

MARTECH STACK AUDIT CHECKLIST

EVALUATE, OPTIMIZE & SCALE YOUR
MARKETING TECHNOLOGY ECOSYSTEM



1 INVENTORY YOUR CURRENT MARTECH STACK



PLATFORM DOCUMENTATION

- Create a complete list of all tools
- Document platform owners
- Record annual software costs
- List contract renewal dates
- Identify active users by platform
- Document all current integrations
- Identify primary use cases for each tool

CATEGORIES TO REVIEW

- CRM platforms
- Marketing automation systems
- Analytics and reporting tools
- Sales engagement platforms
- Customer support tools
- CMS and website platforms
- AI and automation tools
- Data enrichment solutions
- Advertising platforms
- Project management systems

2 EVALUATE BUSINESS ALIGNMENT



STRATEGIC FIT

- Does each tool support current business goals?
- Does the platform improve operational efficiency?
- Is the tool scalable for future growth?
- Does the platform contribute measurable business value?
- Does the system align with current GTM strategies?
- Are teams actively relying on the platform?

COST VS. VALUE

- Are you paying for unused functionality?
- Is the platform providing ROI?
- Are there lower-cost alternatives available?
- Is the platform still necessary?

3 REVIEW PLATFORM UTILIZATION



USER ADOPTION

- Review active vs. inactive users
- Identify underutilized features
- Analyze workflow adoption rates
- Evaluate training and onboarding processes
- Review internal documentation quality

OPERATIONAL EFFICIENCY

- Identify manual tasks that could be automated
- Review repetitive workflows
- Evaluate ease of use for teams
- Identify friction points slowing execution

4 AUDIT INTEGRATIONS & DATA FLOW



SYSTEM CONNECTIVITY

- Review CRM integrations
- Verify marketing automation syncs
- Audit lead routing workflows
- Review API dependencies
- Check customer data consistency
- Identify manual spreadsheet processes

DATA QUALITY

- Identify duplicate records
- Review lifecycle stage consistency
- Audit field mapping accuracy
- Verify lead source tracking
- Review data governance standards

5 EVALUATE REPORTING & ATTRIBUTION



REPORTING ACCURACY

- Validate dashboard accuracy
- Review attribution models
- Verify conversion tracking setup
- Audit UTM naming conventions
- Ensure KPI consistency across teams

PERFORMANCE VISIBILITY

- Can teams easily access reporting?
- Are reports trusted by leadership?
- Is campaign ROI measurable?
- Are funnel drop-off points visible?

6 IDENTIFY REDUNDANCIES & CONSOLIDATION OPPORTUNITIES



TOOL OVERLAP

- Identify duplicate platforms
- Review overlapping functionality
- Consolidate unnecessary tools
- Standardize systems across teams

OPERATIONAL SIMPLIFICATION

- Reduce administrative overhead
- Simplify user management
- Improve cross-team collaboration
- Reduce software sprawl

7 ASSESS SCALABILITY & FUTURE READINESS



GROWTH READINESS

- Can systems handle increased lead volume?
- Can workflows scale with growth?
- Are platforms AI-ready?
- Does the stack support future automation?

TECHNOLOGY FLEXIBILITY

- Review API flexibility
- Evaluate vendor support quality
- Assess integration scalability
- Identify future operational gaps

8 PRIORITIZE OPTIMIZATION OPPORTUNITIES



IMMEDIATE IMPROVEMENTS

- Eliminate redundant tools
- Improve integrations
- Fix reporting inconsistencies
- Clean up CRM data
- Improve workflow automation

LONG-TERM OPTIMIZATION

- Create governance processes
- Standardize naming conventions
- Improve platform documentation
- Schedule recurring MarTech audits
- Build a scalable optimization roadmap

FINAL AUDIT REVIEW

Before completing your audit, confirm:

- Every platform has a clearly defined purpose
- Teams understand platform ownership
- Reporting is accurate and actionable
- Systems are properly integrated
- Technology investments align with business goals
- The stack supports future growth and scalability

NEXT STEPS

A successful MarTech stack is not about having the most tools — it is about having the right tools working together efficiently. Use this checklist regularly to improve visibility, streamline operations, reduce costs, and create a stronger foundation for scalable growth.

