

MARKETING AUTOMATION CHECKLIST

STRATEGY - CHECK. TACTICS - CHECK. SUCCESS - CHECK.

Comprehensive Marketing Automation Checklist with 50 items to review that make or break automation initiatives. This checklist covers various aspects of your marketing automation strategy to ensure a well-optimized and effective system.

HOW TO:

STEP 1: REVIEW EACH ITEM IN THE TEN CATEGORIES BELOW. AS YOU REVIEW THE LIST CROSS OUT THE ONES YOU KNOW FOR CERTAIN DO NOT PERTAIN TO YOUR ORGANIZATION'S USE OF MARKETING AUTOMATION. THOSE ARE THE ONES THAT DO NOT PERTAIN TO YOUR SETUP OR BUSINESS REQUIREMENTS. PUT A QUESTION MARK NEXT TO THE ONES YOU ARE UNSURE OF, RESEARCH IF THOSE ARE APPLICABLE, AND DECIDE IF THEY SHOULD BE CROSSED OFF THE LIST.

STEP 2: OF THE REMAINING LISTED ITEMS, START AT THE TOP AND GO THROUGH EACH, TAKING NOTES PROVIDING SPECIFIC DETAILS WHERE APPLICABLE. FOR EXAMPLE, YOU MIGHT ADD A NOTE THAT SAYS 'COMPLETE' FOR ONE ITEM AND THEN ADD A PARAGRAPH OF DETAILS FOR POTENTIAL CONSIDERATIONS, UPDATES, AND IMPACTS OF ANOTHER ITEM.

STEP 3: COMPILE ALL OF THE NOTES, GROUP, & PRIORITIZE. ADD THE INTENDED OWNERS, DATES, RESOLUTION COMMENT COLUMN, AND SHARE.

STEP 4: ESCALATE ANY HIGH-PRIORITY ISSUES VIA A SUPPORT TICKET IMMEDIATELY WITH YOUR PLATFORM PROVIDER.

STEP 5: MANAGE THE LIST AS PART OF A WEEKLY AUTOMATION PROJECT UPDATE CHECK-IN PRIORITIZING IMMEDIATE, SHORT-TERM, AND LONG-TERM PRIORITIES, ALONG WITH THOSE THINGS THAT IMPACT OPERATIONAL STANDARDS FOR REPORTING AND ANALYTICS AND CAMPAIGN REQUIREMENTS.

STEP 6: PLAN TO REVISIT THIS CHECKLIST OR A SIMILAR ONE ANNUALLY.



START HERE...

I. General System Review

Platform Health:

Ensure all systems and servers are operational.

Check for any recent updates or patches.

User Access:

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Review and update user permissions.

Remove any unnecessary or inactive user accounts.

Data Clean-Up:

Conduct a thorough audit of lead, contact, and record data.

Review duplicate management strategy.

Integration Check:

Review integrations with other tools and platforms.

Confirm data flow between systems.

Security Audit:

Verify security settings and access controls.

Update passwords and enable multi-factor authentication.

II. Campaign Performance

Email Campaigns and Performance:

Analyze open rates, click-through rates, and conversion rates.

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- Test and optimize email subject lines and content.

- Automation Workflows:

- Review and update automated workflows.

- Ensure triggers and actions are correctly set.

- Landing Pages:

- Evaluate landing page performance.

- Check for broken links or outdated content.

- Lead Scoring:

- Refine lead scoring criteria.

- Ensure alignment with sales priorities.

- Social Media Integration:

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- Review social media posting schedules.

- Analyze engagement metrics on social platforms.

III. Content Strategy

- Content Calendar:

- Assess the content calendar for the upcoming months.

- Plan content themes for the new year.

- Content Personalization:

- Evaluate the use of personalization tokens in emails.

- Test personalized content effectiveness.

- Content Relevance:

- Review past content performance.

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Identify and update outdated content.

Multichannel Consistency:

Ensure consistent messaging across all channels.

Align content with current brand guidelines.

Video Content:

Assess the effectiveness of video content in campaigns.

Plan for new video content creation.

