

STATE OF MARTECH 2022

by Scott Brinker & Frans Riemersma

sponsored by



Table of Contents

Introduction	3
The Marketing Technology Landscape	4
Martech Expansion & Consolidation	12
Martech Integration & Aggregation	17
Martech Stack Dynamics	23
The 2022 Stackies	31
Sponsors	65

Launchpad by Nick Saraev (generated by AI)

Introduction



Scott Brinker
Editor, *chiefmartec.com*



Frans Riemersma
Founder, *MartechTribe*

Our last global marketing technology landscape graphic was produced two years ago in April. It was early into the COVID-19 pandemic, and the marketing industry faced tremendous uncertainty.

Would this crisis be the catalyst for consolidating — if not outright collapsing — the vast and vibrant martech vendor universe? We had [mapped 8,000 solutions](#), but was that the peak before the fall?

In short, no. Instead, the pandemic catalyzed an *acceleration* of digital transformation. This was clear in 2021 when Frans [mapped the European landscape](#) and saw huge year-over-year growth.

After taking a hiatus from mapping a global one in 2021, we — Scott and Frans — teamed up to build a new engine for tracking and visualizing the space.

The result is the [2022 Martech Map](#), categorizing a whopping 9,932 martech solutions. It's included as a static image in this report. But it's also available as an interactive martech search engine, enabling you to slice and analyze the landscape in a variety of dimensions.

Yes, there's been a ton consolidation over the past two years. Many martech vendors were acquired, disbanded, or pivoted to something different.

But the number of new entrants, from startups and more mature companies offering a martech service, still outpaces the forces of consolidation. Software is eating the world in millions of small bites.

It's mind-boggling to see the grand scale of it all. Yet we are steadily adapting to an abundance of apps in our environment. Connected ecosystems are growing around the major martech platforms, and a new generation of “aggregation” systems are bringing greater cohesion to internal tech stacks.

The art on the cover of this report is *Launchpad* by AI artist Nick Saraev. Although it's really “by” the AI that Nick wrote, which can generate original works of art in under a second.

It's representative of the next-gen wave of martech innovation underway. Imagine describing to your computer any picture or painting you want — and it instantly appears. This is just one example.

Arthur C. Clarke famously said: any sufficiently advanced technology is indistinguishable from magic. This new wave of martech is magical.

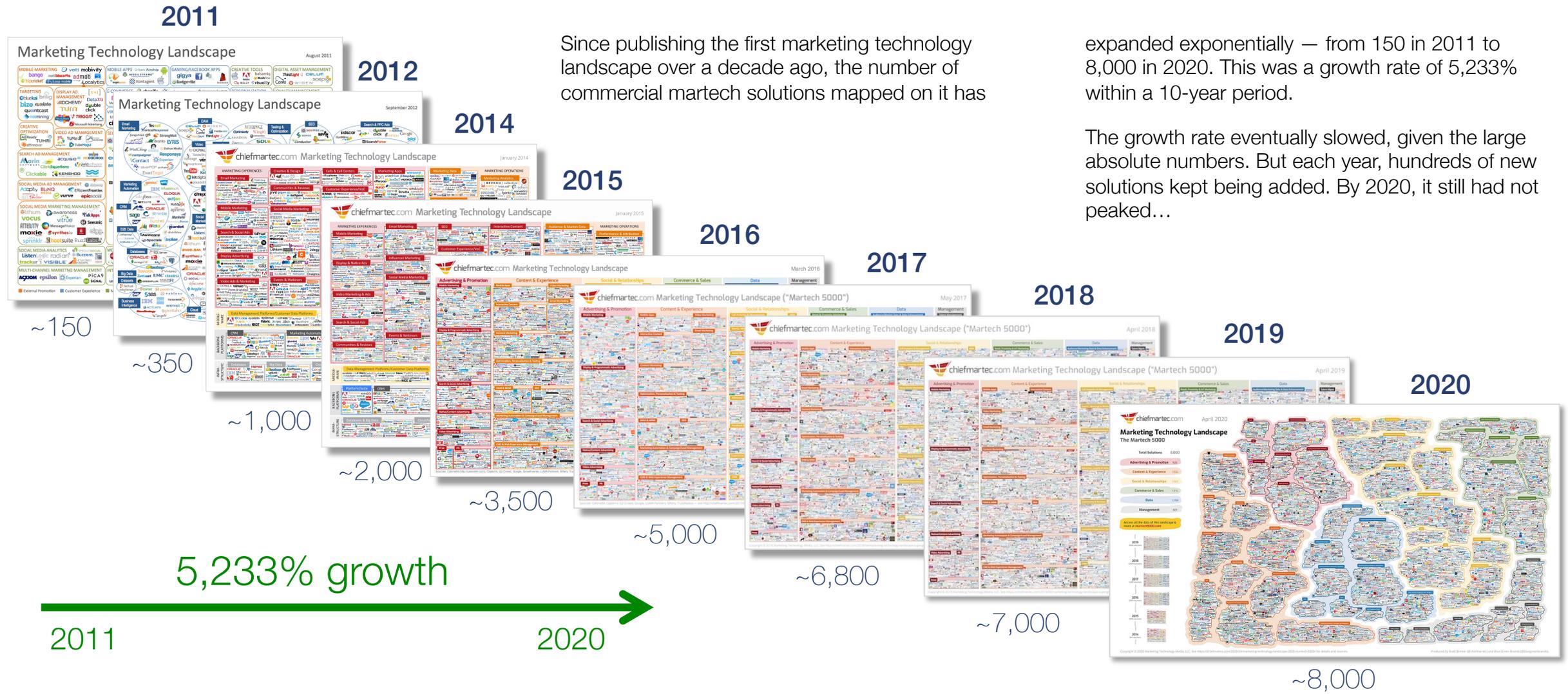
In the pages that follow, we'll walk you through the [2022 Martech Map](#), the patterns we see emerging in the industry, and ways in which marketing ops and technology teams are adapting to them. That will be the perfect segue into sharing the entries to The 2022 Stackies: Marketing Tech Stack Awards.

Thank you to the six sponsors who helped fund this research and report: Learning Experience Alliance, OfferFit, Workato, SAS, Amplitude, and Goldcast. Each has included a page at the end of this report, which we encourage you to check out.

