

# Marketing Automation Progression Model

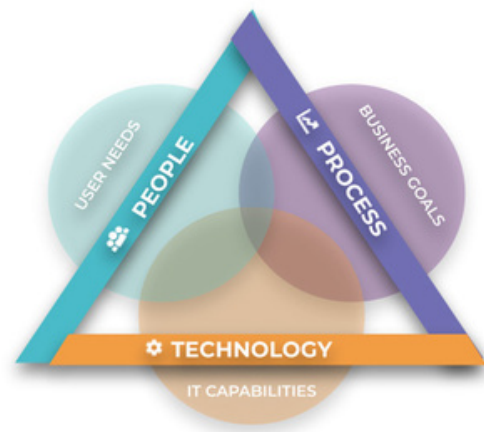
ROADMAP BUILT BY THE EXPERTS.

Marketer's main focus is usually not on technology, understanding messaging, brand and demand generation tactics and features. Leadous is here to help marketers connect their automation platform to goals, and link technology to business strategy to get results.

Whether an instance has been built from scratch or inherited, it is never a bad idea to have a third party expert weigh in. An independent examination of an instance at a certain date in time allows marketers to have a roadmap of how to improve their position and create a value story for automation to share with management.

Based on the Marketing Automation Progression Model, platform audits and instance reviews are two types of audits that let experts get 'under the hood' if you will, to help optimize the use of your platform.

These services are key to building a strong foundation, connecting features to their benefits, and connecting engagement to results driven marketing strategies.



## INSTANCE REVIEW

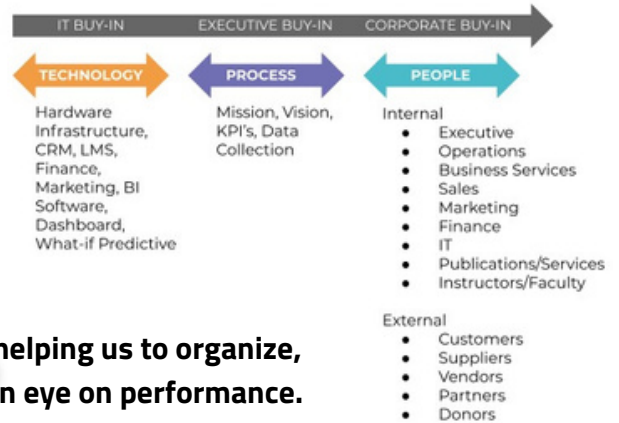
An instance review is a short term engagement that focuses on a specific area, usually Technical Set Up, to ensure proper steps were followed during the implementation. The Instance review focuses on a specific list of a best practice technical set up steps to ensure it is running as it should. In addition to the list of standard technical check boxes, the instance review also looks at the standard components included in onboarding and implementation, including the CRM sync and template seeding.

## PLATFORM AUDIT

A platform audit is a comprehensive audit of an instance, it includes all of the components of an instance review and more. Everything from **key** campaign flows and scoring, third party app integration, and everything in between or after. This inspection digs deep into the use of every feature to ensure value is being driven through automation.

## KEY FINDINGS

Whether a review or an audit, each comes with a findings deliverable that gives a detailed overview. Highlighting key specifics that make your instance unique, areas of concern, and points of performance failure. These findings provide an 'as is' state and give the necessary data points to determine the next steps.



“ **Leadous helped us accelerate our automation plans by helping us to organize, execute and manage recommendations while keeping an eye on performance. Our partnership has changed the way we leverage features and since our review in 2018 we have signed on to have yearly audits to ensure we are evolving.** ”

- Thought Leading CMO, Leadous Customer

## RECOMMENDATIONS

For an instance review, recommendations are provided as a list of steps that need to be taken to resolve current issues. Those steps are prioritized and often require platform support assistance.

In a platform audit the recommendations are broken up into immediate, short-mid term and long-term action items. These are based on the Marketing Automation Progression Model and support the best practice evolution for automation initiatives. The as is, optimal state, and future vision are taken into consideration to help build a custom roadmap to take users beyond where they are today.

To learn more about the Marketing Automation Progression Model behind our audit services connect with us today.

## ABOUT LEADOUS INC.

Leadous is a world-class consultancy that leverages marketing automation to deliver exceptional experiences for the 'journey makers' and the 'journey takers'. The journey between "Hello Prospect" to "Welcome Valued Client" can be difficult to navigate. From concept to conversion, Leadous utilizes technology, methodology, and certified marketing automation experts to deliver consulting services that increase demand, drive conversion, and deliver pipeline growth making the journey a well-traveled one. Our near-decade-long world-class partnerships with Adobe, Hubspot, Oracle, and Salesforce give us the capabilities to serve hundreds of clients, across industries, to obtain measurable value from their investments in customer journey solutions. Let us lead you. | [www.leadous.com](http://www.leadous.com) | 844-LEADOUS

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