Simon

Martech Stack Optimization

Leveraging Marketing Technology to
Drive a Seamless Customer Experience

Introduction

This report is the second in a four-part series that presents Simon Data's perspective on how brands can maximize the value of their marketing budgets. The primary goal of this report is to offer a step-by-step guide for how marketing leaders can think holistically about their stacks by connecting technology capabilities to marketing strategies and tactics and demystifying the complex web of marketing technologies that have proliferated in recent years.

This report contains a series of guidelines, tools, and links to other Simon Data resources that can help guide understanding and decision-making when facing today's enormous martech landscape.

For best-practice content and guidance, the following reports from Simon may be a helpful companion guide to this framework:

> **Lifecycle Marketing: An Essential Framework for High-Impact Marketing**

> **Cost Optimization: Making the Most of Limited Marketing Resources**

> **Cost Optimization: Managing Media Costs for Optimal Impact (Coming 2021)**

> **Cost Optimization: Aligning People and Talent Capabilities to Marketing Needs (Coming 2021)**

How to use this report:

Insights. This report offers a collection of original insights and guidance on making the most of your marketing technology stack. Use this report to develop your brand's approach to marketing technology decisions and maximizing its impact potential.

Guidance. Use the tools featured throughout the report to improve your martech planning.

Leverage Your Simon Data Team. Your dedicated Account Manager and the Strategic Advisory team are available to discuss how you can use the principles featured in this report to support your marketing and business objectives. Reach out and schedule a conversation.

State of
# the Stack

Marketing in a Data-Driven World

Marketing is no longer traditional print and TV ad placements with spray-and-pray brand initiatives; it's now a complex digital dance of listening for data, thinking against a strategy, and speaking with customers.

- An exponential amount of data is created everyday that, with the proper tools and strategy, can be tapped, mined, and leveraged by brands to make better decisions about their marketing and provide unique and valuable customer experiences.

- To do so, marketing teams are dedicating a significant amount of their annual budgets to building and maintaining their martech stacks.

Source:
Simon Data analysis;
1) IBM, 2017.
2) Gartner, 2020.

The Explosion of Data in Marketing Has Dramatically Expanded the Role of Tech

Data Is Growing Exponentially
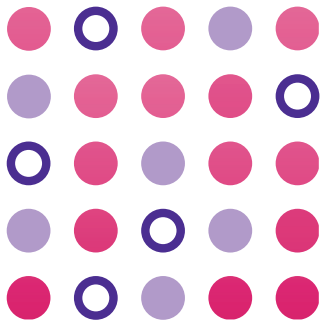
10x

...the amount of data exists today than it did a year ago.[1]

Tech Is Now a Significant Part of the Budget

26.2%

...of the average marketing budget goes to technology.[2]

Access to data has completely changed the game for how Marketing operates, but it has also become overwhelming and costly.

Marketing in a Data-Driven World

Tech selection and management is more difficult than ever as martech has become a booming industry, with marketing leaders everywhere looking to amp up their stacks to keep up with competitors and rising customer expectations.

- **Market Pressure:** Competitive positioning is a driver of stack development as each brand tries to not only close the gap with their peers in the market but exceed it.

- **Internal Pressure:** Brand leaders often feel pressure from the C-suite to deliver. Caught between a rock of limited resources and a hard place of needing to demonstrate ROI, Marketing leaders struggle to establish a solid stack strategy.

- **Customer Pressure:** As customers go more digital, brands face increasing expectations to meet customers where they are, pushing brand leaders to acquire new technologies aimed at enabling new-in-kind initiatives.

Source:
Simon Data analysis;
1)Scott Brinker, 2020;

Finding a Path to Value Feels Overwhelming with Martech's Sprawl
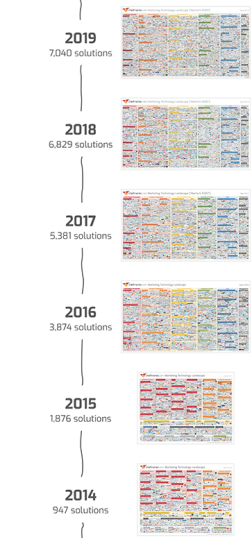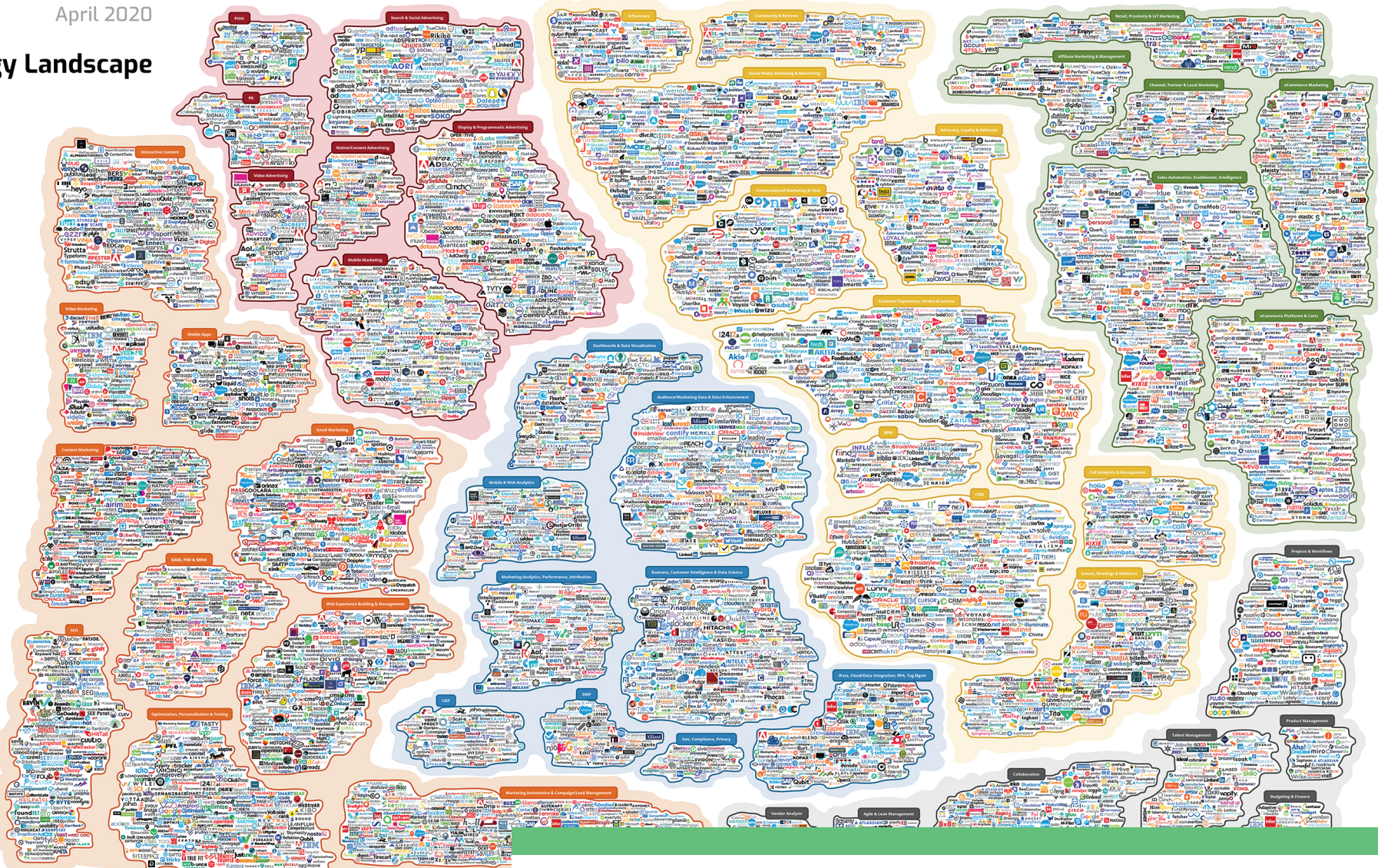
Today's MarTech Landscape[1]

From **947** to **8,000+** in just six years, the martech landscape has expanded exponentially, creating an opportunity and pressure for stacks to grow, and for marketers to become overwhelmed.

Over Stacked, Under Leveraged

While technology is critical to today's marketing function, it has become acutely overwhelming. Enterprise stacks have accumulated layers over the years, leaving teams often not even knowing what lives in it.

- **Shiny Object Syndrome:** Stacks grow when new tools are selected because it's what 'everyone else has,' or because they promise to solve a particular surface-level pain point. However, the addition of new tools can often create new problems.

- **Hidden Costs:** Large stacks are not just expensive to acquire, but they also have several recurring costs such as:
  - Lost revenue due to bad data
  - Tech debt associated with maintenance, upgrades, and missed opportunity from versioning
  - Staff upskilling and external support

Source:
Simon Data analysis;
1) Gartner, 2019.   3) Blissfully, 2019;
2) Scott Brinker, 2019;   4) Gartner, 2020.

The Proliferation of Martech Tools Has Not Translated to Realized Capability or ROI

Bad Data and Tech Are Ubiquitous

30%

...of a company's revenue is lost due to bad data[1]

91

...different marketing cloud services are in the average enterprise marketing stack[2]

2x

...more applications are used in a company than they think[3]

Many Capabilities Remain Under-leveraged

Average Martech Stack Capability Utilization, by %[4]

Unused 43%   **Used 57%**
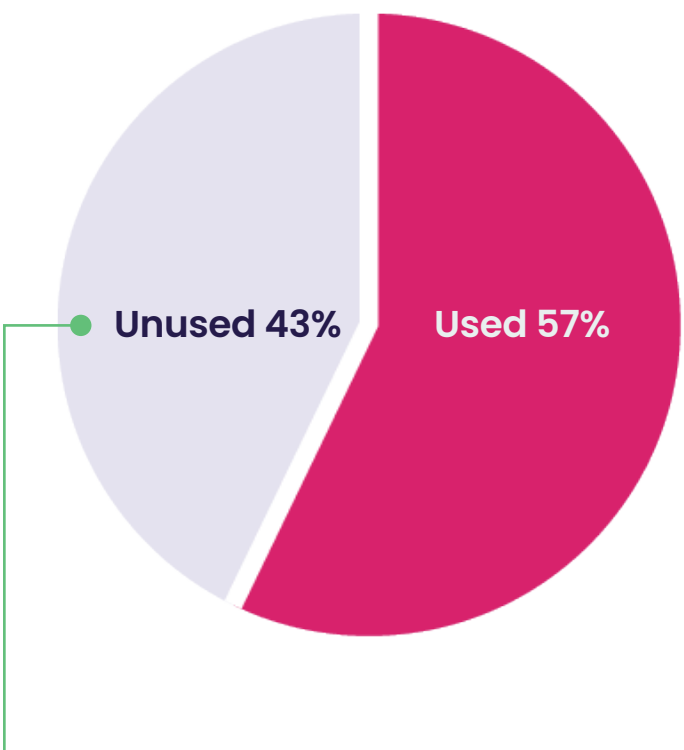
Nearly **one-half** of the average company's martech capabilities go underused — meaning Marketing either fails to get critical value out of their tools or are paying for more than they need.

Listening, Thinking, and Speaking Out of Turn

Marketers have built their stacks to be customer-focused, but most technologies only focus on one or two of the essential elements of strong customer experience:

- **Listening:** Tools to collect data from customers.

- **Thinking**: Tools that process data, generate insights, and support decision-making.

- **Speaking:** Tools that allow brands to connect and engage with customers across their lifecycle.

Given that best-in-class customer experiences depend on marketers being able to operate at the intersection of these three elements, stacks that fail to seamlessly integrate these elements are doomed to underdeliver.

Source:
Simon Data analysis.

