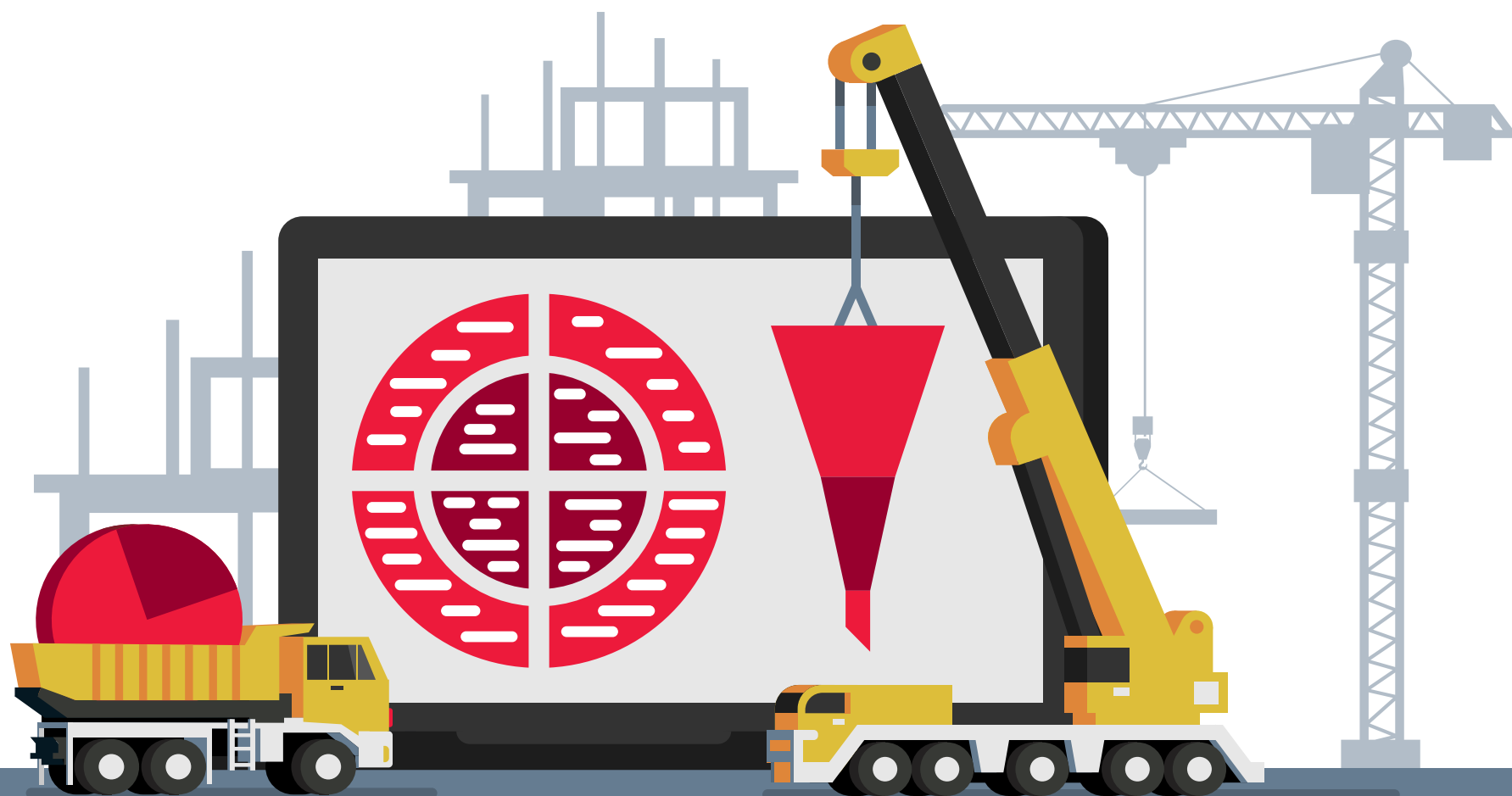


Best Practices for Evaluating and Building Out Your MarTech Stack



Introduction

Modern marketing teams have access to thousands of tools and platforms, all created with the goal of making marketing outreach more efficient and effective, and all leveraging the vast amounts of marketing data available through a myriad of digital sources.

Thanks to marketing technology (MarTech), you can personalize content and its delivery with extreme precision, refine your efforts to more closely fulfill your target's needs and preferences, and do it all with ease and cost efficiency.

