



CHECKLIST: AI-DRIVEN MARKETING OPS



CAMPAIGN AUTOMATION & INTELLIGENCE

- ☐ Are triggers and logic clearly mapped for each campaign?
- ☐ Can agents personalize content using real-time behavior data?
- ☐ Are workflows modular for testing agent-generated variations?
- ☐ Is agent input optimized across timing, copy, and channel mix?

TOOLS & SYSTEMS

- ☐ Are we using platforms with open APIs (e.g., HubSpot, Salesforce)?
- ☐ Can agents access CRM, dashboards, and CMS content directly?
- ☐ Is there secure role-based access for data and workflows?
- ☐ Do systems support real-time data sync and agent updates?

DATA ACCESS & GOVERNANCE

- ☐ Are agents operating with compliant, clean, and permissioned data?
- ☐ Are usage logs and data trails available for audits?
- ☐ Do we restrict agent visibility for sensitive or regulated info?
- ☐ Is data refreshed frequently enough to support agent accuracy?



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CONTENT & ASSET MANAGEMENT

- ☐ Can agents repurpose or remix approved content templates?
- ☐ Are brand voice and compliance rules embedded in prompts?
- ☐ Is there version control for agent-edited or generated content?
- ☐ Do we have fallback content for flagged or risky outputs?

MEASUREMENT & OPTIMIZATION

- ☐ Are we tracking agent-assisted conversions and attribution shifts?
- ☐ Is agent activity visible in dashboards or campaign logs?
- ☐ Are success metrics aligned with human and agent contributions?
- ☐ Can we test agent performance against benchmarks or human output?

REVIEW & OVERSIGHT

- ☐ Is human QA required for high-risk or public-facing outputs?
- ☐ Can agents flag uncertainty or escalate for review?
- ☐ Are we running regular reviews of agent workflows and decisions?
- ☐ Do we log agent interventions to support continuous improvement?