HOW TO ADOPT MARKETING AUTOMATION
step-by-step

INITIATION STAGE

Have you defined your customers' journey?

Yes — No → Build your customers' journey

Have you defined your strategy for each stage of the customers' journey?

Yes — No → Define the strategy

Do you know how MA supports your strategy?

Yes — No → Define your need for MA

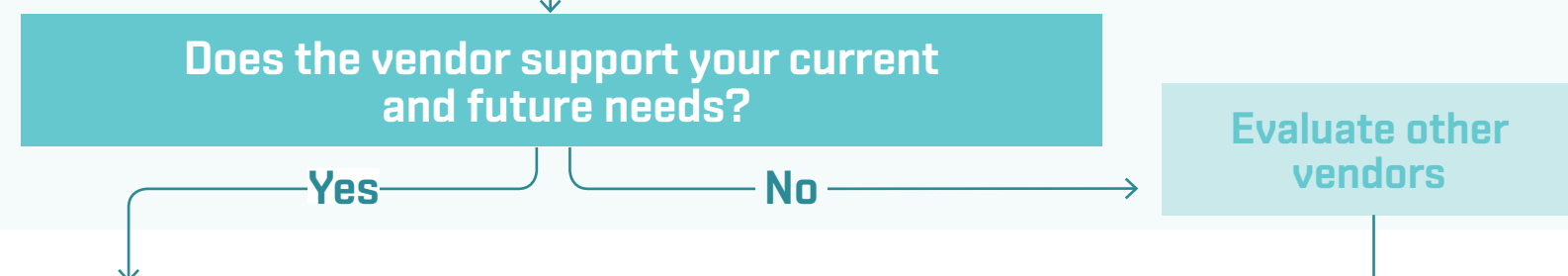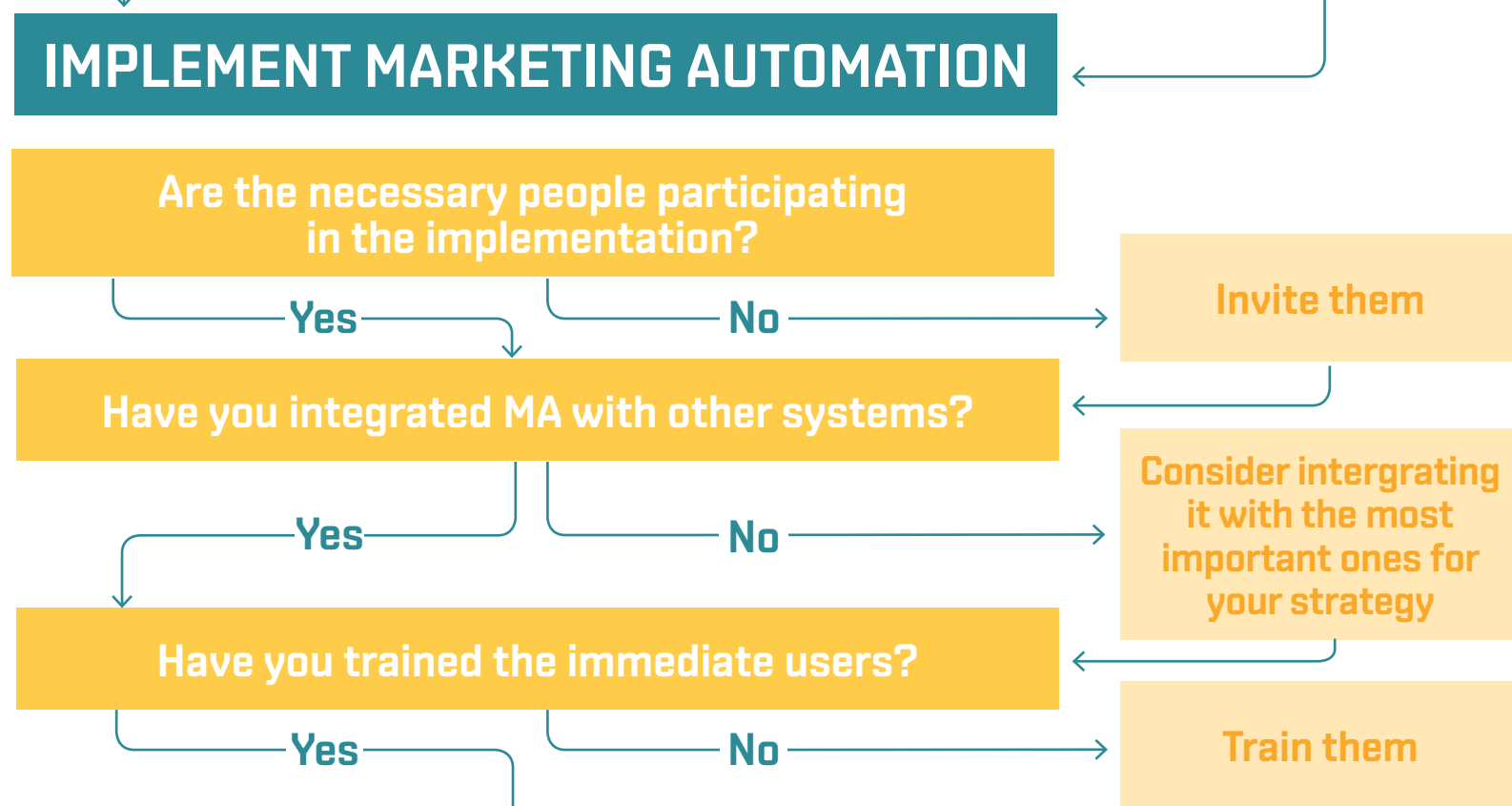## BUILD THE BUSINESS CASE
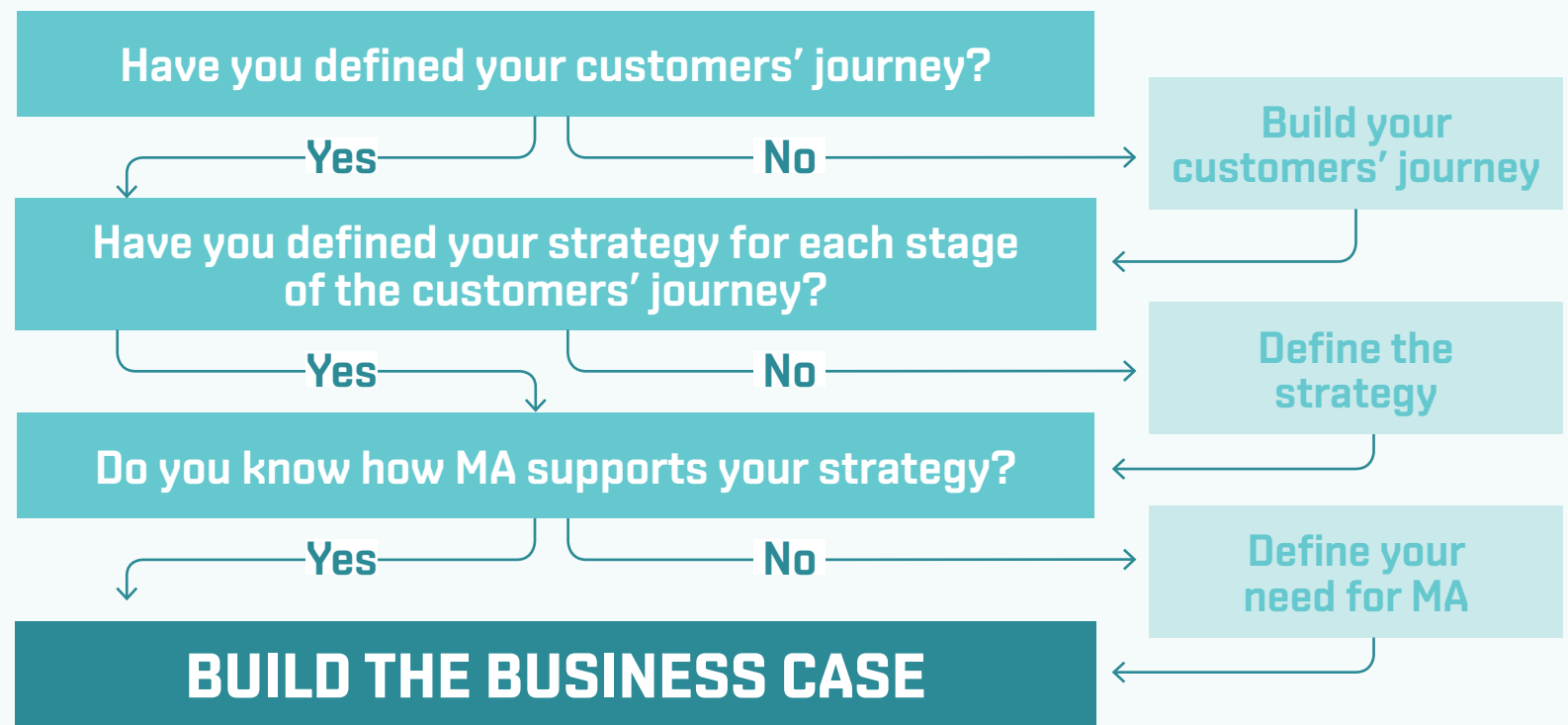
- Which are the objectives?
- What is your strategy to achieve the objectives?
- What resources do you need?
- Who participates and what are their responsibilities?

EVALUATE AND SELECT THE VENDOR

Does the vendor support your current and future needs?

Yes — No → Evaluate other vendors

IMPLEMENT MARKETING AUTOMATION

IMPLEMENTATION STAGE

Are the necessary people participating in the implementation?

Yes — No → Invite them

Have you integrated MA with other systems?

Yes — No → Consider intergrating it with the most important ones for your strategy

Have you trained the immediate users?

Yes — No → Train them

POST-IMPLEMENTATION STAGE

READY TO USE MARKETING AUTOMATION

- Continue developing it
- Integrate it with other needed platforms
- Define how to train other peoplev
- Consider assigning a person to administrate the platform