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The IT Leader's Pre-Flight Checklist for Marketing Systems

How to Evaluate, Approve, and Govern Marketing Technology Before It Becomes Your Problem

"Marketing's next platform is your next problem—unless you shape it first.'

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Executive Summary

Marketing technology decisions are increasingly landing on IT's desk after the fact. A platform fails a security audit. An integration breaks during quarter-end. Data governance gaps trigger compliance concerns. And somehow, IT takes the heat for systems they never approved.

This pattern is neither inevitable nor acceptable.

According to *Gartner's annual CMO Spend Survey*, marketing technology now consumes 22.4% of total marketing budgets. Yet most of these investments, including marketing operations platforms designed to manage marketing budgets, plans, and performance, are procured without IT's architectural input. The result is technical debt that compounds with every additional tool in the stack.

The result? IT leaders inherit responsibility for platforms they did not vet, integrations they did not design, and security postures they did not approve.

For many IT leaders, the first decision is not which platform to approve, but whether to build custom solutions or adopt an enterprise marketing system of record. This checklist is designed to ensure that whichever path is chosen, architecture, governance, and accountability are established before risk accumulates.

This white paper provides a systematic pre-flight checklist for evaluating marketing technology platforms, specifically marketing operations platforms that unify marketing budgets, plans, and performance, before procurement. By establishing evaluation criteria across five critical domains, IT leaders can transform from reactive firefighters into strategic partners who shape technology decisions from the start.

Key Takeaways
- Why marketing technology failures become IT problems
- The five critical evaluation domains for enterprise marketing systems
- Architecture patterns that enable rather than constrain marketing operations
- A repeatable framework for assessing implementation risk
- How to build productive partnerships with marketing leadership

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Chapter 1: The Hidden IT Risk in Marketing Technology Decisions

Understanding Why Marketing's Platform Problems Become Your Problems

The modern enterprise marketing function operates a technology stack that rivals many IT departments in complexity. Marketing automation platforms, customer data platforms, analytics tools, campaign management systems, budget tracking spreadsheets, and performance dashboards create a web of interconnected systems that must exchange data reliably, maintain security standards, and scale with business demands.

Yet unlike core enterprise systems, marketing technology is often procured through departmental budgets with minimal IT oversight. In many organizations, IT becomes involved only after contracts are signed. By that point, architectural decisions have already been made, integration requirements have been defined, and security reviews are treated as procedural checkboxes rather than rigorous evaluations.

The Accountability Gap

When these systems inevitably encounter problems, accountability shifts. Marketing purchased the platform, but IT maintains the infrastructure. Marketing configured the integrations, but IT troubleshoots the failures. Marketing owns the data strategy, but IT answers to compliance audits.

This accountability gap creates a no-win situation for IT leaders:

Scenario 1: Integration Failures

Marketing deploys a new campaign management platform that requires real-time data from Salesforce, Oracle Financials, and three separate ad platforms. Six months post-launch, synchronization delays cause budget tracking discrepancies.

Scenario 2: Security Incidents

A marketing analytics vendor experiences a data breach. During the incident response, leadership learns the vendor never completed a security assessment, stores customer data in a non-compliant jurisdiction, and has admin credentials shared across multiple marketing team members. IT is asked to explain how this vendor was approved.

Scenario 3: Audit Findings

External auditors flag inconsistencies between marketing spend reported in the ERP and marketing spend tracked in departmental systems. The variance exceeds materiality thresholds. Finance and IT are asked to reconcile systems that were never designed to reconcile.

The Cost of Reactive Involvement

Each scenario shares a common pattern: IT involvement came too late to prevent the problem but arrived in time to own the resolution. Organizations that involve IT early in technology procurement consistently experience fewer implementation failures, faster deployments, and quicker realization of business value compared to those that engage IT only after decisions are finalized.

The question is not whether IT should be involved in marketing technology decisions. The question is whether that involvement happens before procurement, when architecture can be shaped, or after deployment, when problems must be managed.

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Chapter 2: Why IT Should Lead Marketing Platform Evaluation

From Gatekeeper to Strategic Partner

The traditional IT role in marketing technology has been reactive: approve security questionnaires, provision infrastructure, and troubleshoot problems. This reactive posture serves no one well. Marketing experiences IT as a bottleneck. IT experiences marketing as a source of unplanned work. Both functions operate with incomplete information about the other's constraints and requirements.

