Selecting Your Marketing System of Record

How to evaluate modern platforms that connect marketing budget, plan, spend, and performance data.

Uptempo

The status quo isn't working

Do more with less. That's the mandate. But marketing ROI keeps slipping because three fundamentals are broken:

1. **Investment data is static.**
   Spend is trapped in spreadsheets and finance tools.

2. **Plans are siloed.**
   Disconnected planning and reporting blur the line between campaigns, spend, and outcomes.

3. **Performance data is too narrow and scattered by channel.**
   Teams waste time deciding what gets credit instead of understanding what is holistically driving results.

It doesn't have to be this way.

Other functions solved these challenges long ago with a system of record. Sales runs on CRM. Finance runs on ERP.

Marketing needs its own system of record: a platform that connects budgets, plans, and performance in real time, so every dollar is visible, defensible, and optimizable. That's how modern teams meet the mandate and win.

This guide will help you run a rigorous evaluation of marketing operations platforms, align stakeholders, and select capabilities that match your current maturity stage, then grow with you.

How to use this guide

- → Start with the Critical Requirements to shortlist vendors.
- → Use the Scorecard and Use-Case Questions during demos.
- → Stack rank the shortlisted vendors in the Buyer's Worksheet.

Critical requirements when selecting the right platform

Not all marketing operations platforms are created equally.
These seven requirements reflect the reality of enterprise demands and C-Suite expectations.

1. Purpose-built for marketing (not a finance tool)	Ask vendors
• Connects investments, campaign planning, and performance in one workspace. • Supports a unified view of marketing investments and campaign plans, with the ability for matrixed cuts. • Supports custom fiscal years and campaign planning/reporting that spans multiple years.	• Can you demonstrate plan-to-performance views that a CMO can defend to the rest of the ELT? • How are campaign plans and budget commitments tracked for future fiscal years such as Olympic or World Cup sponsorships? • How easy is the platform for marketers to learn, use, and adopt without heavy IT or admin support? Do we need a coding team to maintain the solution or other internal/external resources to provide ongoing support and maintenance?

2. Connected planning and budgeting	Ask vendors
• Supports separate but connected hierarchies for budget/spend and campaign/plan. These can be customized to fit the needs of your organization. • Supports many-to-one and one-to-many funding between line items and campaign tactics, with audit trails and preserved GL/ cost-center mapping.	• How can the annual marketing budget be built separately from campaign planning? Can budgets be allocated before annual planning is finished? • Can you demonstrate how the solution allocates and tracks investments for an event when there are multiple funding sources? Or can one budget line item connect to multiple campaign activities?

3. Enterprise-grade security, governance, and scale	Ask vendors
• Role-based workspaces, SSO, and audit trails/logs. • Global hierarchies (currency, time zones) and portfolio roll-ups. • Policy guardrails and approvals that satisfy Finance and Internal Audit.	• How do you set up user provisioning and permissions for large, global teams? • What does audit reporting look like for a quarterly close? • How are budget transfers requested, approved, reconciled, and trackable?

4. Bi-directional integrations that reduce errors and give near real-time visibility	Ask vendors
• Open integrations across ERP/EPM/PO, CRM, work management, ad networks, and BI tools. • Objects and fields that sync both ways to reduce manual work, the risk of data-entry errors, and reporting lags.	• What integrations are included by package and how do you handle “bring your own” systems? • Do you build and maintain your own integrations, or would we need system integrator partners or consultants? • Do you provide recommended cadences by source type (e.g., ERP actuals daily post-close, CRM activities near real-time, ad spend daily)?

5. Customer success model with domain expertise	Ask vendors
• Proven onboarding and change-management playbooks. • Maturity frameworks, best practices, and executive-ready views that speed time to value and adoption.	• What is your maturity model? • How do you approach establishing a common taxonomy across a global organization? • How do you measure adoption and value in the first 90/180 days?

6. Proven customer results	Ask vendors
• Documented case studies across complex enterprises and industries. • Before/after metrics (e.g., ROI lift, wasted spend reduced, increased marketing budget, time saved)	• Do you have customer references for marketing and finance users? • Can you map a customer like us (industry/scale) and show the specific constraints they had and how they were solved?

7. Strong product vision	Ask vendors
• Closed-loop insights (investments ↔ campaigns ↔ results) to create a system of record for marketing. • AI that provides instant, trustworthy insights across budget, plan, and performance data.	• Can you show how to drill down from a reporting dashboard to the specific budget line item and campaign activity that produced the result? • How will AI improve variance insights and mix recommendations?