The Marketing Technology Landscape

Launchpad by Nick Saraev (generated by AI)

A Decade-Long Global Explosion of Martech



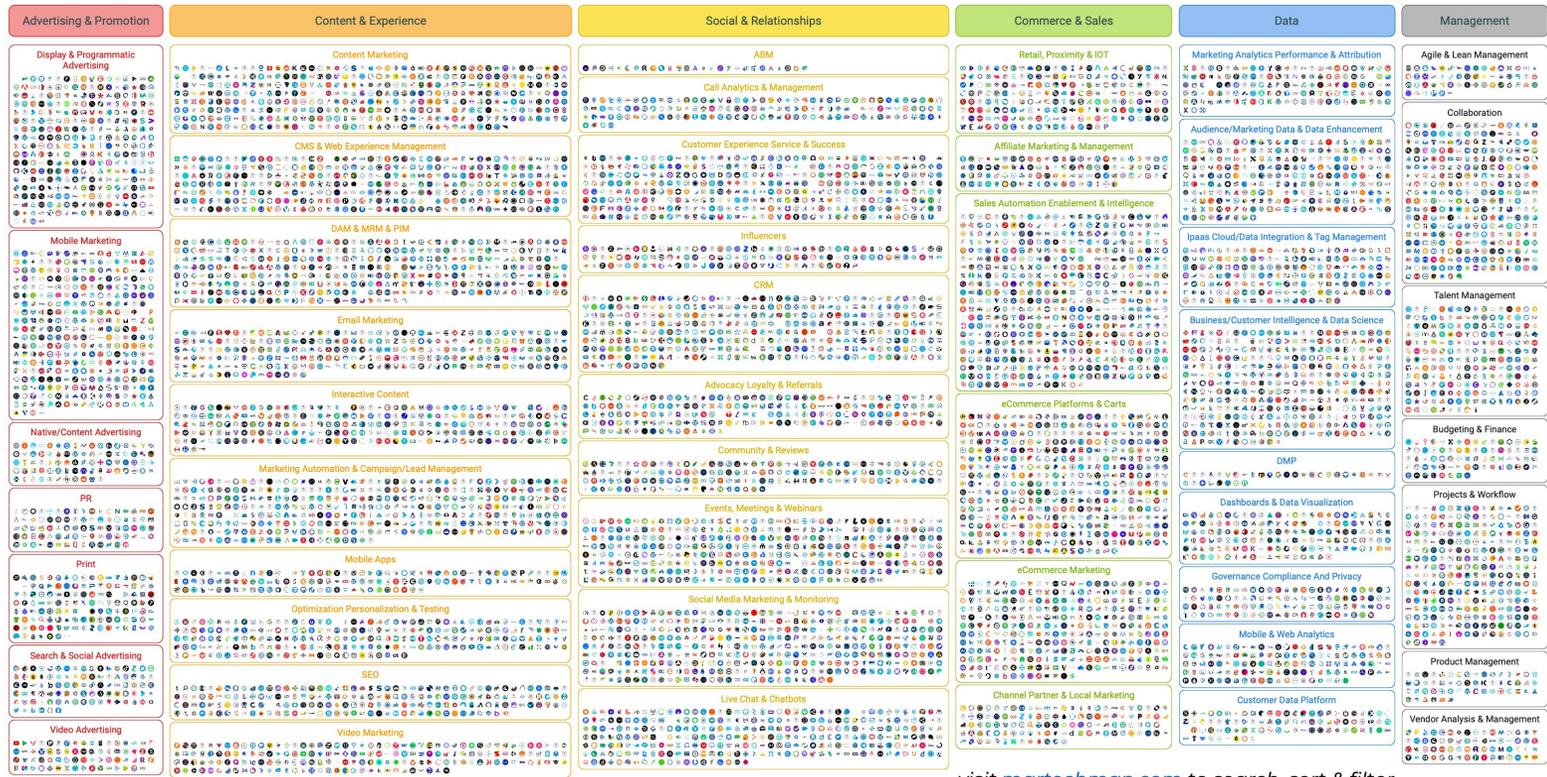
Since publishing the first marketing technology landscape over a decade ago, the number of commercial martech solutions mapped on it has

expanded exponentially — from 150 in 2011 to 8,000 in 2020. This was a growth rate of 5,233% within a 10-year period.

The growth rate eventually slowed, given the large absolute numbers. But each year, hundreds of new solutions kept being added. By 2020, it still had not peaked...

The 2022 Martech Map – A Living Landscape

MartechMap an initiative by  chiefmartec &  MartechTribe **2022 Marketing Technology Landscape** May 2022



visit martechmap.com to search, sort & filter

This is a snapshot of the new marketing technology landscape as of May 3, 2022. It has **9,932** martech solutions mapped into 49 categories.

We call it a snapshot, because this graphic is now dynamically produced from a live data set that you can explore at martechmap.com.

The look-and-feel of the landscape is quite different as a result. Instead of packing full logos in by hand – an insanely laborious effort in previous years – we are now using the favicon from each vendor’s website and fitting them in an evenly-spaced grid.

This has several advantages over previous layouts. Because it’s now algorithmically generated, we can publish a new version any time with refreshed data. Given that the martech industry is likely to continue to evolve rapidly, we will update it regularly. In fact, we encourage you to contribute by reporting new, changed, or exited vendors on martechmap.com.

The advantage of using favicons for the logos is that we can scrape them directly from vendors’ websites – to be sure we always have the latest version – and easily fit them into a grid.

Visit martechmap.com to Search, Sort, and Filter

Martech is a vibrant, rapidly changing industry. So, a once-a-year, static image and dataset is fated to quickly be out of date. Our solution? Give you a dynamic visualization online that is continually updated with fresh data.

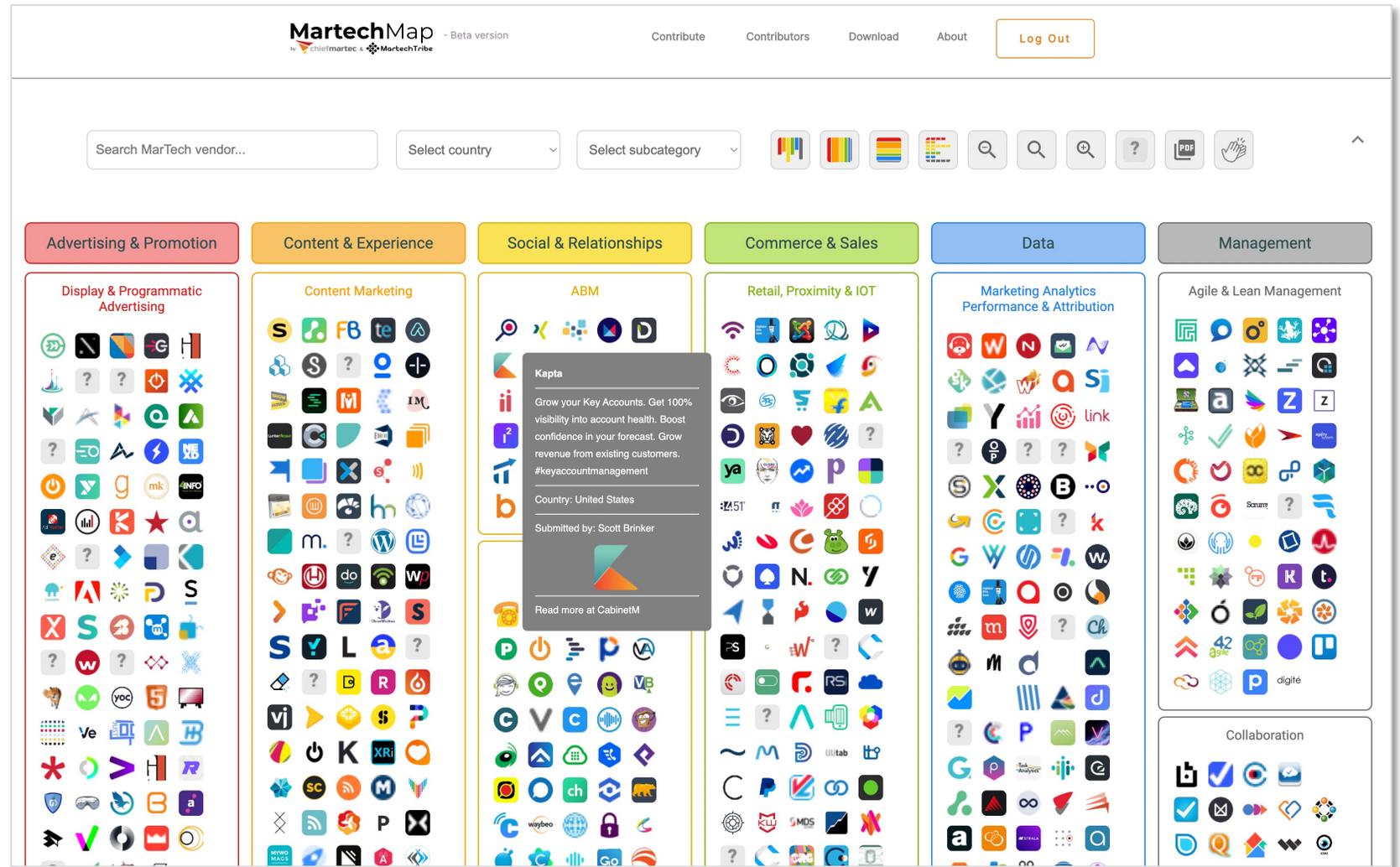
By signing up for free on martechmap.com, you can now explore the latest version of the landscape at any time.

