# How to Audit your Way to a Best-in-Class MAP

Kyle Sosa & Amanda Thomas

ETUMOS

How to Audit your Way to a Best-in-Class MAP

# Agenda Slide

- What is a MAP Audit?
- Why & when should you take on a MAP Audit?
- What is included in a MAP Audit?
- What should you do with your MAP Audit?

How to Audit your Way to a Best-in-Class MAP

# Your Speakers

**Kyle Sosa**

Marketing Operations
Consultant
Lakewood, CO
LinkedIn

**Amanda Thomas**

Sr. Marketing Operations
Consultant
Houston, TX
LinkedIn

ETUMOS

# 01 What is a MAP Audit?

# What is a MAP Audit?

- An assessment of how well your current MAP is set up
- End goals:
  - More visibility into your MAP operations
  - A plan of attack to remediate broken and/or missing components
- Designed to work with all MAPs in the industry
  - General template, but can be customized
- Etumos Level of Effort: 20-25 hours
  - Roadmap w/ recommendations included

# 02 Why & when should you take on a MAP Audit?

How to Audit your Way to a Best-in-Class MAP

# Why take on a MAP Audit?

## Make the most of your MAP investment

Get to the point where your MAP has a clear rhyme and reason, runs with minimal to no errors, and is doing everything you need it to do. Your MAP should work for you, not the other way around.

## Identify opportunities to cut costs

Ensure you are only paying for what you need in your MAP instance. An unused add-on you purchased at renewal? Bye! Storage costs for untouched records? Adios!

## Eliminate your security risks

A chance to uncover the skeletons in the closet in your instance and remove access completely or adjust permissions for each individual user.

## Eliminate your tech debt

Clean up old assets and processes that haven't been used in years, which also enables you to transition to a different MAP, should you need to, much quicker.

ETUMOS

# When should you take on a MAP Audit?

## First joining a company

Get a quick win as a new employee and build credibility across your department. This is a great way to show initiative and bring fresh ideas to the table.

## Planning your team's OKRs

It can be difficult to find time during the FY when it feels like every team needs your attention. Highlighting the importance of an audit at the beginning of the year can be that opportunity.

## Interning for a company

Whether you are interning, or have an intern working for you, this is a great opportunity to give the next generation of MOPs professionals real-world experience.

# 03 What's included in a MAP Audit?

How to Audit your Way to a Best-in-Class MAP

# Scorecard Preview

| Sections | Score | Review Status |
|---|---|---|
| Account and Billing | 3/3 - Great | Not Started |
| Permission Sets/Roles | 2/3 - Needs Review | Not Started |
| Users | 1/3 - Broken | Not Started |
| Tracking Code | | Not Started |
| Connected Apps/Integrations | | Not Started |
| Salesforce Connected App Settings | | Not Started |
| Email Discovery | | Not Started |
| Email Configuration | | Not Started |
| Marketing Emails | | Not Started |
| Privacy and Consent | | Not Started |
| Landing Pages | | Not Started |
| Forms | | Not Started |
| Lists | | Not Started |
| Naming Conventions | | Not Started |
| Domains and URLs | | Not Started |
| Workflows | | Not Started |
| Scoring | | Not Started |
| Property Audit | | Not Started |
| Database Health | | Not Started |
| Reports | | Not Started |

# Scorecard Preview (cont.)

| Name | On/Off | Description | Type/Category | Total Enrolled | 7 Day Enrollment | Records on Hold | Last Updated | Created | Review Status | Action Item | Notes |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |
| | | | | | | | | | Not Started | | |

Keep

Delete

# Scorecard Preview (cont.)

| **Instructions:** Export all your emails (operational and non-operational) into this tab with the information tied to each column. Some platforms may not export each column presented in this tab, so adjust the columns accordingly. Once exported, review the statistics in each column to find outliers and begin to form hypotheses on what went well and/or what didn't go well. Write the hypotheses in the next section and then work with your team to begin testing in future email sends. | | | | **Hypothesis 1:**<br>**Hypothesis 2:**<br>**Hypothesis 3:** | |
|---|---|---|---|---|---|
| **Type** | **Email Name** | **Created Date** | **Created By** | **From Name** | **From Address** |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

# Let’s jump in!

# Key Components of the Audit

## Prioritize your efforts

Everything will appear as urgent on the surface, but not everything actually is. Identify the impact to the business and work backwards from there.

