Kentico

Checklist

Where Is Your Automation Leaking?

The Lifecycle Automation Audit Checklist

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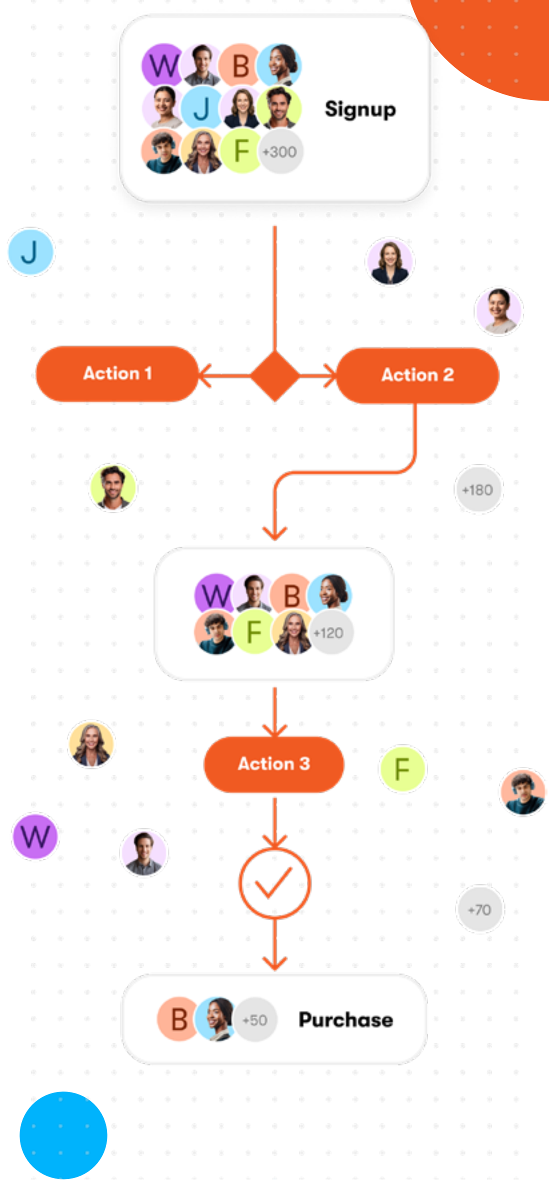
What's Inside.

Every marketing automation program leaks. This becomes leads that never get a follow-up. Scores nobody acts on. Customers whose milestones pass unnoticed. Journeys that quietly strand contacts in a step nobody remembers building. Each one is invisible on its own, and together they cost you pipeline and retention that you'll notice every single day: businesses without a follow-up strategy lose an estimated [$287,000 in potential annual revenue per 1,000 leads].

The upside to solving these problems: companies that plug automation leaks see [451% more qualified leads] and on average, [automation done well drives revenue up more than a third], through stronger conversion, better retention, and higher customer lifetime value.

This checklist is a structured self-audit to help you fix your marketing automation and turn leaks into revenue. It includes 34 yes/no checkpoints that cover five areas of your lifecycle automation. Every "No" is considered a leak, and every leak comes with a concrete next step to plug it and improve results.



How to use this checklist

- Block 30 minutes. Go section by section and answer every checkpoint with Yes or No.
- A "Yes" must be true today, not planned, not "mostly."
- For every "No," read the next-step to get actionable advice.
- Count your "No" answers and check your leak level at the end.

1. Nurture: Does anyone fall through right after first contact?

The nurture phase is where most programs leak first: signups that never get confirmed, sequences that ignore engagement, and data that is collected but never used.

yes	no	Question	If no
☐	☐	**Does every lead-capture form trigger an automated follow-up within minutes of submission?**	**No? →** Start where every program should: a form-triggered automation with a confirmation email.
☐	☐	**Do you follow up with subscribers who never confirm their double opt-in?**	**No? →** Add a short wait (around 2 days), check recipient-list membership, and send one reminder to non-confirmers. This single fix typically recovers a meaningful share of lost subscribers.
☐	☐	**Do your content sequences advance based on engagement rather than a fixed calendar?**	**No? →** Gate each step on a real click or activity. Chained automations that only advance on engagement feel natural to subscribers, and stop you from flooding inboxes that have gone quiet.
☐	☐	**Do disengaged contacts get a gentle check-in before more content arrives?**	**No? →** Add a nudge branch for non-clickers (“Still interested?”). If they engage with the nudge, resume the series; if not, pause instead of pushing.
☐	☐	**Are your confirmation and reminder emails written differently for their different jobs?**	**No? →** A confirmation confirms; a reminder re-sells the value of subscribing. Both variants can be drafted quickly with AI.
☐	☐	**Do you capture interests or source data at signup and use it to branch nurture paths?**	**No? →** Map signup form fields to contact fields so conditions can branch on them from the very first email. Data you collect but never branch on is a leak.
☐	☐	**Do you know exactly where contacts drop out of each nurture sequence?**	**No? →** Give every branch a named, outcome-specific finish step so your statistics read as answers (“117 already confirmed / 55 reminded”), and connect automations to customer journeys to spot drop-off.

