E-commerce Marketing Automation Software (MAS) Evaluation Checklist

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Platform Information:

Platform Name:

Vendor:

Version:

Deployment Type: (Cloud-based, On-premise, Hybrid)

Integration Capabilities:

- ☐ Integration with E-commerce Platform
- ☐ Integration with CRM
- ☐ Integration with Email Service Provider
- ☐ Integration with Social Media Platforms
- ☐ Other integrations (Specify):

Features:

Customer Segmentation:

- ☐ Dynamic Segmentation
- ☐ Behavior-based Segmentation
- ☐ Demographic Segmentation

Campaign Management:

- ☐ Email Campaigns
- ☐ SMS Campaigns
- ☐ Push Notifications
- ☐ Social Media Campaigns

Personalization:

- ☐ Product Recommendations
- ☐ Personalized Content
- ☐ Dynamic Content

Automation Workflows:

- ☐ Abandoned Cart Recovery
- ☐ Welcome Series
- ☐ Post-Purchase Follow-up
- ☐ Upsell/Cross-sell Automation

Analytics and Reporting:

- ☐ Conversion Tracking
- ☐ Revenue Attribution
- ☐ A/B Testing
- ☐ Customer Journey Analytics

Multi-Channel Support:

- ☐ Email
- ☐ SMS
- ☐ Social Media
- ☐ Web Push Notifications

Usability and User Experience:

User Interface:

- ☐ Intuitive Interface
- ☐ Customization Options
- ☐ Mobile Responsiveness

Ease of Use:

- ☐ User Training Required
- ☐ Onboarding Process
- ☐ Documentation Availability

Security and Compliance:

Data Security:

- ☐ Encryption
- ☐ Compliance with Data Protection Regulations (GDPR, CCPA, etc.)

Permission and Access Control:

- ☐ Role-Based Access
- ☐ Audit Trails

Scalability and Performance:

Scalability:

- ☐ Scalability for Growing Businesses
- ☐ Enterprise-Level Scalability

Performance:

- ☐ Speed and Responsiveness
- ☐ Uptime SLA

Customer Support:

Support Options:

- ☐ Phone Support
- ☐ Email Support
- ☐ Live Chat
- ☐ Knowledge Base

Training Resources:

- ☐ Video Tutorials
- ☐ Documentation
- ☐ Webinars

Cost and Licensing:

Pricing Model:

- ☐ Subscription-based
- ☐ Usage-based
- ☐ Custom Quote

Total Cost of Ownership:

- ☐ Initial Setup Costs
- ☐ Subscription Costs
- ☐ Additional Costs (if any)

Additional Considerations:

User Reviews and Testimonials:

- Check online reviews and testimonials

Future Roadmap:

- Vendor's plans for future updates and features

Customization and Flexibility:

- Ability to customize workflows and campaigns

Disclaimer: This checklist is a general guide, and you may need to tailor it to your specific business requirements.

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