Integration of Listening, Thinking, and Speaking Is Critical to Customer Experience

Many Marketing Technologies Only Focus on One or Two of These Critical Competencies
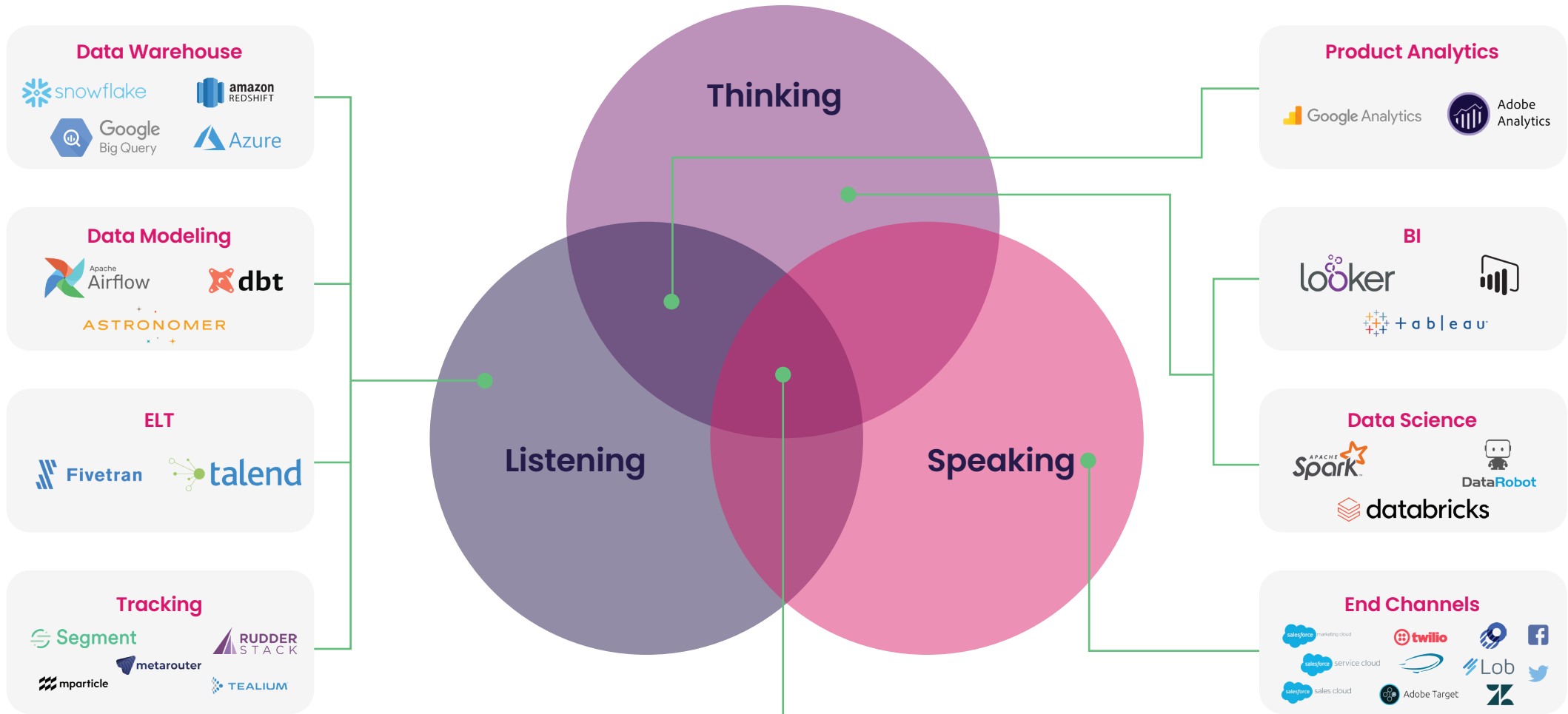
In most architectures, the capabilities required to **listen, think,** and **speak** are disconnected, creating gaps in the customer experience and marketing's impact.

Managing Spokes Without a Hub

Marketers and IT teams spend a tremendous amount of time and resources trying to connect these disparate tools, leading to a confusing morass that is difficult to maintain and tremendously wasteful.

- Disconnected systems cause teams to under-leverage large portions of their stacks' capabilities.

- Fragmented data workflows are high-maintenance for teams at best and generators of a poor customer experience at worst.

- Disintegrated technology can cause missed opportunities through slow turnaround, misaligned data points, and low-leverage insights.

- Too often stacks have overlapping capabilities that not only exacerbate the fragmentation but deepen redundancies.

Source:
Simon Data analysis.
1) Ventana Research, 2020.

Efforts to Unify Listening, Thinking, and Speaking across Disparate Tools Creates Waste

Integrating the Fragmented Systems of Most Stacks Is Costly and Time-Consuming

70% of organizations need to integrate more than 6 disparate data sources.[1]

End channels are both critical sources of and consumers of customer data and thus rely on a solid data infrastructure to have impact.
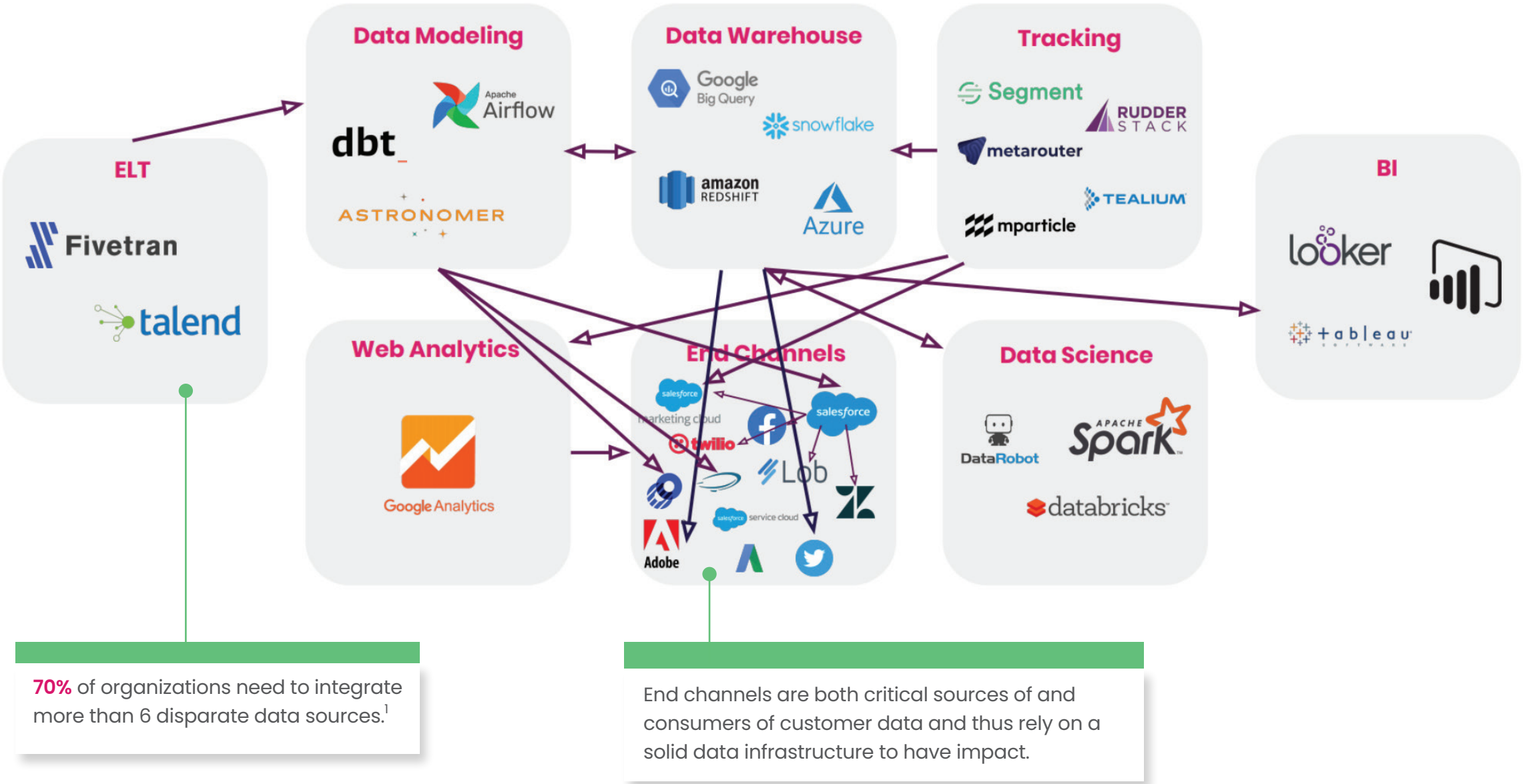
Data, Data Everywhere…

Marketers, forced contend with more data than ever before, struggle to leverage it across a myriad tools and teams in an efficient, effective, and agile way.

- Data flow is hindered by not having the right tools with the right connections keeping them from having the right impact in marketing's key initiatives

- Workflow is hindered by slow manual processes that take up both marketer resources and speed to market.

- The customer experience is directly impacted by how a brand listens to customers' behaviors and preferences, thinks about the right content for them, and speaks with to them in the right place and at the right time.

Source:
Simon Data analysis.

Marketing's Biggest Data Pain Points Stem from Gaps in Tech Stacks

Data Flow

Siloed Data
- No central location for all data to live
- Unable to unify data effectively
- Identity and personalization is difficult

Slow Data:
- Difficulty matching real-time data to profile data
- Refresh rates too slow

Data Volume
- Imbalanced data storage causing data loss
- Too much data to process in a timely manner

Workflow

Inaccessible Data
- Cross-functional silos and red tape
- Roles and responsibilities

Manual Processes
- Pulling data by hand per project
- Poor integration across tools
- Coordinating across teams

Orchestration
- Managing the rollout across channels
- Balancing experimentation

Customer Experience

Experience Gaps
- Content doesn't resonate
- Disconnects between online and offline experience
- Misalignment between business unit engagements

Missed Opportunities
- Marketing engagement arrives too late
- Missed identity resolution across channels

A Change for the Better

Brands should not settle for the current state, but aim for a north star of a well-connected data ecosystem that enables a clear view of the customer and a seamless execution of marketing initiatives.

- Disconnected, lost, or unusable data should not be considered a cost of doing business as common pain points of the modern marketing data system.
- Resolve data-led pain points using tools to enable a seamless connection across data sources.

Source:
Simon Data analysis.

Transform Data Systems to Better Listen, Think, and Speak to Customers

Opportunities to Mature Data Capabilities from Current to Ideal State
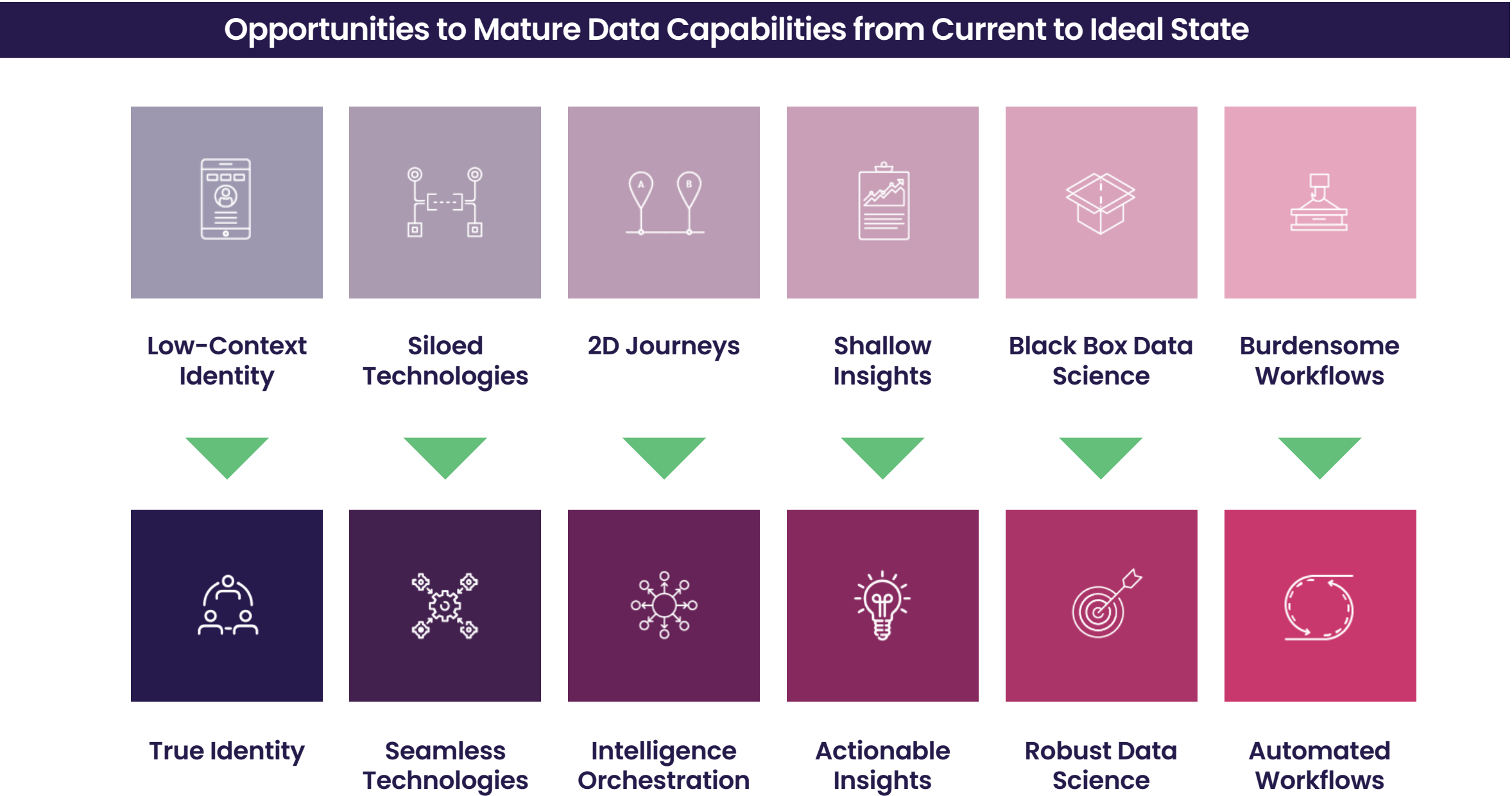
Low-Context Identity	Siloed Technologies	2D Journeys	Shallow Insights	Black Box Data Science	Burdensome Workflows
▼	▼	▼	▼	▼	▼
True Identity	Seamless Technologies	Intelligence Orchestration	Actionable Insights	Robust Data Science	Automated Workflows

Smart Hub, Smarter Data

Establish an ecosystem. Avoid a disconnected system by leveraging a Smart Hub tool that helps not only centralize fragmented data, but also enable a baseline of critical data infrastructure capabilities to drive customer experience.