A more productive model positions IT as a strategic partner in marketing technology evaluation. This partnership does not mean IT dictates marketing's technology choices. It means IT contributes architectural expertise to ensure those choices can be implemented successfully, maintained efficiently, and governed appropriately.

The Strategic Partner Model

Effective IT partnership in marketing technology evaluation addresses three fundamental questions:

1. Can This Platform Integrate with Our Enterprise Architecture?

Marketing platforms do not operate in isolation. They must exchange data with CRM systems, financial systems, identity providers, and data warehouses. They must authenticate users through enterprise identity systems. They must log activities for audit and compliance purposes. IT brings essential perspective on integration feasibility, API compatibility, data transformation requirements, and the total cost of maintaining integrations over the platform's lifecycle.

2. Does This Platform Meet Our Security and Compliance Requirements?

Marketing platforms increasingly handle sensitive data: customer personally identifiable information, financial data, competitive intelligence, and strategic planning information. This data must be protected according to regulatory requirements, contractual obligations, and organizational policies. IT maintains the expertise and tooling to assess vendor security postures, evaluate compliance certifications, and identify gaps that require remediation before deployment.

3. Will This Platform Scale with Our Business?

Marketing platforms increasingly handle sensitive data, including customer personally identifiable information, financial data, competitive intelligence, and strategic planning information. This data must be protected according to regulatory requirements, contractual obligations, and organizational policies.

For global organizations, this also includes country- and region-specific data protection and data residency requirements. Platforms must support controls that govern where data is captured, processed, and stored, ensuring compliance with local regulations in markets where data must remain in-country or within defined regional boundaries.

IT maintains the expertise and tooling to assess vendor security postures, evaluate compliance certifications, validate data residency and localization capabilities, and identify gaps that require remediation before deployment.

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Building the Partnership

Effective IT partnership in marketing technology evaluation addresses three fundamental questions:

- Joint technology governance committees with representation from both functions

- Shared evaluation criteria that address both marketing effectiveness and technical requirements

- Collaborative vendor assessments that leverage both marketing domain expertise and IT architectural expertise

- Clear escalation paths for decisions that require trade-offs between marketing functionality and technical risk

For organizations seeking to establish such partnerships, enterprise marketing operations platforms like Uptempo are specifically designed to bridge marketing and finance operations, providing the kind of integrated architecture that reduces IT burden while meeting marketing's operational needs.

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Chapter 3: **The Pre-Flight Checklist**

Five Critical Evaluation Domains

The following checklist provides a systematic framework for evaluating marketing technology platforms. Each domain addresses a critical aspect of platform suitability for enterprise deployment.

Domain 1: Integration Architecture

Key Question: How will this platform exchange data with our existing systems?

Integration failures are the most common source of marketing technology problems. A platform that cannot reliably exchange data with existing systems creates manual workarounds, data inconsistencies, and operational friction that undermine the platform's value.

Checklist Items

API Documentation Review

- [ ] Is comprehensive API documentation publicly available?
- [ ] Are APIs versioned with clear deprecation policies?
- [ ] Do APIs support both real-time and batch data exchange patterns?
- [ ] What authentication mechanisms are supported (OAuth 2.0, API keys, SAML)?

Integration Pattern Assessment

- [ ] What pre-built integrations exist for your critical systems (ERP, CRM, identity provider)?
- [ ] How are integration configurations managed and version-controlled?
- [ ] What error handling and retry mechanisms exist for failed transactions?
- [ ] How is integration health monitored and alerted?

Data Model Compatibility

- [ ] How does the platform's data model map to your enterprise data structures?
- [ ] What data transformations are required for integration?
- [ ] How are schema changes in source or target systems handled?
- [ ] What master data management considerations apply?

Rate Limits and Throughput

- [ ] What API rate limits apply, and can they be increased for enterprise volumes?
- [ ] What is the maximum supported data throughput for bulk operations?
- [ ] How does the platform perform under sustained high-volume operations?

Red Flags

- [ ] Proprietary integration protocols without open API alternatives
- [ ] Undocumented or frequently changing APIs
- [ ] Rate limits that cannot accommodate enterprise data volumes
- [ ] No webhook or event-driven integration support

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Domain 2: Security and Compliance

Key Question: Does this platform meet our security requirements and regulatory obligations?

Marketing platforms increasingly process regulated data. Customer PII, payment information, health data, and financial information all flow through marketing systems. Security and compliance failures create legal liability, reputational damage, and regulatory penalties.