But for businesses building out their MarTech stack, choosing the right solutions and vendors can be overwhelming, confusing and time-consuming. Changes are made frequently: A survey found that 53% of marketers say they adjust their MarTech stacks once or twice per year — the choices they make have a long-lasting impact on a marketing team's ability to attract and convert leads, and prove marketing's impact on an organization's pipeline and revenue.

With more than 13 collective years of experience building out marketing technology solutions for customers across the U.S., BDO Digital has developed best practices and strategies that you can use when evaluating marketing technology tools and vendors to help you build a solid foundation for a MarTech stack. It can help you boost value from your investments — and won't leave you sifting through the rubble for scattered, forgotten leads and lost opportunities.

This guide explores those best practices for every step in the process, from conducting a gap assessment to choosing vendors and deciding whether to engage with a third-party agency.

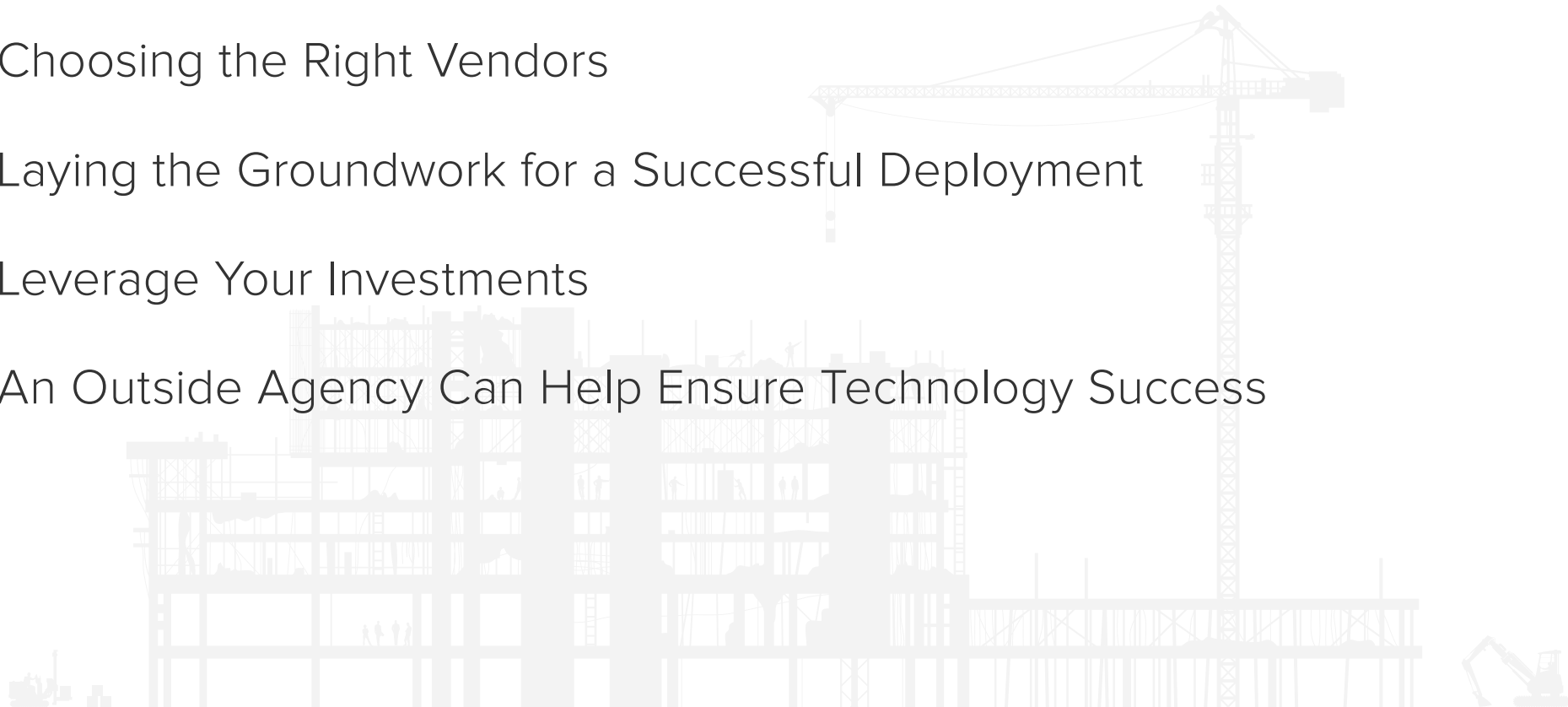
What will I learn from this guide?

- ▶ How to assess your existing stack and determine your marketing technology needs.
- ▶ How to plan for purchasing and implementing new tools.
- ▶ How to leverage the investment in your marketing technology stack.
- ▶ How to evaluate and select technology vendors.



