

Is your Salesforce marketing working as hard as it should?

A 10-minute quarterly review

Check any symptom the customer recognises. Three or more in one area usually points to a structural problem. The score on the back shows where the gaps are.

1 Strategy and intent

- ☐ Undefined goals for what Salesforce marketing should achieve for the business
- ☐ Calendar-driven campaigns instead of behaviour- or goal-driven planning
- ☐ Unlinked lead scoring and qualification logic between marketing and sales

2 Sends and campaigns

- ☐ Broad campaign sends targeting the full list, or close to it
- ☐ Schedule-based send frequency rather than customer-behavior triggers
- ☐ Plateaued or declining engagement rates

3 Journeys and automation

- ☐ Static journeys left unchanged since the initial go-live
- ☐ Automated campaigns are missing or limited to a single channel
- ☐ Minimal personalisation or dynamic content used

4 Data and segmentation

- ☐ Manual data entry is still the source of truth instead of Salesforce
- ☐ Friction in data flows from other systems into Salesforce
- ☐ Manual or irregular processes for cleaning and maintaining contact data

5 Reporting and ROI

- ☐ Difficulty tracking marketing's direct contribution to revenue
- ☐ Manual spreadsheet work required to build reports
- ☐ Limited visibility into which campaigns drive the best results

6 AI and platform readiness

- ☐ Unsure where to start with AI-driven features or getting unsatisfactory AI results
- ☐ Roadblocks to scaling personalisation efforts
- ☐ Time spent on manual tasks the platform should handle

ADD UP THE TICKS

Where does your score land?

Total symptoms

/ 18

Low

1-3

A couple of isolated symptoms, not yet a pattern, so nothing is compounding yet. Worth flagging with us if the same box comes up again at the next review.

Mid

4-8 or 3+ ticks
in any one
category

The gaps are still contained to a category or two, not yet spread across the platform. Contained like this, they're easier to fix now, before they start compounding into each other. A health check with us maps what's linked and what to address first.

High

9+

The gaps have spread across multiple categories rather than staying contained. This is the point where your Salesforce setup stops working as hard as it should, sometimes underperforming, sometimes unreliable. A discovery session with us shows where to start and how to get things running smoothly.

Ready to get more from Salesforce?

Let's talk about how we can support your team.

Let's talk →