

MarTech Stack Audit Checklist

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40 questions across 5 categories to assess your marketing operations maturity. Score each item 1-4 (Ad Hoc → Intelligent) to identify your highest-impact improvement areas.

1. Tool Inventory & Costs (8 questions)

- Have you listed every marketing tool with its annual license cost?
- Do you know the total number of tools in your stack? (Benchmark: 12-20 average)
- Have you identified tool overlap — multiple tools serving the same function?
- Do you track utilisation rates for each tool? (Benchmark: 60-70% is healthy)
- Have you calculated true TCO including implementation, integration, and maintenance? (2-3x license fees)
- Can you identify 3+ tools that could be consolidated without capability loss?
- Do you have a formal tool evaluation process for new purchases?
- Is there a single owner responsible for the overall tool stack strategy?

2. Integration Health (8 questions)

- Are CRM and marketing automation bidirectionally synced in real-time?
- Do leads flow automatically from capture to CRM without manual steps?
- Are UTM parameters standardised across all campaigns and channels?
- Do analytics platforms receive data from all marketing channels automatically?
- Can you trace a single contact's journey across all touchpoints?
- Are there any 'data black holes' where information gets lost between systems?
- Do you have monitoring in place to detect when integrations break?
- Is field mapping documented between all connected systems?

3. Data Quality & Governance (8 questions)

- Do you have documented naming conventions for campaigns, lists, and assets?
- Is there a regular data deduplication process (monthly or more frequent)?
- Do you measure data completeness? (Benchmark: 85%+ of required fields populated)
- Are there automated validation rules preventing bad data entry?
- Do you have a defined data retention and deletion policy (GDPR compliance)?
- Is there a single source of truth for customer/prospect data?
- Do you regularly audit email deliverability and list hygiene?
- Are lifecycle stages clearly defined with documented criteria for progression?

4. Process & Workflow Maturity (8 questions)

- Are your top 10 marketing workflows documented with clear ownership?
- Do you have lead scoring implemented with defined MQL/SQL thresholds?
- Are there SLAs between marketing and sales for lead follow-up?
- Do you run regular campaign retrospectives (what worked, what didn't)?
- Is there a formal change control process for workflow modifications?
- Can stakeholders self-serve basic reports without ops team involvement?
- Do you have campaign templates that ensure consistent execution?
- Is there a defined escalation path for operational issues?

5. Measurement & Analytics (8 questions)

- Do you track pipeline contribution (% of pipeline influenced by marketing)?
- Can you report on customer acquisition cost by channel?

- Do you measure funnel conversion velocity (time from lead to customer)?
- Is there multi-touch attribution in place (beyond last-click)?
- Do you track campaign ROI at the individual campaign level?
- Are marketing dashboards updated automatically (not manually)?
- Do you benchmark your KPIs against industry standards?
- Is there a regular ops review cadence (weekly/monthly) with defined metrics?

Scoring Guide: Count your checked items per section. 6-8 = Strong (Optimised/Intelligent). 4-5 = Developing (Managed). 1-3 = Needs Attention (Ad Hoc). 0 = Critical Gap.

Sources: Gartner CMO Spend Survey 2025; Forrester B2B Marketing Benchmarks 2025; MarketingOps.com State of the Profession 2025; Adverity Data Quality Report 2025.

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