- A 'Smart Hub' customer data platform sits at the center of a best-in-class ecosystem ensuring that marketers can activate all the data across their organization.

- Smart Hubs go beyond integration and help make decisions for a network of systems for message execution and experience personalization.[1]

Source:
Simon Data analysis;
1) Gartner, 2020.
2) Scott Brinker, 2020;

Create a Centralized Data Ecosystem to Enable a Seamless Experience

Illustrative Smart Hub-Enabled Marketing Stack

More than ever, marketers are centralizing disparate systems with **52%** of teams deploying a multi-system, integrated architecture.2
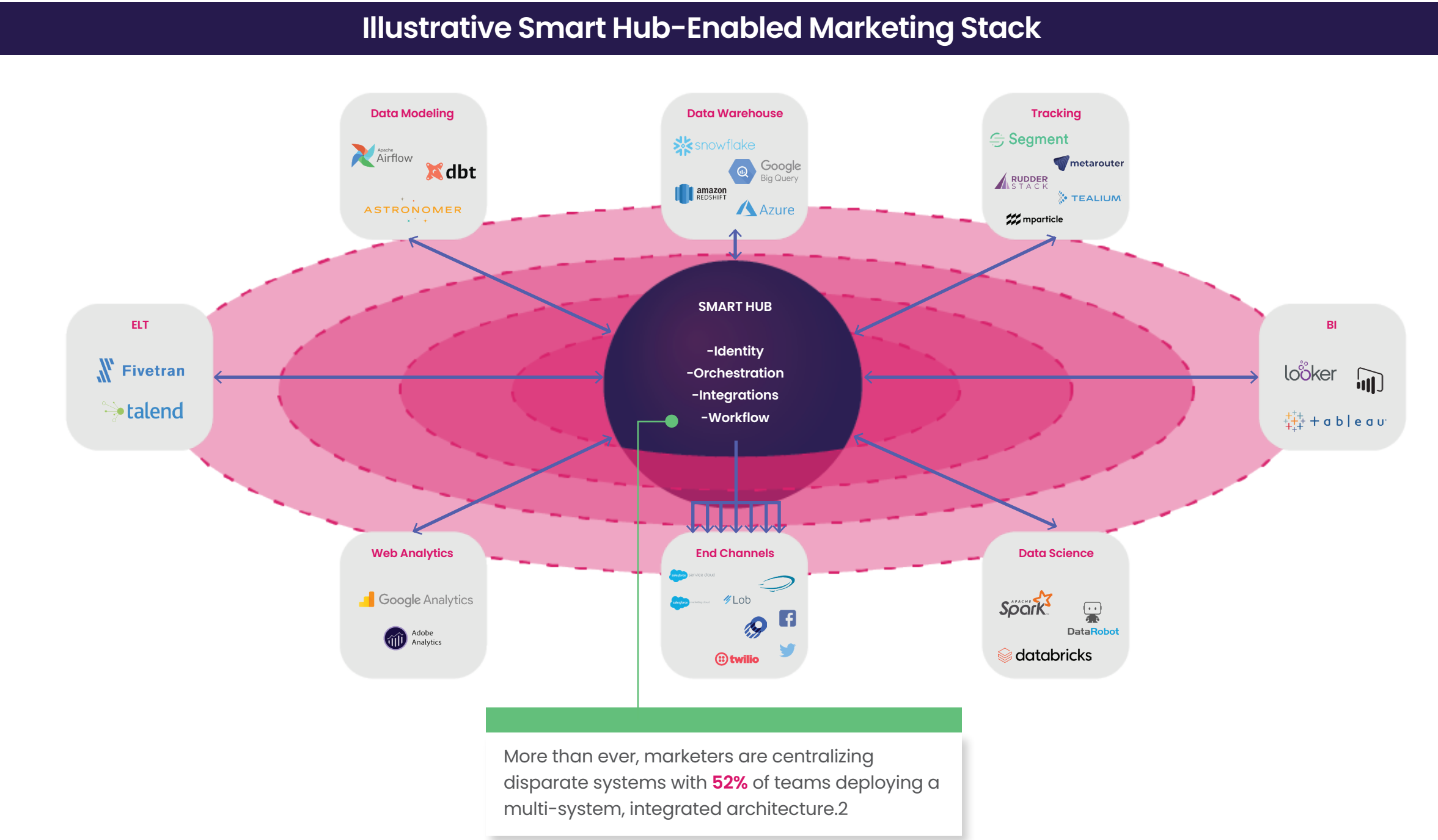
Use It or Lose It

Make the most of it. Assess your current stack for redundancies and leverage a CDP to maximize your capabilities, increase the likelihood of an ROI, and increase satisfaction with the technologies at your disposal.

- Be more intentional about the capabilities you bring on board to increase the likelihood that your team will see a high return on the investment of those tools.

- Use a Smart Hub CDP to increase your ability to leverage more of your stack's capabilities and increase overall satisfaction with your stack.

A High Return on Stack Utilization

Stack Capability Usage
Impact on ROI

20%
ROI
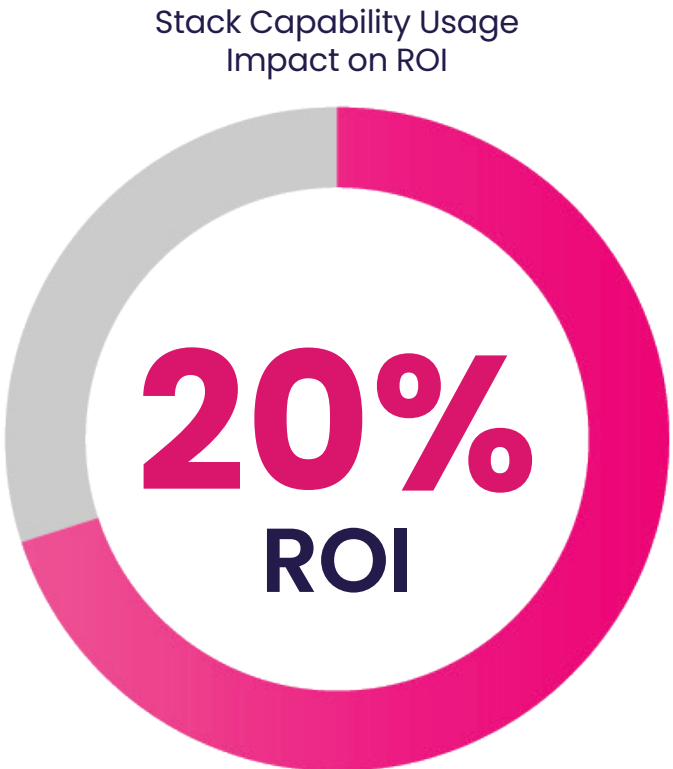
Gartner predicts that CMOs who utilize **70%** of their stack's capabilities will achieve **20%** better marketing ROI than their peers. [1]

CDPs Might Be a Key to Happiness

MarTech Stack Satisfaction
by CDP Status

1.39X

1X

No Plans for CDP   CDP Deployed
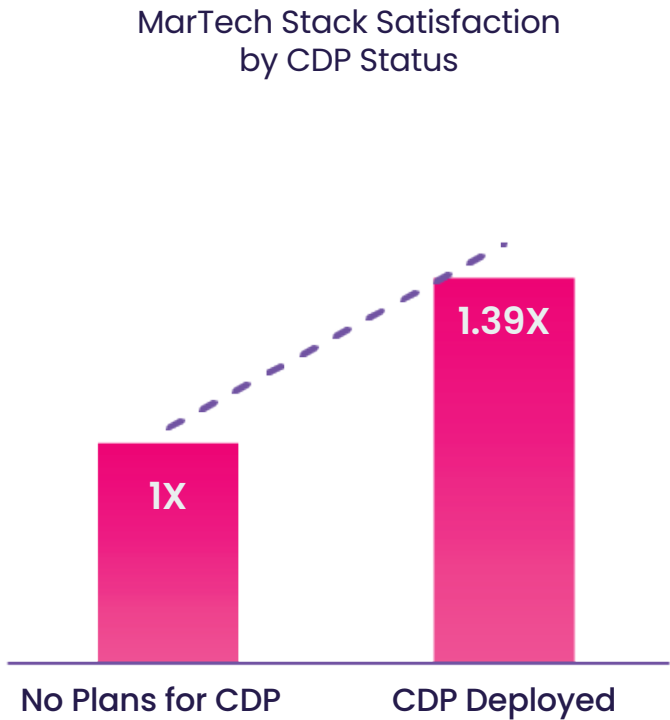
Marketing teams that have deployed a customer data platform are nearly **40%** more likely to report being happy with their tech stacks. [2]

Source:
Simon Data analysis;
1) Gartner, 2020.
2) Scott Brinker, 2020;

Stack Evalution Guidelines

Building Your Best-Fit Marketing Technology Stack
Roadmap

1 **What In My Current State Should Impact My Decisions?**

Stack Framework Best Practices

Business Context Drivers

Customer Context Drivers

Status of Incumbent Technology

2 **How Do I Identify My Best-Fit Customer Connectors?**

Establish Marketing Objectives

Identify End-Channel Requirements
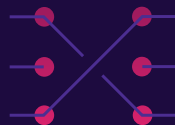
Connector Capability Best-Fit Tool

3 **How Can I Optimize My Data Infrastructure?**

Core Data Infrastructure Capabilities

Smart Hub Enabled Capabilities

Data Capability Best-Fit Tool

4 **How Can I Pull It All Together?**

Simon Martech Stack Worksheet

Simon Martech Stack Framework

Building Your Best-Fit Marketing Technology Stack
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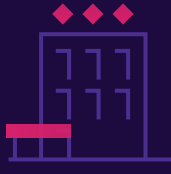
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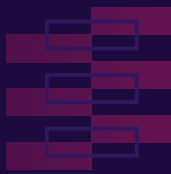
Simon Martech Stack Framework

Building and Describing Your Stack

Map your stack. Visualize your current marketing stack to not only ensure full coverage (and limit redundancies) but also to communicate your plans to cross-functional peers.

- There are as many ways to map a stack as there are companies. Simon Data identified common markers of best practice stack construction:
  - Customer Connectors
  - Customer Data Enablement
  - Customer Data Foundation
  - Content Management
  - Operations & Decision Management
- This stack enables an abstract visualization of the flow of customer data across tools, putting it at the center to hold the marketing program together.

TIP:
Make it your own. Use this template to get you started. See the appendix for a template.

