

MARKETING AUTOMATION SYSTEM AUDIT

Your marketing automation platform is the heart of your operations. But while it's incredibly powerful, it's also incredibly complex, and many marketers struggle with usability, performance, and ROI.

Whether you have inherited a new system along with a new role or you need a better understanding of a system that has become frustrating and problematic over the years, DemandLab's marketing automation system audit untangles the complexity, identifies the issues, and provides a clear plan for performance optimization.

How it works

We conduct a phased, systematic, and independent examination of your marketing automation platform to determine whether the system setup, activities, and related results align with industry benchmarks, best practices, and your unique business initiatives and goals.

Our audit team holds Q&A sessions with you to ensure we understand your system and business needs.

The audit uncovers answers to key questions including:

- How organized, secure, and user-friendly is your functional setup?
- How robust are your data collection and management processes?
- How many essential, high-ROI programs are you leveraging?
- Can you report on campaign/source ROI and lead generation?

Key deliverables

Upon completion of the audit, you receive a workbook that includes a comprehensive review of your marketing automation platform. This workbook includes a series of recommendations for increasing efficiencies, advancing system use, ensuring proper use and set up, and optimizing the system for ROI.

Gain insight into system usability, optimization, utilization, value, risk, compliance, and reporting.

DEMANDLAB'S THREE-PHASED AUDIT INCLUDES:

- System Inventory and Plan
- Diagnostic Audit
- Solutions Analysis and Recommendations

Marketing Automation System Audit

DemandLab uses a phased approach that delivers results sooner and provides a progressively deeper understanding of your system, its current limitations, and its true capabilities.

Each phase can be delivered as a standalone service or stacked together for an end-to-end solution that provides a roadmap to system remediation and optimization.

PHASE 1	PHASE 2	PHASE 3
Inventory and Plan	Diagnostic Audit	Analysis and Recommendations
AUDIT PROCESS		
<ul style="list-style-type: none"> • Hold a kickoff meeting • Obtain and validate system access credentials • Hold discovery meeting(s) to define and document the system issues and ideal state • Conduct initial inventory of system • Document a diagnostic investigation plan 	<ul style="list-style-type: none"> • Conduct a forensic system exploration • Document and illustrate a detailed list of findings • Document initial recommendations • Prioritize recommendations for impact • Review and finalize with client input 	<ul style="list-style-type: none"> • Conduct an in-depth exploration of a specific technical or business challenge • Explore and brainstorm possible solutions to key challenges within given business constraints • Review and catalog technical solutions with internal advisory/ team • Evaluate solutions for fit, effort, and priority • Select primary option given customer context
KEY DELIVERABLES		
<p>At the end of the process, we deliver:</p> <ul style="list-style-type: none"> • System inventory and findings document • Audit plan document • Client review meeting • Outline of next steps for the Diagnostic audit phase 	<p>At the end of the process, we deliver:</p> <ul style="list-style-type: none"> • Diagnostic audit and findings document • Summary of observed problem(s) • Documented recommendations • Client review meeting of key findings and recommendations • Outline of next steps 	<p>At the end of the process, we deliver:</p> <p>Strategic review and recommendations document</p> <ul style="list-style-type: none"> • Analysis: Deep dive into the root cause of identified problem(s) • Recommendations: Full evaluation of solution(s) prioritized by impact and effort required to correct the issue(s) • Client review meeting • Outline of next steps for remediation phase

To discuss your marketing automation needs, please contact us at contact@demandlab.com.



DemandLab, a technology-focused marketing consultancy, helps business leaders to unlock the potential of their marketing organizations to accelerate revenue and drive the customer experience (CX). Learn more at www.demandlab.com.

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