2. Lead Scoring: Does your score actually change what happens?

A scoring model that doesn't trigger action is decoration. This section checks whether your scores are trusted, current, and connected to real handoffs.

yes	no	Question	If no
☐	☐	**Do you have a documented scoring model that marketing and sales both signed off on?**	**No? →** One workshop, one page: which actions and attributes earn points, and what score means "sales-ready." If it only lives in one person's head, it leaks.
☐	☐	**Does your model combine behavioral signals with profile and fit data?**	**No? →** Weight engagement and fit separately. High activity from a poor-fit contact should never outrank a quiet contact who matches your ideal customer profile.
☐	☐	**Does crossing a score threshold automatically trigger an action?**	**No? →** A score nobody acts on is a report, not a system. Fire an event at the threshold.
☐	☐	**Do scores decay when contacts go quiet?**	**No? →** Time-box behavioral points ("in the last X days") so last quarter's webinar attendance doesn't inflate today's score.
☐	☐	**Do negative signals lower scores?**	**No? →** Subtract points for unsubscribes, support escalations, or careers-page visits. Scoring that only goes up overstates your pipeline.
☐	☐	**Do you review the model against actual sales outcomes at least quarterly?**	**No? →** Compare the scores of closed-won versus closed-lost deals and adjust the weights. Your model is a hypothesis, test it.

3. Retention and Lifecycle: Do customers stay loyal after they buy?

Post-purchase hours, loyalty milestones, events, and win-backs: the moments where retention is won are all time-sensitive. Manual processes miss them by design.

yes	no	Question	If no
☐	☐	**Do customers hear from you within hours of a purchase, not weeks?**	**No?** → The hours right after purchase are peak receptivity, and the window closes fast. Trigger a post-purchase sequence from the order confirmation.
☐	☐	**Does your post-purchase content depend on what the customer actually bought?**	**No?** → Store purchase details on the contact record and branch emails by product. Generic "thanks for your order" content is a wasted moment.
☐	☐	**Are loyalty milestones celebrated automatically and on time?**	**No?** → A tier-upgrade congratulations sent the day after qualifying lands completely differently than one sent weeks later from a manual report. Automate tier progression messages.
☐	☐	**Do you have guards against duplicate milestone messages?**	**No?** → Add guard conditions and deliberate recurrence settings so a customer who advances faster than expected isn't congratulated twice, or skipped.
☐	☐	**Do your event journeys distinguish attendees from no-shows?**	**No?** → Bridge offline attendance back online (a QR code pointing to a form works well), then branch: thank-you plus exclusive offer for attendees, softer "we missed you" for no-shows.
☐	☐	**Do lapsing customers enter a win-back sequence before they are gone?**	**No?** → Define what "going quiet" means for your business (60 days? 6 months?) and trigger re-engagement automatically at that point, not when someone remembers to pull a list.
☐	☐	**Is retention data written back to contact records for future segmentation?**	**No?** → Write tier, attendance, and purchase flags to contact fields so every channel (email, web personalization, ads) can build on what automation learned.

4. Governance: Could your program survive a handover tomorrow?

Governance leaks multiply every other leak. An unnamed step or a missing finish step doesn't just confuse colleagues; it corrupts your statistics, strands contacts, and blocks re-engagement.

