**DECISION MATRIX FOR EMAIL MARKETING SOLUTION**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Scoring:** Exceeds | 3 |  | **Weighting:** Required | 300% |
| Meets requirements | 2 |  | Desired | 200% |
| Partially meets | 1 |  | Optional | 100% |
| Does not meet requirements | 0 |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  | **Vendor Ratings** | |  |  |  |  |
|  | **Section & Requirements** | **Level of** | **Option #1** | | **Option #2** | | **Option #3** | | **Option #4** | | **Option #5** | |
|  | **Importance** |  |  |  |  |  |  |  |  |  |  |
|  |  | **Score** | **Total** | **Score** | **Total** | **Score** | **Total** | **Score** | **Total** | **Score** | **Total** |
|  |  |  |
|  | **Data Management** |  |  | **0** |  | **0** |  | **0** |  | **0** |  | **0** |
|  | Can contacts update their own subscription (opt-in) information? | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can the system/solution be integrated into our CRM system so that new lists are | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | automatically ready for use in mailings (or is list upload required)? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can the system be integrated into our CRM system for the opt-out, removal and | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | updating of bad addresses, processed by Marketing as required? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can opt-in, demographic and/or contact detail information be integrated with our | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | public Web site? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can users update their own demographic or preference information (such as | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | industry they are in or information they would like to know about)? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Message Creation** |  |  | **0** |  | **0** |  | **0** |  | **0** |  | **0** |
|  | Does the tool have a built in HTML editor, with the ability to work from a | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | WYSIWYG view and if needed, a code view? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Does the HTML editor prepare clean, standard HTML? | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Does the tool support the creation of templates with the ability to insert appropriate | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | text into multiple content areas on the template? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can a template be created from an ad-hoc email that was sent during a prior | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | marketing campaign? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Does the tool support the creation of an email that does not start from a template | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | (while still including the required footer, opt-in, opt-out) information? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can images be easily added to a message? | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can images be manipulated through the web-based editor or template engine (to | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | size, crop, stylize the image through a server-based image tool)? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can the Marketing department preview the message before sending the email to | Optional |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | show what it would look like in multiple mail clients? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Message Delivery** |  |  | **0** |  | **0** |  | **0** |  | **0** |  | **0** |
|  | Is there support for the delivery of X emails per hour? Can you throttle the delivery | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | (so that we don't get too many site visitors)? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there the ability to schedule the campaign for immediate delivery, with execution | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | occurring within 30 minutes or less? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Are the images within the email hosted by the Email Marketing Service Provider | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | on their server? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there the ability to test against a SPAM filter prior to delivery, that is kept up-to- | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | date with the ever changing filter engines in use today? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can the Marketing department elect to publish the email message to the Web site | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | from within the email marketing software? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |

**Decision Matrix for Email Marketing Solution**

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|  | **Importance** |  |  |  |  |  |  |  |  |  |  |
|  | **Message Tracking & Reporting** |  | **0** | | **0** | | **0** | | **0** | | **0** | |
|  | Is tracking of messages opened, click-through and bounce-back available? | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there the ability to save the reports in HTML, Excel or PDF for offline use? | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there the ability to build custom reports at will, without the need for per hour | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | consulting services? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Are the message statistics provided in real-time, slightly delayed, after completion | Optional |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | of delivery or next day? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Usability & Administration** |  |  | **0** |  | **0** |  | **0** |  | **0** |  | **0** |
|  | Is knowledge of HTML is not required for the creation of an email campaign? | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there the ability to cut-and-paste from Microsoft Word into the email creation too | Required |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | while retaining all formatting? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is the system able to correct a broken link after the message has already been | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | delivered? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there the ability to save campaigns, as the basis for delivery to another list, | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | reuse under a new campaign name and/or for historical reference? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Can access to the tool be secured through various levels of rights to the | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | application (creation of emails, approval of emails, delivery and admin)? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there an integrated approval workflow as a campaign is created, to allow for | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  | approval at multiple levels (marketing director, proofreader, author)? |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Is there level one help desk type support for the application from the vendor? | Desired |  | 0 |  | 0 |  | 0 |  | 0 |  | 0 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **TOTALS** |  |  | **0** |  | **0** |  | **0** |  | **0** |  | **0** |

**Costs**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Initial Costs and License Fees | n/a | $ | - | $ | - | $ | - | $ | - | $ | - |
|  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Yearly Maintenance and Support Costs | n/a | $ | - | $ | - | $ | - | $ | - | $ | - |
|  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Cost per 1000 emails (based on a yearly average of 75,000 emails). | n/a | $ | - | $ | - | $ | - | $ | - | $ | - |
|  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **TOTALS (Year One)** |  | **$** | **-** | **$** | **-** | **$** | **-** | **$** | **-** | **$** | **-** |

**Questions and Notes (based on Jupiter Research Report):**

Does the product have testing (by this they mean the ability to send out two different emails to 100 people, examine the click-through success and send the remaining emails based on the more popular campaign) and Can-Spam support (it is believed that compliance with Can-Spam is systematically possible)?

Page 4 of the Jupiter Research report listed 15 vendors that met or exceeded the average satisfaction score based on the client survey they completed. Is our preferred vendor in that list?

Jupiter Research suggests that "Marketers should insist on receiving a product road map…".

Jupiter Research suggests that "Marketers should insist on having dedicated Internet protocol (IP) addresses…", however, our email volumes might not justify that level of service.

Does the product in some way integrate with our Web site analytics, either through passing a variable or through API-based integration?