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Assessing Your Stack

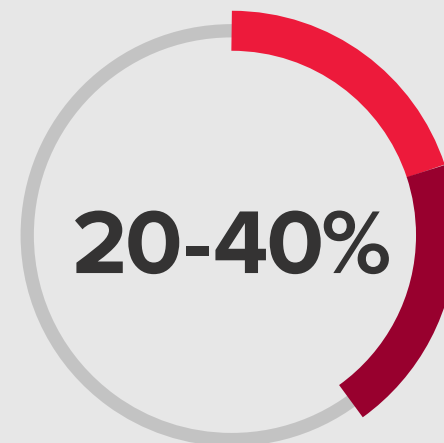


Assessing Your Stack

When the market for MarTech began to expand and gain momentum about a decade ago, the choices were easier. Companies could achieve big results by implementing tools that perform basic functions, such as lead acquisition and management.

Today, however, those tools are table stakes, and the expectations of marketers have grown. The D3 Methodology teaches us, technology alone — without strategy, expertise, resources, and ongoing management and administration — will not enable organizations to achieve a mature demand generation state. There exists greater complexity in all areas of marketing, including operations, and greater demand for data-driven marketing to support forecasting and attribute marketing's contributions to revenue. Stacking the tools also requires complex integrations to align them seamlessly, without patching or workarounds.

To reduce this complexity, a thorough MarTech assessment is necessary. Assessing your existing MarTech stack will not only uncover gaps — cracks in your foundation, if you will — but also provide insight into which tools you should keep, retire or purchase to gain the best value from your investment.



Don't Leave the Health of Your Stack to Chance

BDO Digital surveyed several dozen top marketing leaders and found they spend an average of **20%** — in some cases as much as **40%** — of their marketing budget on technology alone. That doesn't even include the cost of staff to manage and administer it. With that much money invested, it's unwise to leave the health of your stack to chance.



Strategy First: Plan Before You Purchase



Strategy First: Plan Before You Purchase

“Strategy first” may seem like common sense, but it isn’t always common practice in marketing when it relates to technology.

Many organizations find themselves feeling like there’s no time to devise a well thought-out strategy and, once they have a budget, may scramble to address specific issues — without looking at the big picture. Say you want to automate email sends, so you implement a simple tool that does that and nothing else. Or you want to run a customer survey, so you use a survey tool without thinking about how you’re going to analyze and act on the results. Using point solutions may seem fast and affordable, but it could cost you more time and money in the long run.

Without a solid strategy in place before you buy, you may not even understand what it is you need! For example, if you have a steady stream of leads at the top of your funnel, you may not need technologies that support driving acquisition. Marketing automation tools help with conversion, but perhaps you need additional help with lead-scoring technologies, such as those that apply sophisticated algorithms and predictive intelligence. Or, you could augment conversion efforts with tools that enable content development. Measurement tools may include those that enable campaign attribution, demand funnel inventory capabilities and content consumption.

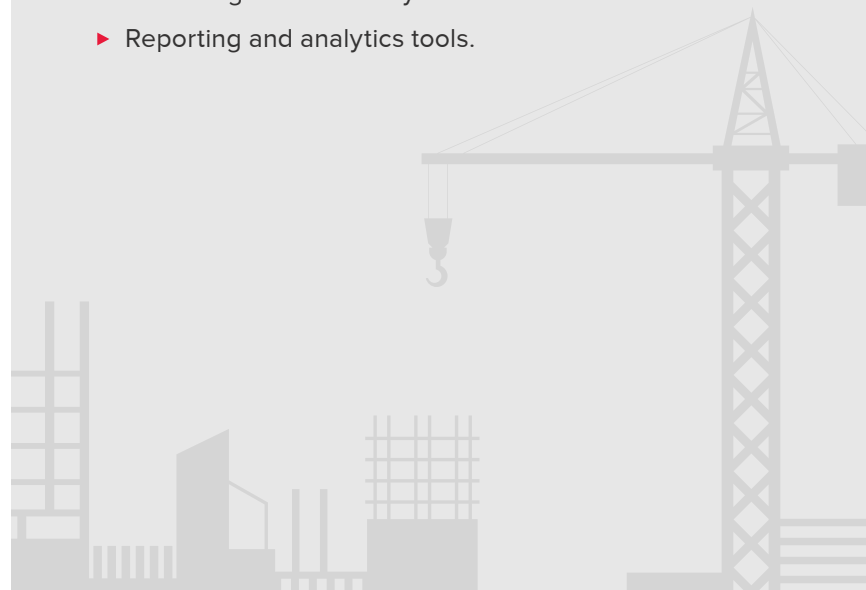
For a successful MarTech stack and any MarTech deployment or integration, it’s critical to take the time up front to develop a solid strategy with resources and processes in place. Marketers are trained to be agile and encouraged to push the envelope; however, adopting new tools means leading with strategy and honoring the requirements — and measurements — for the desired outcomes.

