

# Selecting an Enterprise Influencer Marketing Platform

*A Guide & Workbook*



Spring // Summer 2021

# Introduction

If you are reading this guide, you may be interested in a new technology platform to help manage a **growing influencer marketing program**. As you may already know, there is a lot to think about, and so whether you are searching for a platform for the first time, upgrading from an entry-level platform, or switching enterprise platforms, **this guide provides a comprehensive list of criteria**.

We've segmented this guide into sections that follow the **process for developing and growing influencer marketing programs**.

Below is a list of considerations for selecting an influencer marketing platform for your enterprise::

- 1. Thinking About Your Long-term Influencer Marketing Strategy**
- 2. Important Industry Reviews & Rankings**
- 3. Governance (i.e., User Permission Levels, Customization, and Security)**
- 4. All Things Data (i.e., Data Ownership & Data Science)**
- 5. Platforms with Different Types of Services**

## The Influencer Marketing Process:

- 6. Searching for Influencers**
- 7. Vetting Influencers**
- 8. Influencer Recommendations & Approvals**
- 9. Campaign Management**
- 10. Measurement & Reporting**
- 11. Managing an Influencer Database (CRM)**
- 12. Integrations & APIs**

# How To Use This Guide As a Workbook

You will see that the sections below contain workbook grids for you to use however you would like, with rows containing criteria and the columns representing the different platform candidates of your choice. You can add checkboxes or specific feedback and metrics to each cell within the grid. We also left a few criteria rows blank in every section to add your unique requirements to each section. If you would like a Google Sheet version of the grids, access that [here](#).

## Example Platform Scoring Grid

Criteria	Candidate Platforms				
	1	2	3	4	5
Provided Criteria					
Blank Rows for your Criteria					

## Example Populated Grid

Criteria	Candidate Platforms				
	1 ACME	2 Dunder	3 Mifflin	4	5
Database size	17MM	4MM	?		
Two-factor security	Yes	?	?		
Fraud management	Yes	Yes	?		
API	Yes	No	Kinda		
Easy to use	Yes	Yes	Yes		
Global offices	Yes	No	No		



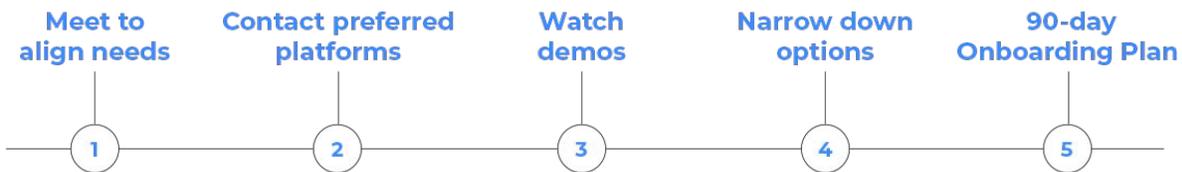
Throughout the guide, look out for:

**Pro-Tips:** Things experienced influencer marketing professionals should know to investigate.

**Questions to Ask:** The questions to ask the platforms you are considering.

# The Typical Evaluation Process

Based on our experience, a search for a new influencer marketing platform can take anywhere from 60 to 90 days, so don't be afraid to take your time. Here are the most common steps:



1. Before getting started, we encourage you to **meet with your colleagues** and partners to **align this guide's criteria** that matter to your business and unique requirements.

**Pro-Tip:** Start with no more than five platforms, or your search will take a lot longer and require more than a few hours per week

2. Next, **email the Sales Teams** from the different platforms you are considering to set up a time to brief them. The first meeting - or two - can be shorter meetings, as you will be aiming to **align on goals and requirements**.

**Pro-Tips:**

- Send this document to the Salespeople to understand the criteria you want to cover and highlight what's most important to you so they can prioritize appropriately.
- Don't ask to see the platform during the first meeting - instead, take the time to brief the Sales Team on your criteria.

3. After meeting to **discuss your criteria with no more than five platforms**, schedule time to **see the platform's demonstration** (i.e., demo).

