

Time-giving Automation

The Way Back to Meaningful Marketing

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We plan to regularly review and refresh this documentation so be sure to sign up for the [CKearney Consulting newsletter](#) on our website to be notified of updates.

Marketing Automation Scorecard

- | | | |
|--|--------|-------|
| 1. Do you have a marketing/business development process and/or system(s) in place? | Yes | No |
| | 25 pts | 0 pts |
| 2. Do you have your project lifecycle documented and mapped? | Yes | No |
| | 15 pts | 0 pts |
| 3. Do you have multiple marketing software channels and/or platforms? | Yes | No |
| | 15 pts | 0 pts |
| 4. Does your firm have more than one office, business units or division? | Yes | No |
| | 10 pts | 0 pts |
| 5. Do you have recurring tasks that could be automated to save you time and resources helping you prioritize and streamline in an efficient way? | Yes | No |
| | 10 pts | 0 pts |
| 6. Is your leadership interested in measurable marketing objectives and analytics? | Yes | No |
| | 10 pts | 0 pts |
| 7. Would your firm benefit from transparent communication, reminders and clearly defined processes? | Yes | No |
| | 10 pts | 0 pts |
| 8. Could your firm profit from a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead? | Yes | No |
| | 5 pts | 0 pts |

MA Score Results

- 0 – 24 Points :: Prepare for Automation
- 25 – 55 Points :: Automation In Progress
- 56 – 100 Points :: Majority/Fully Automated

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Marketing Automation Resources

56 – 100 points :: Majority/Fully Automated

Congrats, your firm is close to reaching complete marketing automation or the majority of your processes are automated.

At this stage you are rinsing and repeating the stage of marketing automation (MA). You are mainly focused on main and monitor stage.



Keep MA Going

- Align your automation goals with the company objectives
- Monitor your automations regularly
- Review your documentation, processes and mappings
- Celebrate the wins

Keep the Overwhelm Away

- Chip away, one at a time
- Take it slow and steady
- Marketing Automation doesn't happen overnight
- Ask "Wouldn't It Be Great If..."

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