The Essentials

Once you’ve identified the capabilities of your existing tools and any gaps in your MarTech stack, you can begin to prioritize new purchases and integrations. Organizing marketing technologies into essential categories is helpful as you begin to look at what you need.

Although there are thousands of marketing tools on the market — and the number seems to grow all the time — they fall into seven overarching essential categories:

- ▶ Content creation tools.
- ▶ Content management tools.
- ▶ Data management tools.
- ▶ Lead management systems.
- ▶ Lead management tools.
- ▶ Marketing automation systems.
- ▶ Reporting and analytics tools.



Consider technologies in each of these seven essential categories as your foundation.

You may not need an independent solution for each category; it depends on your level of sophistication needed and the resources you have available. In order to play in today's modern marketing arena, you should have at least some capabilities spanning each of these categories.

In many cases, there may be some overlap. For example, Marketo Engage has account-based marketing (ABM) capabilities inside its marketing automation system (although for an added cost), while Demandbase One offers a stand-alone ABM system that integrates with the leading marketing automation systems. Lead management capabilities for scoring and nurturing are also embedded in the leading marketing automation systems, but there are complementary solutions, such as predictive modeling and artificial intelligence tools, that might enhance your lead scoring approach.

A product like Adobe Creative Cloud can help you build a document library, and tools, such as Vidiyard and Uberflip, enable you to create and deploy different kinds of content. Or, you may choose content operations and management tools, such as Kapost and others that are essential for content marketing.

Avoid the Shiny Object Syndrome

While it may be tempting to invest in a new “innovative” solution that claims to address your immediate challenge, make sure you're already getting all of the value from your existing investments. Don't add unnecessary complexity without knowing the full capabilities of the tools already in your stack. Just as an ornate decoration may be too heavy for a building's facade, an unnecessary, yet “shiny,” platform may send your whole stack crumbling to the ground!

[Read this blog post](#) for tips on avoiding the shiny object syndrome.



When Is It Time to Sunset a Tool?

Have you ever worked on a marketing team where only one person on your team knows how to use and operate a specific tool? Maybe that particular tool — one that is detrimental to the performance of the team — has been installed since the company's inception, well before you came onboard. Maybe it's a proprietary tool or one that's been customized by that one individual on your team. **Problem:** Now that person has left the company, and no one knows how to use it. That tool is now abandoned, of use to no one.

Here's another common situation. Perhaps you once thought a specific tool might help your team, like that visual project management solution you used to keep track of projects assigned to freelance graphic designers. Now that you have an in-house designer, you don't use freelancers, and the software is just sitting there idle in your stack, costing you monthly fees.



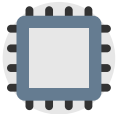
Tools can end up on a company's sunset list due to various factors. That's why a MarTech assessment is so essential and should include an examination of the following factors for each tool:



Impact: What impact does the tool have on meeting your marketing objectives? Does the value it provides align with the management and expense?



Usage: Who uses the tool? How is the tool being used against marketing goals and objectives? Are there other tools in your stack that can provide the same functionality?

