

# YOUR MARKETING AUTOMATION CHECKLIST

Marketing automation solutions can deliver big results: incredible productivity, targeted engagement, sales and marketing alignment, and clear insight into what is—and isn't—working. According to eMarketer, 86% of marketers said that marketing automation improved nurturing, 73% said that it gave them measurable results, and 66% said that it enhanced targeting and personalization.

Now it's your turn to reap these same values for your business. As you explore the market of marketing automation solutions, here is a 3-step checklist to follow to help you make an informed decision that's right for you.

## STEP 1 WHAT ARE YOU LOOKING FOR?

Ask yourself—what are you trying to achieve with marketing automation? To start, identify and document your goals.

### Enter your goals:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Example Goals:

- I want to generate more leads by increasing traffic to my website.
- I want to run multi-channel campaigns that are consistent and personalized.
- I want to be able to integrate marketing automation with all of my current technology vendors.

## STEP 2 MARKETING AUTOMATION CHECKLIST

Use this checklist to ensure your marketing automation solution has all of the capabilities you need for both your current and future programs.

### Usability

When it comes to making your team more productive, a marketing automation solution must allow you to handle the following:

- Email batch and trigger:* Send large batches of email; track and report on deliveries, opens, and clicks; automatically send triggered email responses based on the recipient's actions or behavior; and track clicks on specific links within emails.
- Email deliverability:* Ensure your messages are being delivered and find fixes for low-deliverability rate.
- Landing pages:* Build landing pages without help from IT and direct traffic to customized, personalized landing pages based on segmentation.
- Forms:* Place forms on landing pages, microsites, or your website, and progressively collect information from visitors with each subsequent site visit.

- *Mobile*: Optimize emails for mobile phones and tablets as well as monitor, test and react to how your customers interact with your mobile app.
- *A/B Testing*: Experiment with subject lines, copy, graphics, calls-to-action, frequency, etc. to see which emails are performing best and test content on landing pages, social ads, display ads and more based on segmentation.
- *Templates/libraries*: Take advantage of templates and pre-built programs for email, landing pages, webinars, tradeshow, lead scoring, and lead nurturing.
- *SEO*: Analyze key word rankings for you and your competitors; generate lists of new keywords; gain recommendations on web and landing page optimizations; identify inbound link opportunities.
- *Cloning*: Quickly replicate successful campaigns with minimal effort.
- *Personalized multi-channel campaigns*: Create a consistent, personalized, 1:1 conversation with your audience on all channels, including mobile, social, email, and web.
- *Calendars*: View all of your events and campaigns in a color-coded, centralized team calendar and easily compare them to goals.
- *Social*: Segment and score based on activity within social networks. Increase engagement with social programs such as referrals, sweepstakes, and social share buttons.
- *Lead/customer lifecycle management*: Easily and effectively engage, track, nurture, and manage all leads at each stage of the funnel.
- *Nurturing*: Set up and deliver a series of content offers; understand how leads engage with your content so you can respond accordingly; easily add new content to campaigns; automatically suppress content an individual has already seen.
- *Multi-channel campaigns*: Track cross-channel behaviors to send personalized nurture emails and coordinate marketing across channels.
- *Real-time personalization*: Personalize emails, landing pages, and website content for different site visitors based on their behaviors and attributes; personalize content in your content management system; and use tokens to auto-populate messages with program-specific information (such as names and dates).
- *Advertising integrations*: Seamlessly incorporate personalized digital ads into your outreach and nurture streams.

### Team alignment

The right marketing automation solution helps unite everyone on your marketing and sales teams. To that end, find a solution that enables:

- *CRM/database integration*: Enable your marketing automation and [CRM system](#) to sync in real-time so that your data is always up-to-date, allowing you and your sales team to act quickly and accurately.
- *Lead scoring*: Use multiple scores for multiple products; score website visits and form-fills based on their relevance; score based on complex behaviors; and separate interest from fit. Add scores for positive engagements such as visiting your pricing page and subtract scores for negative engagements such as inactivity or visiting your careers page.
- *Sales insight*: Filter and present sales with the most useful, relevant prospect data; trigger sales alerts based on lead activity and even prioritize alerts based on content downloaded or other actions taken; and prioritize leads by who is most likely to buy. Allow sales to send and track marketing-approved email templates and add prospects to nurture campaigns.

### Campaign/Deployment.

Look for a marketing automation solution that makes it possible to easily target the right person with the right message at the right time across channels using:

- *Segmentation*: Segment your database by demographics, firmographics, simple behaviors (e.g. clicked on link in email), and cross-channel behaviors (e.g. shared content on Facebook).

## Analytics

One of marketing's most important functions is linking revenue with the campaigns responsible for generating that revenue. Ideally, your marketing automation solution will help you do just that by supporting:

- *Program ROI:* Analyze your channels and programs based on successes, content offers, new names, pipeline, revenue, opportunities, etc. Identify your top performing programs to run again and your poor performing programs to discontinue.
- *Multi-touch reporting:* Go beyond seeing the first or last marketing touch that influences a deal and [give credit to every campaign](#) contributing to a closed deal.

## Other.

- *Ecosystem:* Sometimes you need more than marketing automation to pull off your programs and campaigns. Look for a solution supported by a [large ecosystem](#) of partners that extends and enhances the capabilities of your marketing automation.
- *Community:* Whether you're new to marketing automation or are an experienced user looking to extract the most value possible, look for a vendor that connects you with a variety of resources and support, including [a community of like-minded marketers](#).

## STEP 3 COMPARE YOUR OPTIONS

Now that you know which features to seek out, take the time to evaluate more than one solution. Even a single side-by-side comparison can give you real context into which functionalities you truly want and need.

Jot down some specific tasks that you need your marketing automation solution to be capable of:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Examples of specific tasks include:

- **Multi-Channel Engagement:** Sending an email or mobile message after someone fills out a form.
- **Scoring:** Adding a specific score to a lead record based on product interest after they view your product page.
- **Listening and Responding:** Triggering message after a lead has not engaged with you in a certain amount of time.

For more detail on what you should consider when selecting a marketing automation solution for your organization, download our full guide, [Asking the Right Questions: How to Evaluate Marketing Automation](#).