MarTech Stack Assessment Worksheet

Identify your high-level goals and objectives.
After you've determined the focus, you can self-assess and score your ability to execute your tactics.

Examples of marketing technology platforms:

Examples of goals and tactics:

Goals↓	Tactics↓	CORE	CRM	WEB	MARKETING AUTOMATION	DATA	OTHER/ 3RD PARTY	TOTAL	Actions and Takeaways
		Jack Henry	SFDC	PixelSpoke	Marketo	Finastra	Qualtrics		
		Score							
New Deposit/ Loan Growth	Create look-a-like models to target new HHs	7	3	3	7	10	0	30	Utilize web and CRM to collect prospects and retarget
Customer Satisfaction	Survey customers regularly and collect feedback on web	0	3	7	3	3	7	23	Use core data to identify customers' activities for soliciting feedback

Identify your marketing technology platforms:

Platform Name→

Goals↓	Tactics↓	Score						TOTAL	Actions and Takeaways

SCORING ...

10 = Fully Integrated
7 = Advanced use but still requiring manual manipulation or siloed execution
3 = Basic use not utilizing all features and functions
0 = Not using or N/A

Look at your total scores ...
Which goal and tactic(s) received the lowest?
Which goal and tactic(s) received the highest?
What are you doing differently and how can you close the gap?
Which platforms could you be better utilizing the features and functions?
How can you better integrate with your technology infrastructure?

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The middle columns (CORE through OTHER/3RD PARTY) are labeled **Score**.

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