**Pro-Tip:** In advance, provide the Sales Team with a hypothetical campaign scenario, including influencers you would like to search for with their platform. This way, the demo will be personalized for you.

4. Next, **narrow it down to two finalists** and **discuss pricing**. Be prepared to see a significant range in pricing, as some platforms are designed for large enterprises and some are for small businesses with fewer requirements.

**Pro-Tip:** Don't let the price discourage you. The more expensive platforms are well worth the cost - and they tend to be healthier, more stable platforms in the market that will scale and grow with you.

5. After you have selected your winner, **request a 90-day onboarding** (or implementation) plan to understand best how the onboarding process will work - from implementation through to your first campaign and wrap report.

# 1 Your Long-Term Influencer Marketing Strategy

No matter what **stage of maturity** your influencer program is in, you will need the right solution to **achieve your goals now and for the next 2-5 years**. If there is a chance your influencer marketing strategy will grow in size and priority – including additional teams, offices, and partners – you should be **considering your long-term influencer strategy** in your platform selection.

A simple, less expensive platform that may seem perfect for your requirements and budget today may not easily scale with your future ambitions - and subsequently, **switching to a different platform can be costly and time-consuming**.

The many influencer marketing platforms are quite different in how they operate. Some, like CreatorIQ, are **pure-play in-house platforms with limited services**. Others are **managed platforms - meaning they package their technology alongside agency-like services**. It's crucial to align your needs with these different services options so as not to be pressured to purchase services you won't need.

Criteria	Candidate Platforms				
	1	2	3	4	5
# of customers with users in more than one country					
Experience with complex, global deployments					
Number of customers with more than 10 seatholders					
Relevant product roadmap					
Innovative product roadmap					
Pure In-House Platform					



**Pro-Tip:** One way to gauge a platform's ongoing innovation and vision is reaching out to its customers. They likely know the product's ins and outs, so this is a great way to get additional insight. Using resources like [G2Crowd](#) or [Product Hunt](#) can also be of help.

**Question to Ask:** Be sure to ask to see the platform's "Product Roadmap" to understand which features are coming in the next 3-6 months. The Roadmap ensures their plans align with your future goals and requirements.

## 2 Industry Reviews & Rankings

There are **three primary third-parties that review the influencer marketing platform space** and have helpful information to help marketers make an informed decision.

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### G2 Reviews

To date, G2 has published over 1M reviews, and over 4M visitors are helping millions of businesses make better buying decisions. The trusted website has changed the way businesses research, purchase, and manage their software and services. To explore the Leaders, visit G2 [here](#).

### Influencer Marketing Hub

Influencer Marketing Hub reviews aim to give a better overview of features, benefits and pricing of the industry-leading influencer marketing platforms. We were listed #1 on their Influencer Marketing Platform Reviews page. To see each platform's respective Influencer Marketing Hub score [here](#).



**Pro-Tips:** Research the leading platforms' LinkedIn Insights pages to understand:

- **Total Employee Count** - you may be surprised how small some of the platforms are - many having fewer than 50 employees.
- **Employee distribution** and headcount growth by function
- Be sure to **focus on Engineering** (i.e., the more engineers, the bigger the team building their technology).
- **Company growth** (i.e., is the company stable and growing?). In emerging technology spaces, stability is essential.

### Advanced:

- Check out the **venture capital** each platform has raised - only the healthiest, fastest-growing, and stable companies with low customer turnover can continue raising venture capital (The only platform that has raised a Series C is CreatorIQ)

# 3 Governance

## - User Rights, Permissions, Customization, and Security

Often overlooked, a key sign of **platform readiness and maturity** is the ability to dynamically provide different **user permission levels depending on roles and responsibilities**. Because influencer marketing platforms are increasingly integrating with more extensive advertising and marketing technology stacks, **security is critical**.

When it comes to influencer marketing strategy, marketers often focus on campaign-specific priorities and **overlook long-term considerations**. For example, a marketer will tell you how important creator discovery is, but neglect to consider who might need access to campaign data 12 months after the campaign ends.