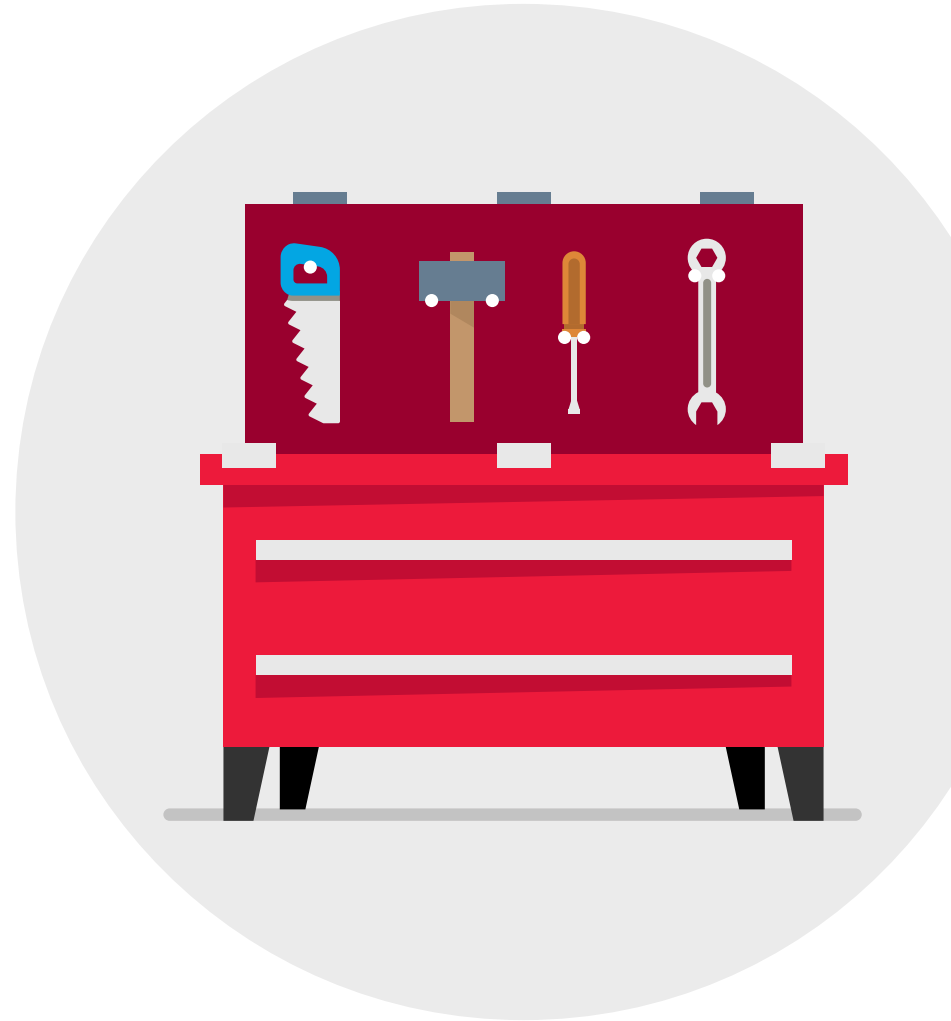


Adoption: How fully have users adopted the technology? Is it considered important to the team? Do they consider the tool to be vital to their mission?



Integration: How well does the tool integrate with your mission-critical applications? Do you need to spend time maintaining custom integrations?

By evaluating each system against these criteria, you gain valuable insight into which tools to keep in your stack, which to sunset and remove, and what other tools you'll need to fill in the gaps. You may also learn what changes you can make to get more value out of the systems you have in place.



Choosing the Right Vendors



Choosing the Right Vendors

Once you've decided which technologies you need, it's time to choose vendors.

But, technology vendors can be like bad contractors. They promise to be on time and responsive, but they don't follow through. The project goes over time and over budget, and the work is subpar. You wouldn't want that for your home or building — and you certainly wouldn't want that for your MarTech stack!

Ever work with a vendor that promises responsive support but somehow is never around when you need them? Has a vendor ever sworn they know how to integrate their tools with your mission-critical applications, only to then end up telling you it's impossible after you've signed a multiyear contract? We've all been there, and these are just some of the reasons that selecting the right vendor is arguably the most critical decision you have to make.



More Demo, Less PowerPoint

If you're getting a demo, make sure you're getting an actual demo of the product. Set the expectation prior to the meeting that you don't want to see screenshots and slides, but the actual product in use. Remember: You're buying the product, not the sales rep. If the sales rep is fantastic, but the product isn't, don't get charmed into a purchase. On the flip side, if you're not building a good rapport with the sales rep, ask for someone else to be assigned to you.



During the vendor evaluation process, here are some important questions to ask to help you gain insight and make the wisest selection:

How many clients do you have (or plan to add this year)?

The right answer to this question depends on your organization's needs. If a vendor has thousands of clients, perhaps that means a broader ecosystem with more established partners, extensive training options and so on. Depending on the level of that company's passion for customer service, however, the larger scale of the company might mean you don't get the same level of intimacy you might with a smaller vendor. Smaller vendors can come with different pros: a closer relationship with staff, the ability to help shape the product and often a higher caliber of customer service. It's important to examine the pros and cons of both options and how they relate to your organization's needs.

What is the profile of your average client?

The vendor's average client should look a lot like you. This can indicate the vendor serves your specific market well. This is especially important if you are in a vertical such as healthcare, which has nuances and requirements. Even if the vendor's average client isn't in your specific market, you can learn a lot from the general description: Do they tend to be small, large, B2B, B2C, in certain verticals or have other commonalities?