IV. Data Management

Segmentation Strategy:

Review and update customer segments.

Create new segments based on recent data.

Preference Centers:

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Check the functionality of preference centers.

Update preferences based on customer feedback.

Data Enrichment:

Explore opportunities for data enrichment.

Enhance customer profiles with additional data.

Data Privacy Compliance:

Ensure compliance with data protection regulations.

Review and update privacy policy if necessary.

Data Backup:

Confirm that regular data backups are in place.

Test data restoration processes.

V. Reporting and Analytics

Dashboard Accuracy:

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- Verify the accuracy of marketing dashboards.

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- Update KPIs based on business objectives.

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- Attribution Models:

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- Assess the effectiveness of attribution models.

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- Adjust models to reflect customer journeys better.

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- Conversion Tracking:

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- Review conversion tracking setup.

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- Test and verify tracking pixels.

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- Custom Reports:

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- Create custom reports for specific stakeholders.

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- Ensure reports are scheduled for regular distribution.

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- Budget Analysis:

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- Analyze marketing spend against performance.

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- Adjust budget allocations for optimal ROI.

VI. Customer Engagement

- Personalized Campaigns:

- Assess the effectiveness of personalized campaigns.

- Experiment with new personalization strategies.

- Feedback Loops:

- Analyze customer feedback from surveys or reviews.

- Implement improvements based on feedback.

- Customer Segmentation:

- Create targeted campaigns for specific customer segments.

- Monitor engagement metrics for each segment.

- Customer Journey Mapping:

- Review and update customer journey maps.

- Identify opportunities for enhanced engagement.

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Customer Retention:

Assess customer retention rates.

Plan retention campaigns for the new year.

VII. Mobile Optimization

Responsive Designs:

Check the responsiveness of email templates.

Ensure landing pages are mobile-friendly.

Mobile App Integration:

Review mobile app integration (if applicable).

Optimize push notification strategies.

SMS Campaigns:

Evaluate the performance of SMS campaigns.

Test different SMS messaging strategies.

Mobile Analytics:

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Review mobile analytics data.

Identify trends and areas for improvement.

App Updates:

Ensure that mobile apps are up-to-date.

Check for any pending app updates.

VIII. Automation Infrastructure

Workflow Efficiency:

Optimize automation workflows for efficiency.

Remove unnecessary steps or delays.

API Integrations:

Review API integrations with external tools.

Test API connections for reliability.

A/B Testing:

Evaluate past A/B tests and their outcomes.

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- Plan new A/B tests for the upcoming campaigns.

- Fallback Strategies:

- Ensure fallback mechanisms are in place.

- Plan for system failures or downtime.

- System Scalability:

- Assess the scalability of the automation system.

- Plan for potential increases in workload.

IX. Future Planning

- Trend Analysis:

- Research industry trends for the upcoming year.

- Align marketing strategies with emerging trends.

- Emerging Technologies:

- Explore new marketing automation technologies.

- Assess their potential impact on current systems.

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 Competitor Analysis:

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- Conduct a competitor analysis in the automation space.

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- Identify areas for differentiation and improvement.

 Skills Enhancement:

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- Evaluate the skill set of the marketing team.

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- Plan for training or skill enhancement programs.

 Goal Setting:

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- Define clear marketing automation goals for the new year.

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- Communicate goals to the entire marketing team.

X. Documentation and Knowledge Transfer:

 Documentation Review:

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- Ensure all processes and workflows are documented.

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- Update documentation based on any changes.

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 Knowledge Transfer:

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- Facilitate knowledge transfer sessions.

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- Cross-train team members on critical tasks.

 Knowledge Repository:

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- Update the knowledge repository with new insights.

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- Make information easily accessible to the team.

 Collaboration Tools:

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- Review collaboration tools used by the team.

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- Ensure effective communication channels.

 Team Feedback:

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- Gather feedback from the marketing team.

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- Implement improvements based on team input.

Investing time in a comprehensive review of your marketing automation system will set the stage for a successful and strategic year ahead. Leadous is here to provide support if you need assistance with any of the components of this checklist, please don't hesitate to reach out.

