Marketing Automation Assessment

COMPANY NAME • DATE

Executive Summary • 1
Reporting • 2 - 7
Report Summary • 8

BONFIRE MARKETING

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment
EXECUTIVE SUMMARY · COMPANY NAME

SITUATION

This is where you can state how long you've been using your marketing automation system, the current situation with your instance at the time of this assessment, and any details about what you're hoping to accomplish by going through this evaluation.

KEY FINDINGS

Come back to this section once you've completed the audit of your instance and provide a high-level overview of the key things you discovered and the opportunities your company has to improve your use of marketing automation.

© 2017 Bonfire Marketing.
All rights reserved.
Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment

REPORT • COMPANY NAME

FEATURE	UTILIZATION			NOTES
Foundation • Basic	None	Partial	Optimal	
Tracking Code: Installed on all web properties, reporting properly and filtering out your company's IP.	◉	○	○	
CNAME / Subdomain	◉	○	○	
CRM Connector: Regular sync happening, clean mapping with fields, lead score and prospect activities being displayed on CRM records and sales enablement features are activated.	◉	○	○	
Foundation • Advanced				
Naming Conventions: Use of consistent naming conventions on forms, lists, landing pages, files/content to keep instance clean and make assets easy to locate.	○	○	○	
Preventing Single Point of Failure: Cross-training multiple users on your instance to ensure you never miss a beat in the event that one of your employees wins the lottery.	○	○	○	
Checks and Balances: Good processes in place for sending outbound emails, modifying automation rules or templates to prevent costly errors.	○	○	○	
Email Marketing • Basic				
Email Engagement: How do your metrics stack up? Measure your click-through rate (CTR) (industry benchmarks) and click-to-open (CTO) rates (note: 20%+ is considered good for most)	○	○	○	
Deliverability: Use system tools to ensure emails will not get trapped in spam filters.	○	○	○	
Email Unsubscribe Prevention: Use of a subscription or preference center. Good segmentation and use of supression lists to prevent unwanted email sends.	○	○	○	

Recommendation

Recommendations

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment

REPORT · COMPANY NAME

FEATURE	UTILIZATION			NOTES
Email Marketing • Advanced	None	Partial	Optimal	
Dynamic Content: Relevance drives conversions. Send the best messages and offers based on buyer profiles.				
Email Testing Programs: "Always be testing" to see which design, offers, what frequency of emails, or what time of day are most effective.				
Mobile-Friendly Templates: How many of your emails do you look at on your mobile phone? We thought so.				
Responsive Design and Coding: Responsive design for any screen (desktop, tablet and mobile).				
Lead Nurturing / Drip Campaigns • Basic				
Automated Campaigns: Route leads directly into nurturing campaigns based on interest category segments/buyer profiles and buying cycle stage (i.e. Awareness, Consideration, and Transaction).				
Triggers to halt Nurturing Emails: As fast as someone can be added, ensure you've got suppression lists or automation programs in place that remove prospects based on data attributes, behavior or internal sales rep activity.				
Lead Nurturing / Drip Campaigns • Advanced				
Prevent Dupliate Content: Automation campaigns that prevent sending someone the content they just downloaded.				
Recycling Campaigns: Continue engaging prospects who aren't moving through the buying cycle. Campaign examples include: lead stage or opportunity stage (i.e. closed lost), or lack of sales rep activity.				

Recommendation

Recommendations

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment

REPORT • COMPANY NAME

FEATURE	UTILIZATION			NOTES
Landing Pages • Basic	None	Partial	Optimal	
Progressive Profiling: Utilize progressive profiling to minimize the total number of forms fields, which helps reduce friction and increase conversions.				
Pre-populated Data on Forms: Don't make prospects continue to fill out the same fields if you already have the data.				
Social Media Integration: Use of fast-acting social sharing icons so others can help you spread the word.				
Landing Pages • Advanced				
Dynamic Content: Give the people what they want by dynamically serving messages and content/offers based on who they are and what they care about.				
A / B Testing: How well do your pages convert? Take a portion of your list and split to the traffic to position your programs for the best success.				
Responsive Design and Coding: Responsive design for any screen (desktop, tablet, mobile).				
Mobile-Friendly Templates: How many of your emails do you look at on your mobile phone? We thought so.				
Database Management • Basic				
FORMS: **Pick Lists vs. Open Text Fields:** Keep your data clean and allow for good segmentation by using pick-lists whenever possible. **Auto-append:** Be sure to turn on any auto-append options (e.g. add country and state from prospect IP address) to reduce unnecessary fields. **More Advanced Forms:** Utilize conditional fields to improve user experience and hidden fields to gather and store more information about your prospects.				

