GK3 CAPITAL

Marketing Automation Platform Checklist for Fund Marketers

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Is your marketing automation platform ready to support scalable, compliant growth? Use this checklist to find out.

1. CRM & Contact Management

- Integrates with your existing CRM (Salesforce, etc.)
- Provides full visibility into contact activity and history
- Allows segmentation by channel, advisor type, AUM, territory, and behavior

2. Campaign Management

- Offers visual workflows for email nurture sequences
- Supports dynamic content and personalization
- Includes A/B testing capabilities
- Provides easy landing page and form creation
- Enables lead scoring and qualification

3. Compliance and Data Governance

- Built-in tools for GDPR, CCPA, and FINRA compliance
- Consent and subscription preference center
- Audit logs for activity and permission changes
- Role-based access and data segmentation

4. Reporting and Attribution

- Dashboards for campaign performance and ROI
- Multi-touch attribution for fund flows
- Integration with fund performance data and advisor portals
- Exportable reports for internal and compliance review

5. Sales Alignment

- [ ] Integrated tools for sales follow-up and tracking
- [ ] Syncs marketing activity to sales pipelines
- [ ] Alerts for advisor activity (email opens, site visits)
- [ ] Enables seamless handoff from marketing to wholesaling

6. Platform Usability

- [ ] Easy for marketers to use without IT support
- [ ] Provides training resources and support
- [ ] Scales with your firm's AUM and distribution model

7. Budget and ROI

- [ ] Clear pricing model (no hidden user or contact fees)
- [ ] Demonstrated ROI within the first 12 months
- [ ] Fits within your team's current and future tech budget

Expert Tip:

No single platform is perfect—but your tool should make marketing easier, not harder. If you're checking more boxes for one platform than another, that's a strong sign it's the right fit.