Checklist Items

Security Certifications

☐ Does the vendor maintain SOC 2 Type II certification?

☐ What additional certifications apply to your industry (HIPAA, PCI-DSS, FedRAMP)?

☐ When were certifications last renewed, and are reports available for review?

☐ What findings were noted, and how were they remediated?

Data Protection

☐ How is data encrypted at rest and in transit?

☐ What key management practices are employed?

☐ Where is data physically stored, and what jurisdictional implications apply?

☐ How is data segregated between customers in multi-tenant environments?

Access Control

☐ Does the platform support enterprise identity integration (SAML, OIDC)?

☐ What role-based access control capabilities exist?

☐ How is privileged access managed and audited?

☐ What multi-factor authentication options are available?

Incident Response

☐ What is the vendor's security incident notification policy?

☐ What SLAs govern incident response and resolution?

☐ Has the vendor experienced security incidents, and how were they handled?

☐ What penetration testing and vulnerability management practices are employed?

Red Flags

☐ Missing or outdated security certifications

☐ Inability to support enterprise identity integration

☐ Opaque data handling practices or jurisdictional concerns

☐ No formal incident response process

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Domain 3: Data Governance

Key Question: How will this platform maintain data quality, consistency, and auditability?

Marketing decisions increasingly rely on data. Budget allocations, campaign optimizations, and performance reporting all depend on accurate, consistent, and auditable data. Platforms that cannot maintain data governance create decisions based on unreliable information.

Checklist Items

Data Quality Controls

- [ ] What validation rules prevent invalid data entry?
- [ ] How are duplicate records identified and managed?
- [ ] What data cleansing capabilities exist?
- [ ] How is data accuracy measured and reported?

Audit Trail

- [ ] What changes are logged, and what detail is captured?
- [ ] How long are audit logs retained?
- [ ] Can audit logs be exported for external analysis?
- [ ] Are audit logs tamper-evident?

Reconciliation Capabilities

- [ ] Can platform data be reconciled with authoritative sources?
- [ ] What variance reporting exists?
- [ ] How are discrepancies identified and resolved?

Red Flags

- [ ] No audit trail for data changes
- [ ] Unable to reconcile with financial systems of record
- [ ] Limited data validation capabilities
- [ ] No data lineage or impact analysis

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Domain 4: Scalability and Performance

Key Question: Will this platform perform reliably at enterprise scale?

Platforms that perform adequately in proof-of-concept environments often fail at enterprise scale. Campaign launches, quarter-end reporting, and annual planning cycles create demand spikes that expose architectural limitations.

Checklist Items

Architecture Review

- What is the platform's underlying architecture (monolithic, microservices, serverless)?
- How does the platform handle horizontal scaling?
- What single points of failure exist?
- How is high availability achieved?

Performance Benchmarks

- What response time SLAs govern the platform?
- What throughput limits apply to data processing operations?
- How does the platform perform under peak load conditions?
- What performance degradation occurs under sustained high utilization?

Global Operations

- How is latency managed for geographically distributed users?
- What data residency options exist?
- How are regional compliance requirements addressed?
- What disaster recovery capabilities exist?

Red Flags

- Single-region deployment with no disaster recovery
- Performance SLAs that exclude peak periods
- No documented capacity planning process
- Architecture that cannot scale horizontally

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Domain 5: Vendor Stability and Support

Key Question: Will this vendor remain a viable partner over the platform's expected lifecycle?

Marketing technology investments are multi-year commitments. Vendor instability, acquisition, or product discontinuation creates migration costs, operational disruption, and stranded investment.

Checklist Items

Financial Viability

- What is the vendor's financial position (revenue, profitability, funding)?
- What is the vendor's customer concentration risk?
- What is the vendor's growth trajectory?

Product Investment

- What is the product roadmap, and how is it communicated?
- What is the release cadence, and how are updates deployed?
- How is backward compatibility maintained?

Support Model

- What support tiers and SLAs are available?
- What escalation paths exist for critical issues?
- What self-service resources are available?
- How is platform status communicated during incidents?

Exit Planning

- What data export capabilities exist?
- What formats are available for data extraction?
- What notice period applies to service termination?
- What migration assistance is available?

Red Flags

- Undisclosed or concerning financial position
- Stagnant product development
- No clear product roadmap
- Limited data portability options

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Chapter 4: Architecture Considerations for Enterprise Marketing Systems

Building for Maintainability and Governance

Enterprise marketing systems must balance marketing's need for operational flexibility with IT's requirements for security, maintainability, and governance. This balance requires architectural patterns that enable marketing effectiveness while maintaining technical standards.