yes	no	Question	If no
☐	☐	**Could a colleague understand any of your automations at a glance, without opening every step?**	**No? →** Rename steps to describe what they do ("Wait 2 days for confirmation", "Is confirmed?"), not what they are ("Wait", "Condition"). Well-named processes are self-documenting for humans and for AI.
☐	☐	**Does every branch end in a named, outcome-specific finish step?**	**No? →** Missing finish steps leave contacts in limbo, break re-triggering, and turn statistics into noise. Treat every branch terminus as a required, named finish.
☐	☐	**Is the recurrence mode a deliberate choice for every process?**	**No? →** "Always" risks duplicate emails; "Only once" blocks re-engagement; "If not already running" needs finish steps to work. Pick per scenario, not by default.
☐	☐	**Do you check consent or list membership before every marketing send inside an automation?**	**No? →** Add a consent or recipient-list condition ahead of marketing emails. Compliance leaks are the most expensive kind.
☐	☐	**Do you have a protocol for editing or disabling live automations?**	**No? →** Contacts in wait steps keep executing after you disable a process, sometimes for days. Account for in-flight contacts before editing, and never assume "disabled" means "stopped."
☐	☐	**Are related automations named and grouped so their relationships are visible?**	**No? →** Use naming that reveals chains ("Onboarding Step 1: Welcome") and group related processes under campaigns so nobody has to reverse-engineer your program.
☐	☐	**Does someone review automation statistics on a schedule?**	**No? →** Put a monthly review on the calendar: completion rates by finish step, drop-off points, send performance. Automations are assets; unreviewed assets depreciate.
☐	☐	**If your site is multilingual, does every language get the same automated experience?**	**No? →** Audit coverage per language. A journey that only exists in English is a leak for every other market you serve.

5. Agentic Readiness: Could an AI teammate work in your program today?

AI agents are becoming part of the marketing team. Whether they make you faster or make a mess depends on foundations you can build now: consolidated data, readable automations, clear permissions, and audit trails.

yes / no	Question	If no
☐ yes ☐ no	**Does your customer data live where your automation runs: one platform rather than loosely stitched tools?**	**No? →** AI agents can only act on context they can reach. Every integration seam between your data and your automation is a place agents (and insights) leak out.
☐ yes ☐ no	**Are your automations readable enough for an AI to understand and improve?**	**No? →** Descriptive step names and outcome-specific finishes aren't just for colleagues; they're the context AI assistants use to analyze processes and recommend fixes.
☐ yes ☐ no	**Have you defined what AI agents may do with and without human approval?**	**No? →** Set role-based permissions and approval workflows before delegating. "Human approves before publish" is a sensible default you can relax deliberately.
☐ yes ☐ no	**Are AI and agent actions logged and auditable?**	**No? →** You should be able to answer: who asked, which agent acted, what it produced. If you can't, pause delegation until you can.
☐ yes ☐ no	**Are you already using AI to draft automation content?**	**No? →** Email drafting is the lowest-risk, highest-payoff starting point. Use AI to start drafting emails, and then adjust by hand.
☐ yes ☐ no	**Do you know which journey friction points you would hand to an AI teammate first?**	**No? →** List your three most repetitive optimization tasks (journey analysis, content review, campaign briefs). That list is your agentic pilot backlog.

Your Marketing Automation Leak Level.

Count your “No” answers across all 34 checkpoints.

“No” count	**0–5**	**6–14**	**15+**
Leak level	**Drip**	**Steady leak**	**Open valve**
What to do	Your program is fundamentally sound. Tune rather than rebuild: focus on whichever single section collected your “No” answers.	Revenue is dripping out at the handoffs. Fix Nurture and Retention leaks first, they have the most impact on pipeline and repeat purchase, then tackle Governance.	Don’t fix everything at once. Pick one journey (post-signup is usually best), make it watertight end to end, and use it as the template for the rest.

One more rule: any “No” in the Governance section multiplies the leaks everywhere else. If you scored well overall but poorly there, treat Governance as priority one.

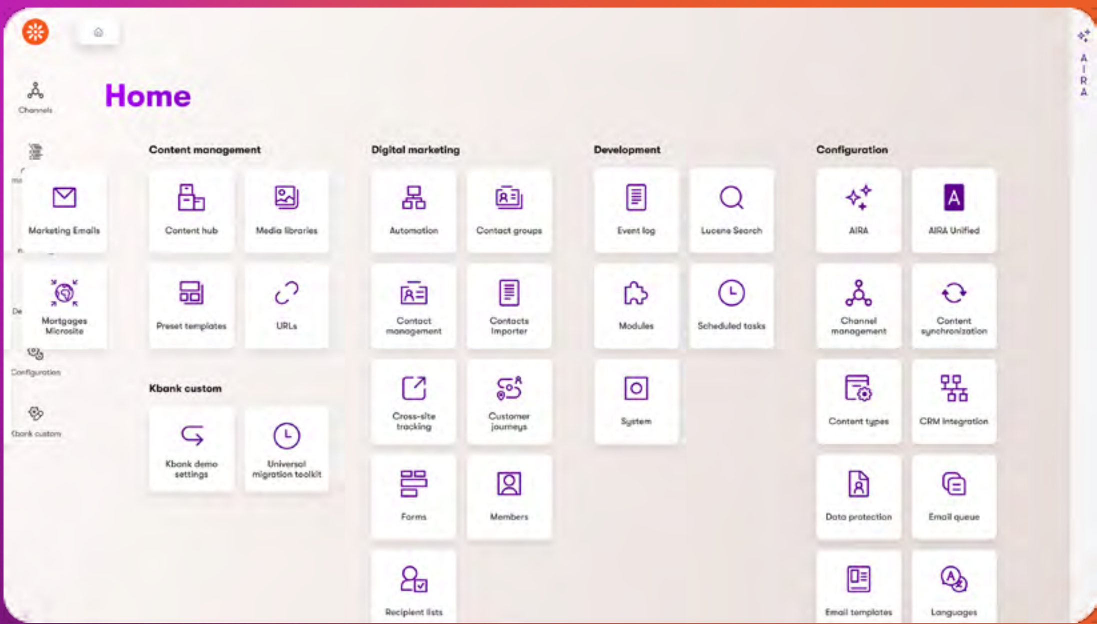
Use Xperience by Kentico to Fix Your Marketing Automations.

