?	<ul style="list-style-type: none"> What types of data are stored inside customer profiles? How are message event histories handled? How can behavioral events be incorporated into campaigns?
	4. What level of involvement from technical resources is needed to launch a campaign?	<ul style="list-style-type: none"> Is custom scripting required for campaign launches? Are campaigns constrained by SQL queries? Does the platform maintain data export/import requirements?
Execution	1. What is the required setup for sending scheduled or triggered campaigns?	<ul style="list-style-type: none"> What types of triggers exist for deploying campaigns? How are audiences segmented while campaigns run? Can the solution support transactional messages?
	2. How do lifecycle campaigns contribute to the customer experience?	<ul style="list-style-type: none"> To what degree are campaign workflows automated? How does the platform report activity and conversion tracking? How are audience segments sequenced through different campaigns?
	3. How is deliverability handled?	<ul style="list-style-type: none"> What is the process for email authentication? Is there an IP warming process? How is sender reputation addressed and supported?
	4. What level of reporting detail does it offer?	<ul style="list-style-type: none"> How do users create reports? How does the platform integrate with BI tools? How does the platform report workflow efficiency?

Productivity:

How Does the Platform Enhance Operational Efficiency?

What it means:

Productivity represents the “true value” each platform has to offer. It’s very easy to evaluate an ESP on cost alone—think past this and assess how each ESP impacts the time and resource dependencies of those who bring campaigns to market.

What to look for:

In the near term, you want to ensure each can provide seamless reproductions of your most important campaigns. Down the road, how will the tool help you achieve your aspirational campaign and marketing goals? Are they even within reach? If so, who needs to be involved to get there and how long will it take?

Note the current stakeholders and their required deliverables needed when bringing a new or recurring campaign to life. As you evaluate, determine whether each tool adds or reduces these resource burdens in a post-implementation setting. ESPs geared toward marketer empowerment and campaign independence significantly reduce execution roadblocks.

Why this matters:

Aim to eliminate data silos and jumping between tools as much as possible; manually pushing and pulling data through your tools hurts productivity and costs your entire team valuable time. Every moment you, your marketing team, your engineering colleagues, or data science team are working through arduous tasks, that’s time being taken from business-driving objectives. If moments like these compound with every piece of content you’re delivering, you’re hindering multiple paths toward growth and acting as a cost center.

Time and resources are high-value commodities inside the workplace, but the right platform can give these intangibles back to you. With free-flowing data, automating menial tasks accelerates production. As production increases, new possibilities present themselves—marketing transforms, engineering and data regains their focus, and your company progresses forward.



38%

of marketers feel their MarTech in place isn’t sufficient to perform their jobs effectively ([Walker Sands](#))



8 Questions to Ask About ESP Productivity

Platforms geared toward enhancing productivity will reduce the typical barriers associated with marketing campaign execution.

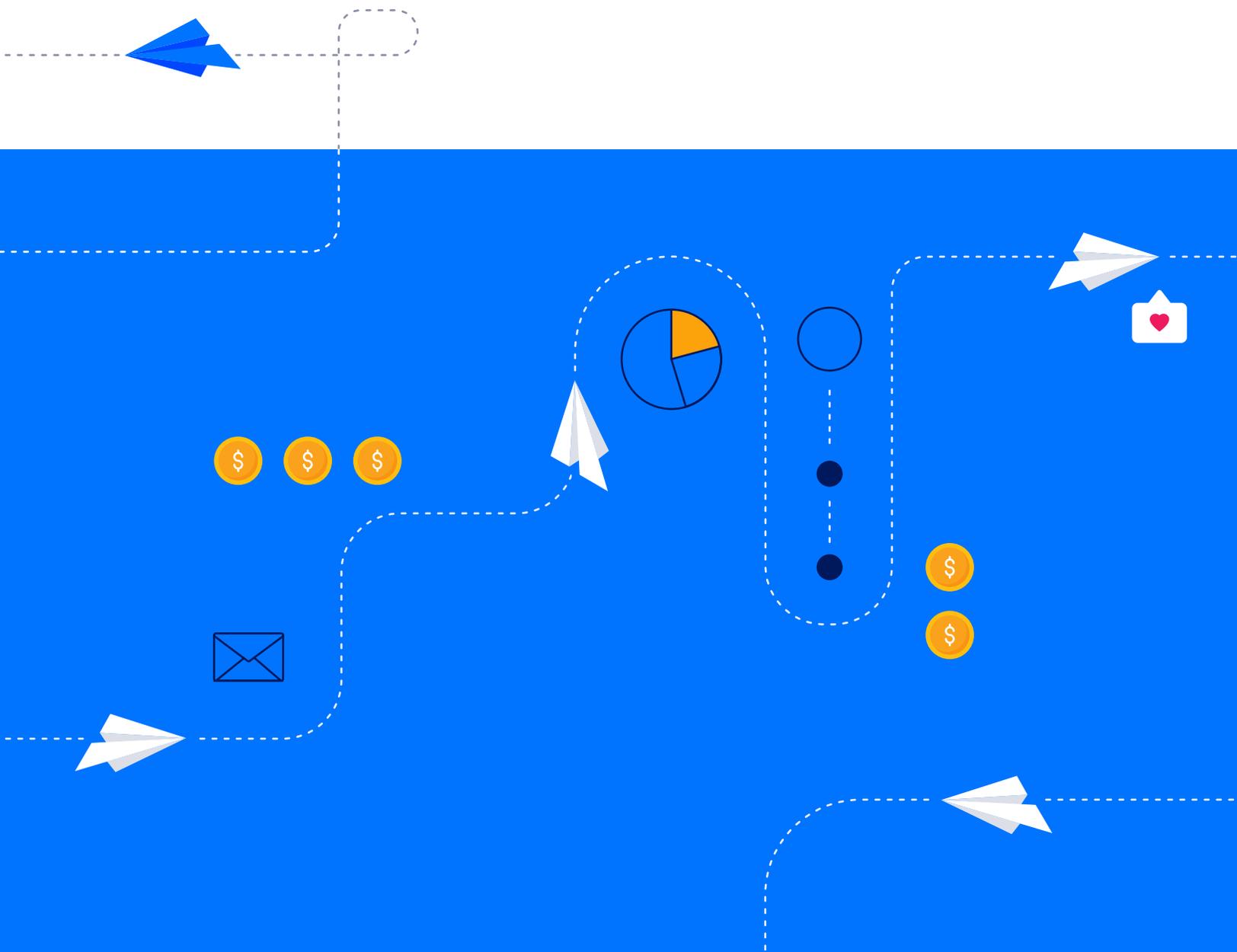
New capabilities and streamlined efficiencies will free up the bandwidth and resources needed to explore new customer experience enhancements.