The System of Record Pattern

The most successful enterprise marketing architectures establish a clear system of record for marketing financial and operational data. This system of record serves as the authoritative source for:

- Marketing budget allocations and spending
- Campaign plans and resource commitments
- Performance metrics and attribution data
- Financial reconciliation with enterprise systems

When a system of record is clearly established, integration patterns simplify. Data flows from source systems into the system of record, and reporting systems consume from the system of record. This pattern eliminates the reconciliation nightmares that plague organizations with multiple, conflicting data sources.

Uptempo's enterprise platform exemplifies this pattern, serving as the marketing system of record that unifies plans, budgets, spend, and performance in a single platform with native integration to financial systems.

Integration Architecture Patterns

Pattern 1: Hub-and-Spoke Integration

The system of record acts as a hub, with integrations to spoke systems for specific data domains.

This pattern centralizes integration logic, simplifies troubleshooting, and creates a single point of control for data governance.

Pattern 2: Event-Driven Architecture

Changes in source systems trigger events that propagate to interested consumers. This pattern enables real-time data synchronization, loose coupling between systems, and easier addition of new integrations.

Pattern 3: Batch Synchronization

Scheduled processes synchronize data between systems at defined intervals. This pattern is appropriate for data that does not require real-time availability and systems with rate-limited APIs.
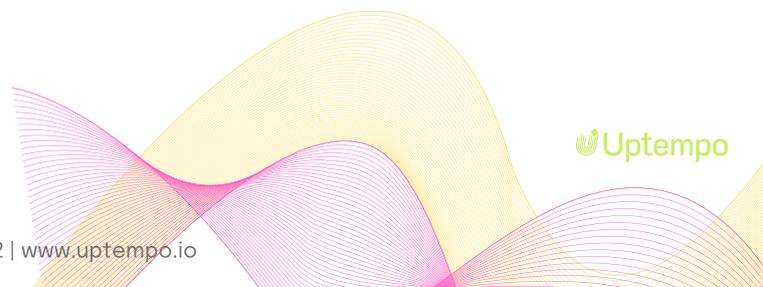
Chapter 5: Implementation Risk Assessment Framework

Quantifying and Managing Implementation Risk

Not all marketing technology implementations carry equal risk. A framework for assessing implementation risk enables IT leaders to allocate appropriate oversight, identify potential problems before they materialize, and set realistic expectations with stakeholders.

Risk Assessment Dimensions

Dimension	Description	Risk Range
Integration Complexity	Number of required integrations, data transformation requirements, real-time vs. batch requirements	Low (1-2) to High (5+)
Data Sensitivity	Classification of data processed, regulatory requirements, contractual obligations	Low to High (PII)
Operational Criticality	Business processes dependent on platform, impact of unavailability, recovery requirements	Low to Critical
Change Magnitude	Number of users affected, process changes required, training requirements	Low to Enterprise-wide

Risk-Based Oversight Model

Based on aggregated risk scores, assign appropriate IT oversight:

Risk Level	Oversight Model
Low	Standard review, self-service provisioning
Medium	Enhanced review, dedicated IT resource for implementation
High	Full IT partnership, architecture review board approval
Critical	Executive sponsorship, dedicated implementation team

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Chapter 6: **Building the Business Case with Marketing**

From Adversary to Advocate

IT's involvement in marketing technology evaluation should create value for marketing and business, not just risk mitigation for IT. When IT approaches marketing technology evaluation as a partnership, the result is better technology decisions that serve both functions.

Value Propositions for Marketing Partners

Faster Time-to-Value

IT involvement in vendor evaluation identifies integration challenges before they become implementation blockers. Addressing these challenges during procurement negotiation is faster and cheaper than discovering them post-contract.

Reduced Operational Friction

Platforms that integrate cleanly with enterprise systems require less manual workaround and data reconciliation. Marketing teams spend less time managing technology and more time on marketing activities.

Lower Total Cost of Ownership

Proper architectural assessment identifies hidden costs: integration development, data transformation, additional infrastructure, and ongoing maintenance. Understanding total cost of ownership enables more accurate budgeting and better resource allocation.

Improved Credibility

Marketing systems that produce accurate, auditable data improve marketing's credibility with finance and executive leadership. When budget reports reconcile with financial systems and performance data can be validated, marketing can defend its investments with confidence.