Hovering over a logo will reveal the name of the company and a brief description from their website or Twitter profile. Clicking on a logo will take you to their website.

You can also search and filter the landscape, looking for specific terms that appear in their description, or narrowing the result by the HQ country.

You can help us improve this landscape by sending in additions or updates to vendors via a submission form on the site.

At launch time, martechmap.com is in a beta stage. We appreciate any feedback you want to share with team@martechmap.com.



The Martech Landscape Grew 24% Since 2020

Based on the current data as of this publish date, we can report that the landscape grew 24% over the past two years.

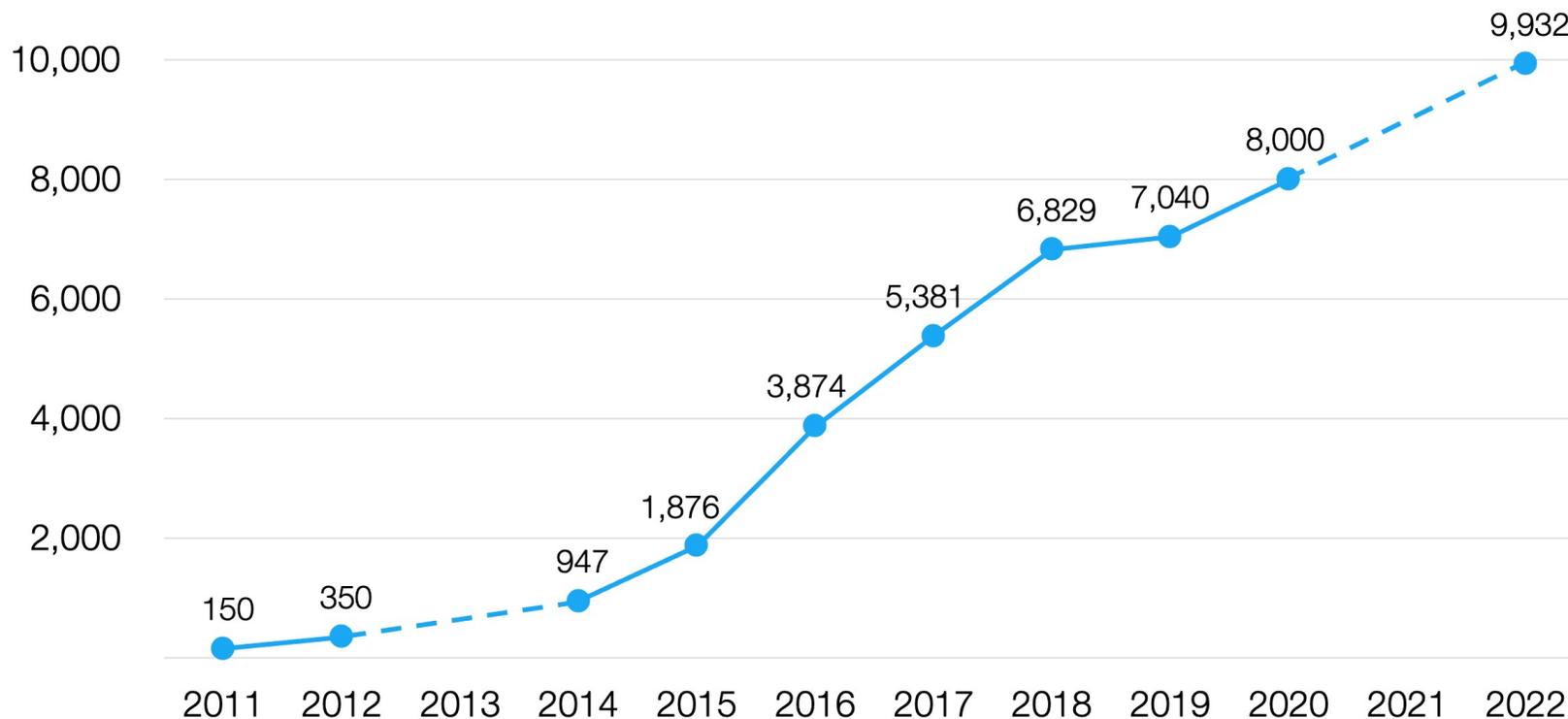
When the pandemic first hit in early 2020, there was speculation that it might be the catalyst to (finally) shrink the martech vendor landscape.

In fact, the opposite happened. The drive to deliver better digital customer experiences and streamline digital business operations accelerated the demand for martech and inspired a new wave of startups in the space.

For instance, the Y Combinator cohort for the summer 2021 had [47 new martech ventures](#).

While there were plenty of exits (972) during the past two years too, from acquisitions and pivots to unsuccessful products shutting down, the number of new — or at least newly discovered — martech solutions (2,904) grew faster.

