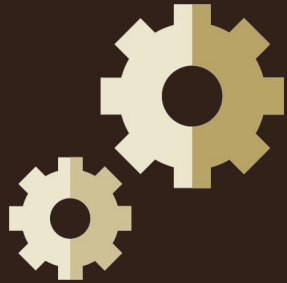


STACK M  XIE

Marketing Ops Testing Playbook

Understand the business impact and best practice testing approach to keep your revops machine running flawlessly.



Why is testing so important?

Organized, institutional testing is an imperative when running a steady, scalable martech stack. As your stack continues to grow, it's important to stabilize and vett your ecosystem. Ensuring you're starting from a stable foundation makes shoring up gaps with new implementation far easier to manage. Testing also offers time-starved marketing operations staffers a chance to get ahead of a problem before it impacts revenue generation.

What should you be testing?



- Preference centers
- Lead generation forms on websites
- Evergreen Assets
 - nurture email links
 - links to downloadable assets
- Scripts firing on your high value pages
- Metadata on critical pages
- Website links



Business Impact

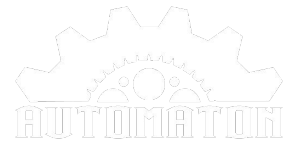
Having a broken preference center can have long-term impact on your organization. Here are a potential ramifications:

- Legal issues around GDPR compliance
- Higher unsubscribe rates
- Leads not receiving content they have shown interest in
- Lost revenue from lost opportunities for touchpoints

Why does it get missed?

With many marketing automation programs the "Preference Center" is built and managed internally. Everything is based off field values and smart lists. Failing to take customer preferences into account is easy to do if you haven't tested that all your fields are being stamped, your leads are running through workflows in the correct order, and everything is syncing correctly to your CRM on the right fields. And then of course remember to use the filters.

Why
preference
center
testing?



What to test:

ASK YOURSELF:

WHAT DATA ARE YOU COLLECTING?

Outline the required data points you should be collecting and that the data is mapping between all required systems

WHERE DOES THE DATA GO?

Is the data syncing as expected across systems?

Is the lead ending up in the right campaigns, programs, list across systems?

ASSETS

- Banner Compliance
- Munchkin Compliance
- Fields for preferences
- Subscription Compliance

SCENARIOS + OUTCOMES

- Test each of your preference options (if they opt into one category, are they being excluded from other mailings)
- Make sure leads are added to the right list, segment, campaigns
- Leads are included and excluded to list as expected
- All the right fields are being stamped (you will want to outline this fields and expected values for each scenario)
- People's preferences are being honored and fields are being updated

Business Impact

Evergreen asset links are a critical part of your customer journey. Offering prospects bad links will disrupt conversions and breakdown trust and credibility with your brand. If you have assets, managed by disparate teams and across platforms, things can get missed. You need to know that each asset is being delivered as expected.

Why does it get missed?

Evergreen assets tend to be activated and left to run unattended because, that is the ultimate purpose of the program. MOPS expects it to run without incident till it's deactivated. The root cause can be many things; a few examples are content being renamed, moved or deleted. In a world where different people are touching the same systems, it's very easy for a link to go down, an email to be deactivated, or for a page to no longer work.

Why
test
evergreen
assets?

What to test:

- That the form is submitting to your systems
- That your confirmation email is being delivered to the end user
- That tokens in your email are displaying correctly
- Your subject line is correct
- Your links are working
- Attribution data points append to the lead



Business Impact

Demand generation is the process of generating leads and engagement for your business. They tend to be your hottest leads and most frequently end in a closed deal. If your team is unable to follow up quickly, you're losing revenue.

Why does it get missed?

Issues with forms can be hard to catch. Having dependent processes between your marketing automation tool and CRM can lead to bottlenecks that can cause poor operational performance for lead delivery to sales. Form to sales routing can be complex and testing your lead routing allows you to be proactive in system hiccups, and decrease impact on closing real opportunities.

Why lead
generation
form
testing?

