



Marketing Automation Readiness Checklist

□ Dedicate Staff Time

Marketing automation is powered by two things, a technology platform (which you can easily purchase) and great content marketing. But someone still has to manage that platform. Some companies choose to completely outsource their marketing automation, but we recommend against this. You'll never send as many emails, think up as many creative ROI generating workflows or automate as many tasks if a third party is doing it for you. Getting an interested internal party to "own" your marketing automation platform is a must.

□ Start a Blog

Generating content like weekly blog posts and promoting them on social media takes time. And in our experience, if it isn't part of someone's job, it becomes a failed side of desk project. You know – the projects sitting on the side of your desk that you will get to...but never do. Regularly blogging drives content generation that can be distributed via email, social media and even turned into long form content. It is a core component of content and inbound marketing.

□ Create a Newsletter

If you don't already have plans for a newsletter, start now. Sending regular, segmented emails is one of the easiest and sure fire ways to generate traffic to your site. Marketing automation gives you a dead simple way to do this, so take advantage of it.

□ Integrate with a CRM

A big part of marketing automation's job is to empower the sales team with intelligence on leads and opportunities. For example, what pages on the site a lead looked at, when they returned to the site, what emails they opened etc. None of that is effective without a CRM. So whether using a built-in CRM or syncing to an external one like Salesforce, be sure you make this part of your plan.

□ Publish Long Form Content

Form blocked content like ebooks, videos, case studies and white papers are a pillar of any marketing automation strategy. You need to create content that is of enough value that people are willing to pay for it with their personal information.

□ Learn Photoshop

Writing compelling content is just the first step. That content needs imagery to make it exciting. You need feature images for blog posts, embedded images, ad units, email headers and many other pieces of creative to get the most out of your marketing automation and content marketing efforts. Get a good designer to create some easy to use, layered .psd templates for you and an Adobe Cloud account to update a new piece of creative for each post. You'll save a lot of money this way and your product will look a lot more refined.

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