The inflows are still greater than the outflows.



since 2011, the martech landscape has grown 6,521%

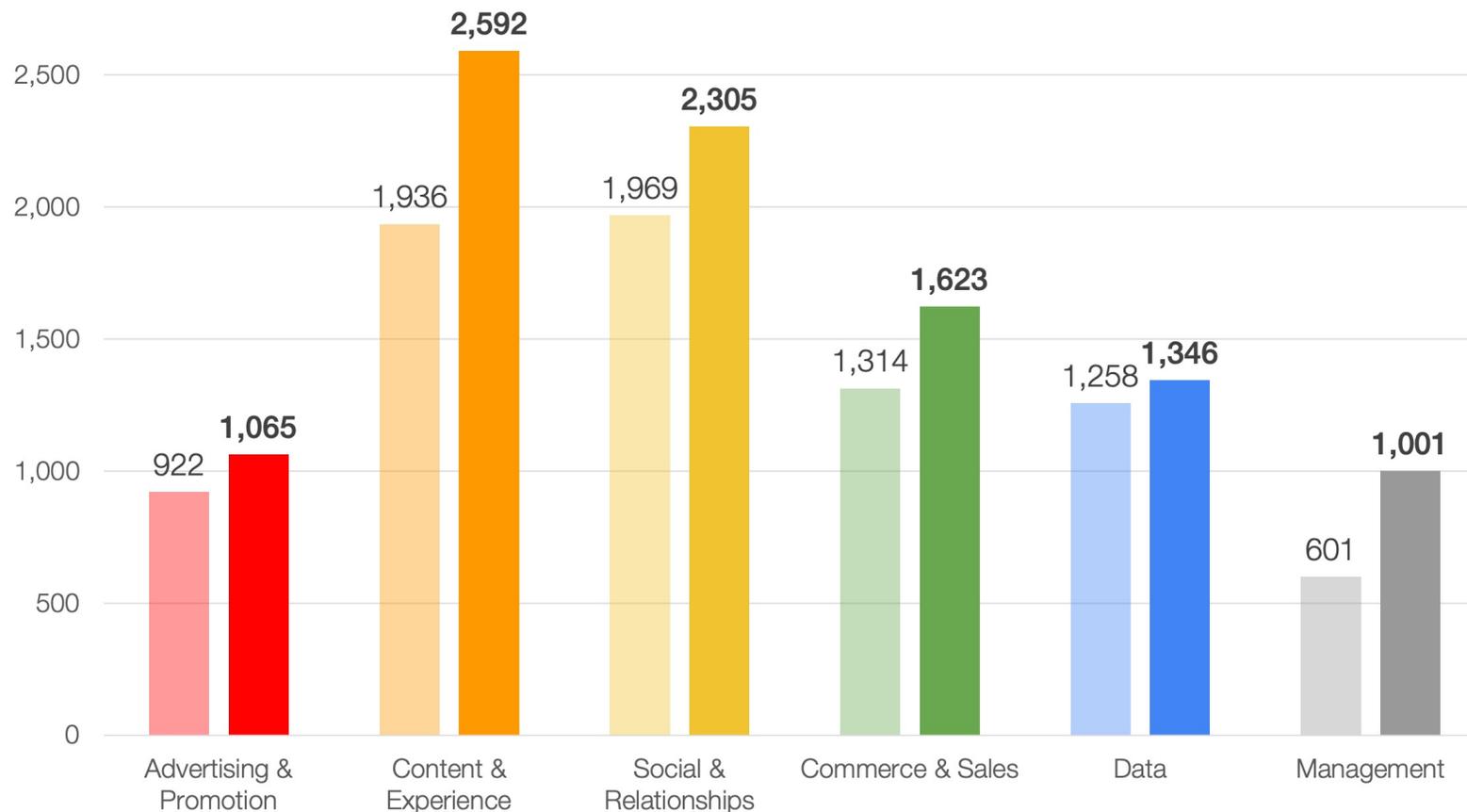
Every Martech Category Grew, But Some Grew Faster

While every category on the martech landscape experienced growth over the past two years, some grew faster than others:

- Advertising & Promotion: 16%
- Content & Experience: 34%
- Social & Relationships: 17%
- Commerce & Sales: 24%
- Data: 7%
- Management: 67%

The largest growth happened in the categories of Content & Experience, Commerce & Sales, and Management. The first two make sense as these are the categories where there is the greatest potential for differentiation in customer experience.

The growth in management tools is likely a result of marketing teams operating their day-to-day work in an ever more digital fashion — including greater support for remote work.

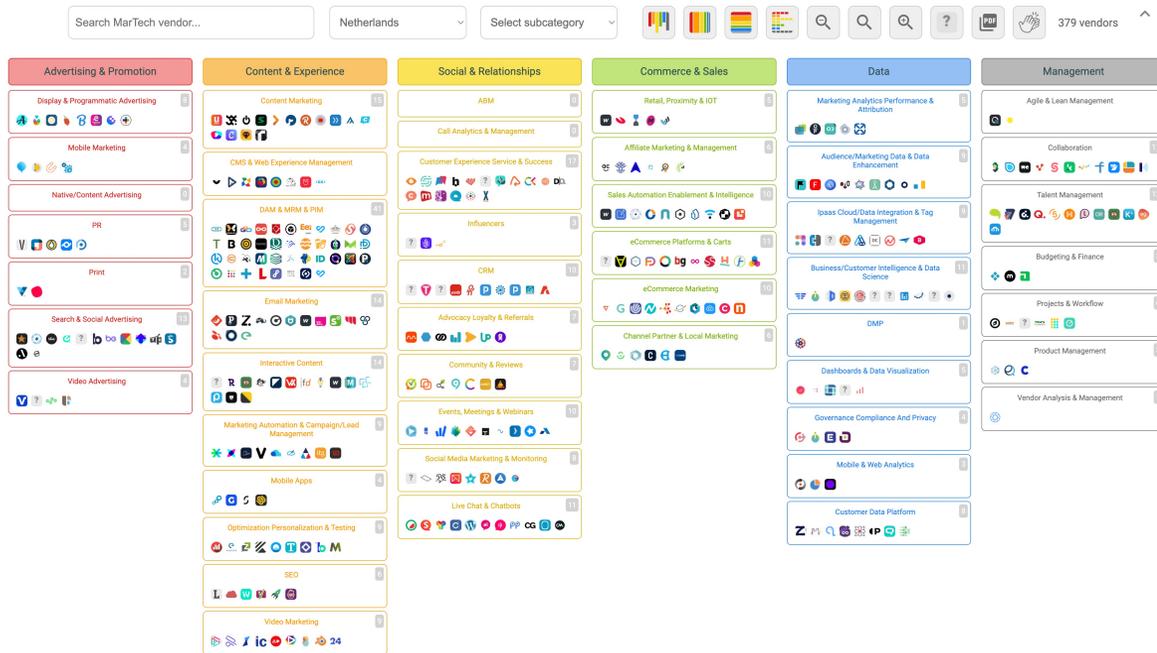


growth in martech categories from 2020 (light) to 2022 (dark)

