



MARKETING AUTOMATION SELF-ASSESSMENT

The 6-Pillar Marketing Automation Review Framework

The exact diagnostic our strategists run on enterprise and DTC brands, turned into a scorecard you can complete in 20 minutes to find revenue opportunities from your email and SMS programs.



A working framework from Verndale - Boston - Philadelphia - Los Angeles - Montréal - Quito

Built for 7-figure enterprise and DTC brands.

Do not overhaul your marketing automation until you know where you stand

Email drives between \$36 and \$38 for every dollar spent, the highest ROI of any digital channel. Yet most brands underfund it and quietly lose revenue to problems they cannot see.

We frequently meet brands eager to launch new AI campaigns or migrate platforms while their foundational data is broken. Ripping and replacing a marketing automation strategy without first baselining performance creates real revenue risk. This framework removes that risk. It walks you through the same six pillars we evaluate in a full Marketing Automation Review, so you can score your own program honestly before committing to a single change.

How to use this scorecard. Read each pillar, then rate your program from 1 (not in place) to 5 (best in class) using the five option cards on each page. Each card explains exactly what that score means. Total your score on page 9 and read your band. The lowest-scoring pillars are where your revenue is most likely leaking right now.

0.3%

The spam ceiling

Gmail and Yahoo block senders above a 0.3% complaint rate. Most brands never check theirs.

30x

The automation gap

Automated flows return 30x more than one-off campaigns, and are usually set once and forgotten.

258%

The personalization lift

Dynamic content can raise campaign ROI by 258%. Batch and blast leaves it on the table.

Sources. Email ROI: Litmus, State of Email. Spam complaint threshold: Gmail and Yahoo 2024 sender requirements. Automation multiple: Klaviyo benchmark data. Dynamic content lift of 258%: Emailmonday, 2026.



SECURE THE FOUNDATION

Database Health & Deliverability

Your database health dictates your inbox placement. If your list quality is poor or your authentication is incomplete, none of your other work matters, because the revenue never reaches the inbox.

WHAT WE REVIEW

- ✓ Spam trap analysis: pristine, recycled, and typo traps
- ✓ Engagement decay tracking and a defined sunset policy
- ✓ SPF, DKIM, and DMARC fully authenticated
- ✓ Spam complaint rate held below the 0.10% safe threshold

SCORE THIS PILLAR

1 = not in place - 5 = best in class. Mark the box that fits you today.

1

No hygiene or auth

You never clean your list and SPF, DKIM, and DMARC are not set up.

2

Basic only

Authentication is partly set up, but you rarely remove dead or inactive subscribers.

3

Some monitoring

You clean the list occasionally and glance at spam rates now and then.

4

Active management

You suppress unengaged contacts on a schedule and watch deliverability regularly.

5

Fully optimized

Authentication is complete, complaint rate stays under 0.10%, and a sunset policy runs automatically.

BENCHMARK Complaint rate under 0.10%, full SPF/DKIM/DMARC authentication, and a documented sunset policy.



BUILD THE ASSET YOU OWN

Subscriber Acquisition & Data Capture

With third-party cookies deprecated, how you capture zero-party and first-party data is now a permanent competitive advantage. Every entry point on your site is a chance to convert anonymous traffic into a known, consented subscriber.

WHAT WE REVIEW

- ✓ Optimized pop-ups, embedded forms, and a working preference center
- ✓ Acquisition and conversion rate tracked by source
- ✓ A paid-to-owned pipeline that turns ad spend into subscribers
- ✓ Progressive profiling that enriches profiles over time

SCORE THIS PILLAR

1 = not in place - 5 = best in class. Mark the box that fits you today.

1 Single signup form One generic subscribe box and nothing else.	2 A few capture points A pop-up and a footer form, but neither is optimized for conversion.	3 Multi-channel Forms across the site, SMS keyword opt-ins, and social sign-ups are all live.	4 Source-tracked You know which channels bring your highest-converting subscribers.	5 Enriched & optimized Capture everywhere, tracked by source, with profiles that grow richer over time.
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BENCHMARK Capture on every owned touchpoint, conversion measured by source, and progressive enrichment in place.



MEASURE WHAT PAYS

Campaign Performance & Revenue KPIs

Open rates are inflated by Apple Mail Privacy Protection and no longer tell the truth. Brands winning in 2026 measure revenue, not vanity metrics, and they test relentlessly.

WHAT WE REVIEW

- ✓ Click-to-Revenue Ratio and Predictive Engagement Scores tracked
- ✓ Authentication verified against current sender guidelines
- ✓ A consistent A/B and multivariate testing program
- ✓ Reporting tied to business outcomes, not channel vanity

SCORE THIS PILLAR 1 = not in place - 5 = best in class. Mark the box that fits you today.

1 Opens only You judge whether an email worked by its open rate.	2 Opens & clicks You watch opens and clicks, but cannot tie sends to revenue.	3 Revenue tracked You can see the dollars each campaign generates.	4 Testing in place You routinely A/B test subject lines, creative, and send times.	5 Revenue KPIs + testing Every send is judged by revenue and improved through constant testing.
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BENCHMARK Continuous testing increases email ROI by 83%. Revenue-linked KPIs are now the standard.



