



MAS - Vendor Q&A

Questions	Answers
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Existing Data

What would happen to our current data (email, web visits...etc)?	
What's the process for integrating w/our CRM? Link to integration doc would be great.	

Platform

Is your platform internally or externally hosted? If external, by who?	
Where are your servers located within NA? If international also, where?	
Where are you headquartered and where are your support offices?	
Is your downtime pre-scheduled for new features/improvements? If so, when do these typically take place?	
Do you offer a sandbox environment?	
What is the recommended browser to use? Also, which one do you not recommend to use?	
Do you have pre-built data remediation tools, and/or a specific area for maintaining data?	
Is there a pre-built process for maintaining Lead Source and Original Lead Source?	
Can sub-folders be created for organizing assets (emails, landing pages, files...etc)?	
Can I create multiple scoring rules (ex., per product line, or content message type)?	
Can I setup a degradation scoring model (ex., inactive last 6 months)?	

User Roles and Permissions

How many "Free" system users can I create?	
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Do you provide default roles/profiles, or do these need to be setup?	
Can I hide certain areas of the system from view? If not, can I at least restrict access?	

SFDC Integration

What is the standard sync time and is it bi-directional?	
Can I sync both standard and custom objects?	
Are there any limits to how many fields can sync?	
Is there any limit to how many standard (non-SFDC) fields I can create?	
Can I set rules around when fields should update as well as sync into SFDC?	
Can an admin delete system fields after creation?	
When integration errors occur, how will I be notified (in UI only or via email)?	
Is automation activity (web visits, form submits, email actions) visible in SFDC? Does this activity count against our API limits?	

API Integrations

What are your webinar connectors?	
What are your event connectors?	
Do you have a Wordpress plugin?	
Do you integrate with SlideShare or any other lead gen collection applications?	
Do you have a Google Adwords and Analytics connector?	
Are there API call limits?	
Is API usage reportable?	



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Do you support Webhooks?	
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Support

Will we be supplied dedicated account support engineer?	
Will we be supplied a delivery expert to work with ISPs on our behalf and provide report support?	
How often and how early does support communicate system changes?	
Do you provide 24x7 support? If not, what times?	
Do you provide Global support?	
Will you provide web and email support?	
Do you offer priority case routing?	
Do you have a user community as well as a support community (video tutorials, docs...etc)?	
Do you offer live online training sessions? If so, how often?	

Social Integration

How does your Social connector work?	
What Social Networks do you connect with?	
Do you offer Social Sharing and Sign-on?	
Do you support RSS feeds? If yes, how customizable is the process? If no, do you integrate with a vendor that does?	
Do you offer Facebook Publishing?	
Do you offer YouTube video support?	
Do you have Refer-a Friend functionality?	
Can I embed Social into email and landing pages?	



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Landing Page

Can we transfer our current dedicated IP (not ours), or do we need to start over?	
Do you offer a dedicated IP?	
If a new IP is needed, what is warm up timeframe/ recommended process?	
Do you offer full link branding/customization? Are there any limits to how many?	
Do you support dynamic content in landing pages?	
Can I set meta data tagging?	
Do you offer A/B landing page testing?	
Do you have a pretty URL builder/editor?	
Do you provide mobile friendly landing page templates? If not, can we import ours?	
Can I customize HTML, CSS, and JS within landing page editor?	

Form

Are forms embedded in landing page as iFrame?	
Is progressive profiling built through UI or is it cloud based?	
Can I customize the form css as well as embed javascript to manipulate field layout structure?	
Do I have access to form HTML, and if so and customize will progressive profiling/personalization code still render correctly/function?	
Is progressive profiling supported/work on a external landing page?	
Can I add a Contact submission to multiple campaigns one form?	



Email

How many soft bounces until email is flagged as hard, and can we adjust this in UI?	
How many hard bounces until email becomes invalid, and can we reverse this in UI?	
Do you provided a dedicated email relay?	
Do you offer email authentication? If so, by who?	
Is there a built in Spam filtering warning system?	
Have your servers been whitelisted?	
Do you have Feedback Loops set up with any ISPs? If so, which ones?	
How are spam complaints from ISPs processed?	
Are you in Junk Mail Reporting Partner Program? Are you a member of Microsoft SNDS (Smart Network Data Services) program?	
Are you Sender Score or Habeas SafeList Certified?	
Do you use a certification Email services such as Goodmail Systems?	
Do you publish Sender Policy Framework (SPF)/Sender ID records for your IP?	
Do you provide mobile friendly email templates? If not, can we import ours?	
Can I setup dynamic content within email? If so, are there any limitations?	
Can I personalize emails based on standard and custom object fields from Salesforce?	
Is A/B testing support? If so, how are percentages generated?	
Can email copy be updated even after it's been sent to recipient?	
Do you have email survey support functionality?	



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Can I customize sender from/reply to fields? Also, can personalization be added to these fields?	
Do you offer in-box preview functionality? If so, are all ESPs, browsers and devices included?	
Do you have approval process functionality built into the UI?	

WYSIWYG Editor

Is your editor internally built? If no, which editor do you use?	
Is the editor internally supported?	
Can source code be accessed and modified?	

Subscription Management

Can I add both standard and custom Salesforce fields to the subscription center?	
Does the standard subscription center support both css and javascript updates?	
Can I manually remove re-subscribed someone who was flagged as email opt out?	
Can I automate the Universal email opt-out field true/false value, or is it a manual process to add and remove someone?	
Do you have customers that use a custom subscription center built through your form/landing page functionality? If so, examples please.	

Program and Campaign Management (Workflows)

Is the Program/Campaign builder setup to allow for drag and drop assets and decision steps?	
Is there a limit to how many Programs and Campaigns can be created and active at one time?	
Do both the campaign and campaign member status natively sync with SFDC? And can I create	



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a SFDC campaign from this system?	
Is there specific system functionality for managing campaign member status priorities?	
Can I update/add new campaign fields and have these sync directly into SFDC? Also, how does this work in reverse?	
Can I tag campaigns and have those tags associated with the members of campaign?	

Contact

Do you provide an independent table to report, search, export and edit all Contact records (this table would account for all SFDC Contact/Leads)?	
Can I create segment from the Contact table?	
Is there functionality to create grouped segments?	

Anonymous Leads

Can I track anonymous leads? If so, how are they tracked?	
What details are provided about this visitor type?	

File Storage

Is there any file type restrictions?	
Is there a storage limit size?	
If videos can be hosted, is there a default player?	

Analytics

Is your reporting engine internally built or is it a external BI platform?	
Do you provide a set of standardized reports/dashboards for all feature assets?	
Can I customize standard reports using all objects/fields syncing from SFDC?	



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Can I schedule reports to run? If so, any limitations?	
Can I report on marketing spend per campaign and per lead (cost per member)?	