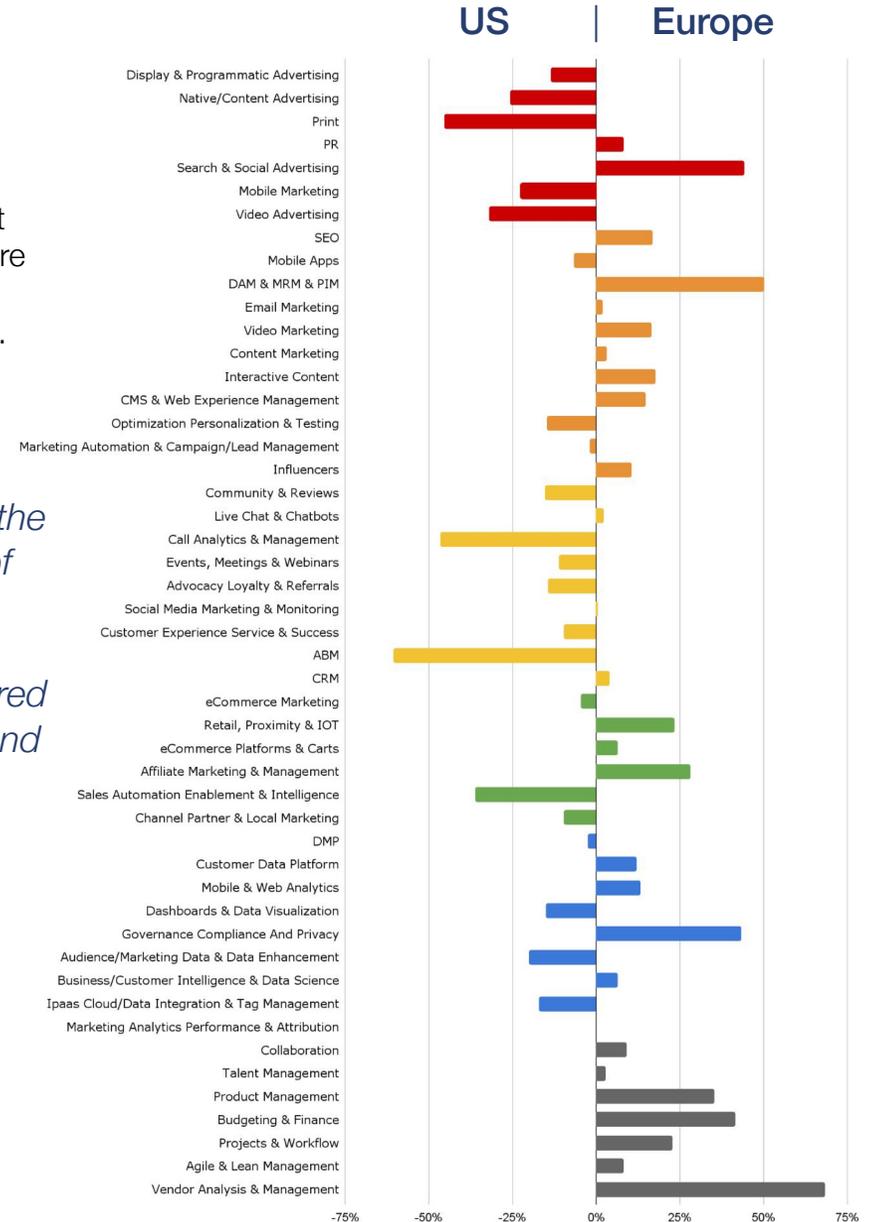
Martech Is Local and Global

Global martech companies, selling internationally, arise from countries around the world. At the same time, many smaller martech products specialize in serving their own local region.

There are some interesting clusters within different regions. For instance, Europe developed 50% more DAM & MRM products than the US, while the US developed 61% more ABM products than Europe.



379 martech vendors headquartered in The Netherlands, filtered on martechmap.com



comparing the number of martech vendors headquartered in Europe and the US

1 tool

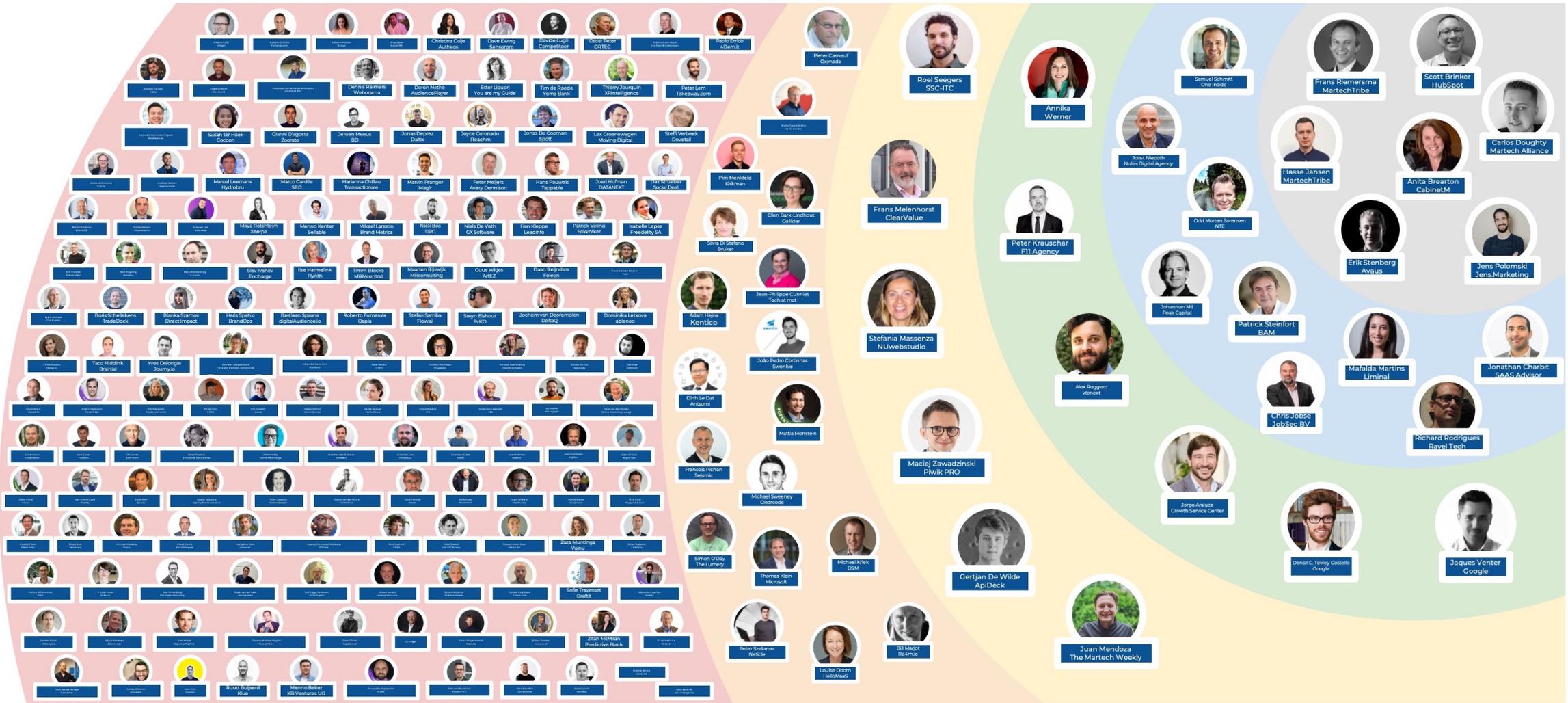
> 1 tool

> 10 tools

> 15 tools

> 25 tools

> 200 tools



Produced April 2022 by Annika Werner, Frans Riemersma and Scott Brinker



Thank you to the many contributors to the 2022 marketing technology landscape data set, as well as to Anand Thaker and Jeff Eckman and the Blue Green team for tremendous contributions in previous years.



Martech Expansion & Consolidation

Launchpad by Nick Saraev (generated by AI)

Martech Consolidates, Yet New Apps Keep Emerging

“It seems like every other week, I read about a major martech acquisition. Yet the number of solutions on the martech map continues to grow. How can this be?”

