Tackling the Stack:
A Marketing Technology Roadmap

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A deliberately designed marketing tech stack can help in-house agencies be more organized, efficient, collaborative, data-driven and impactful. But with so many platforms and needs to consider, choosing the right combination of tools is a complex process. Consider these tips from a webinar by 7-Eleven's Marissa Eddings.

PARTS OF THE STACK

- Customer Data Platform (CDP)
- Content Management System (CMS)
- Campaign Management and MRM
- Marketing Orchestration and Automation

- Data Management Platform (DMP), Ad Tech and Media
- Advanced Analytics
- Marketing Measurement

QUESTIONS TO ASK

If you're looking for a platform

- Which teams will be using it?
- What are the needs of those teams?
- How many licenses will you need?
- How much storage will you need?
- Who will manage it day-to-day?
- How will it integrate with other tools?

If you already have a platform

- Are you getting the most out of it?
- Are there features you don't use?
- Does it integrate with your other platforms?
- Can it be accessed easily and effectively?
- Are you seeking feedback regularly?

STEPS TO ASSESS YOUR STACK

1. **Envision:** Define the customer experience (CX) you want to deliver
   - Get input from senior leadership and relevant teams (Marketing, IT, Digital, etc.)
   - Establish objectives for integration, automation, personalization, and Analytics

2. **Assess:** Review your MarTech capabilities, customer data and marketing operations

   - Review documents, conduct surveys and facilitate discovery interviews
   - Consider channels, data, analytics, resource management, delivery and customer journeys

3. **Strategize:** Identify gaps in technical and operational areas to enable CX objectives

   - Isolate repetitive, manual tasks that create inefficiency
   - Seeks opportunities to enhance integration, fostering improved personalization and reporting

4. **Plan:** Prioritize initiatives to close gaps and create a roadmap

BONUS TIPS

- MarTech requires cross-functional collaboration. Be clear on all roles and responsibilities up front.
- MarTech needs a top-down approach. Don't add tools for one-off needs. Consider the full stack.
- Don't try to boil the ocean; standing up an effective MarTech stack takes time.
- If the whole isn't significantly better than the sum of its parts, then the stack isn't doing its job.