Key capabilities scorecard

Use the following scorecard to evaluate each marketing operations suite or platform. For every feature, rate how mature it is and how important it is to your business. When you're done, add up the scores and look at which areas have the highest ranking. The right choice is the vendor with the strongest totals in the areas you care about most.

Score	
4	Feature is highly developed
3	Feature is adequate
2	Feature is sub-optimal/poor
1	Feature is not available and not on the roadmap for at least 6 months

Importance	Prioritize by asking yourself...
High	Is this essential to achieving our goals now?
Medium	Is this important but not essential right now?
Low	Is this optional, and not a blocker to success?
Not Required	Is this a nice-to-have with minimal impact on value?

Essential platform capabilities

Questions to ask	Purpose of asking	Score	Importance
Does your solution follow enterprise-grade security parameters?	Robust security practices are in place to protect your organization's marketing data.		
Are you able to set configurable roles and permissions?	Protects marketing data within your organization and only grants access to those that need it.		
Is your platform configurable to the specific needs of my organization?	Ensures the software can be customized to align with your own internal marketing processes.		
Does your solution offer Single Sign-On (SSO)?	Decreases the attack surface, making systems more secure and saves your IT team time and money with automation, integration, and password resets.		
Do you provide out-of-the-box analytics and dashboards as well as custom reports?	Ability to report on marketing performance in a way that matches your business needs.		
Does your solution provide audit trails for budget transfers and investment plan changes?	Confirms accountability and compliance across finance/IT, speeds troubleshooting, and creates a defensible record of decisions.		

Essential platform capabilities (continued)

Questions to ask	Purpose of asking	Score	Importance
Is AI embedded to surface insights with governance and opt-outs for my data?	Verifies that AI accelerates decisions safely, delivering time savings and accuracy without compromising privacy or compliance.		
Does the platform support inline comments, @mentions, and approvals?	Enables efficient cross-team and vendor collaboration.		
Does it support granular user-based permissions and secure access for external agencies/partners?	Maintains control, auditability, and data security.		
Essential platform capabilities subtotal			

Marketing financial management capabilities

Questions to ask	Purpose of asking	Score	Importance
Does the solution support both top-down and bottom-up investment planning?	Ensures budgets are allocated from a high-level to enforce alignment with corporate strategy while allowing planned costs to be entered at the tactic level.		
Does the system track requested, committed, invoiced, and actual spend, and roll them up alongside multiple forecasts and plans?	Ensures you can see the full budget lifecycle and avoid surprises before costs hit actuals.		
Can the platform map marketing budget line items to GL accounts and cost centers in finance's corporate budget?	Aligns marketing detail with finance structures, automates budget mapping, prevents miscoding, and accelerates reconciliation.		
How does the system enable budget requests, manage approved transfers and audit the entire process?	Boosts agility and helps marketers seamlessly request and track budget changes. Audit trails provide defensibility for finance/IT and help with audits.		
Can purchase requests be generated with custom forms and approval workflows?	Provides a seamless PR process.		
Can the system manage and track campaign tactics and costs that span multiple years?	Enables marketers to easily manage recurring tactics and associated costs.		
Does the platform support custom fiscal year calendars?	Allows marketers to plan and budget in a way that matches how finance closes the books.		
Is there a flexible multi-currency management structure which rolls up all spend to a master currency?	View results in the currency that needs to be reported on globally and ensures current exchange rates are applied to marketing costs.		

Marketing financial management capabilities (continued)

Questions to ask	Purpose of asking	Score	Importance
Does the system track over- or underspend for each budget line item, program, and department?	Flags areas of spend concern and enables greater agility by being able to quickly shift budget to what's working.		
Can it analyze costs vs. previous years, project future spend, and create compelling visuals?	Financial granularity builds trust in marketing teams and reduces wasted spend.		
Can a single budget line fund multiple marketing activities—and can one marketing activity draw from multiple budgets—and budget years with full traceability?	Mirrors real-world campaign and department funding processes and preserves clean rollups for finance and marketing.		
Are investment plan edits (amounts, timing, owner, funding source) versioned with who/what/when and reason codes?	Creates a defensible history of decisions and eliminates ambiguity during reviews.		
Marketing financial management capabilities subtotal			