What's on your product roadmap for the next 12 months?

Not only does this question uncover a vendor's commitment to innovation and upcoming product releases, but it also can reveal negatives — gaps in the product, scalability issues or performance concerns. Follow that question with a conversation about what led to those enhancements being priorities, and whether or not they came from the internal product management vision or customer feedback. This dialog can reveal how in tune the vendor is with their ongoing customer needs.

What training and support resources are available from both you and your partners?

Find out details behind resources available on the website or in brochures. Is there formal training? Who develops the curriculum, and who are the instructors? Are there online or live training options? What about documentation? Explore the service and support offerings with your own organization and projects in mind.

What are the primary reasons clients leave you?

Although it's a very direct question, it's a valid one — one that can give you tremendous insight if the vendor is candid and authentic about client adoption and usage. Follow up with probing questions around what percent attrition they experience each year. Keep in mind, the primary reason most MarTech tools are not renewed is because clients feel that they didn't get the ROI they expected. Often, a failure to realize ROI with technology solutions stems from a lack of planning or committed resources. Asking the vendor why clients leave may uncover the true reasons.

Aside from the license fee, what other costs should I plan for?

Give the vendor a chance to disclose any other costs of using the product that may not be obvious. Will you need to invest in other technologies to support this one? What resources will you need in-house, or will you want to leverage a third-party agency with more experience?

How long does it typically take to get up and running?

Find out the average implementation time, but don't stop there. Does this implementation/migration have dependencies on cross-departmental resources? What percentage of implementations run into hurdles or take longer than anticipated? Can you "fast track" it? Are there shortcuts you can take or pre-implementation initiatives that help pave the way to success?

Can you provide me client references?

Calling a reference enables you to ask questions similar to the above: How long did it take before you were successful? What resources did you use to get set up and drive adoption? What level of change management was required in the organization? Were there surprises in costs or other areas? Don't miss this opportunity to gain insights from customers who have already been through the process you're anticipating. Have your list of questions prepared.

Laying the Groundwork for a Successful Deployment



Laying the Groundwork for a Successful Deployment

So you've chosen the tools and vendors, and you've secured the budget for building out your stack. Unfortunately, you've forgotten to tell sales that you're changing the way you're generating and routing leads to them. Or maybe you failed to involve IT, and suddenly they don't think they have the resources to help support the rollout. Such oversights could jeopardize the success of your deployment — and make you look really bad to upper management!

Lay the groundwork for a successful deployment by assessing these key areas for getting everyone aligned and on-board prior to your deployment:

1. Understand stakeholder expectations.

Do the key stakeholders agree on the need for this tool? It's critical to have cross-departmental alignment on major technology initiatives. When considering a sales enablement tool, for example, the best practice is to involve the sales organization early in the process. A tool selected without their buy-in won't be well received or easily adopted, but if everyone agrees on the need and requirements, they'll be more likely to put effort into adopting and using the tool. Identify alignments that are required for each technology category and collaborate with the stakeholders up front.

2. Make sure you have resources in place for a successful deployment.

Two sets of resources are necessary for every technology adoption: **1)** people to put the technology in place, and **2)** people to operate it after implementation. Sometimes they can be internal resources, but more commonly, marketing teams work with outside agencies such as BDO Digital that can offer the bandwidth and experience for rapidly deploying systems and providing ongoing support after systems are up and running.

3. Assign a project manager to oversee implementations.

For most projects, you'll need someone tracking and managing your system implementation and deployment as the process has many moving parts. Having a designated project manager and project plans can help to ensure your implementations go quickly and smoothly.

4. Set expectations.

A successful system deployment requires setting expectations across teams that may be impacted. Schedule a kickoff meeting with key stakeholders to cover why deploying the system is an initiative that involves everyone, who will do what and when they'll do it, and what success may look like. After kickoff, your project manager should coordinate the resources, manage scheduling and track deliverables.

5. Decide how you will measure success/ROI.

By starting with the end in mind, the conversation will shift from features and functions to impact and results. You're about to invest your time and money in a tool to address a problem or need. Take the time up front to find out what success looks like and how long it may take.

Leverage Your Investments



Leverage Your Investments

As you invest in more technology and continue building out your stack, consider these five tips to help ensure you get the maximum value from your investments:

1. Make sure your marketing technologies are connected.

The most successful and effective MarTech stacks are well integrated. Having disparate systems can be very costly and drain internal resources, and technologies that don't communicate with each other may limit functionality and decrease your ROI. A fully functional, well-integrated stack provides a holistic view of marketing's contribution to funnel growth and enables more complete reporting to attribute your efforts to revenue.