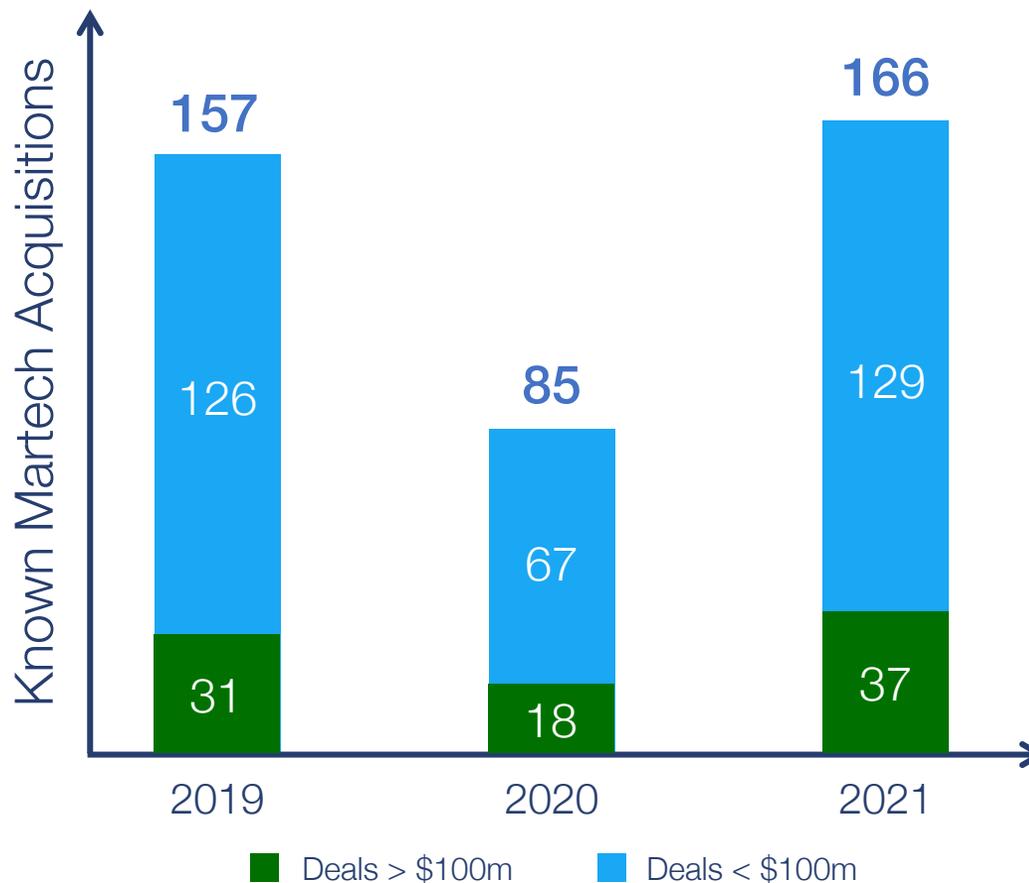
Indeed, the martech industry sees a tremendous amount of M&A activity. LUMA Partners, one of the leading investment banks in martech publishes quarterly reports of known deals. There were 157 in 2019, 85 in 2020, and 166 in 2021.

About one out of every five of those was a deal valued at \$100 million or more. Such large acquisitions almost always make the news. Last year, there were 37. On average, that’s 3 per month that likely garnered headlines in industry publications.

It’s a testament to just how large the martech industry is that so many significant acquisitions are constantly occurring. All those headlines naturally give the impression of massive consolidation.

Yet while that consolidation is real, as a percentage of the total number of martech solutions, these known acquisitions are 2% or so of the total landscape.

Meanwhile, new martech startups and other more established companies continue to enter the space. Ironically, consolidation is often a catalyst for new software to be created.



Source: LUMA Partners Market Reports, Q1 2020 and Q1 2022

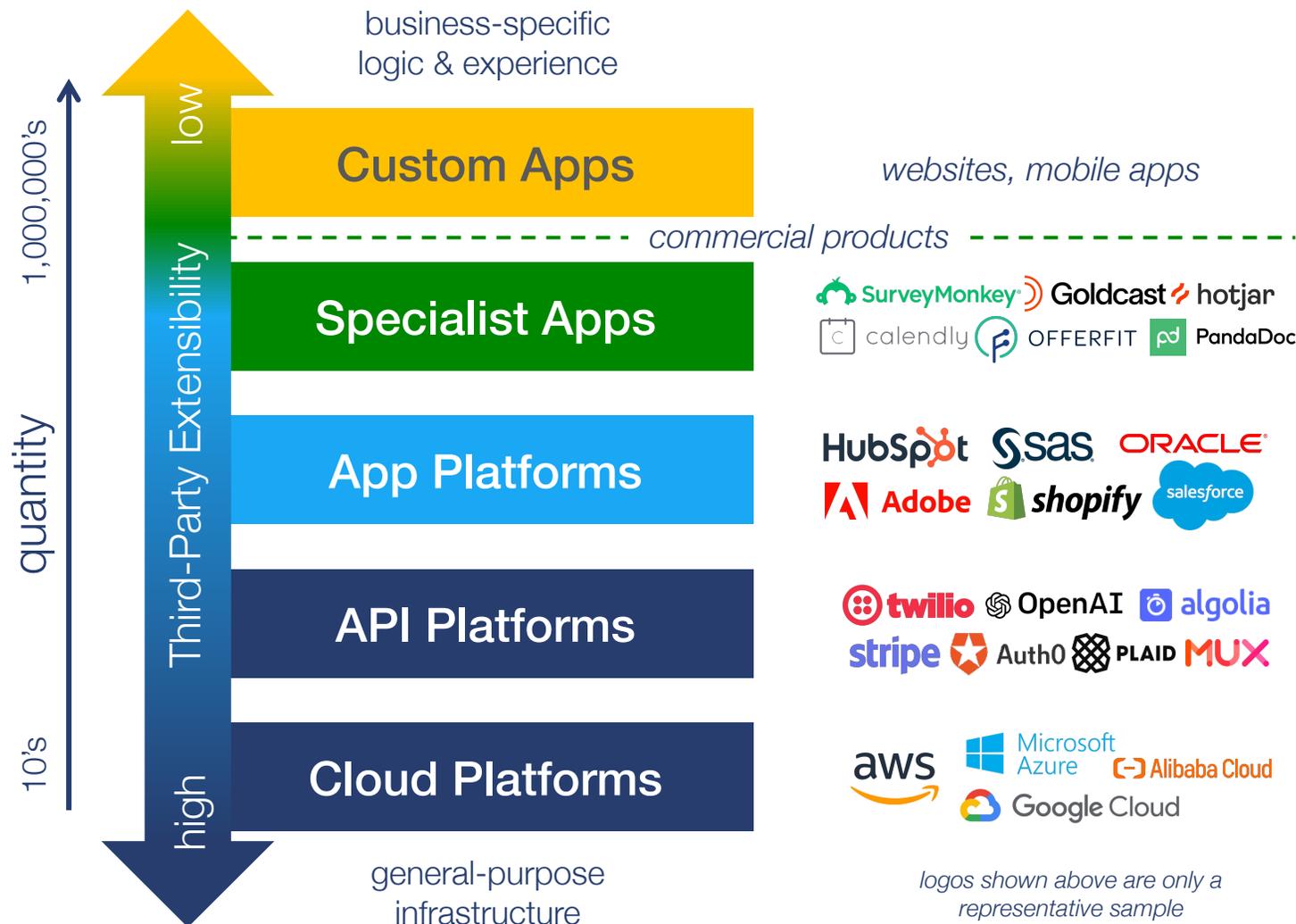
The Spectrum of Platforms and Apps in the Cloud

Cloud software falls along a spectrum from general-purpose infrastructure — cloud platforms such as AWS, Azure, and Google Cloud — business-specific logic and digital experiences that are built as custom apps for individual firms.