Visualize Your Marketing Stack to Ensure Full Coverage of Essential Capabilities
Illustrative Marketing Stack

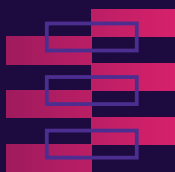| Objective Enablement	Email	SMS	Push	Print	Social	Search	Interactive	Loyalty	Reviews	Site
Acquisition			●		●	●		●		●
Conversion	●	●		●		●	●		●	●
Retention	●	●	●		●			●	●	●
Growth	●	●	●	●	●			●	●	●
Advocacy	●			●		●		●	●	●
Experience	●	●	●					●	●	●

Customer Connectors

Customer Data Enablement

CDP

⊟ Simon

Customer Data Foundation

Event Processing | Pipes | Location
Warehouse | Modeling | Cloud Server

Content Management

CMP | eComm
Creative Dev
SEO | Web Optimization

Operations & Decision Management

Tracking | Project
DSP
BI | Analytics/Attribution

Objective-mapping allows teams to better assess coverage and focus of the customer connectors that will be used to drive the results across marketing's initiatives.

Data and data-enablers are critical to operationalize the function to connect with customers in a meaningful, personalized way and flow data both up into the end channels and down to operations.

The Complicated Modern Marketing Stack

Consider your options. Within the Martech landscape, there are several types of capabilities that marketing teams seek in order to not only enable their initiatives, but to also keep the function running. Balancing the capabilities required against a management set of technologies is a challenge most marketing leaders face.

- Not all tools fit neatly into boxes, and several have multiple capabilities that span across categories.

- Marketing teams are often faced with finding the balance between a few centralized marketing tools vs. many best-of-breed tools to be able to meet their needs.

- Tools from each category are required to operationalize a high-impact, modern marketing program.

Source:
Simon Data analysis;
1) Scott Brinker, 2020;

Marketing Technologies Come in Every Size, Capability, and Price Point

Common Martech Stack Capability Categories1

Advertising & Promotion

- Print
- Search & Social Advertising
- PR
- Video Advertising
- Natice/Content Advertising
- Display & Programmatic

Commerce & Sales

- Retail, Proximity & IoT Marketing
- Affiliate Marketing & Management
- Channel, Partner & Local Marketing
- Sales Automation, Enablement & Intelligence
- eCommerce Marketing
- eCommerce Platforms & Carts

Social Relationships

- Influencers
- Community & Reviews
- Social Media Marketing & Monitoring
- Conversational Marketing & Chat
- Advocacy, Loyalty & Rewards
- Customer Experience, Service & Success
- ABM
- CRM
- Call Analytics & Management
- Events, Meetings & Webinards

Data

- Dashboards & Data Visualization
- Audience/Marketing Data & Data Enhancement
- Mobile & Web Analytics
- Marketing Analytics, Performance, Attribution
- Business, Customer Intelligence & Data Science
- CDP
- DMP
- Gov, Compliance, Privacy
- iPass, Cloud/Data Integration, RPA, Tag Management

Content/Experience

- Interactive Content
- Video Marketing
- Mobile Apps
- Content Marketing
- Email Marketing
- DAM, PIM, MRM
- SEO
- Optimization, Personalization & Testing
- Web Experience Building & Management
- Marketing Automation & Lead Management

Management

- Vendor Analysis
- Agile & Lead Management
- Collaboration
- Talent Management
- Budgeting & Finance
- Product Management
- Projects & Workflows

Customer Connectors

Data Foundation & Enablement

Content & Decision Management

Platforms that marketing teams use to speak to their customers through various end-channels. Not all brands need every tool; others might need more.

Tools that collect, track, and manage customer data to enable measuring and optimizing initiatives.

Shared tools to manage and enable team efficiency, agility, and impact against a high-return marketing program.

Closing the Gaps with a Seamless Stack

Enable lifecycle marketing. A high-impact marketing program should have the capabilities to effectively manage how they listen, think, and speak with their customers — best-in-class teams connect these seamlessly into one conversation.

- Assess how each of these tools syncs together to enable an ecosystem of data exchange for a seamless customer experience.

- **Managing:** Tools that enable the team to optimize or maintain processes and drive the program forward in a productive and efficient way.

Understand How Stacks Communicate to Enable Best-in-Class Lifecycle Marketing

	Listen	Think	Speak	Manage
Customer Connectors	▮		▮	
Customer Data Enablemetn	▮	▮	▮	▮
Customer Data Foundation	▮	▮		
Content Management			▮	▮
Operations & Decision Management		▮		▮

Without a seamless architecture connected by effective customer data enablement, the gaps in delivery across these tool groups can reduce the efficacy of Marketing's experience initiatives.
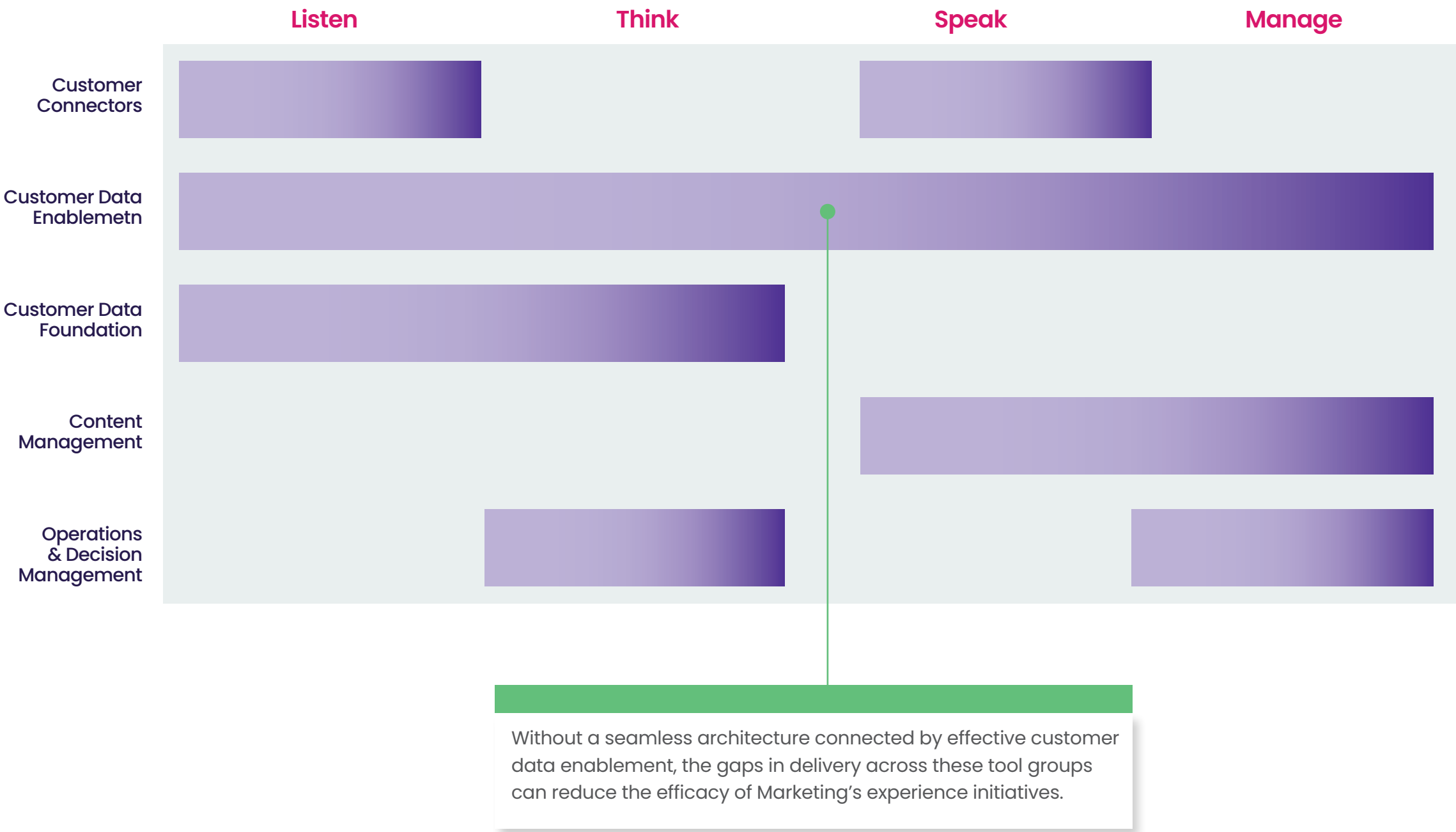
Complexities Impacting Tech Requirements

Consider high-impact drivers. Take into account the varied complexities across your customer base, your current stack, and your business context to help define your approach to tech stack needs and requirements.

- **Customer Complexity:** How a customer buys, owns, and engages with a brand are critical drivers of end-channels.
- **Business Context:** The internal dynamics and capabilities of a team present both needs and limitations on certain tech options.
- **Incumbent Stack:** A brand's current stack can have a critical impact on any new

TIP:
Ask around. Take the opportunity to connect with cross-functional peers to find out what this criteria might look like for your brand and start a collaborative dialogue.

Make Marketing Technology Decisions Considering Key Internal and External Factors

Customer Complexity	Business Context	Incumbent Stack
Consideration	Team Skill	Current Stack Size
Product Lifecycle	Cross-functional Accessibility	Data Sources
Segment and Persona Variation	Firmographics	Data Complexity
Engagement Preferences	Available Resources	Stack Connectivity
Product Portfolio		

Each of these elements affect the decision-making process for new and existing tech and should be considered during the selection process.

Customer Complexity in Stack Considerations

Marketing Technology Decision Drivers

Consider your customer's context.
Factor in how customers prefer to buy, own, and engage in your vertical so you can make smart choices about core capabilities of your tech stack.

- **Consideration:** Every purchase requires a customer to make decisions that are affected by things like price, importance and brand preference.

- **Product Lifecycle**: The longevity and frequency of use defines how a customer owns a product and the cadence of repurchase.

- **Segment & Persona Variation:** Market size and diversity affect the complexity of technical and communications requirements.

- **Engagement Preferences:** It's critical to meet and exceed customer communication preferences, which vary based on vertical, trend, or ease.

Customer Complexity	Impact on Technology Requirements
Consideration Level • low • medium • high	• End-channel tool portfolio • End-channel capability requirements
Product Lifecycle • time of ownership • frequency of use	• Lifespan of product defines engagement frequency and need for loyalty management • Measurement and dashboarding requirements
Segment & Persona Variation • single consumer • household • seller • market variation	• Data complexity requirements • Security requirements • Segmentation capabilities • Communication channels and tactics
Engagement Preferences • end-channel Preferences • frequency preferences	• Feature requirements • Cross-channel communication and tactics
Product Portfolio • simple • complex	• Data source and model complexity • eCommerce UX feature requirements

Business Context in Stack Considerations

Be realistic about your current internal state. Look at the non-technical elements of your current business context to identify potential requirements or limitations that might impact your choice of technology.

- **Firmographics:** The DNA of a brand creates several consideration points for technical requirements

- **Team Digital Skills:** Not every brand will have the means or access to mature digital skills, thus affecting the ability to fully leverage some marketing tools. This should be considered as a barrier or opportunity when selecting a tool.

- **Cross-Functional Accessibility:** Internal structure and politics also affect Marketing's access to data, resources, and collaboration.

- **Available Resources:** Marketing team and budget size can affect the tools and output potential that are available to teams when selecting or using technologies.

Internal Business Context Decision Drivers

Business Context	Impact on Technology Requirements
Firmographics • Go-to-market model • Company age • Company size	• Data and security regulatory requirements • eCommerce platform capability complexity requirements • End-channel integration requirements
Team Digitial Skill • Low • Pockets of skill • Digitally native	• Functionality or capability limits • Maturity of tech portfolio • External support requirements
Cross-Functional Accessibility • Heavily siloed across the organization • Accessible with red tape • Collaborative culture	• Integration capability requirement • Analytics, insights generation, and reporting requirements • User permissions and workspaces
Available Resources • Time and effort • Financial	• Automation capabilities • Advanced capability buying power limitations

Technical Complexity in Stack Considerations

Consider your current marketing stack.
Review current stack structure and capabilities to determine if a new tech can fit in seamlessly or if there are additional requirements to mitigate current risks.

- **Stack Size:** Marketing teams vary in the number of tools at their disposal, shifting in between one do-it-all cloud platform and several best-in-breed tools.

- **Data Sources:** Where data is housed affects the ability to quickly and reliably use data in daily Marketing applications.

- **Data Complexity:** Various dimensions of data impact the backend requirements needed to own, process, and leverage data successfully.

- **Stack Connectivity:** The ability to connect different tools together is critical in efficiency and output of Marketing's most important initiatives.

