Data Platforms and Collection:

Data collection + Management: (Rate 1-5)

Do all your platforms and data sources collect, store, and manage customer data and then integrate in a helpful way?

(1= not at all, 3= sort of, 5=yes)

Challenges with Current Setup

Do all of your stakeholders agree on one source of truth for data?

(1=limited agreement, 3=most of us agree, 5=100% agreement)

Can you and most of your team access your data quickly and efficiently?

(1= major challenge, 5= no challenge)

Customer Journey + Behavioral Analytics:

Customer Journey Mapping:

Can you track a user's journey and behavior at each step through your products?

(1= limited tracking, 5= comprehensive tracking)

Data Insights + Marketing Strategies:

How well do you translate data insights into actionable marketing campaigns, flows, and strategies?
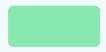
(1= limited use, 5 = strong actionable steps)

Segmentation, Targeting + Personalization

Segmentation Effectiveness:

How well can you define and use your cohort to power recommendations in the product or marketing efforts?

(1=not able to, 3= limited 5=able and effective)
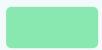
Personalization Strategies:

How well can you personalize your messaging based on precise customer data like location, past purchases, behaviors, in-store and online data, or location data?

(1=limited, 5=extensive hyper-personalization)

Segmentation + personalization tools:

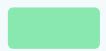How effective are your tools and techniques for audience segmentation, personalization, and recommendations?

(1=limited effectiveness, 5 = highly effective)

Messaging Platforms and Performance
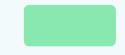
Campaign Management + Execution:

How efficient and timely is your process for planning, creating, and executing marketing campaigns across different channels?

(1=ineffcient, 5= highly efficient)

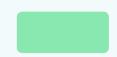**Data integration with messaging platforms:**

How well does your behavioral data integrate with your messaging platforms?

(1= poor/no integration, 3= limited integration, 5= seamless integration)
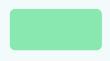
Challenges with Campaign Management:

How much of a challenge is managing and executing marketing campaigns across channels?

(1= major challenge, 5= no challenges)

Measuring Marketing Campaigns:

How effectively do you measure the effectiveness of your personalized messaging campaigns?

(1=limited measurement, 5= comprehensive measurement)

Attribution and Reporting

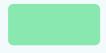How effectively can you attribute campaign performance to specific channels, messaging tactics, or teams?

(1=limited attribution. 5= clear attribution)

Experimentation
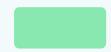
A/B and Multivariant Testing:

Do you use A/B or multivariant testing to optimize your messaging and campaign elements?

(1=never, 3=sometimes, 5=frequently)

Testing Frequency:

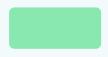How quickly can you plan, deploy, and report on experiments? Do you are running enough experiments?

(1=it is so slow, 3=yes, but we need more, 5=we are a well oiled machine)

People, Resources, Talent
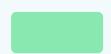
Data Sharing & Impact on Decision-making:

How effectively is data shared across teams and how much does this sharing impact decision-making for marketing campaigns and product roadmaps?

(1=limited sharing or impact, ad 5=seamless sharing or strong impact)

Resource and Talent Challenges:

How quickly can all of your teams work together to go through the flow of data collection, segmentation, marketing campaigns (including experimentation), and reporting to all teams?

(1= it is turtles in peanut butter, 3=okay but could improve, 5= we deserve a medal)

Results and Next Steps

Your total score is

Score 29-75: Opportunity for Transformation

Your Martech setup has significant growth potential. Several areas need improvement, particularly in data utilization, platform integration, and actionable insights. A full Martech audit is recommended to identify root issues and create a strategic path for a more efficient ecosystem. Sign up now for a full MarTech audit!

Score 36-64: Opportunity for Strategic Optimization

Your MarTech foundation is solid, but there's room for strategic optimization. Streamline workflows, improve integrations, and unlock more significant marketing potential. Partner with us for an in-depth MarTech audit and roadmap to enhance campaign performance, gain deeper customer insights, and maximize marketing ROI.

Score 126-145: Future-proofing Your Marketing Efforts

Congratulations! You have a well-integrated Martech stack and leverage data effectively. To stay ahead, continue optimizing and exploring emerging technologies. We can help you ensure your marketing remains agile, relevant, and effective in the ever-evolving landscape. Sign up now for a free MarTech audit!

Sign up for a complimentary Martech Audit and allow our team to handle the hard work.

Plus, get a surprise gift.

Take the Audit. Get the Gift