

MARKETING AUTOMATION

SELF-ASSESSMENT



Analyzing the processes your marketing and sales departments currently have in place will help you pinpoint areas that can be improved with a marketing automation solution. Use the following questions about your current management of sales and marketing campaigns to help you identify areas that can be optimized.

- What are the marketing strategies that you currently use (email marketing, paid search, webinars, live events, etc.)?
- What role does email play in your marketing strategy?
- Are you using lead nurturing?
- Does your sales team use a CRM system?
- How do you handle marketing-to-sales lead handoff?
- How does your sales team prioritize leads?
- How large is your database?
- How are you leveraging social media?
- How can you incorporate cross-channel marketing into your efforts?
- How do you manage your forms and landing pages?
- How are you measuring and evaluating your marketing success?
- Who in your company will use marketing automation?
- Who will take ownership?
- How will your marketing team benefit from marketing automation?
- How will your sales team benefit from marketing automation?
- What ratio of sales engagements currently result in a closed deal?
- What steps can you take towards better qualifying leads and improving this ratio?
- Are you using your website for lead generation? If so, how can you expand this?
- What are your current KPIs, and how can you show each department's value?
- What are some short-term goals that can be achieved with marketing automation?
- What are some long-term goals that can be achieved with marketing automation?