Marketing Attribution Readiness Checklist

Use this checklist to evaluate how ready you are to purchase a marketing attribution platform.

- [ ] UTM Strategy - Consistent usage of UTM Medium and UTM Source

- [ ] UTM Strategy - Standardized process for creating and implementing UTMs (UTM builder tool of some sort)

- [ ] CRM Campaigns - Syncing all marketing engagement from MAP to CRM Campaigns

- [ ] CRM Campaigns - Standardized Campaign Type values and consistent usage of Campaign Types

- [ ] CRM Campaigns - Standardized Campaign Member Status values and consistent usage of Member Statuses

- [ ] CRM Campaigns - Standardized Responded checkbox usage and consistent usage of Responded checkbox

- [ ] Mirrored Database - All records immediately sync from MAP to CRM with few exceptions (based on required fields or picklist values)

- [ ] Fields & Objects - Using standard fields as much as possible in CRM

- [ ] Fields & Objects - Using standard objects for Leads, Contacts, Accounts, Campaigns and Opportunities

- [ ] Opportunity Contact Roles - Using standard Opportunity Contact Roles to connect Contacts to Opps as opposed to custom field(s)/process(es)

- [ ] Opportunity Contact Roles - OCRs are required on Opportunities

- [ ] Management & Ownership - Have designated an Owner/Admin for marketing attribution platform

If you have any questions about the importance of any of these items, or would like help with best practices, please feel free to reach out to us via any of the channels below.

Contact Us

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