## Identify your stakeholders

A RACI chart is a great idea here. What you're looking to do likely doesn't *just* affect you, and nobody likes last minute surprises. The earlier you bring your stakeholders into the picture the easier the rest of the process is.

## Don't just stop at instance statistics

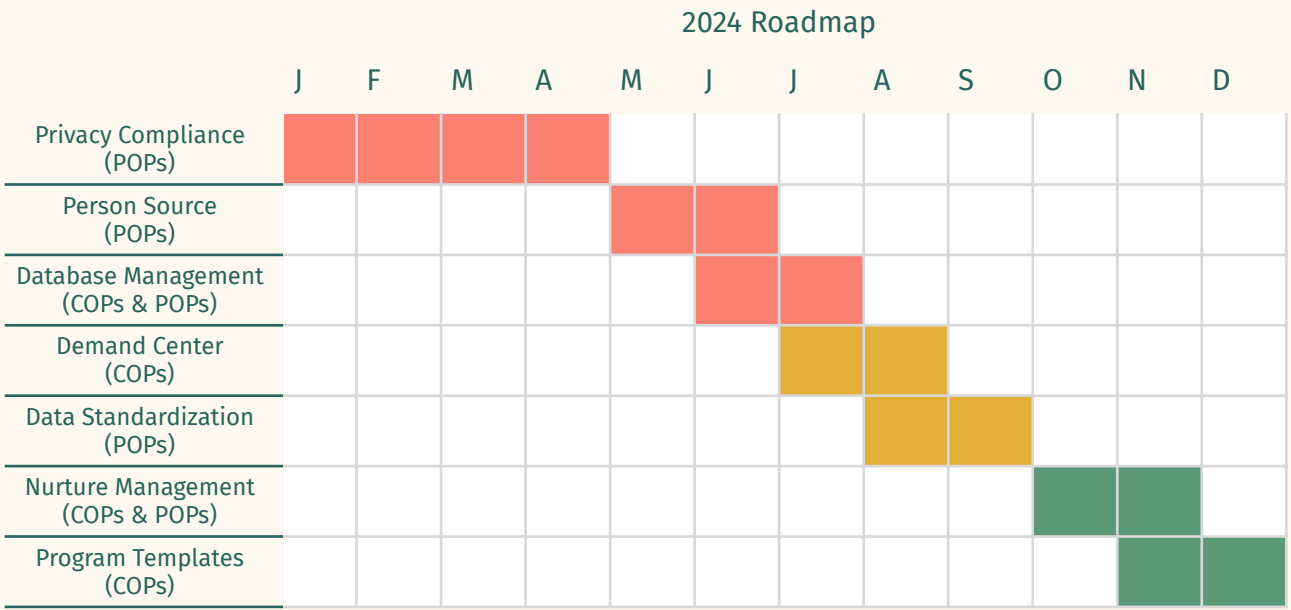
This doesn't tell the whole story of how your instance, and your team, is performing. The whole point is to get as much as you can out of your investment in the platform.

# 04 What do you do with your MAP Audit?

# Next Steps

- Map out your projects for the next 6-12 months
  - Prioritize based on level of effort and business impact
- Set aside team each week to tackle the projects
  - Rome wasn't built in a day
- Meet with your stakeholders and ensure timelines align
  - Things can change, but better to do this sooner rather than later

# Example Project Timeline



# Example Project Tracker

| Project | Priority | Task Owner | Estimated Hours | Start Date | Expected Finish Date | Progress | Status | % Complete | Project Owner | Project Goal/Business Impact | Notes / Comments |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Ad-Hoc Tasks** | 1 - High | | 0.00 | | | Not Started | Evergreen | | | | |
| Ad-Hoc Task 1 | | | | | | | | | | | |
| Ad-Hoc Task 2 | | | | | | | | | | | |
| Ad-Hoc Task 3 | | | | | | | | | | | |
| Ad-Hoc Task 4 | | | | | | | | | | | |
| Ad-Hoc Task 5 | | | | | | | | | | | |
| **Strategic Project** | 1 - High | | 0.00 | | | Not Started | On Pace | 0% | | | |
| Project Task 1 | | | | | | | | | | | |
| Project Task 2 | | | | | | | | | | | |
| Project Task 3 | | | | | | | | | | | |
| Project Task 4 | | | | | | | | | | | |
| Project Task 5 | | | | | | | | | | | |
| **Strategic Project** | 1 - High | | 0.00 | | | Not Started | On Pace | 0% | | | |
| Project Task 1 | | | | | | | | | | | |
| Project Task 2 | | | | | | | | | | | |
| Project Task 3 | | | | | | | | | | | |
| Project Task 4 | | | | | | | | | | | |
| Project Task 5 | | | | | | | | | | | |
| **Strategic Project** | 2 - Medium | | 0.00 | | | Not Started | On Pace | 0% | | | |
| Project Task 1 | | | | | | | | | | | |
| Project Task 2 | | | | | | | | | | | |
| Project Task 3 | | | | | | | | | | | |
| Project Task 4 | | | | | | | | | | | |
| Project Task 5 | | | | | | | | | | | |