2. Provide necessary training to help ensure widespread adoption.

Every new technology has a learning curve. Assess how similar or different a potential new tool is compared to the one you're currently using, and how much deployment and ongoing training you'll need to ensure users adopt and use the tool. If needed, enlist help from an outside trainer.

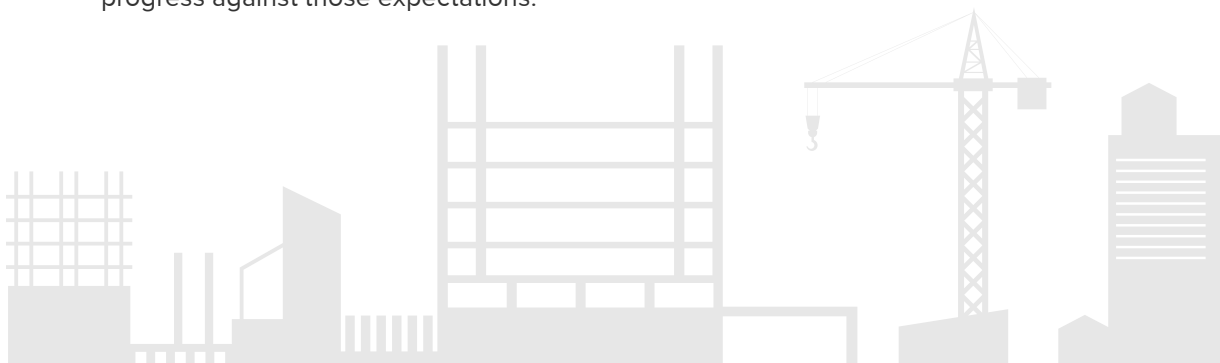
3. Track and measure your performance.

What does success look like with your new tool or tools? Most marketing tools are subscription-based, meaning a year or two from now, you'll need to renew your subscription. If that's the case, justification for continuing to invest in the tool may be required. If you determine beforehand what success looks like, you can measure ROI against that vision. Ask your vendor, references and agency team what to expect in terms of impact to your marketing efforts in the months following adoption. Then, track your progress against those expectations.

Get Your Data in Order

No marketing stack can be successful without quality data. Yet, effective data management is challenging and riddled with roadblocks, from inaccurate or incomplete data to duplicate data, data silos and so on. **More than half** of marketers cite data quality and completeness as their biggest challenge to marketing success, and Experian found that about **30%** of customer data is inaccurate. What's more, email marketing databases degrade at a rate of about **22.5%** per year!

As marketing continually gathers data across channels, having systems in place to validate, cleanse, normalize and enrich data is essential. BDO Digital's guide, "[How To Implement Effective Data Management To Enable Data-Driven Marketing](#)," is a good resource on this topic.



4. Use your tools to help improve data quality.

Data hygiene may not be the most exciting topic, but its impact on your bottom line can be riveting — or horrifying — depending on how well your organization does it. According to [ZoomInfo statistics](#), up to **25%** of B2B database contacts contain inaccuracies, causing **40%** of business objectives to fail. In fact, bad data costs U.S. businesses more than **\$611 billion** each year. Try to leverage technology within your stack that governs data before it goes into your database. Bad data can be a lot easier to validate, cleanse, normalize and enrich if it's done before inaccurate or incomplete information has a chance to make it into your CRM. It's also important to look at how your tools may enable you to control your user permissions and comply with data privacy laws, such as GDPR and CCPA.

5. Foster sales and marketing alignment.

While most B2B marketers have already turned their attention to qualifying leads and their revenue output, more tools and capabilities likely exist within their stack that can be taken advantage of to directly support their sales team. Investigate how the tools you have in your stack can be better leveraged to help your sales team nurture and convert prospects into customers or expand your install base, and unite both teams around their most important objectives.



An Outside Agency Can Help Ensure Technology Success



An Outside Agency Can Help Ensure Technology Success

A vendor may be able to provide some level of product support, but the complex process of integrating new technology into your MarTech stack requires a higher degree of proficiency. Vendors are typically only knowledgeable about their specific offerings, not how they interact and integrate with other tools.