If you're evaluating platforms, or already use Xperience by Kentico and want to see how you can get the most out of marketing automation in your platform, here's exactly where Xperience by Kentico has a built-in answer to checkpoints from this audit.

Checklist item	The Leak	How Xperience by Kentico Handles it
Nurture **Q1**	**Forms that don't trigger a follow-up**	Form submission triggers and autoresponder emails, no developer needed
Nurture **Q2**	**Subscribers who never confirm double opt-in go unfollowed**	A wait step checks recipient-list membership and sends one reminder to non-confirmers automatically
Nurture **Q3**	**Content sequences advance on a fixed calendar instead of real engagement**	Chained automations trigger sequentially, and custom activities signal when a subscriber should move to the next step
Nurture **Q4**	**Disengaged contacts keep receiving content with no check-in**	A nudge branch pauses non-clickers and resumes the series only if they re-engage

Checklist item	The Leak	How Xperience by Kentico Handles it
Nurture **Q5**	**Confirmation and reminder emails read the same**	AIRA drafts both variants natively, so you're editing, not starting blank
Lead Scoring **Q3**	**Scores that cross a threshold but nothing happens**	Custom triggers, conditions, and actions let your automations react to any real business event, not just a score, and automatically alert sales or fast-track the nurture
Retention **Q1**	**Post-purchase follow-up arrives weeks late instead of within hours**	Custom contact fields capture purchase details at order confirmation and trigger a sequence immediately
Retention **Q3**	**Loyalty milestone messages depend on someone running a manual report**	Tier progression is recognized automatically the moment a customer qualifies
Retention **Q4**	**Customers get duplicate or skipped milestone messages**	Guard conditions prevent duplicate congratulations when a customer advances faster than expected
Retention **Q5**	**Event follow-up can't distinguish attendees from no-shows**	QR-code-based attendance tracking merges registration and attendance to the same contact, enabling a two-path follow-up
Agentic Readiness **Q5**	**Every automation email still written by hand**	AIRA drafts automation emails natively, giving your team an AI-assisted starting point

Every fix in this checklist (engagement-gated nurture, threshold-triggered scoring actions, post-purchase branching, event attendance journeys, loyalty milestones, and AI-assisted content) is a built-in pattern in Xperience by Kentico.



Get in-depth insight into how you can clean up your marketing automation with step-by-step guides in our Xperience by Kentico Automations blog series.

Explore the automation guides:	**community.kentico.com** Xperience by Kentico Automations series
Read:	**Five Marketing Automation Tips**
See it live:	**Book a demo**

About Kentico.

Kentico is a content management system with built-in digital marketing, native commerce, and AI agentic capabilities that help deliver personalized customer experiences through websites, microsites, emails, apps, digital kiosks, and other channels. It replaces multiple disconnected tools with a unified solution that reduces technology complexity and improves team productivity.

Empower your team to create engaging experiences while eliminating time-consuming tasks with a comprehensive platform that is easy to learn and use, powered by built-in AI agentic capabilities that streamline marketing workflows. Tailor content, commerce experiences, and delivery to individual preferences and develop consistent interactions across multiple digital touchpoints, reaching your customers on their favorite channels, any time, anywhere. Kentico consolidates multichannel content management, digital marketing, and commerce capabilities in a single solution, helping your team achieve more with fewer processes and less technology.

Eager to Learn More?

Talk to our experts. Book a 1-on-1 consultative demo. We'll walk you through the capabilities that make migrating to Kentico the easiest hard decision you'll make this year.

→ MEET OUR EXPERTS

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