# Key Takeaways

- Audits are a must if you oversee a MAP at your company
  - Main goal: Own a best-in-class MAP instance
- MAP audits don’t just benefit your immediate team, but your entire company
  - Cutting costs, eliminating security risks, clear & documented processes
- Identify your high, medium, and low priority items
  - Prioritization is a must; one step at a time
- Anybody can do it, especially you!
  - A great way to make immediate impact

# Q&A

# Additional Slide Options Remove from Final Presentation

[WEBINAR NAME]

# Resources

- Resource One
- Resource Two
- Resource Three

[WEBINAR NAME]

# About Etumos

We are Marketing Operations experts focused on helping our clients activate the full potential of their marketing investments.

- Marketing Platform Consulting
- Marketing Intelligence
- System Implementations & Migrations
- Centralized Campaign Management
- And more!

Contact us to learn more about how we can help your organization!

# TITLE

Leverage agile frameworks to provide a robust synopsis for high level overviews. Iterative approaches to corporate strategy foster collaborative thinking to further the overall value proposition. Organically grow the holistic world view of disruptive innovation via workplace diversity and empowerment.

Bring to the table win-win survival strategies to ensure proactive domination. At the end of the day, going forward, a new normal that has evolved from generation X is on the runway heading towards a streamlined cloud solution. User generated content in real-time will have multiple touchpoints for offshoring.

# 01

# Section Header

How many chucks does a wood-chuck chuck, if a wood chuck, could chuck wood?

# 01 Section Header

How many chucks does a wood-chuck chuck, if a wood chuck, could chuck wood?

01

# Section Header

ETUMOS

LAYOUT EXAMPLES

# Timeline

LAYOUT EXAMPLES

# 4 Column Layout

## Insert Title

Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vissolet efficiendi

## Insert Title

Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vis, solet efficiendi

## Insert Title

Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vissolet efficiendi

## Insert Title

Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vis, solet efficiendi

LAYOUT EXAMPLES

# Logo Holders (8)

LAYOUT EXAMPLE

# Phase rollout (2 phases)

| Phase I | |
|---|---|
| Phase description (e.g New molecular entities) | |
| Column heading | Column heading |
| Item 1 | Item 1 |
| Item 2 | Item 2 |
| Item 3 | Item 3 |
| Item 4 | Item 4 |
| Item 5 | Item 5 |
| Item 6 etc. | Item 6 |
| | |
| | |
| To add/remove rows, click the table and go to the Layout tab. | |

| Phase II | |
|---|---|
| Phase description | |
| Column heading | Column heading |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Group 1 Group 2 Group 3 Group 4

ETUMOS

LAYOUT EXAMPLE

# Phase rollout (3 phases)

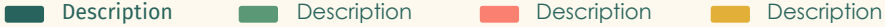
| Phase I | | Phase II | | Phase III | |
|---|---|---|---|---|---|
| Phase description (e.g New molecular entities) | | Phase description | | Phase description | |
| Column heading | Column heading | Column heading | Column heading | Column heading | Column heading |
| Item 1 | Item 1 | | | | |
| Item 2 | Item 2 | | | | |
| Item 3 | Item 3 | | | | |
| Item 4 | Item 4 | | | | |
| Item 5 | Item 5 | | | | |
| Item 6 etc. | Item 6 | | | | |
| | | | | | |
| | | | | | |
| To add/remove rows, click the table and go to the Layout tab. | | | | | |

Group 1 Group 2 Group 3 Group 4

ETUMOS

LAYOUT EXAMPLES

# Timeline




| Activity | Progress | January | | | | February | | | | March | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Phase | | | | | | | | | | | | | |
| Task description | 100% | | | | | | | | | | | | |
| Task description | 50% | | | | | | | | | | | | |
| Task description | 25% | | | | | | | | | | | | |
| Task description | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Phase | | | | | | | | | | | | | |
| Task description | 100% | | | | | | | | | | | | |
| Task description | 50% | | | | | | | | | | | | |
| Task description | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