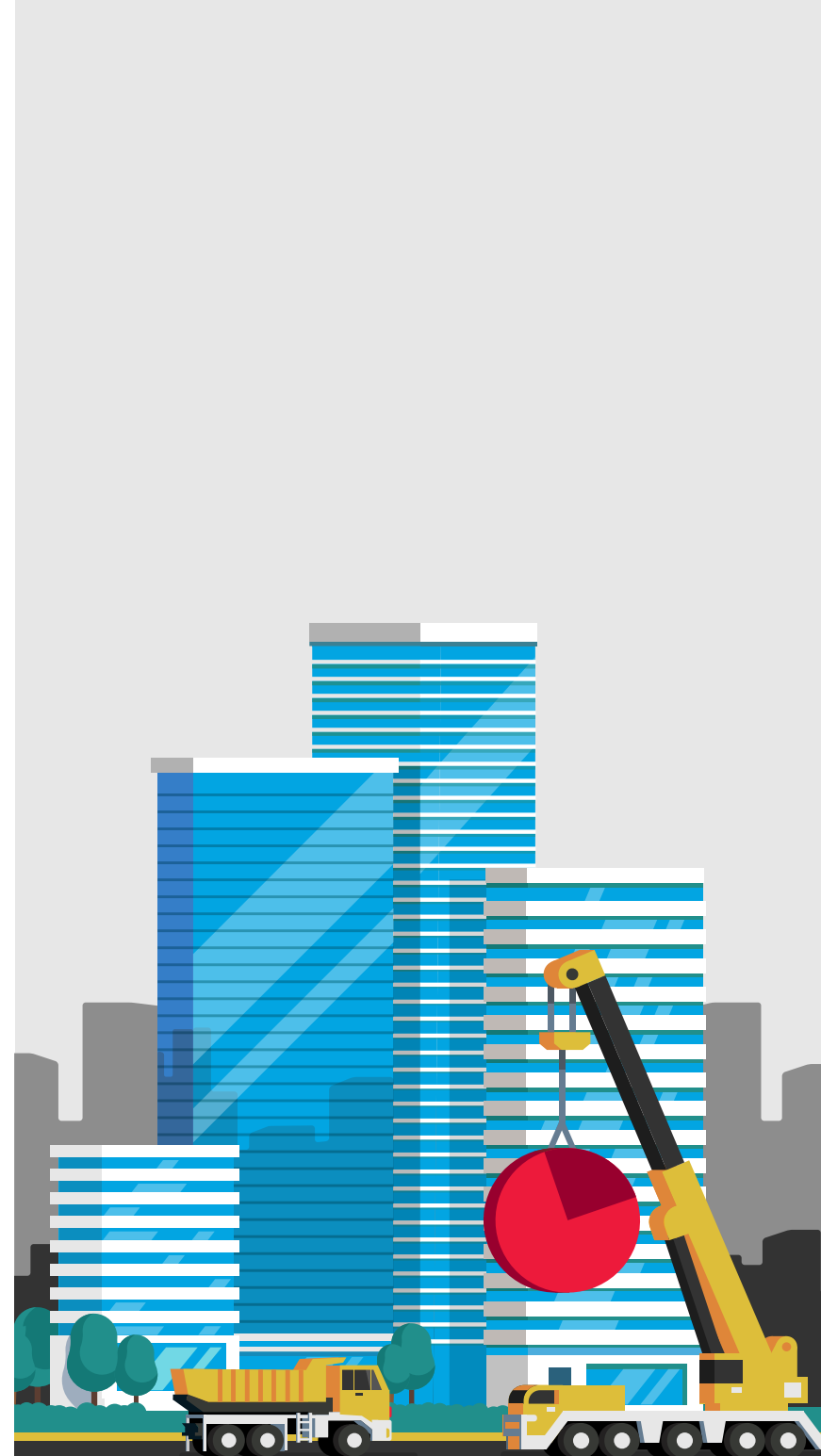
A good agency has broad, real-world experience you may lack in-house to help ensure your stack is built to last and strong enough to support expansion over time. They can focus on customizing solutions for your unique individual needs and requirements rather than making your organization change to fit a vendor's so-called best practices.

An agency may also provide managed or project-based services for ongoing support, alleviating the need to hire additional, costly full-time resources. Not to mention, you'll have more control and oversight of your MarTech initiatives and outcomes, and a team of professionals dedicated to delivering rapid value and maximum ROI.

About BDO Digital

We work with B2B marketing leaders to build and refine their demand generation strategy, implement and leverage their marketing technology stack, and provide supportive resources. Connect with us to get the most out of your investment in Adobe Experience Cloud solutions like Marketo Engage, Marketo Measure (Bizible), Adobe Experience Manager, Adobe Target and Adobe Analytics.

[Contact us today to learn more](#)



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