

NOTION + PDF TEMPLATE

Marketing Stack Audit

The exact template our strategists use to audit a Fortune 500 marketing stack. Tools, owners, data flows, and integration gaps — captured on a single canvas.

FORMAT

PDF Workbook

LENGTH

9 Pages

EDITION

Edition 2026.1

WHY AUDIT YOUR STACK

If you can't see your stack, you can't fix it.

Most marketing teams know they have too many tools. Far fewer know which ones are redundant, which ones have broken integrations, and which ones nobody actually uses.

A proper stack audit is not a software inventory. It is a map of where data flows, where it gets stuck, where decisions get made (or don't), and where you are paying for capability you already have somewhere else.

The marketFX Stack Audit works across five layers — Acquisition, Engagement, Conversion, Retention, and Measurement — and asks five questions of every tool: Does it own a workflow? Does it own data? Does it talk to its neighbors? Is its owner the same as its budget owner? Could one tool replace two?

How to use this template

This template is built to be filled in twice — first by you, working alone, in about ninety minutes. Then together with your team, in a working session of two to three hours. The first version captures what you think your stack does. The second captures what it actually does. Wherever those two versions disagree, you have found an audit finding.

Notion-ready structure

Every table in this PDF is structured to copy directly into a Notion database. Column headers match Notion property names. The "Status" field uses the standard Notion select values (Essential, Duplicative, At Risk, Sunset, Investigate).

THE FRAMEWORK

The five layers of a marketing stack.

Every marketing tool you own does one of five things. Auditing layer by layer (rather than vendor by vendor) is how you find duplication, gaps, and broken handoffs.

LAYER 01**Acquisition**

Tools that find and capture demand. Paid media platforms, SEO tools, programmatic, social ad managers, attribution sources, partner / affiliate platforms, intent and ABM data, landing page builders. The first question of every acquisition tool: *does it directly trigger or measure a top-of-funnel event?* If not, it lives in a different layer.

LAYER 02**Engagement**

Tools that hold attention and deliver content. Website / CMS, content management, social publishing, community platforms, video and creative tools, podcast hosting, brand asset management. The acid test: *does this tool host the experience the customer interacts with?*

LAYER 03**Conversion**

Tools that turn attention into action. Forms, calendar / booking tools, checkout, CRO platforms, chat and conversational tools, lead routing, sales engagement. The acid test: *does this tool sit at the point of customer commitment?*

LAYER 04**Retention**

Tools that grow customer value. CRM, marketing automation, email, SMS, loyalty, push, customer support, NPS, lifecycle orchestration. The acid test: *does this tool act on first-party data after the first conversion?*

LAYER 05**Measurement**

Tools that turn activity into insight. Analytics, tag management, BI / warehouse, attribution, dashboards, data clean rooms, customer data platforms. The acid test: *does this tool produce a number an executive uses to make a decision?*

TOOL INVENTORY

Every tool, owner, and cost — on one page.

Capture every marketing tool currently in use. Owner is the human accountable, not the AP contact. Status is your first-pass judgment, refined in the working session. Extend in your Notion workspace once the starter set is captured.

TOOL	VENDOR	LAYER	OWNER	COST/MO	STATUS

Status values: **Essential** (cannot operate without) · **Duplicative** (overlap with another tool) · **At Risk** (under-used, contract expiring, or owner-less) · **Sunset** (planned removal) · **Investigate** (unclear use).

DATA FLOWS & INTEGRATIONS

Where does data move — and where does it stop?

For every meaningful data handoff in your stack, capture the source, the destination, the method, and the freshness. The integrations that go missing here are usually the ones you discover are broken six months later.

SOURCE	DESTINATION	DATA OBJECT	METHOD	FREQUENCY	HEALTH

Method: **Native** (built-in connector) · **iPaaS** (Zapier, Workato, Tray) · **API** (custom build) · **Reverse ETL** · **Manual** (CSV / paste — flag every instance). Health: green (working & trusted), amber (working but not trusted), red (broken or unmonitored).

GAP FINDER

Eight questions that reveal hidden gaps.

Most stack audits stop at "what do we own?" That is the inventory. The audit is what you discover by asking the next question.

- Coverage gap.** Is there a tool for every layer (Acquisition, Engagement, Conversion, Retention, Measurement)? Which layer is under-tooled?

- Duplication gap.** Where do two or more tools serve the same job? (Common: two analytics platforms, two email tools, three places that store first-party data.)

- Owner gap.** Which tools have no single named human owner? Tools without owners decay.

- Adoption gap.** Which tools are paid for but used by fewer than three people, fewer than once a week?

- Integration gap.** Which tools are running as data islands — no inbound or outbound integrations?

- Trust gap.** Which dashboards or reports does the team override with a spreadsheet because they don't trust the source?

- Brief gap.** Where are creative briefs, audience definitions, or campaign plans being rewritten because tools don't share them?

- Identity gap.** Is there one source of truth for customer identity — or does each tool have its own?

AUDIT FINDINGS

Synthesize what you found.

After the inventory, the data flow map, and the gap finder, you should have between four and seven real findings. Each one is one sentence on the problem, one on the implication, and one on the move.

Finding #1

Problem · Implication · Move

Finding #2

Finding #3

Finding #4

A finding is well-formed when a non-marketer can read it and know what is broken and what should happen next.

TAKE IT TO NOTION

Convert this audit into a living document.

This PDF is the static snapshot. The audit becomes valuable when it lives in a Notion workspace your team updates quarterly. Below is the database structure that mirrors this template.

Database 1 · Tools

PROPERTY	TYPE	NOTES
Tool	Title	Primary key
Vendor	Text	
Layer	Select	Acquisition · Engagement · Conversion · Retention · Measurement
Owner	Person	Human accountable, not AP
Cost/mo	Number	USD
Status	Select	Essential · Duplicative · At Risk · Sunset · Investigate
Last reviewed	Date	Quarterly cadence

Database 2 · Data flows

PROPERTY	TYPE	NOTES
Source	Relation → Tools	
Destination	Relation → Tools	
Data object	Text	e.g., Lead, Customer, Event, Order
Method	Select	Native · iPaaS · API · Reverse ETL · Manual

Want the working Notion template?

We can hand over a pre-built Notion workspace with the three databases above, pre-populated views, and the working session agenda our senior strategists use with Fortune 500 clients. Book a 30-minute call and we will share it.

[Book a Strategy Session →](#)