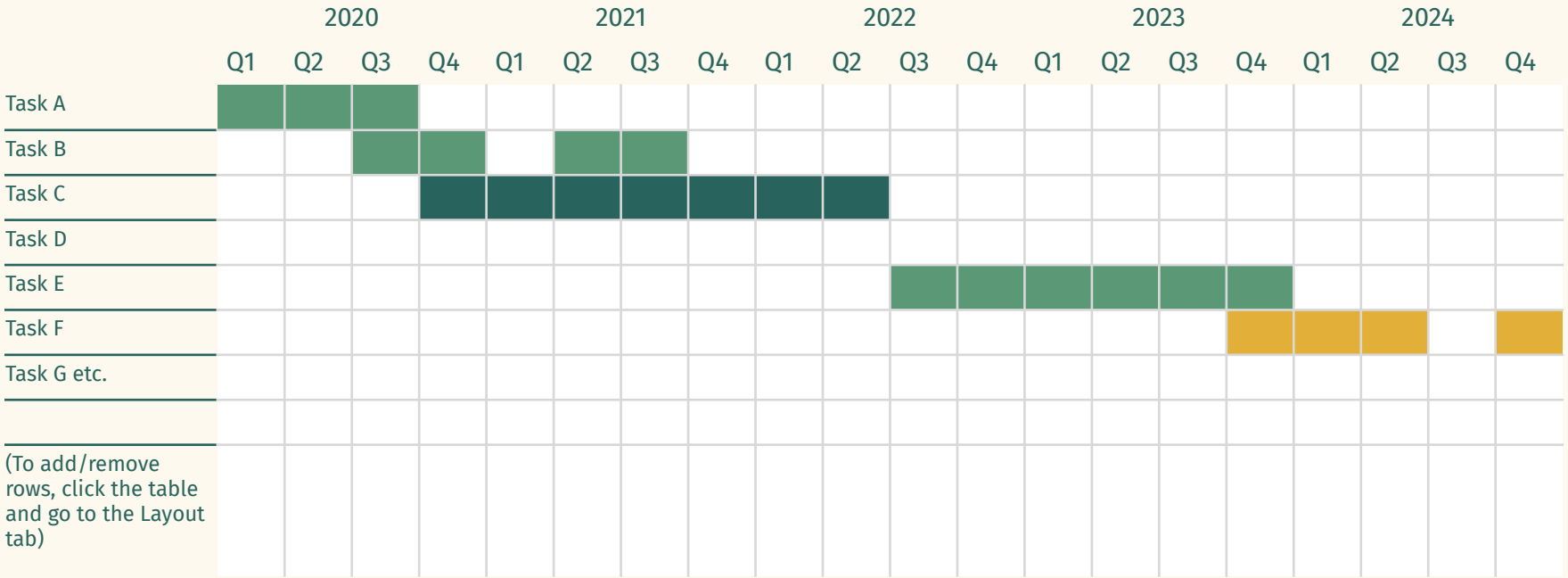
# Table

Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vis, solet efficiendi tamquam his et, homero tamquam suscipiantur cu usu. Ut nam solet inimicus expetendis, atqui aeterno molestiae mel eu, option dolorem forensibus et quo.

| | Subsection | |
|---|---|---|
| | Subsection | |
| Attributes | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

LAYOUT EXAMPLE

# Gantt Chart




ETUMOS

LAYOUT EXAMPLE

# Stats & Data Points

Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vis, solet efficiendi tamquam his et, homero tamquam suscipiantur cu usu. Ut nam solet inimicus expetendis, atqui aeterno molestiae mel eu, option dolorem forensibus et quo.

**10**

### Data Title

Lorem ipsum dolor sit amet,

**10**

### Data Title

Lorem ipsum dolor sit amet,

**10**

### Data Title

Lorem ipsum dolor sit amet,

**10**

### Data Title

Lorem ipsum dolor sit amet,

LAYOUT EXAMPLE

# Stats & Data Points

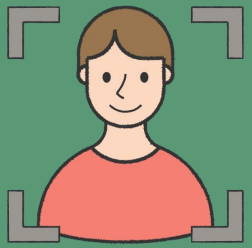
Est ei movet gloriatur deseruisse. No vel integrate adolescens deterruisset. Persius legimus appareat sed cu, eu tollit putant propriae vis, solet efficiendi tamquam his et, homero tamquam suscipiantur cu usu. Ut nam solet inimicus expetendis, atqui aeterno molestiae mel eu, option dolorem forensibus et quo.