There is tremendous consolidation at the bottom of this spectrum with those cloud platforms, where four companies hold the majority of the market share. At the top of the spectrum, however, there are millions of custom-built apps and websites.

As we go up this spectrum, diversity increases, with each layer building on the ones below. Cloud, API, and app platforms all enable developers to build on, extend, or integrate with their services. This makes it easier for more apps to be created, “standing on the shoulders of giants” below.

Successful apps that start at the top of the spectrum may migrate down as they grow. A popular specialist app may open APIs and become an app platform for others to extend. Competition increases with scale though, which leads to consolidation. At the same time, those new platforms enable new custom and specialist apps to be built on their foundation.



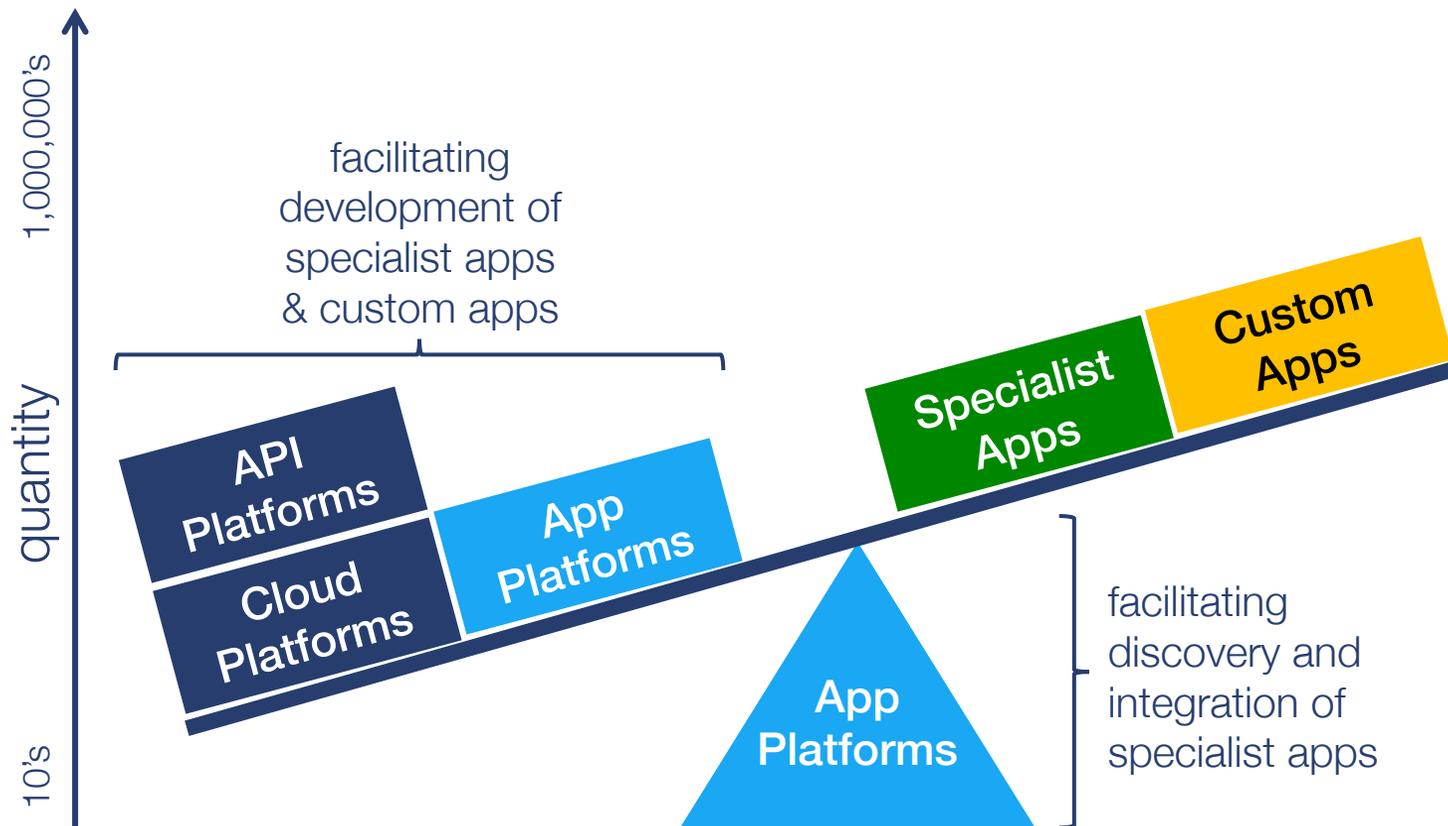
How Platform Consolidation Drives App Expansion

The irony of platform consolidation in martech — and cloud software more generally — is that it drives the development of more specialist and custom apps.

Consolidated platforms reduce the choices of which ones developers should build on to reach the largest possible audience. This is the dynamic with Apple and Android that has resulted in millions of mobile apps. It's a virtuous cycle, as the more apps built on a platform further increase that platform's strength — attracting even more developers to build on it.

Consolidated platforms also tend to be quite stable, both technically and as businesses that are likely to be around for years to come. They often win on cost economies of scale and breadth of functionality. This further drives that virtuous cycle of attracting more apps to be built on their foundation.

App platforms also play a special role in facilitating the success of specialist apps by making them more discoverable for customers in their domain through app marketplaces. The more plug-and-play an app can be on their platform, the easier it is to adopt — which further enables more specialist apps to be successful within their ecosystem.



Apps, Apps Everywhere — The Great App Explosion

“Software is eating the world,” Marc Andreessen famously declared in 2011. It’s true, and it turns out that the world is quite large. The variety of apps and digital experiences that are possible seems nearly unlimited, with new innovations and iterations continually emerging.

The research firm [IDC has estimated](#) that there will be over 500 million digital apps and services deployed in the cloud by 2023.