Marketing campaign management capabilities

Questions to ask	Purpose of asking	Score	Importance
Can I view a unified, time-based, color-coded calendar by audience/ markets/ offerings and share a filtered, auto-updating link?	Aligns timing across teams and keeps stakeholders current on what's in-market without manual updates.		
Is the campaign hierarchy fully configurable (levels, naming, required fields) and consistent across teams for reliable rollups?	Establishes a common and consistent taxonomy so campaign planning is approached in the same manner across global organizations and it's easier to find and compare information across brands and regions, and teams.		
Can estimated costs be captured at the campaign/tactic level ahead of any budget assignment?	Creates a clear baseline for funding, approvals, and later variance analysis.		
Can executives see campaign plan rollups by hierarchy/time/tags with drill-down, and can those summary views be saved and shared by role?	Delivers executive-ready summaries that stay consistent across reviews, while preserving traceability to the details.		
Can one budget line fund multiple marketing activities—and can one marketing activity draw from several budgets—with full traceability?	Mirrors real-world campaign funding models while preserving clean rollups for finance and marketing.		
Does the system capture briefs (objectives, KPIs, audience, channels, timing, dependencies) linked to the campaign plan?	Aligns teams on campaign purpose and scope so execution matches intent and approvals move faster.		

Marketing campaign management capabilities (continued)

Questions to ask	Purpose of asking	Score	Importance
Can we tag investments and activities with flexible dimensions and required fields at the right levels?	Enables consistent slicing/dicing of plans and spend for analysis and governance.		
Can reports aggregate campaign and investment data by any tag (or combination of tags) with filters and exports?	Makes it easy to answer stakeholder questions without rebuilding reports each time.		
Marketing campaign management capabilities subtotal			

Performance optimization and analytics capabilities

Questions to ask	Purpose of asking	Score	Importance
Can we set targets by funnel stage (conversion rates and cycle times) for each campaign/program?	Aligns plans to measurable outcomes at every stage so teams know what “good” looks like.		
Does the system capture actuals by funnel stage and show progress vs. target in-period?	Provides an early read on what’s off-track, enabling faster course corrections.		
Can we define custom KPIs with targets and capture actuals at campaign/tactic levels?	Ensures all activities can be measured against expected performance, even those outside the conversion funnel.		
Does the software enable my team to predict the performance of marketing plans in real-time?	Model expected outcomes before taking any action or utilizing resources.		
Is ROI measured at the campaign/tactic level with clear attribution and timing?	Reveals which investments are paying off so teams can invest or reallocate spend to more productive placements.		
Are there automated alerts for under-performance (vs. target/forecast) and variance views with drill-downs?	Surfaces issues sooner, reducing wasted spend and missed targets.		
Can we compare planned activities vs. executed (what we said we’d do vs. what went live) to spot slippage and bottlenecks?	Improves operational reliability by highlighting execution gaps that hurt results.		
Can the performance of plans, campaigns, programs and tactics be stack ranked by specific measures?	Shows which campaigns are performing best to allow for faster decision making.		
Performance optimization and analytics capabilities subtotal			

Integrations

Supports integrations with...	Purpose of asking	Score	Importance
ERP/EPM or other Finance system	Reconcile actuals to plan in minutes instead of weeks for faster budget reallocation to activities driving growth.		
What import methods and cadences are supported from finance tools (APIs vs. files; daily/weekly), and can actuals link to plans/POs?	Sets realistic expectations for "near real-time" visibility and stable reconciliations.		
Purchasing platforms	Enables full-cycle financial tracking and ongoing updates of what has been spent and what is outstanding.		
Work management solutions	Provides a comprehensive view of project and budget status for rapid re-deployment of funds or resources to where they matter most.		
Ad networks, analytics, and inbound performance solutions	Maps ad spend and performance directly to campaigns/tactics and GL/cost centers for accurate pacing and month-end close.		
CRM/MAP platforms	Tie investment data to campaign and opportunity data so you can better track performance and optimize spend.		
DAM tools	Gain full visibility of global assets and associated costs across all channels.		
Marketing mix modeling platforms	Centrally manage and monitor performance data from all advertising investments/ working dollars to automatically quantify KPIs and other metrics.		
Data lakes and BI tools	Ability to create custom ROI and cost analysis reports.		
Integrations coverage subtotal			

The right solution should deliver these business benefits

+99% budget accuracy	2.5x increase in ROI	125k hours saved
IBM	GE Digital	IKEA

Ready to take the next step?

Contact us at sales@uptempo.io and we can help you build a complete business case for a marketing operations solution based on your unique capability needs.

Who is Uptempo?

Uptempo is the global leader in enterprise marketing operations software, connecting budgets, plans, and performance in one system with deeply integrated measurements so CMOs can optimize resources, identify savings, reallocate effectively, and demonstrate impact while supporting budget growth.

Uptempo is used by more than 625,000 marketers at 250+ leading enterprises, including HubSpot, Cisco, Unilever, and Land O'Lakes.

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