Ensure that a platform is equipped with **advanced user permission levels** so that you can manage who has access and who doesn't – this will allow you to **collaborate in the present, while accounting for the future**.

Criteria	Candidate Platforms				
	1	2	3	4	5
Admin permission levels					
Other user permission levels					
Single sign-on security					
Penetration testing security					
Two-factor security					
White-labeled platform					
White-labeled reporting dashboards					



### Pro-Tips:

- Don't forget about the ability to easily white-label parts of the platform for different brands, clients, or partners.
- An API is a game-changer because it allows you to integrate seamlessly with more extensive adtech and martech stacks and ensure enhanced security.

### Questions to Ask:

- How many ways can the platform be white-labeled?
- How many different types of user permission levels are available? For example, admin permission levels, basic permission levels, etc.

# 4 Data Ownership & Data Science

As new **algorithms, artificial intelligence, and ML solutions** penetrate every sector and business category, influencer marketing platforms are taking full advantage. This technology addresses ongoing problems like **follower fraud and audience deduplication**, and **streamlines existing influencer programs'** core components.

For example, machine learning can help **optimize creator identification**, enhance **content selection to identify and predict performance**, **improve audience targeting** to scale campaign reach, and **drive real ROI** and business outcomes.

Identify influencer marketing platforms that have integrated ML into their products. This technology, combined with other data sets, will help you **make data-informed decisions with critical insights**.

Criteria	Candidate Platforms				
	1	2	3	4	5
Data ownership					
# of full-time data scientists on-staff					
Proprietary algorithm(s)					
Proprietary machine learning engine(s)					
Lookalike influencer search					
Advanced fraud detection					
Imagery analysis					



**Pro-Tip:** Marketers are more often blending their data sets (i.e., their CRM data with their influencer marketing data).

### Questions to Ask:

- How easily can data be exported via different parts of the platform?
- Who owns the different data sets? Basic data? Enriched data?

# 5 Platforms with Services

There are three different categories of influencer marketing platforms - **Full-Service**, **Managed**, and **In-House** - each distinct in the level of direct involvement that the client has with them.

**Full-Service Platforms:** essentially agencies, they offer a wide range of services from strategy to tactical campaign execution. These companies don't require their customers to use their platform, making the technology a nice-to-have.

**Managed Platforms:** hybrid 'platform-agencies' with fewer managed services, often requiring their customers to log in to the platform to complete tasks, communicate, and more.

**In-House Platforms:** offer a limited scope of highly specialized consulting services for mature influencer marketers seeking to manage all aspects of day-to-day campaign execution in-house.

Criteria	Candidate Platforms				
	1	2	3	4	5
Customer Success Team					
Implementation Team					
Customer Support Team					
Strategic Data & Insights					
Custom reporting services					
Innovation services					
Thought leadership					
Competitor analysis					
Custom internal & competitive benchmarking					
Task support					
"Hands-off" campaign and reporting services					
24/7 Support					
Certified Service Partners					



## Pro-Tip:

- Visit [G2](#) to see the different platforms' badges and reviews detailing the quality of their customer experiences.
- If you need services in the short or long-term, you may be best served to engage a platform with external strategic services partners.

**Questions to Ask:** For Implementation, sometimes called Enablement, ask about the process and the team's Implementation experience. Some platforms have less experienced Implementation Managers, while others have experienced leaders and teams hired from large, enterprise platforms.

# 6 Searching for Influencers

An influencer database with **advanced machine learning capabilities** can help narrow down **relevant creators**, no matter your brand’s level of **influencer marketing maturity**. For marketers looking to ramp up an early-phase influencer marketing program, **simple search capabilities with intuitive filtering** are important. For more advanced influencer marketers with a large, preexisting roster of influencers, **lookalike modeling capabilities** that allow you to **automate and scale the identification process** may be most important.