Marketing Technology Decision Drivers

Incumbent Stack	Impact on Technology Requirements
Current Stack Size • Small • Large	• Integration and connectivity requirements • Increased security capabilities or additional security tool support
Data Source/Hosting • One centralized warehouse • Several decentralized warehouses • In-house server • Externally hosted	• Extraction and transformation capabilities • Security capabilities for data access • Data accessibility requirements • Warehouse integration and connectivity capabilities
Data Complexity • Volume • Variety	• Data visualization and modeling fulfillment • Data integration maturity • Segmentation capability maturity • Analytics dashboarding and insights automation
Stack Connectivity • No Connectivity • Some connectivity • Full connectivity	• Technology integration capabilities • Analytics integrations

Customer Connectors

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Simon Martech Stack Worksheet

Simon Martech Stack Framework

Selecting Customer Connectors

Walk into decision-making prepared.
Be critical about the realities facing your team with regards to what you really need from a customer connector tool and what you can feasibly handle.

- Objective setting is a critical first step to narrowing your scope, defining high-level parameters, and building critical buy-in for what will likely be a large investment.

- Adding in customer context enables the team to further narrow the critical capabilities required to meet customer needs and expectations in how Marketing communicates with them.

- Marketing doesn't always have the power to make major (or quick) modifications to internal structure, skill, or dynamics meaning it's critical to consider these in narrowing or expanding on decision criteria.

Pre-Work Checklist for Setting Criteria for Customer Connector Marketing Tools

Use the following checklist as high-level guidelines to the pre-work required to set the general criteria for a new marketing tool:

I. Establish Marketing Objectives.

- ❏ Map your Marketing objectives to your brand's broader goals.
- ❏ Establish the tactics required for you to achieve those objectives.
- ❏ Communicate and get executive buy-in on planned marketing objectives and high-level tactics.

II. Align to the Customer Context.

- ❏ Acknowledge how your customer buys or owns (respective to objective) products from your vertical.
- ❏ Take into account communication and engagement preferences your customers have and optimize to them.

III. Consider Internal Context Drivers and/or Detractors.

- ❏ Assess your team's digital skill level and the implications it has on your ability to feasibly leverage certain tool capabilities.
- ❏ Consider any connectivity requirements across existing stack tools or data sources.
- ❏ Be honest about your budget and how you will measure return on the investment.

Objectives as a Goalpost for Tech

Aim for a north star. Lay out critical markers for Marketing success to establish objectives the team will need to accomplish with the technology in your stack.

- Begin with brand-wide commercial objectives to not only ensure a shared vision, but also to help gain buy-in at the executive level when time comes to assess funding for new technologies.

- Position marketing objectives as levers that can be pulled to drive the brand-wide objectives — they should resonate well with each other.

> **TIP:**
> **Engage leadership**. Collaborate with executive leadership to get a true, 360° view of brand and corporate-level objectives and better understand their expectations of marketing,

Source:
Simon Data analysis.

Finding a Path to Value Feels Overwhelming with Martech's Sprawl

Brand Objectives

Commercial objectives are the keystone of any organization, offering focus, alignment, and a north star for functional activities across the board.

Not all brands have centralized objectives. For those that do, not all marketers have easy access to them. Encouraging strategic thinking in the organization can sometimes be the first step to kick off a beneficial conversation among Marketing and its executive peers.

Sample Commercial Brand Objectives:

- Company/Brand Reputation
- Cost-Reduction/Margin
- Net Profit/Revenue Growth
- Human Capital Development
- Innovation
- Efficiency
- Risk Mitigation

Marketing Objectives

Marketing objectives are the levers that Marketing can (and plan to) pull to drive their part of the brand's commercial objectives.

Each brand objective can have several possible ways that Marketing can drive them, and strategically mapping those out can be a critical part of rationalizing Marketing's activities and spend in the future.

Sample Marketing Objectives:

- Acquisition
- Conversion
- Retention
- Growth
- Advocacy
- Customer Experience
- Marketing Efficiency

Specific Tactics Drive Specific Results

Align tactics to objectives. Consider the essential activities that enable success against Marketing and business objectives. This will help you to better focus on the capabilities most needed to make those things happen. Consider tactical and data needs.

- Tactics are good indicators of technical capabilities that should be factored into stack considerations.

- Be innovative and take the opportunity to consider new-to-you or even new-in-kind tactics that could be employed to achieve objectives.

TIP:
Ideate. Use Simon's Tactic Ideation Toolkit to help identify solutions to achieving difficult objectives by taking customer context into account.

Source:
Simon Data analysis.

Lifecycle Objective-Tactic Alignment in the Customer Context

Brand Goal	Acquire	Convert	Retain	Grow
Marketing Objective	• Be seen/found • Capture leads	• Nurture for engagement • Enable decision-making • Encourage larger carts	• Nurture for engagement • Enable re-purchase ease	• Nurture for engagement • Offer
Marketing Tactic	• Ads & promos • Social • SEO • Traditional • Lead capture tactics • Interactive tools	• Ads & promos • Personalization • Interactive tools • Email • Automation • eCommerce • Conversation /customer service	• Personalization • Site optimization • Email • Loyalty/rewards • eCommerce • Social • Mobile • Automation • Feedback	• Personalization • Site optimization • Email • Loyalty/rewards • eCommerce • Social • Mobile • Automation

Some marketing tactics are better placed to enable certain objectives than others. Choose the ones that will have the most impact for you.

Defining End-Channel Requirements

Be honest about what you need and don't need. Consider your objectives: what tools do they require that are available to you? What do the tools enable, and what do they require to have impact with customers?

- Make the selection of Marketing tools be a representation of your team's capabilities and objectives — don't rely on pre-populated stacks.

- All tools have different requirements for what they need to work, defining the types of orgs and objectives they work best for.

- Every tool type will exist on a spectrum of maturity and complexity, with different capabilities that may or may not work for your team.

TIP:
Be critical. Use the criteria-setting tools on the following pages to help you narrow down on where on the spectrum your best fit might lie.

Common Categories of Customer Connectors

Customer connectors are channel tools that enable brands to communicate and engage directly with their customers across lifecycle marketing initiatives. Not every brand will require the same tool capabilities. Here are the most common customer connector tools most marketing teams deploy:

Email
Enables:
- Mid-cycle nurture
- Brand building

SMS
Enables:
- Time-sensitive updates/alerts
- Two-way engagement

App/Push
Enables:
- Time-sensitive updates/alerts
- Utilitarian 1:1 brand interaction

Website
Enables:
- Brand-building
- Interactive engagement

Print
Enables:
- Physical engagement
- Customer recall

eCommerce
Enables:
- Conversion
- Strategic recommendations

Web Optimization
Enables:
- Deeper engagement
- Tailored results

Loyalty
Enables:
- Gamification
- Shared media

Find Your Best Fit Customer Connector

Not all brands needs advanced technologies for every end-channel, and others might need a little extra. All marketing leaders should think critically about the capabilities they really need to achieve core objectives, increase utilization, and reduce waste. This tool is designed to offer guidance and suggestions to help narrow the search and establish an early-stage capability-requirements list.

TIP:
Get Simon's Help. The Simon Data team works every day integrating the stacks of diverse brands, and we are happy to offer suggestions and feedback on end-channel recommendations.

How-To Checklist for Setting Criteria for Customer Connector Marketing Tools

Use these directions to help get you started on selecting the right category Email Service Provider for your team:

I. **Select your top three marketing objectives.**

Prioritize your top objectives to make sure that you are truly focusing on core requirements. Different objectives require varying levels of platform maturity.

II. **Consider your team's digital skill.**

Identify what capabilities your team has so that you can be realistic about what capabilities can be leveraged to make the most out of the platform.

III. **Identify the most common or strategically imperative product in your portfolio.**

Product type and lifecycle can play a hand in identifying the frequency and complexity of communication needs.

IV. **Take your customer's context into account.**

Any customer connectors should fit into how customers buy, and their diversity can heavily impact capability requirements.

V. **Assess your suggested maturity category.**

Look at your selections and identify which category has the most marked. Use these to help you then look at the capabilities of each maturity level and gauge if these are indeed required for you or your team. Use this as a base guide for requirements setting.

Customer Connector: Email Service Providers

Select your ESP. Consider the ESP capabilities that might be the best fit for you by filtering against objectives, digital skill level, the product lifecycle and consideration level.

- **Objectives:** Best practice conversion and experience tactics require more advanced features than those for acquisition or advocacy – use objectives as your top filter in this category.

- **Team Skill:** Focus on the digital capabilities of your team and what they can feasibly manage within an ESP without leaving too many under-leveraged capabilities.

- **Product Lifecycle and Consideration:** The product itself and how customers consider a purchase defines how often and how complex email journeys are.

Lifecycle Objective-Tactic Alignment in the Customer Context

		Basic		Average		Best-of-Breed	
Best-Fit Qualifiers	Top Objectives	Acquisition	Advocacy	Retention	Growth	Conversion	Experience
		Brand-building		New Product launch			
	Team Skill	Low		Medium		High	
	Product Lifecycle	Short & Frequent	Medium & Infrequent	Medium & Frequent		Short & Infrequent	
	Customer Context	All Segement Complexities		All Segement Complexities		All Segement Complexities	
Defining Capabilities		Basic Email	Drag & Drop Templates	Send Throttling	UTM tracking	OPtimized Send Times	Conversion Reporting
		Reusable Content Bloacks	dedicated IPs	Real-time Data Export	Preference Management	Deep-linking	Tracking Pixels
		Batch Export Data	Domain Authentication	Open-Time Tracking	Engagement Reporting	AMP	Dynamic Content
			Email Capture Forms Authentication	Seedlist Sending	HTML TemplatingReporting	Content Testing	One Time/Deploy Winner
				Delivering Monitoring	Image HostingReporting	Click Map Reporting	Triggered/Deploy Winner
				Subject Line Testing			

Customer Connector: SMS Service Providers

Select your SMS provider. Consider the SMS capabilities that might be the best fit for you by filtering against objectives, digital skill level, the product lifecycle and consideration level.

- **Objectives:** As SMS requires permission to use a customer's phone number and isn't for every brand, best-of-breed capabilities might be reserved for brands using SMS as a key part of product or experience delivery.

- **Team Skill:** SMS has atypical marketing content where best-of-breed requires more strategic, experiment-minded team on hand to manage the details.

- **Product Lifecycle:** SMS reminders can be a valuable tool for reminding customers to repurchase.

- **Market Variation:** The more complex the market, the more important test-and-learn capabilities become.

SMS Service Provider Maturity Best Fit by Qualifying Criteria

		Basic		Average		Best-of-Breed	
Best-Fit Qualifiers	Top Objectives	Conversion	Advocacy	Retention	New Product Launch	Experience	
		Brand-building		Growth			
	Team Skill	Low		Low/Medium		High	
	Product Lifecycle	Short / Frequent	Medium / Infrequent	Medium / Frequent		Short / Infrequent	
	Customer Context	Single Consumer		Low Market Variation		High Market Variation	
Defining Capabilities		Batch Data	Delivered/Not Delivered	Real-time Data	Conversion Reporting	Content Testing	One Time/Deploy Winner
		Sticky Sender	Short Codes	Send Throttling	MMS Support	Deepi-linking	Triggered/Deploy Winner
		Dynamic Content	Preference Management			Personalized Send Time	Reply Management
			Link Mititgation				

Simon

Customer Connector: App and Push Providers

Select your push provider. Consider the push capabilities that might be the best fit for you by filtering against objectives, digital skill level, the product lifecycle and consideration level.

- **Objectives:** Push requires an app download, meaning it should be a priority for brands that are trying to drive retention and experience as it's an engagement opportunity.

- **Team Skill:** Advanced Push, like SMS, requires a strategic, test-and-learn-minded team that can manage the additional capabilities.

- **Product Lifecycle:** Push is a great way of enabling engagement across customer marketing, and advanced features should be considered where an in-app experience is part of product delivery.

- **Market Variation:** The higher the segment complexity, the greater need for more advanced in-platform measurement features.

App and Push Service Provider Maturity Best Fit by Qualifying Criteria

Best-Fit Qualifiers

		Basic		Average		Best-of-Breed	
Top Objectives		Acquisition	COnversion	Advocacy		Retention	Growth
		Brand-building	New Product Launch			Experience	
Team Skill		Low		High		Medium	
Product Lifecycle		Short & Frequent	Short & Infrequent	Medium & Infrequent		Medium & Infrequent	Long & Infrequent
Customer Context		All Segment Complexities		Med/Low Segment Complexities		High Perference for an In-App Experience	
						High Segment Complexity	

Defining Capabilities

Basic		Average		Best-of-Breed	
Batch Data	Image Support	Dynamic Content	Real-time Data	Copy Testing	Personalized Send Time
Mobile Push Notifcations	Web Push Notifcations	Conversion Reporting	In App Messaging	Trigger/Deploy Winner	One Time/Deploy Winner
iOS SDK	Android SDK	Video Support	Frequency Capping	Deep-linking	Title Testing
Engagement Reporting				In App Content Cards	Dynamic Segments

Customer Connector: eCommerce Providers

Select your ecommerce provider. Consider the eCommerce provider that best aligns to your customers' purchasing context.