Category	Concepts to Explore	Features & Functionality to Investigate
Resources	1. What does a typical platform implementation look like?	<ul style="list-style-type: none"> • What resources are involved during the implementation process? • What is the data schema configuration process like? • How are additional channels like mobile integrated?
	2. What level of engineering dependency does the tool require?	<ul style="list-style-type: none"> • How is ongoing technical support handled? • Does the platform require knowledge of proprietary scripting languages? • What are the ETL processing requirements?
	3. How can the tool help consolidate the marketing stack?	<ul style="list-style-type: none"> • How are communication channels supported inside the platform? • How does the platform process transactional messaging? • What are the platform's mobile messaging capabilities?
	4. What types of additional costs can the platform usage generate?	<ul style="list-style-type: none"> • What add-on or licensing costs should we expect with regular use? • Are there overage or additional functionality fees? • How are data cap fees structured?
Time	1. How is the tool future-proofed from data silos?	<ul style="list-style-type: none"> • How is customer data stored and hosted? • How does data pass through the rest of our technology stack? • How does the platform support team collaboration?
	2. How will the tool reduce the time needed to build campaigns?	<ul style="list-style-type: none"> • How easily are channel-specific campaigns created? • Does the platform support template & content replication? • How easily can campaigns be personalized?
	3. What types of messaging events can be automated in the tool?	<ul style="list-style-type: none"> • How does the platform support lifecycle-specific automations (e.g. welcome campaigns)? • How does the platform trigger responsive events that take place on other channels? • How are customers advanced through campaign workflows?
	4. How can the tool support campaign optimization?	<ul style="list-style-type: none"> • How does the platform support testing initiatives? • How is workflow effectiveness reported? • What are the platform's reporting capabilities?

Choosing the Right Path Forward

The road toward digital transformation is reluctantly paved with roadblocks, pitfalls, and challenges; yet, overcoming them is the nature of growth and a necessary component of forward progress—this is the new call to action for modern marketers. Exceeding the evolving demands of today’s consumers calls for insightful, behaviorally-responsive marketing experiences that ebb and flow with an individual’s changing sentiment. And it starts with email.

Before you select your next ESP, carefully examine what each platform brings to the table from **Flexibility**, **Usability**, and **Productivity** standpoints. Keeping a mindful eye on growth and enablement will insulate you and your team from making the wrong choice.



About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize cross-channel campaigns with unparalleled data flexibility.

Leading brands, like Zillow, SeatGeek and Box, choose Iterable to power world-class customer engagement throughout the entire lifecycle.



Data Flexibility at Your Fingertips

Access real-time user, behavioral and event data to trigger personalized messaging at virtually unlimited scale. Support an audience of millions while appealing to each subscriber's unique preferences.



Unified Brand Experience

Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail and more throughout every lifecycle stage, from activation to re-engagement.



Agile Iteration & Optimization

Launch, measure and fine-tune campaigns with ease to deliver more relevant messaging faster than the competition. Experiment and iterate on-demand to determine the right content, channel and cadence for each user.



Customer Journey Mapping

Visualize the entire customer journey and build sophisticated, cross-channel segments and campaigns with Iterable's intuitive, drag-and-drop Workflow Studio.

If you want to learn more about Iterable, please [request a demo](#) now.

Trusted by the world's leading brands

