Marketing Automation Readiness Checklist (2025)

Strategy

- Have you defined clear marketing goals and KPIs?

- Do you have a documented marketing strategy?

- Are your automation goals aligned with business objectives?

Audience

- Have you segmented your audience based on behavior or demographics?

- Is your email/contact list clean and validated?

- Do you have buyer personas for your key segments?

Content

- Do you have high-quality lead magnets (eBooks, guides, etc.)?

- Are your email templates mobile-friendly and engaging?

- Have you created automated email sequences for each funnel stage?

Funnel

- Have you mapped out the entire customer journey?

- Do you have a clear lead nurturing path?

- Are CTAs aligned with funnel stages?

Technology

- Do you have a CRM integrated with your automation platform?

- Is your marketing stack connected (CRM, forms, email, analytics)?

- Are tracking tools like UTM, pixel, and events set up?

Team

- Is there a designated owner for automation in your team?

- Are roles and responsibilities clearly defined?

- Is there a content and technical support process in place?

Tracking

- Do you monitor key metrics (open/click rates, conversion rate, CPA)?

- Are dashboards in place to track automation performance?

- Do you review and iterate automation workflows regularly?