Recommendation

Recommendations

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment

REPORT · COMPANY NAME

FEATURE	UTILIZATION			NOTES
Database Management • Basic	None	Partial	Optimal	
Lead Assignment and Routing: Your marketing automation solution and CRM should work together to get prospects assigned to the right people and make sure they are notified and able to follow up in a timely manner.				
CRM Campaigns: Sales opportunities live in your CRM to adding prospects to CRM campaigns and adjusting campaign stages ensures that marketing's involvement is well documented when the boss comes calling or Sales wants to know what the marketing team is contributing.				
Tracking Content Interest: Add prospects to CRM campaigns, add tags or drop into segmented lists based on page visits, content downloads, etc. so you can keep track of what your prospects have looked at.				
Database Management • Advanced				
Data Cleansing: Automation programs that add attributes to records and maintain database hygiene will make a huge impact for marketing, sales and the bottom line.				
Monitor and Augment Email Unsubscribes: Monitor email unsubscribes and run contact gathering programs at target accounts to prevent getting locked out of the inbox.				
Lead Scoring • Basic				
Agreed Upon Scoring Model: Get buy-in from your friends in Sales and create a feedback loop to continue to improve.				
Negative Scoring: When it comes to lead quality, it's not a democracy. Add scoring for demographic/ firmographic attributes, visits to certain pages (looking for a new job are we?) and depreciate scores over time as leads get stale.				

Recommendation

Recommendations

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment

REPORT • COMPANY NAME

FEATURE	UTILIZATION			NOTES
Lead Scoring • Advanced	None	Partial	Optimal	
Score Leads more Granularly: Many solutions provide global scoring which makes it easy to give everyone the same score for an action. But, not all forms are created equal and visits to specific pages show real buying interest. Make sure your scores truly find the best leads.				
Caps to Retain Manageable Scores that Make Sense: Cap lead scores and require specific actions and demographics/firmographics to reach certain scores so it's not just the most active prospects on your website that end up with the biggest lead score.				
Account-level Scoring: Keep track of what's happening at key accounts and determine which companies are most active in looking at your solution.				
Sales Enablement • Advanced				
Keep Sales Reps Informed: Make sure prospect activity is available in CRM for sales reps to see.				
Sales Alerts: Send sales reps emails when their prospects take action and when new records are assigned. Many CRMs also allow tasks to be created to help improve follow-up.				
Personalized Emails: Set up auto-response emails to come from the most appropriate sales reps. If your marketing automation solution allows it, teach your sales reps how to send emails to prospects with sales tracking (i.e. directly from the CRM or using an Outlook plug-in).				
Prevent Unwanted Emails to Key Prospects: Build automation programs and supression lists that will remove prospects from programs (i.e. those with an open opportunity or existing customers). Allow reps to remove prospects from email programs themselves.				

Recommendation

Recommendations

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment

REPORT • COMPANY NAME

FEATURE	UTILIZATION			NOTES
Reporting • Basic	None	Partial	Optimal	
Website statistics and visitor metrics.				
ROI for all marketing channels and marketing campaigns.				
Marketing's contribution to pipeline.				
Untouched lead report to ensure consistent follow-up and marketing program success (i.e. lead aging reports).				
Reporting • Advanced				
Dashboards by Role: Unique reports that quickly give executives, sales and marketing leaders, and individual contributors the key information they need.				
Trends for Lead Life Cycle Stages: Keep an eye on your pipeline and your conversion rates for each stage (e.g. inquiry, marketing qualified lead, sales qualified lead, sales accepted lead, opportunities by stage, etc).				
Activity by Buyer Profile: Your messages and content should be different so keep score on how well you're doing with the key players involved in making a decision.				
Key Account Activity: Retain focus on the deals that will really make a difference at your organization.				
Lead Score/Lead Grade Trends: Keep an eye on lead quality and measure scores to ensure you're moving people along the buying cycle.				
Email Delivery: Have reports automatically delivered via email every week to key people in the organization.				
Recommendation				
Recommendations				

© 2017 Bonfire Marketing.
All rights reserved.
Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071

Marketing Automation Assessment
REPORT SUMMARY · COMPANY NAME

SHARE ADDITIONAL INSIGHTS

List out additional insights if necessary.

NEXT STEPS

List out action items and assign tasks to internal and external resources.

MA Assessment
© 2017 Bonfire Marketing.
All rights reserved.

Bonfire Marketing
3530 N Vancouver Ave., Suite 200
Portland, OR 97209

thinkbonfire.com
contact@thinkbonfire.com
(503) 334-2071