MAKE REVENUE WHILE YOU SLEEP

Automation & Lifecycle Architecture

Automation is where your program becomes a true revenue engine. Flows work around the clock and return 30x more than batch sends, but they are usually built once and never revisited against benchmarks.

WHAT WE REVIEW

- ✓ Core flows live: Welcome, Abandoned Cart, Post-Purchase, Winback
- ✓ The full customer journey mapped from first touch to advocacy
- ✓ Triggered, behavior-based journeys, not static sequences
- ✓ Each flow measured against top-performer benchmarks

SCORE THIS PILLAR

1 = not in place - 5 = best in class. Mark the box that fits you today.

1 No flows You only send manual, one-off campaigns.	2 Welcome only A welcome email exists; nothing else is automated.	3 Core flows live Welcome, abandoned cart, post-purchase, and winback are all running.	4 Optimized flows Those flows are tested and tuned, not set-and-forget.	5 Full lifecycle Every stage is automated and measured against top-performer numbers.
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BENCHMARK Top 10% Abandoned Cart flows earn \$28.89 per recipient. Automated flows return 30x vs. one-off sends.



TREAT EVERY SUBSCRIBER AS ONE

Deep Segmentation & Personalization

Batch and blast is dead. The brands winning in 2026 layer behavioral signals, purchase patterns, and predictive scoring on top of demographics, then personalize every element of the message.

WHAT WE REVIEW

- ✓ Advanced behavioral segmentation by purchase and lifecycle stage
- ✓ Predictive Engagement Scoring to prioritize high-intent audiences
- ✓ Dynamic content blocks adapting to each subscriber
- ✓ RFM modeling for best customers, at-risk, and winback

SCORE THIS PILLAR

1 = not in place - 5 = best in class. Mark the box that fits you today.

1 One list, one message Everyone on your list gets the same email.	2 Basic segments You split the list by one or two simple rules, like buyers vs. non-buyers.	3 Behavioral segments You target by what people buy and how they engage.	4 Dynamic content The content inside an email changes based on the person receiving it.	5 Predictive + RFM AI scoring and Recency/Frequency/Monetary models decide who gets what.
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BENCHMARK Dynamic content raises ROI by up to 258%. AI-driven segmentation can lift CTR by up to 40%.



KNOW HOW YOU STACK UP

Competitive & Industry Benchmarking

You cannot win the inbox in a vacuum. Understanding how competitors onboard, what they send, and how often, shows you exactly where to take share.

WHAT WE REVIEW

- ✓ You subscribe to and study competitor email and SMS journeys
- ✓ You map competitor send cadence, depth, and creative quality
- ✓ Your engagement and conversion rates benchmarked to category
- ✓ Insights feed an active plan to win share of inbox

SCORE THIS PILLAR 1 = not in place - 5 = best in class. Mark the box that fits you today.

1 No view You never look at what competitors are sending.	2 Ad hoc glances You notice a competitor email once in a while, with no record kept.	3 Some tracking You subscribe to a few competitors and skim their emails.	4 Regular benchmarking You routinely compare your metrics against category standards.	5 Structured intelligence You systematically track competitor cadence, offers, and onboarding, and feed it into your plan.
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BENCHMARK Ongoing competitive intelligence, with your metrics mapped against current category standards.

Add your six pillar scores

Each pillar is scored from 1 to 5, for a maximum of 30. Your lowest-scoring pillars are the fastest path to recovered revenue. Write your total in the box below, then read your band.

Your total Marketing Automation Score

Add Pillars 1 through 6 (each scored 1-5)

/ 30

6-9

CRITICAL

Rebuild the foundation

Your program is likely losing revenue daily. A structured review surfaces quick wins to pursue now.

10-16

AT RISK

Stabilize first

Deliverability and lifecycle gaps cost real money monthly. Fix the foundation before scaling spend.

17-23

BUILDING

Close the gaps

Basics are in place, but leaks remain in automation, segmentation, or measurement. Targeted fixes pay back fast.

24-30

LEADING

Optimize and scale

A strong foundation. Now push advanced personalization, predictive analytics, and omnichannel orchestration.

Five quick wins for your first 30 days

Regardless of your score, these five moves usually recover revenue fast and require no platform migration.

1

Verify your authentication

Confirm SPF, DKIM, and DMARC are fully configured. This is the most common silent cause of lost revenue.

2

Clean your list and set a sunset policy

Remove spam traps and suppress chronically unengaged subscribers to protect sender reputation.

3

Walk your core flows for broken triggers

Move through Welcome, Abandoned Cart, Post-Purchase, and Winback as a real customer. Fix anything that does not fire.

4

Switch your reporting to revenue

Replace open rate as your headline metric with Click-to-Revenue. Decisions change the moment you measure what pays.

5

Add one dynamic content block

Personalize a single high-traffic campaign with dynamic content and measure the lift before rolling it out.



THE NEXT STEP

Want us to run the full review for you?

Your complimentary Marketing Automation Review applies this exact framework to your live program across email, SMS, push, and in-app. We deliver a scored report, a prioritized gap analysis, 30-day quick wins, and a strategic roadmap. It takes 4 to 6 weeks and needs only read-only access.

Request Your Complimentary Review

verndale.com/offers/marketing-automation-assessment

Prefer to talk it through first? Reach James directly:

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