- **Objectives:** eCommerce's priority is conversion and best-of-breed services optimize the purchase experience, as well.

- **Team Skill:** High-end eCommerce platforms reduce the amount of technical know-how required for set up and management, but basic ones offer more customization.

- **Customer Context:** How (and where) a customer prefers to buy is a critical consideration for what eCommerce capabilities you need to consider.

- **Market Variation:** Brands managing marketplaces need to optimize to two diverse markets requiring best-of-breed capabilities, however, for those with household targets, a basic, self-customizable tool might be a better fit.

eCommerce Provider Maturity Best Fit by Qualifying Criteria

		Basic		Average		Best-of-Breed	
Best-Fit Qualifiers	Top Objectives	Advocacy	Brand-building	Advocacy	Retention	Conversion	Experience
				New Product Launch			
	Team Skill	High		Medium		Low	
	Product Lifecycle	All Applicable		All Applicable		All Applicable	
	Customer Context	Online & App Purchases		Online & App Purchases		Online, App, and Brick & Mortar Purchases	
		Household Target		Single Consumer Target		Buyer-Seller	Global Market
Defining Capabilities		Batch Data	Image Support	Dynamic Content	Real-time Data	Copy Testing	Personalized Send Time
		Mobile Push Notifcations	Web Push Notifcations	Conversion Reporting	In App Messaging	Trigger/Deploy Winner	One Time/Deploy Winner
		iOS SDK	Android SDK	Video Support	Frequency Capping	Deep-linking	Title Testing
		Engagement Reporting				In App Content Cards	Dynamic Segments

Customer Connector: Print Content Providers

Select your print provider. Consider your top objectives and product lifecycle as your top criteria selectors for print service providers.

- **Objectives:** Print marketing is a great tool for acquisition and brand building, but brands seeking to optimize experience through print should consider more advanced features.

- **Team Skill:** Not all brands need advanced digital skills to run an impactful print marketing program, but the more advanced the platform, greater skills should be considered.

- **Product Lifecycle:** Print reminders can be a valuable tool for managing a long-time relationship and encouraging upsell.

- **Market Variation:** The more complex the market, the more important test-and-learn and single-customer capabilities are.

Print Content Provider Maturity Best Fit by Qualifying Criteria

		Basic		Average		Best-of-Breed	
Best-Fit Qualifiers	Top Objectives	Conversion	Growth	Acquisition	Retention	Brand-Building	Experience
		Advocacy		New Product			
	Team Skill	Low		Medium		High	
	Product Lifecycle	Short & Frequent	Short & Infrequent	Medium & Frequent	Medium & Infrequent	Long & Frequent	Long & Infrequent
	Customer Context	Low Segment Complexities		Medium Segment Complexities		High Segment Complexities	
Defining Capabilities		CRM Integrations	Delivery Tracking	Production Workflow	Response Tracking	API	Single Customer View
		Drag & Drop Design	Templates	Dynamic Content	Real-time Reporting	Address Verification	A/B Testing
		HTML Templates		Realtime Dashboards	Look-a-like Modeling	Personalized Send Time	
				Custom Audiences	Workflow Drop Mailers		
				Automation			

Customer Connector: Loyalty Management

Select your loyalty management provider.
Consider how loyalty management will fit into your objectives to identify the best-fit loyalty platform.

- **Objectives:** Brands managing retention, growth, and experience should focus on more advanced capabilities, whereas loyalty can be a useful conversion tool, it might not need them.

- **Team Skill:** Optimizing loyalty programs requires a team able to pull insights from campaigns and manage automated initiatives in the platform.

- **Product Lifecycle:** Brands that rely on frequent repurchase should consider advanced capabilities to optimize for repurchase across multiple channels.

Loyalty Management Provider Maturity Best Fit by Qualifying Criteria

		Basic		Average		Best-of-Breed	
Best-Fit Qualifiers	Top Objectives	Acquisition	New Product Launch	Conversion		Retention	Growth
						Advocacy	Experience
	Team Skill	Low		Medium		High	
	Product Lifecycle	Long & Infrequent		Medium & Infrequent	Short & Infrequent	All Frequent Purchases	
	Customer Context	Single Consumer Target		Household Targets		Brick & Mortar Sales Included	
		Low Market Variation		In-App Experience Preferred		High Market Variation	
Defining Capabilities		Activity Tracking	Customizable Reward Metrics	POS Integration	Custom Coupon Codes	Automated Traffic Boosting	CRM
		Reporting	Customizable Rewards	Geolocation Features	Referral Marketing	Audit Trail	
		Digitial Rewards	Results/Dashboarding	Digitial Stamp Card	eWallet Support		
		Targeted Messaging			Templates		

Simon

Customer Connector: Web Optimization Provider

Select your web optimization provider.
Consider how optimizing the web experience fits into your brand objectives and is impacted by market variation.

- **Objectives:** Optimizing the web experience can simplify for higher conversion and growth.

- **Team Skill:** Web optimization is an advanced feature that requires a certain threshold of digital skill across the team.

- **Consideration Level:** The higher the consideration level, the more important it is to simplify the customer's buying experience to increase likelihood of conversion.

- **Market Variation:** The more variation in the market, the more opportunity there is for web optimization to allow for dynamic, resonant experiences across markets and personas.

Web Optimization Provider Maturity Best Fit by Qualifying Criteria

		Average		Best-of-Breed	
Best-Fit Qualifiers	Top Objectives	Conversion	Advocacy	Conversion	Retention
		Brand-building	New Product Launch	Growth	Experience
	Team Skill	Low/Medium		High	
	Product Lifecycle	All Product Lifecycles		All Product Lifecycles	
	Customer Context	Low/Medium Consideration		High Consideration	
		Medium Market Variation		High Market Variation	
Defining Capabilties		iOS SDK	A/B Testing	Container Management	Site Personalization
		Android SDK	Dynamic Content		
		Tracking Pixel	Webforms		

Simon

Data Enablement Tools

Building Your Best-Fit Marketing Technology Stack
Roadmap

1 What In My Current State Should Impact My Decisions?

Stack Framework Best Practices

Business Context Drivers

Customer Context Drivers

Status of Incumbent Technology

2 How Do I Identify My Best-Fit Customer Connectors?

Establish Marketing Objectives

Identify End-Channel Requirements

Connector Capability Best-Fit Tool

3 How Can I Optimize My Data Infrastructure?

Core Data Infrastructure Capabilities

Smart Hub Enabled Capabilities

Data Capability Best-Fit Tool

4 How Can I Pull It All Together?

Simon Martech Stack Worksheet

Simon Martech Stack Framework

Supporting Content with Data Infrastructure

Establish data requirements.
Understand how data currently flows at your organization and assess what you need to get strategic insights and activate critical initiatives.

- Connect with cross-functional peers early in the process as a good way to begin building relationships you may need during the buying process.

- Model your data needs early to identify current gaps and help set criteria.

- Make sure you can use the data you collect by ensuring it flows easily and reliably across your marketing stack.

Pre-Work Checklist for Setting Criteria for Data Enablement Tools

Use the following checklist as a set of high-level guidelines to the pre-work required in setting the general criteria for backend and data enablement tools:

I. Look under the hood.

- ❏ Connect with relevant marketing and cross-functional peers to understand the data management and governance landscape across your organization.
- ❏ Map the current flow of data into and out of Marketing and identify any potential bottlenecks or pain points.

II. Assess your data model complexity.

- ❏ Reflect on your marketing objectives and the data required to monitor and demonstrate success against them.
- ❏ Assess the complexity of the data models required to see marketing's tactics through to have the targeted impact.

III. Consider activation requirements.

- ❏ Consider how you will activate data to get your initiatives into market, such as any identity resolutions, integrations, automations, or cross-functional partnerships.
- ❏ Ensure that you have captured any data regulations related to your vertical and geography that might impact how you leverage data.

Build a High-Impact Data Engine

Core Components of Data Infrastructure Capabilities

Follow the flow of data. Consider how data will get from point A to point B to create, optimize, and automate any customer connector tools.

- These are the core elements to enabling a marketing engine to allow data to enable a strategic, purposeful, and high-impact portfolio of marketing initiatives.

- **Data Extraction & Transformation:** How you will get the raw data into a format usable by the team and your tools.

- **Customer Data Enablers:** How you will collect, process, and get insight on your customers to optimize your marketing for them.

- **Activation Tools:** How you will use data to reduce manual workload and gain insights to optimize initiatives moving forward.

Data Extraction/ Transformation	Customer Data Enablers	Activation Tools
ETL	Tracking	Orchestration
Data Integrations	Segmentation	End Channel Integrations – Automation
	Identity Resolution	End Channel Integrations– Personalization
	Security & Privacy	Analytics/Insights

Each of these elements has its own scale of capability maturity depending on the tool being used that should be considered during the selection process to ensure it fits the team's unique needs.

Simon

Enabling a Seamless Architecture

Create a smart hub of data. Centralize your integration and activation capabilities into one tool to avoid gaps in data and to increase insight into your customers' context to optimize their customer experience.

- Disconnected ingestion, processing, and communication channels cause gaps in customer understanding and experience.

- Smart Hubs are a great way to connect all the data tools in your stack with the tools that connect a brand to customers, making sure a brand can listen, think, and speak effectively with their customers.

- The Smart Hub-enabled tech ecosystem:

  - is more efficient

  - allows for best-of-breed tools

  - simplifies a complex stack

  - fills most basic data enablers and activation tool capabilities

Smart Hub Enabled Seamless Architecture

Capabilities requiring more maturity to meet strategic or contextual criteria can be added to augment a Smart Hub's functionality.

Data Modeling

Data Warehouse

Tracking

ELT

SMART HUB

-Identity
-Orchestration
-Integrations
-Workflow

BI

Web Analytics

End Channels

Data Science

A Smart Hub sits at the center of the ecosystem to seamlessly provide, connect, and enable critical capabilities.

Create a Foundation from Raw Data

Pool data into a usable format. Consider how complex your data systems and models are to be able to identify how mature of a data tool you need.

- **ETL:** "Extract, Transform, Load" allows the collection, cleansing, and transferring of data to a central location.

- **Data Integration:** Enables pulled data to be aggregated into a unified view and validated so it can be used reliably by other sources.

- Be wary of Level 1 across ETL and/or data integration – while it might work for your team, not leveraging at least a Level 2 for each puts you at risk of:

  - Poor customer interactions

  - Rigid schema with too much upfront and manual work

Data Extraction and Transformation Capability Tool Maturity Spectrum

		1	2	3	4
ELT	Tool offers…	Custom ETL for each ingestion	An ETL tool and writing custom business logic to aggregate and normalize data	End-to-end data cleansing and transformation with data pipeline tool	Scalable flexibility/ personalization to each brand client
	Best for brands with…	A single data warehouse	Multiple data warehouses	Quick data turnover that needs to be pulled quickly	A legacy stack with data being extracted from multiple places and systems.
Data Integration	Tool offers…	Flat file ingestion with out-of-the-box connectors	SQL-based ingestion	Data sharing	Data validation
	Best for brands with…	A single data warehouse	Multiple data warehouses	Medium data model complexity	High data model complexity

☐ Smart Hub-Enabled Capability

Enable Customer Data to Work for You

Know your customers. Use the data at your disposal to make customer-focused strategic decisions and enable a positive, 1:1 customer experience.

- **Tracking:** The ability to consume external customer actions (event streams), such as capturing page views or same-page actions.

- **Segmentation:** The ability to make assumptions and aggregate meaningful audience groups based on a single or multiple data points.

- Understanding customer behaviors helps uncover trends and preferences, but also helps scale personalization to ensure optimized content and experience.