Criteria	Candidate Platforms				
	1	2	3	4	5
Database size					
Global coverage					
Marketplace vs. open search					
Search by brands or competitors					
Search by influencer affinity					
Search by keyword (Boolean)					
Search by imagery					
Search by influencer content					
Search by influencer name					
Search by influencer bio					
Search by influencer audience					
Search by social platforms					
Saved and recent searches					
Similar or lookalike creators					



### Pro-Tips:

- Don't trust the Sales demonstration (which is often heavily scripted) to represent what it's like to use the platform to search for influencers.
- Prepare for a product demonstration by coming up with a list of key influencer and audience attributes that align with your target buyer personas.

### Questions to Ask:

- Ask to search for influencers in real-time during the call with each platform. Use the same search criteria for each platform, so the search evaluation is apples to apples.
- Ask, "How many public social accounts does your platform pull data from?" (This is important when it comes to audience affinities. If the platform only has access to limited amounts of audience data, then the credibility of that influencer database – and "audience affinity" filters – should be called into question.)

# 7 Vetting Influencers

After you have identified the influencers that meet your requirements, it's time to **review their integrity** to ensure **they've never bought followers or engagements, and have an active audience**, among other things.

Influencer fraud has challenged the influencer marketing industry since its inception, and to this day, fraudulent influencer practices cost companies billions, which is why the platform you use to select your influencers should also be capable of **automated vetting**.

A fully capable dashboard should be able to scan content for potential **NSFW material** and **flag any concerns in bios, images, and hashtags**, while analyzing existing **brand partnerships** so that you can identify potential conflicts. A comprehensive platform will **evaluate an influencer's audience** and its potential value using a scoring system.

**CreatorIQ's Active Audience Score** analyzes multiple follower and engagement metrics to provide a broad overview of the audience's value, taking the guesswork and manual searching out of the process.

Criteria	Candidate Platforms				
	1	2	3	4	5
Fraud management					
Relevancy					
Active audience score					
Engagement rate benchmarks					
Growth history					
Brand partnership history					
Visual content					
NSFW					
Brand safety					



**Pro-Tip:** Take an influencer's risk into context. For example, if an influencer has follower fraud detected, but you simply want them to create content to be used on your website, their audience integrity doesn't matter as much.

**Question to Ask:** What steps is your team taking to identify new fraud tactics, and how quickly does your vetting AI adapt?

# 8 Influencer Recommendations & Approval

Once you have selected and vetted the influencers with whom you want to work for a project or campaign, it's time to **share your roster of talent with your team and stakeholders for feedback and approval.**

The right influencer marketing platform will **streamline the communication between teams** for easy approval to eliminate unnecessary steps and set up campaigns for success.

The ability to pull several **custom one-sheets** from one platform and present **the right information to the right people** will cut time and effort, helping to ensure speedy approval and launch.

If you're an agency, or if you ever find yourself needing to present to different regional teams or different brands within one organization, consider inquiring about the ability to **white label your presentations.**

Criteria	Candidate Platforms				
	1	2	3	4	5
Shareable influencer feedback form					
Customizable influencer feedback form					
White-labeled influencer feedback form					



**Pro-Tip:** Communicating candidate influencers for feedback and approval can be a very time-consuming part of the influencer marketing process.

### Questions to Ask:

- Ask to speak with each platform's customers about the technology solutions to manage this process.
- Does the platform allow for multi-stakeholder review, even if those stakeholders don't have platform logins?
- Does the platform make it easy to share critical information about creator recommendations in a user-friendly format?

# 9 Campaign Management

Streamlining campaign management is at the heart of an influencer marketing platform. For that reason, this section is the largest, as there are so many things to consider - from finances to communications. The full suite of capabilities that will ensure a centralized approach to campaign management can be broken down into four categories: **setup, communication, financial and legal, tracking and measurement.**

**Setup:** Flexible solutions for setting up campaigns, including options for different benchmarks and variable scopes of responsibilities of influencers or stakeholders involved in the process. A platform should be able to generate dynamic microsites with campaign details, and in the end, provide options for templating.

**Communication:** A platform should allow collaborators to set up deadlines, provide real-time feedback, share content approvals, or relay necessary adjustments. Centralized communication features ensure consistency so nothing falls through the cracks in the process.