What to test:

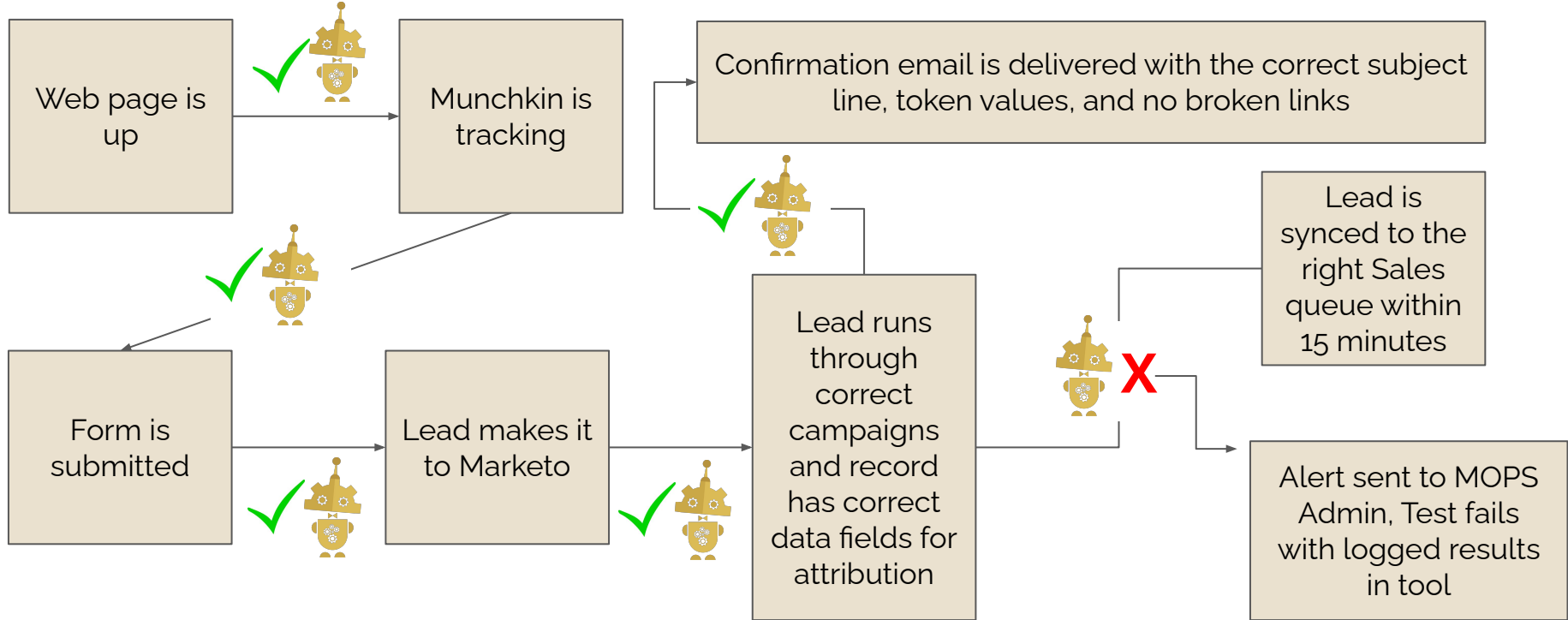
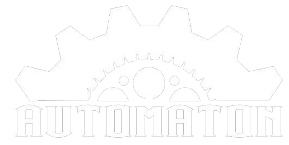
WHERE TO START

Start by reviewing those programs and campaigns that bring in the most leads and those with the highest conversions.



- Your forms are submitting to the correct thank you page
- That the data on your forms are being captured on the right fields
- Your smart campaigns for processing leads are stamping supplemental data in a timely manner, and the data is correct.
- Your leads are routing to the right sales queue and campaign in SFDC
- The time it takes for your lead to end up in a sales queue
- Any scoring on the lead for download
- Any flow steps or changes on the lead record are happening as expected
- Attribution data points are flowing as expected

What does end-to-end testing look like?





TIRED OF MANUAL TESTING?

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