Engagement Approach

Start Early: Engage with marketing during requirements definition, not after vendor selection. Early engagement allows IT to shape requirements in ways that reduce implementation risk without constraining marketing's functional needs.

Speak Marketing's Language: Frame technical requirements in terms of business outcomes. "SOC 2 certification" becomes "protecting customer data and avoiding breach notifications." "API rate limits" becomes "ensuring reports run when you need them."

Offer Solutions, Not Just Problems: When technical concerns arise, come with alternatives. If a preferred vendor has security gaps, identify what remediation would be required. If integration is complex, outline the resources needed to achieve it.

Celebrate Shared Successes: When marketing technology implementations succeed, acknowledge the partnership. Joint ownership of success builds trust for future engagements.

Chapter 7: **Conclusion and Next Steps**

Taking Control Before Problems Arise

Marketing technology will continue to grow in complexity, cost, and criticality. IT leaders have a choice: remain reactive, inheriting problems created by decisions made without their input, or become proactive, shaping technology decisions to reduce risk and increase value.

The pre-flight checklist presented in this white paper provides a systematic framework for proactive engagement. By evaluating marketing platforms across integration architecture, security and compliance, data governance, scalability, and vendor stability, IT leaders can identify risks before they become problems and contribute architectural expertise that improves technology decisions.

Immediate Actions

1. **Establish Governance:** Create or formalize a joint IT-marketing technology governance process. Define when IT involvement is required and what evaluation criteria apply.

2. **Assess Current State:** Evaluate existing marketing technology against the checklist criteria. Identify platforms with elevated risk profiles and develop remediation or replacement plans.

3. **Build Relationships:** Engage proactively with marketing leadership. Understand their technology roadmap and strategic priorities. Position IT as a partner in achieving those priorities.

4. **Develop Expertise:** Invest in understanding marketing operations and marketing technology categories. IT leaders who understand marketing's challenges can contribute more effectively to technology decisions.

Request a Demo

For IT leaders evaluating enterprise marketing operations platforms, Uptempo offers complimentary technical architecture reviews. Our team can assess how Uptempo's enterprise marketing system of record would integrate with your existing infrastructure, meet your security requirements, and support your governance needs.

uptempo.io/demo/

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Appendix: Quick Reference Checklist

Use this condensed checklist for initial platform evaluations:

Domain 1: Integration Architecture

- [ ] Comprehensive, versioned API documentation available
- [ ] Pre-built integrations for critical systems (ERP, CRM, IdP)
- [ ] Rate limits accommodate enterprise data volumes
- [ ] Event-driven integration support available

Domain 2: Security and Compliance

- [ ] SOC 2 Type II certification current
- [ ] Industry-specific certifications as required (HIPAA, PCI-DSS, FedRAMP)
- [ ] Enterprise identity integration (SAML/OIDC) supported
- [ ] Formal incident response process documented

Domain 3: Data Governance

- [ ] Complete audit trail for all data changes
- [ ] Reconciliation with financial systems of record
- [ ] Data lineage and impact analysis capabilities
- [ ] Data validation and quality controls

Domain 4: Scalability and Performance

- [ ] Multi-region deployment with disaster recovery
- [ ] Performance SLAs include peak periods
- [ ] Horizontal scaling architecture
- [ ] Documented capacity planning process

Domain 5: Vendor Stability

- [ ] Financial position disclosed and stable
- [ ] Active product development and clear roadmap
- [ ] Enterprise support tiers and SLAs available
- [ ] Data portability and export options documented

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About Uptempo

Uptempo is the enterprise marketing system of record that connects plans, budgets, spend, and performance in a single, governed platform. Built for complex, global marketing organizations, Uptempo enables leaders to run marketing like a business by creating a clear line of sight from investment decisions to outcomes.

By serving as the system of record for the business of marketing, Uptempo unifies financial governance, strategic planning, and execution visibility across teams. The platform supports enterprise-grade security, scalable integrations, and audit-ready controls, helping CMOs, Marketing Operations, and Finance teams operate from a shared source of truth while reducing manual effort and improving confidence in decision-making.

Customers including Cisco, IKEA, Juniper Networks, IBM, and GE Digital trust Uptempo to deliver budget accuracy within 1% variance while saving thousands of hours previously spent on manual reconciliation.

Learn more: www.uptempo.io

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