

The MAP **Evaluation** Checklist

For Marketing Operations teams evaluating a new marketing automation platform— use this as a starting point for vendor conversations, demos, and RFP scoring.

DATA ARCHITECTURE & CRM INTEGRATION

- Does the platform support native integration with your CRM — without middleware or custom development?
- Can you control exactly which fields sync, in which direction, and when?
- Is sync triggered explicitly or does it run on a batch schedule regardless of need?
- What is the sync throughput, and is there a known backlog issue?
- How does the platform handle duplicate records?

WORKFLOW & AUTOMATION LOGIC

- Can you build complex, multi-branch workflows in a single visual canvas?
- Are there node limits, step limits, or canvas size restrictions?
- Does the platform support real-time triggers, or are actions batch-processed?
- Can you edit a live workflow without rebuilding it from scratch?
- Does automation logic require scripting or developer support for advanced use cases?

AI & INTELLIGENT AUTOMATION

- Does the platform have native AI features, or is AI functionality dependent on third-party integrations?
- Can AI assist with content creation — email copy, subject lines, or campaign briefs — directly inside the platform?
- Does the platform support AI-driven segmentation or predictive scoring?
- Is the AI roadmap clearly communicated and actively being built — or is it vaporware?
- How is customer data used to train AI models, and what are the data privacy implications?

The MAP **Evaluation** Checklist



SEGMENTATION & LEAD SCORING

- Can you filter on any field in your database without workarounds?
- Are segments queried on-demand, or do they run on a schedule regardless of use?
- Does the platform support multiple simultaneous scoring models?
- Does lead scoring live inside the scoring object, or does it require a separate workflow to calculate?
- Can you set score decay and threshold-based triggers natively?



EMAIL & ASSET BUILDING

- Is there a consistent drag-and-drop builder across emails, forms, landing pages, and CTAs?
- Does the email builder perform reliably at scale – no lag, forced refreshes, or known bugs?
- Can you build forms with conditional logic without custom code?
- Does the platform support localization and multi-language content natively?
- Is there a versioning and rollback system for assets?



GOVERNANCE & ADMINISTRATION

- Does the platform support role-based access controls at the workspace level?
- Is there an approvals workflow for assets before they go live?
- Can you set global communication limits by channel and time period?
- Is there visibility into sync errors and send suppressions on the contact record?
- How are transactional emails handled relative to communication limits?



The MAP **Evaluation** Checklist



REPORTING & ATTRIBUTION

- Can non-technical users pull campaign performance reports without analyst support?
- Does the platform surface attribution data at the asset, folder, and workspace level?
- Are UTM parameters tracked and reportable natively?
- Can reports be accessed and filtered without navigating through multiple views?



MIGRATION & IMPLEMENTATION

- What data can be migrated from your current platform – contacts, assets, history, scoring?
- What is the typical implementation timeline from contract to go-live?
- Who owns the migration – vendor, partner, or customer?
- Does the vendor have a certified partner ecosystem for enterprise migrations?
- Is parallel running supported during the transition period?



PRICING & COMMERCIAL TERMS

- Is pricing based on contacts, features, or seats – and is it published transparently?
- Are there hidden add-ons or feature tiers not included in the base price?
- Does renewal pricing increase automatically year over year, or is it tied to actual database size?
- Is there a free trial or sandbox environment available before contract signing?
- What are the support SLAs during and after implementation?