**Financial & Legal:** The platform should keep all of your financial and legal documents in one place. Ensure streamlined access to tax forms, contracts, and compliance information, as well as disclosure forms or any other legal documents that your team requires. A capable platform will also offer multiple ways to pay influencers depending on their preferences, currency, or regional restrictions.

**Tracking & Measurement:** In order to be able to report on the successes and challenges of an influencer campaign, including ROI, it's necessary to track its journey from start to finish. An influencer marketing platform should be able to generate UTM codes and automate shortlink tracking. Real-time reporting on budget and KPIs will help to identify early successes or failures, allowing for adjustments where necessary.



**Pro-Tip:** Map out your typical process – complete with pain points and inefficiencies – so that you have your priorities top-of-mind when briefing the different platforms.

## Question to Ask:

- Ask how many campaigns you need to run through the platform before you master the campaign management features.

# Campaign Management

Criteria	Candidate Platforms				
	1	2	3	4	5
Limit to live campaigns at one time					
Comprehensive campaign setup & settings					
Campaign templates to save time when setting up campaigns					
Campaign FTC disclosure monitoring					
Contract & Legal Document signature routing					
Terms & Conditions agreements					
In-campaign brand safety					
Communicate with influencers in the platform					
Connect the platform with your email so as not to be restricted to influencer communications in the platform					
Dynamically generated microsites, containing campaign details, for every influencer to visit when they forget campaign details					
Tracked & logged communications with influencers, so there is a detailed history of every interaction. Especially crucial for potential legal audits.					
Content approval features					
Budget tracking					
Campaign planner with the ability to customize KPI logic					
Campaign planner with a budget a planner					
Bitly shortlink tracking					
UTM link tagging					

# Campaign Management

Branded evergreen recruitment site or portal					
Templated influencer sign-up or application features					
Account and login for influencers					
Custom influencer information collection for research or applicant screening					
Influencer account authentication to access influencers' real data					
Budget management in 190 countries & 120 currencies					
Multiple influencer payment method options (i.e., Paypal, ACH, wire transfer)					
Influencer Payment term options management					
Personal and payment information collection					
Influencer tax form collection management					
Financial information compliance					
Set & track influencer payment amounts					
Track influencer payment status					
Approve and forward influencer payables					
Post-level financial reporting					
Influencer Tax ID (TIN) matching					
Influencer W9 / W8 BEN payment controls					
Influencer 1099 management					
Full-service payment processing and reporting via CPP					
One-click send for payment handoff					
Secure Connection to Ads Manager					

# 10 Measurement & Reporting

Measuring campaign performance is critical; however, reporting can often be cumbersome, from exporting data to creating presentations to communicating results. The best influencer marketing platforms will focus on **direct access to first-party influencer data, attribution, API connections**, and customizable, shareable **reports**.

**ROI Attribution:** A full suite of customizable KPIs, including engagement rate, impressions, and reach with the ability to mature all the way to bottom-funnel metrics, such as click-through-rate, conversion tracking, and ROAS.

**Paid and Organic Content Tracking:** Be sure to ask if the platform's data engine has the capability to adapt as promoted content strategies evolve with social media platforms and their increasing emphasis on first-party sales attribution.

**Custom Reports:** Customization capabilities should be able to generate beautiful reports with one click, white label reports, and create templates.

Criteria	Candidate Platforms				
	1	2	3	4	5
Customize metrics or KPI logic					
Published reports which can be shared with a link					
Content (imagery) included in reports					
Report white-labeling					
Configurable performance summaries					
Paid & organic reporting					



## Pro-Tips:

- Some platforms offer dynamic, shareable dashboards that update in real-time. Some also provide templated, automated PowerPoint, and PDF presentation generation (i.e., beautiful reports with a single click).
- It's vital to ensure that the platform streamlines channel authentication, as this will be an essential tool in the future that drives first-party data ownership.

## Questions to Ask:

- Be sure to ask about reporting customization and automation capabilities.
- Ask if the reporting allows for proper measurement of ROAS for both organic and paid content.