Data Extraction and Transformation Capability Tool Maturity Spectrum

	1	2	3	4
Tracking & Tag Management — Tool offers…	Pulls of external event streams	A provided SDK for tracking	Event routing to other platforms	Cookie syncing
Tracking & Tag Management — Best for brands with…	Simple customer events	A need for custom-defined customer events	A more sophisticated or complex stack required sends to multiple places	Very complex identity problems and aware of current regulations
Segmentaiton — Tool offers…	No segmentation capability	Segmentation on single event properties	Ability to create customer aggregates	Predictive segments
Segmentaiton — Best for brands with…	No strategic need to segment customers	A need only for trigger-based messaging	A strategic need for growth and personalization	A small team with complex journeys and markets

Smart Hub-Enabled Capability

Enable Customer Data to Work for You – Cont'd

Use customer data responsibly. Understand and prepare your stack to comply with the legal regulations on utilizing customer's data, especially personally identifiable (PII) data in your remarketing initiatives.

- **Identity Resolution:** The ability to align and match customer actions to specific individuals.

- **Privacy & Security:** Ensuring the protection of customer data complying with any laws on data protection and privacy, that may be unique to geography or vertical.

Customer Data Enabler Tools Capability Maturity Spectrum - Continued

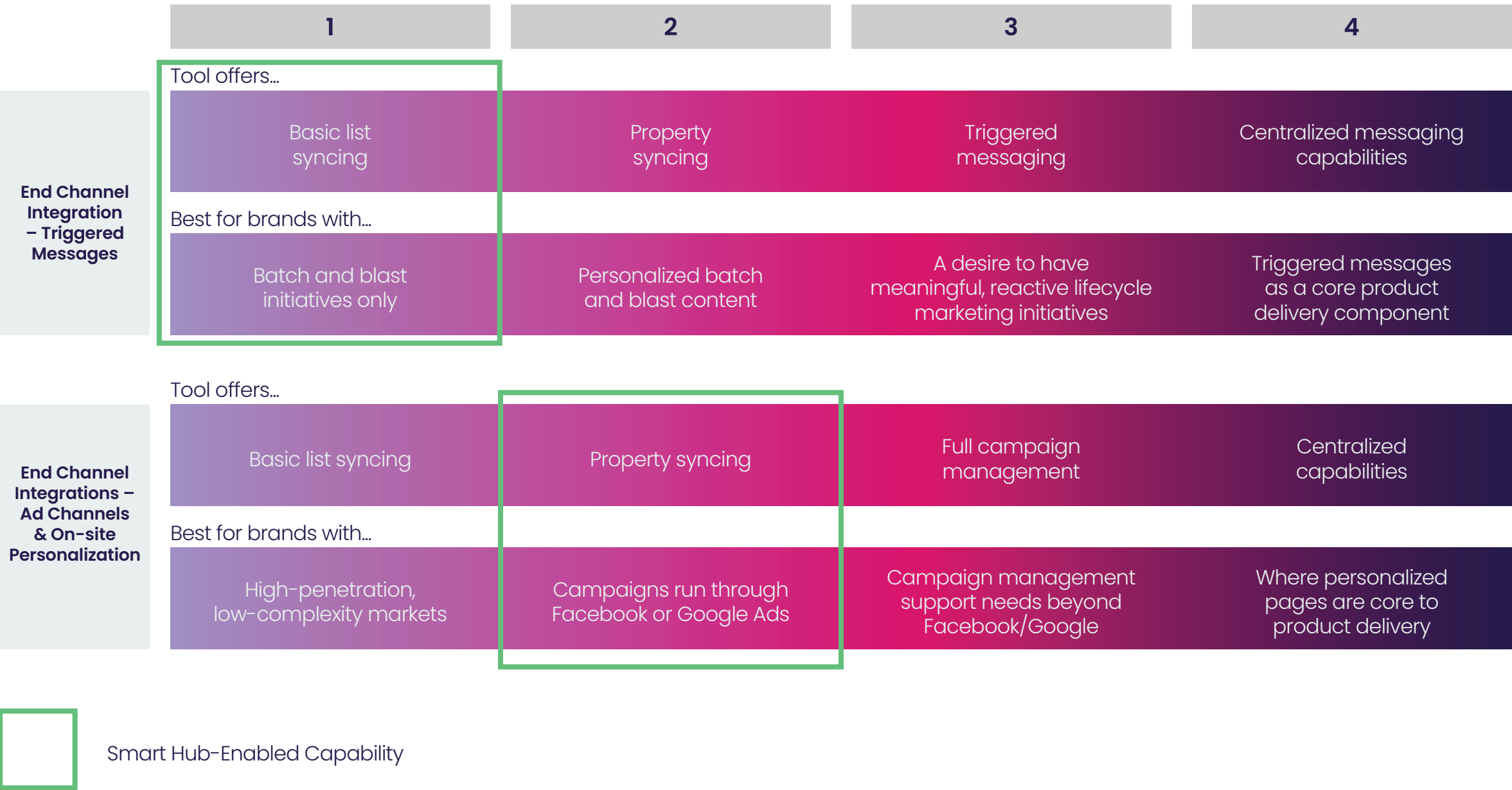|	1	2	3	4
Identity Resolution	*Tool offers…* Single-key identity resolution	Deterministic multi-key identity resolution	Probabilistic multi-key identity resolution	Predictive multi-key identity resolution
	Best for brands with… An entirely online business with required user log in	The ability to have multiple customer identifiers	Complex customer journeys, possibly with multiple users on the same device	A heavy acquisition and retargeting focus
Privacy & Security	*Tool offers…* GDPR + CCPA	SOC II	PCI	HIPAA
	Best for brands with… Any customer data	Any customer data hosted in a SaaS	Any online payments	Access to personal healthcare information

☐ Smart Hub-Enabled Capability

A ctivate Customer Data for Better Results

Activate data for better marketing impact. Leverage what you know about your customers through automation to activate high-impact marketing campaigns that can scale and optimize. All the following are contingent on the relevant customer connectors:

- **End-Channel Integrations**: Tools that offer the ability to connect tools and react to data with timely content on a 1:1 or 1-to-many scale.

- **Triggered Messages:** Are automated messages that react to customer actions and a critical part of the lifecycle marketing experience for customers.

- **Ad Channel Integration:** Connect customer data to digital ads for more personalized content.

- **On-site Personalization:** Live optimization of web pages that respond to customer actions and preferences.

Data Activation Tool Capability Maturity Spectrum

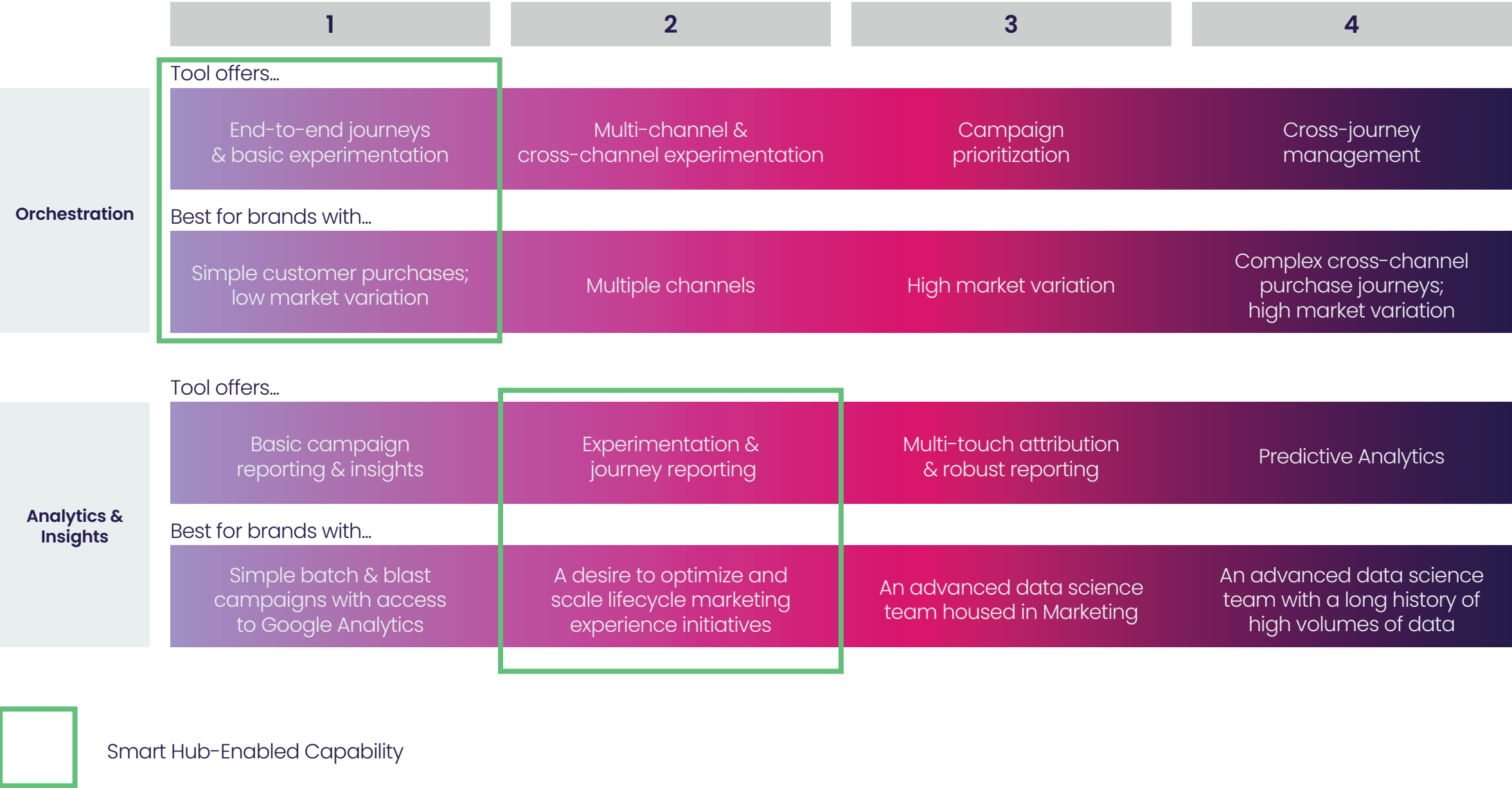|	1	2	3	4
End Channel Integration – Triggered Messages	*Tool offers…* Basic list syncing	Property syncing	Triggered messaging	Centralized messaging capabilities
	Best for brands with… Batch and blast initiatives only	Personalized batch and blast content	A desire to have meaningful, reactive lifecycle marketing initiatives	Triggered messages as a core product delivery component
End Channel Integrations – Ad Channels & On-site Personalization	*Tool offers…* Basic list syncing	Property syncing	Full campaign management	Centralized capabilities
	Best for brands with… High-penetration, low-complexity markets	Campaigns run through Facebook or Google Ads	Campaign management support needs beyond Facebook/Google	Where personalized pages are core to product delivery

☐ Smart Hub-Enabled Capability

Activate Customer Data for Better Results – Cont'd

Learn from your data. Use the data that comes back from customers as a feedback loop to enable a constant optimization of your marketing on a 1:1 level with customers as well as program-wide.

- **Orchestration:** The management of every experience a customer might receive, ensuring that all experiences are connected and can be prioritized and adjusted appropriately.

- **Analytics & Insights:** Data analysis that indicates marketing campaign operations and performance as well as exploratory tools for understanding factors driving those outcomes.

Data Activation Tool Capability Maturity Spectrum

		1	2	3	4
Orchestration	Tool offers…	End-to-end journeys & basic experimentation	Multi-channel & cross-channel experimentation	Campaign prioritization	Cross-journey management
	Best for brands with…	Simple customer purchases; low market variation	Multiple channels	High market variation	Complex cross-channel purchase journeys; high market variation
Analytics & Insights	Tool offers…	Basic campaign reporting & insights	Experimentation & journey reporting	Multi-touch attribution & robust reporting	Predictive Analytics
	Best for brands with…	Simple batch & blast campaigns with access to Google Analytics	A desire to optimize and scale lifecycle marketing experience initiatives	An advanced data science team housed in Marketing	An advanced data science team with a long history of high volumes of data

Smart Hub-Enabled Capability
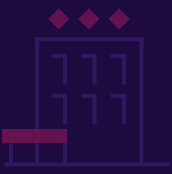
Data Enablement Tools

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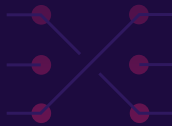
Status of Incumbent Technology

2 How Do I Identify My Best-Fit Customer Connectors?
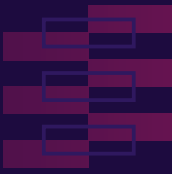
Establish Marketing Objectives

Identify End-Channel Requirements

Connector Capability Best-Fit Tool

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Core Data Infrastructure Capabilities

Smart Hub Enabled Capabilities

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Simon Martech Stack Worksheet

Simon Martech Stack Framework

Crafting the Martech Stack

Pick what is best for you. Use this template to collect your thoughts from across the past several pages and begin the process of developing your stack for the framework.

