Marketing Automation Research

National Investment Center

NIC

About the NIC

The National Investment Center for Seniors Housing & Care (NIC) is a nonprofit whose mission is to support access and choice for America's seniors by providing data, analytics, and connections that bring together investors and providers. NIC's events provide networking opportunities between capital seekers and capital providers, as well as other personnel within the senior housing and care ecosystem, allowing attendees to get a pulse on the industry, facilitate networking, and enable industry collaboration.

Executive Summary

NIC contracted us to provide an alternate solution to HubSpot as their marketing automation platform. NIC presented to us many issues with HubSpot including one significant issue pertaining to HubSpot's engagement policy which permanently added a sizeable percentage of NIC member emails into purgatory. This flaw in HubSpot made it impossible for NIC to communicate by email to their constituents. NIC tasked us to explore alternatives to better align with their organization.

The Challenge

The NIC marketing team requested us to provide several potential platform replacements that would allow critical features, not currently supported by HubSpot including:

- Synchronizing custom Salesforce objects.

- A "No engagement" policy that prevents a user from sending emails.

- The option to allow for more than one email per contact.

- Native integration with Salesforce.

- The ability to separate out leads and contacts within the CRM.

- Real-time, bi-directional sync for no more than 15 minutes.

- Use of validation rules when synchronizing data.

The Solution

We evaluated 17 marketing automation platforms by using the following methods:

- Analyzing customer reviews.

- Viewing tutorials.

- Attending system demonstrations and webinars.

- Conducting conversations with each platform's technical support team.

- Reviewing technical documentation.

- Testing features within the email platforms.

Results

Of the 17 platforms, we narrowed the list to two platforms which met over 85% of NIC requirements with one platform achieving 100% of the requirements. Most of the platforms did not meet the requirements of the client due to their limited capabilities including poor API integration functionality, ease of use, integration limitations with Salesforce, data syncing delays, and scalability. NIC was able to quicky and easily select a replacement email automation platform and quickly implemented the new solution.