# 11 Managing an Influencer Database (CRM)

A feature worth investing in early in influencer marketing strategies is a CRM. **Customizing an influencer CRM database** will make future campaigns smarter and more efficient. A robust CRM is especially crucial as brands and agencies are increasingly looking to forge **long-lasting relationships with influencers**, instead of one-off engagements. Invest in a platform that offers a **dynamic database** that will help you sustain your influencer marketing strategies for the future.

Elevating the experience for influencers requires **data about prior partnerships**, their likes, dislikes, motivations, insights, and so much more so that each communication can be hyper-personalized with complete context.

A capable influencer marketing platform will allow you to **manage your network, campaign data**, and other **proprietary information** centrally, allowing you to manage your private information through a collaborative process.

	Candidate Platforms				
	1	2	3	4	5
First-party authenticated data					
Custom fields & tags					
Partnership history					
Bulk actions					



**Pro-Tip:** Companies with multiple offices, brands, and partners must have a robust CRM. It's critical to keep track of when another portfolio brand or partner entity has engaged an influencer. It's also helpful to keep track of things like influencer attributes such as "Follows Instructions" or "Posts On-Time."

## Questions to Ask:

- Ask to speak to the platforms' customers using the platform's CRM to truly understand its capabilities and limitations.
- Ask if the data you build and store in the CRM will remain private to your organization.

# 12 Integrations & APIs

As influencer marketing becomes a larger part of integrated marketing, it's critical to pick a platform that can easily **connect to other platforms**. This can also include preferred partners for things like measurement programs on platforms like YouTube. Security should be in the ethos of the platform you're considering so that your data is safe.

Depending on your particular needs and the software your team works with, no two API needs are the same. This is why it's important for a platform to have robust and secure API with a wide array of platforms ranging from **CRMs, social media management software, business intelligence (BI) software** such as Tableau, **accounting software, automation platforms**, and everything in between.

	Candidate Platforms				
	1	2	3	4	5
Restful API					
# of customers using the API					
# of total integrations					
# of relevant integrations					
Certified Partner of platforms like YouTube					



**Pro-Tip:** Speak to customers using the API, as platforms sometimes say they have one when they do not. Speak to no fewer than three customers using the API.

**Question to Ask:** Ask about the different platforms that the influencer marketing platform can connect to, such as Salesforce.

# Conclusion

Whether you are just getting started with influencer marketing or up-leveling your program, selecting the right platform is a critical decision. This guide and workbook contains a plethora of criteria, and so hopefully, it proves to be of value during your selection process.

To summarize, here are the key elements to look out for when selecting an enterprise influencer marketing platform:

- 1. Impact on your long-term influencer strategy**
- 2. Industry reviews & rankings**
- 3. Governance features** (user permission levels, customization, security)
- 4. Data ownership & data science**
- 5. Platforms with different levels of services** (full-service, managed, in-house)
- 6. Influencer search capabilities**
- 7. Influencer vetting capabilities**
- 8. Influencer recommendations & approvals**
- 9. Campaign management**
- 10. Measurement & reporting**
- 11. Managing an influencer database (CRM)**
- 12. Integrations & APIs**

Don't forget to use our handy [platform evaluation worksheets](#) detailing all of the criteria you might need to consider.



**Pro-Tip:** Reach out to the team at CreatorIQ who developed this guide & workbook for you. We would love to use your observations, ideas, and feedback in future versions of this document. Please email us at [sales@creatoriq.com](mailto:sales@creatoriq.com).



CreatorIQ is the most trusted software to unify and power advanced influencer marketing for the world's most innovative enterprises. Its Intelligence Cloud facilitates data science-enabled creator discovery, streamlines workflow, ensures brand safety, and drives meaningful measurement. AB Inbev, Airbnb, Calvin Klein, CVS, Disney, H&M, Sephora, and Unilever are just some of the brands that utilize CreatorIQ's platform to drive real business results across their influencer marketing ecosystems.

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per Forrester, G2, and Influencer Marketing Hub



Produced by CreatorIQ in February 2021