## Data Title

Lorem ipsum dolor sit amet, consectetur adipiscing elit donec.

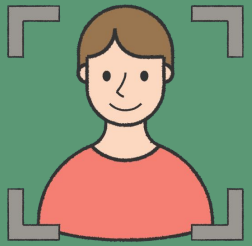
## Data Title

Lorem ipsum dolor sit amet, consectetur adipiscing elit donec.



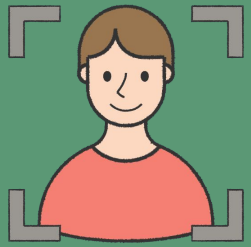
**Boba Fet**
Bountyhunter
*Mandalorian Order*

Boba has a bio. He writes it here. It includes his most notable bounties. Go Boba, go. Beware the Sarlacc.



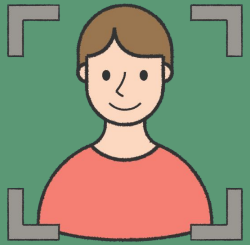
**Boba Fet**
Bountyhunter
*Mandalorian Order*

Boba has a bio. He writes it here. It includes his most notable bounties. Go Boba, go. Beware the Sarlacc.



**Boba Fet**
Bountyhunter
*Mandalorian Order*

Boba has a bio. He writes it here. It includes his most notable bounties. Go Boba, go. Beware the Sarlacc.



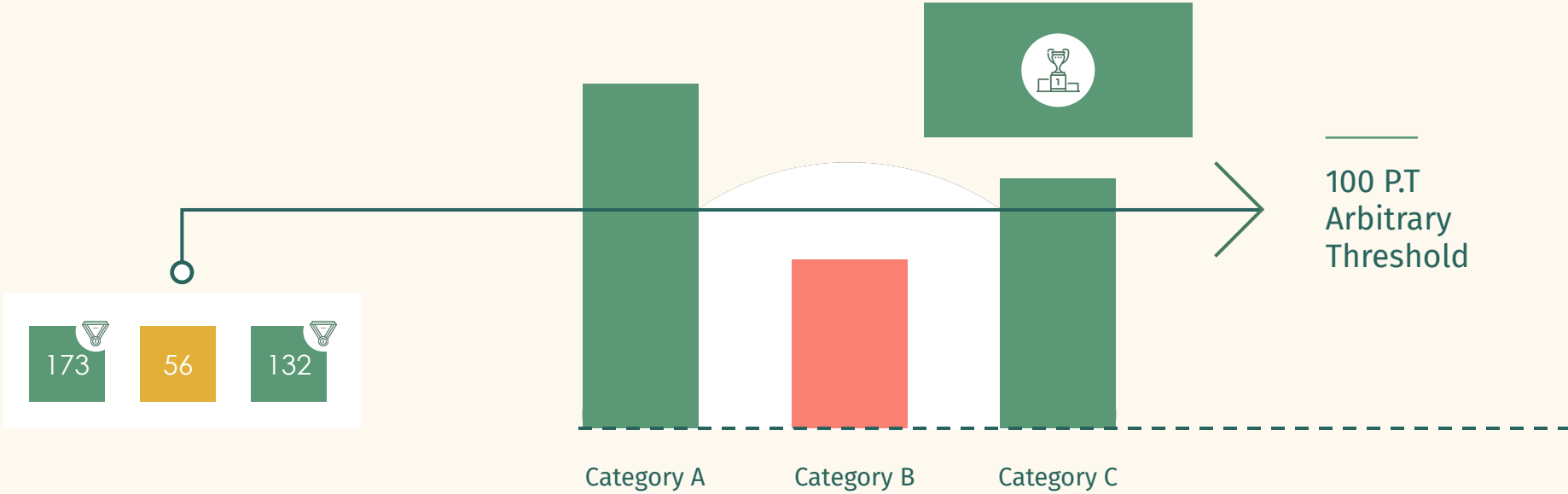
**Boba Fet**
Bountyhunter
*Mandalorian Order*

Boba has a bio. He writes it here. It includes his most notable bounties. Go Boba, go. Beware the Sarlacc.