- Use the Objectives section to write down your team's top objectives. Make sure that you have executive buy-in on these,

- Write down the Customer Connectors that are essential in your team's ability to achieve on your Marketing Objectives.

Customer Data Enablers

Where will you augment the Smart Hub with additional capabilities?

Data Foundations

What tools or resources will you rely on to host and manage raw data?

Crafting the Martech Stack

Map the backend. Consider your data structure and the additional capabilities you might require to meet your strategic or contextual requirements.

- A Smart Hub or CDP provides organizations a level of support across customer data enablers. However, you may need additional support from a more mature tool that specializes in any one of them.

TIP:
Ask around. If you are unsure about your current data foundations, ask your peers in IT to help fill those in and see if there might be a need or an opportunity to make updates.

Data Activation Tool Capability Maturity Spectrum, Continued

Simon CDP/SMART HUB

Critical Marketing Objectives			
What are you trying to achieve as a team?			

	ELT	Data Integrations	Tracking	Identity Resoultion
	Smart Hub	Smart Hub	Smart Hub	Smart Hub

Segmentation	Orchestration	End Channel - Trigger	End Channel –Personalization
Smart Hub	Smart Hub	Smart Hub	Smart Hub

	Security/Privacy	Analytics/Insights	
	Smart Hub	Smart Hub	

Customer Connectors

What tools are you going to use to connect and engage with customers across the lifecycle?

Warehouse

Crafting the MarTech Stack

Run the business. Factor in your business operations-level tools to ensure a full picture of your marketing stack and to avoid redundancies or gaps.
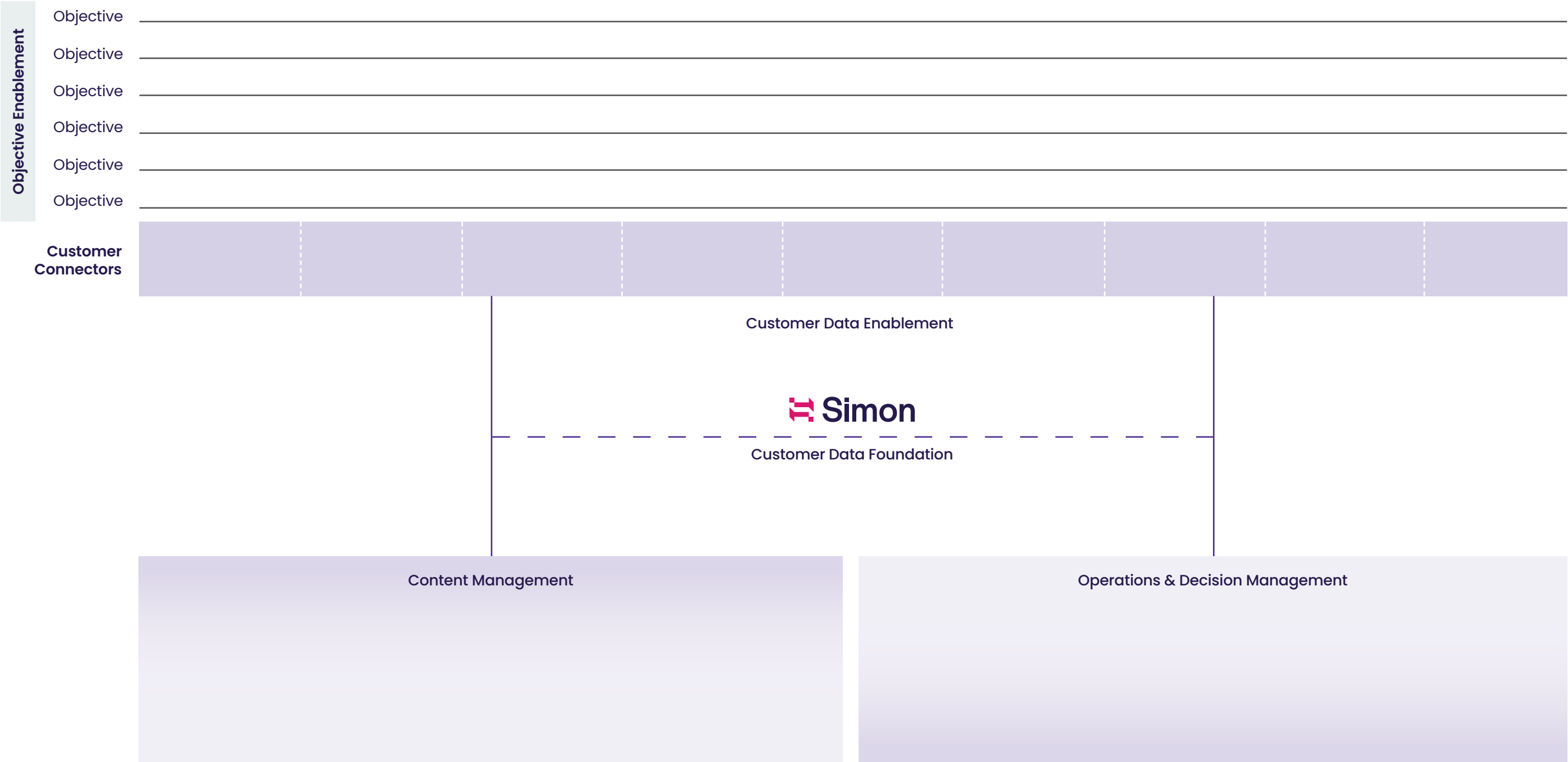
- If you rely heavily on agency help for content development, you may have few Content Management Tools. In this case, consider also any agency management tools you might use.

- Any tools that help manage business insights, efficiency, and workflows are critical to a well-functioning Marketing team — use this section to map out what is being used across the board to

Content Management Tools What will you use to create and manage Marketing content?				
Operations & Decision Management Tools What tools will you rely on to make strategic decisions and optimize the function?				

[Enter Brand Here]'s Marketing Technology Stack
Framework for a High-Impact Marketing Technology Ecosystem

Objective Enablement

Objective _____

Objective _____

Objective _____

Objective _____

Objective _____

Objective _____

Customer Connectors

Customer Data Enablement

Simon

Customer Data Foundation

Content Management

Operations & Decision Management

[Enter Brand Here]'s Marketing Technology Stack
Framework for a High-Impact Marketing Technology Ecosystem

Customer Connectors

Advertising & Promotion
- Print
- Search & Social Advertising
- PR
- Video Advertising
- Native/Content Advertising
- Display & Programmatic
- Mobile Marketing

Commerce & Sales
- Retail, Proximity & IoT Marketing
- Affiliate Marketing & Management
- Channel, Partner & Local Marketing
- Sales Automation, Enablement, & Intelligence
- eCommerce Marketing
- eCommerce Platforms & Carts

Social Relationships
- Influencers
- Community & Reviews
- Social Media Marketing & Monitoring
- Conversational Marketing & Chat
- Advocacy, Loyalty & Rewards
- Customer Experience, Service & Success
- ABM
- CRM
- Call Analytics & Management
- Events, Meetings & Webinars

Data Foundation & Enablement

Data
- Dashboards & Data Visualization
- Audience/Marketing Data & Data Enhancement
- Mobile & Web Analytics
- Marketing Analytics, Performance, Attribution
- Business, Customer Intelligence, & Data Science
- CDP
- DMP
- Gov, Compliance, Privacy
- iPass, Cloud/Data Integration, RPA, Tag Management

Content & Decision Management

Content/Experience
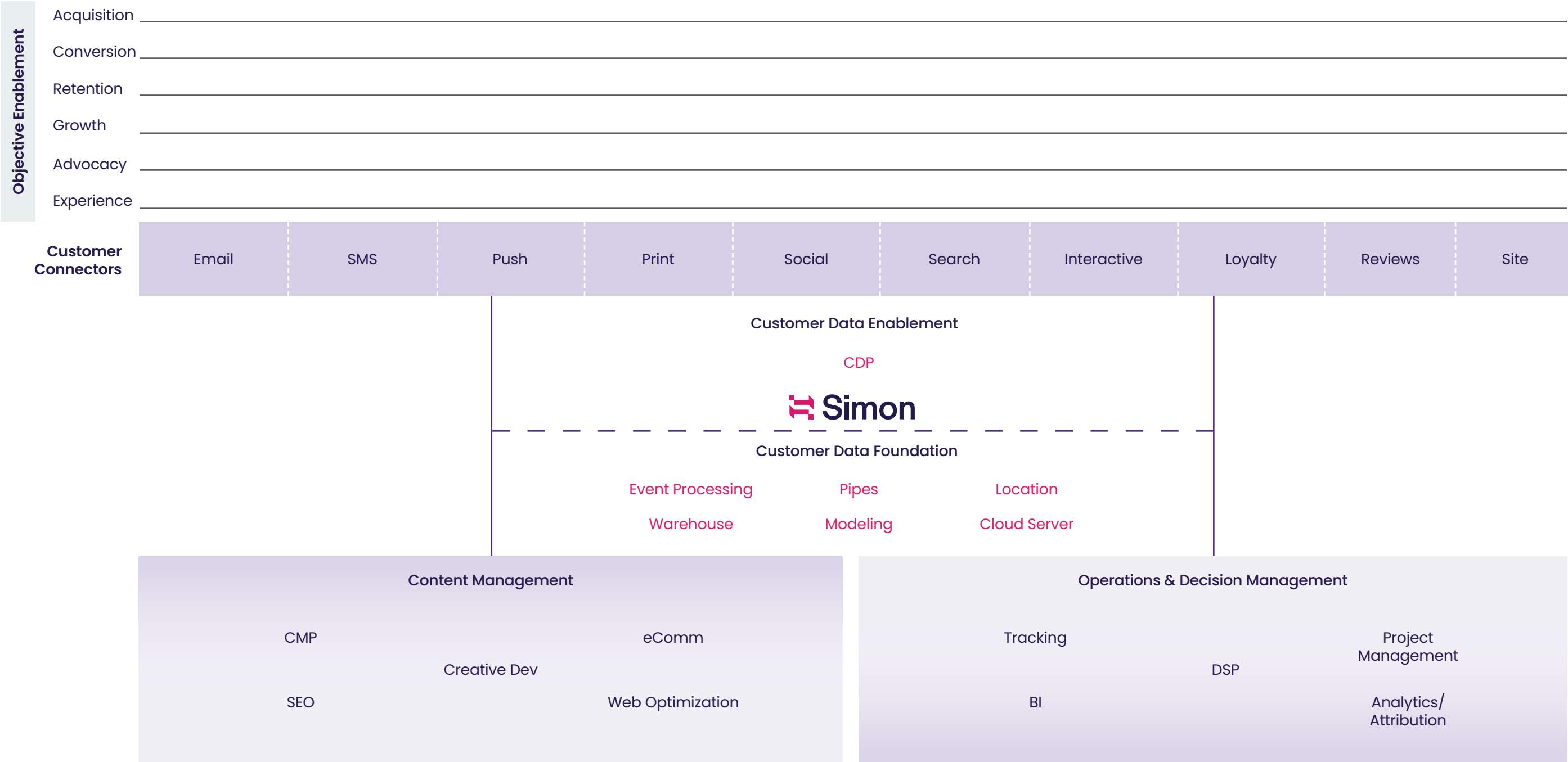- Interactive Content
- Video Marketing
- Mobile Apps
- Content Marketing
- Email Marketing
- DAM, PIM, MRM
- SEO
- Optimization, Personalization & Testing
- Web Experience Building & Management
- Marketing Automation and lead Management

Management
- Vendor Analysis
- Agile & Lead Management
- Collaboration
- Talent Management
- Budgeting & Finance
- Product Management
- Projects & Workflows

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Best In Class Marketing Technology Stack
Framework for Mapping Marketing Technology Stacks

Objective Enablement

Acquisition _____

Conversion _____

Retention _____

Growth _____

Advocacy _____

Experience _____

Customer Connectors

Email	SMS	Push	Print	Social	Search	Interactive	Loyalty	Reviews	Site

Customer Data Enablement

CDP

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Customer Data Foundation

Event Processing   Pipes   Location

Warehouse   Modeling   Cloud Server

Content Management

CMP   eComm

Creative Dev

SEO   Web Optimization

Operations & Decision Management

Tracking   Project Management

DSP

BI   Analytics/ Attribution