



Marketing Automation Inspection Checklist

When you invested in marketing automation, you knew it had the potential to be a game-changer for your business – increasing efficiency, expanding your ability to connect with your audience and driving real ROI. **The results you get from your marketing automation depends heavily on instance set-up, regular maintenance and continued employee training.**

While no list is exhaustive, ensure you're getting a return on your marketing automation investment with this quick inspection.

Technical Configuration

- Mail records including SPF and DKIM are properly setup
- CNAME records are properly setup
- Tracking codes are properly setup, implemented and are tracking
- SSL is properly setup as appropriate
- Users are properly setup with appropriate permissions
- Lead assignment is properly setup and functioning
- Lead notifications are properly setup and functioning

Thoughtful Taxonomy

- Taxonomy is customized for your business but standard within campaigns and assets
- A detailed taxonomy guide is available for use across the organization
- Sample campaigns are available for cloning

Static and Dynamic Email Lists

- You segment contacts with static email lists
- You also segment contacts with dynamic, "smart" lists

Optimized Email Templates

- Email templates are mobile responsive
- Email templates are standards-compliant
- Unsubscribe is clearly marked
- Email templates reflect current branding
- Email templates are easily editable by team members and agency partners

Basic Personalization

- You personalize correspondence, using data fields
 - First name
 - Industry
 - Company name
 - Salutation/Title
- Personalization can be creative
 - Signatures of the lead owner
 - Imagery
 - Industry specific terms

Landing Page Templates

- Landing pages reflect company branding
- Landing pages are responsive
- Landing pages are action oriented and offer clear CTA's
- Landing pages contain small, digestible pieces of data which encourage action
- One CTA per landing page will encourage conversion

Lead Capture Forms

- Lead forms reflect company branding
- Lead forms offer conversion opportunities on key assets and web pages
- Limit the number of forms by implementing UTM tracking for attribution and sourcing

Lead Nurture Workflows

- Workflows support nurture programs for events (tradeshows, content downloads, etc.)
- Nurture workflows are clear, logical, and easy to determine what they do

Reporting, Attribution, Measurement and Compliance

- Your organization is tracking lead channel attribution with Google Analytics UTM Parameter integration (or similar in other platforms)
- Your organization has set and shared operational definitions for lead sourcing
- Lead source definitions and practices follow best practices
- Lead scoring systems are properly setup and understood by both sales and marketing
- Reporting highlights attribution and performance that are most important to your business
- You address deliverability issues (such as bounces and spam)
- Your team is knowledgeable in GDPR and CASL compliance
- Your automation database is populated with only marketable email addresses
- You have a duplicate management strategy
- Your database is free of duplicates

System Integration

- Systems are communicating via bi-directional data share
- Other marketing platforms are integrated and connected as appropriate



How did you do?

Whether you need a marketing automation tune-up or a complete overhaul, getting your marketing team the support they need to succeed can help ensure you're getting a return on your marketing technology investment.

Contact [Right Source Marketing](#) for a complimentary marketing automation assessment.