ETUMOS

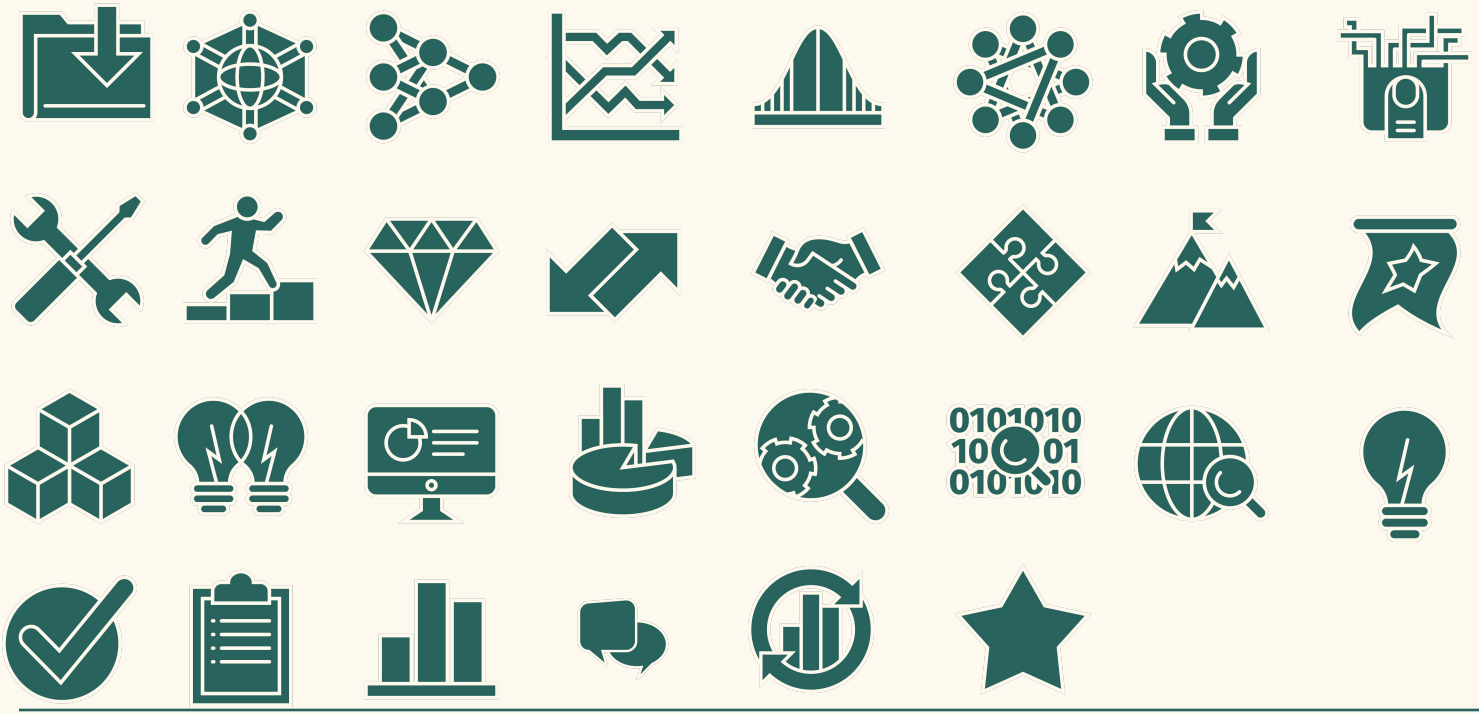
PROFILING PROBLEMS

# Math into Action




ETUMOS

# Simple Solid Icons

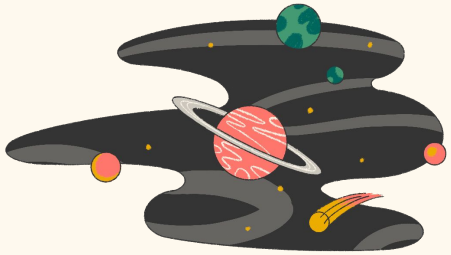


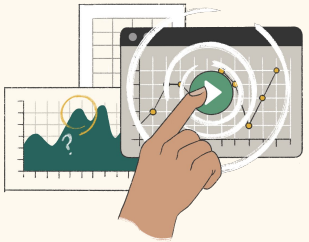

ETUMOS

# Detailed Icons

# Simple Colored Icons

# Illustrations





ETUMOS

# Logos

ETUMOS

ETUMOS

ETUMOS

ETUMOS

ETUMOS
MARKETING TECHNOLOGY CONSULTING

ETUMOS
MARKETING TECHNOLOGY CONSULTING

ETUMOS
MARKETING TECHNOLOGY CONSULTING

ETUMOS

ETUMOS

ETUMOS