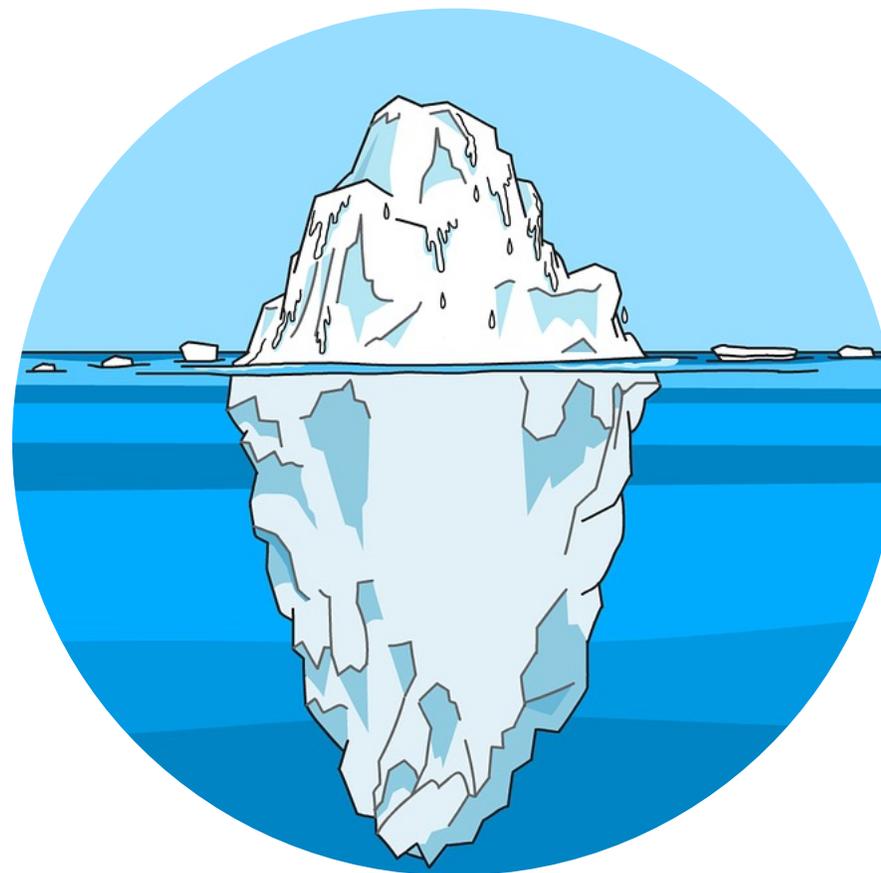
The majority of these will be custom-built apps, websites, and digital experiences unique to an individual business. However, commercially packaged apps and platforms — such as the ones on the marketing technology landscape — will also multiply. One [Forrester analyst estimated](#) that there are over 100,000 SaaS apps today and that there could be 1 million by 2027.

We call this [The Great App Explosion](#).

If that seems impossible, it’s important to remember that this is in the context of an incredibly long tail of specialist apps, many of which will plug into larger app platforms as extensions rather than stand-alone applications. The more seamless that integration process becomes, the more a multitude of “apps” will seem completely natural.

Commercially
Packaged
Apps &
Platforms

Custom
Apps,
Websites &
Digital
Experiences



more than 500 million apps will be deployed in the cloud by 2023, but the vast majority of them will be custom software below the waterline



Martech Integration & Aggregation

Launchpad by Nick Saraev (generated by AI)

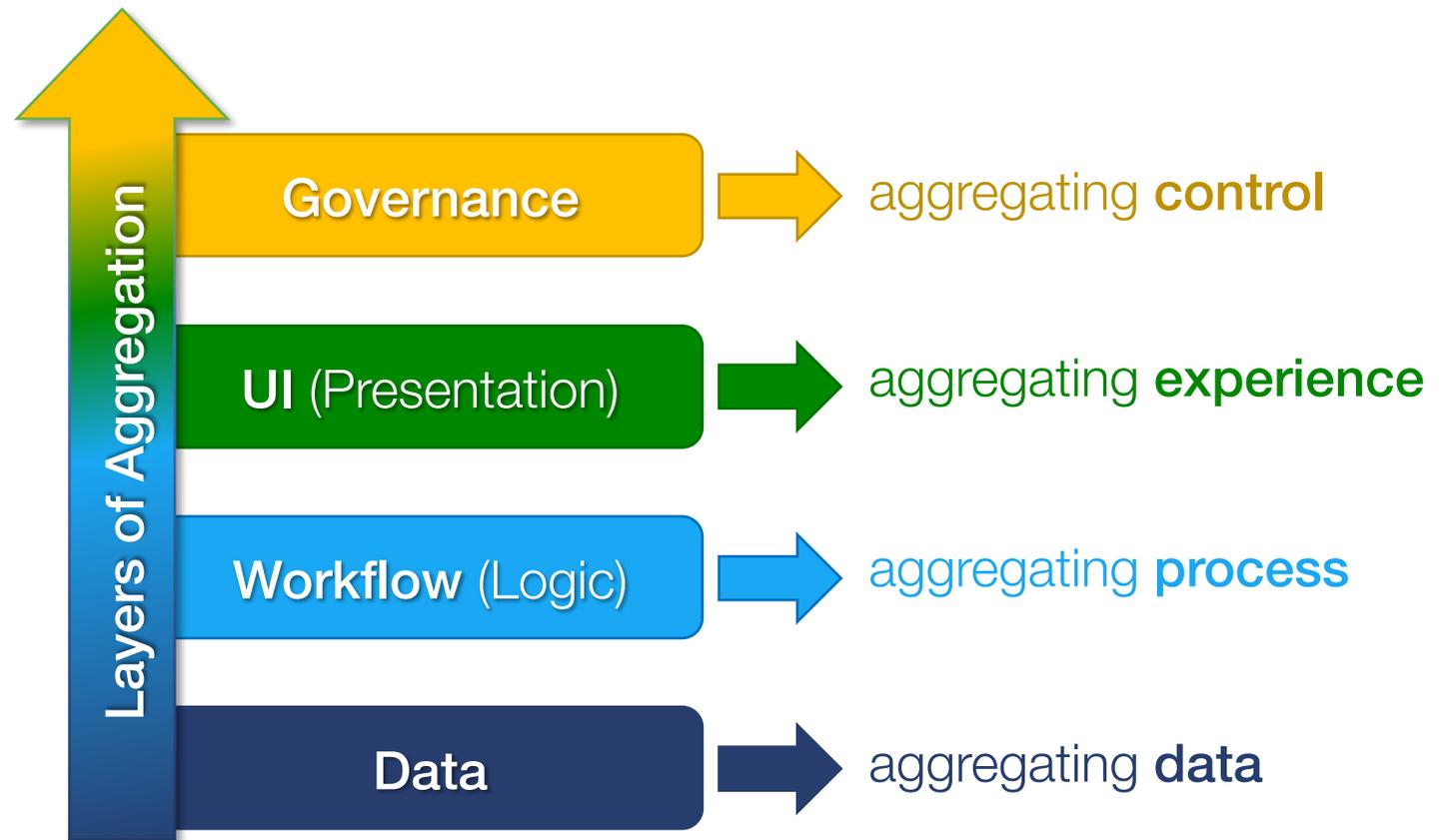
Four Layers of Stack Integration and Aggregation

Integration between apps is crucial in this environment. Although the martech industry still has much room for improvement on this dimension, we've been happy to see more and more apps focus on integration as a first-class feature in their products and go-to-market.

Not all integrations are equal, however. Some are deep, some are shallow. It's important to evaluate integrations by the use cases they address for your own needs.

We believe there are four layers in which integrations exist: data, workflow, UI, and governance. Data is the most common, either one-way or bi-directional syncs of records across systems. Workflow integrations enable triggers in one app to execute actions in another. A UI integration embeds elements of one app into the UI of another — reducing the need for users to constantly switch among different browser tabs and different app interfaces. The governance layer of integrations assures that SLAs and compliance standards are consistent across all apps within an app platform's ecosystem.

Another way of looking at these integrations layers is that they are dimensions by which you can *aggregate* data, process, experience — customer and employee experiences — and control.



four layers of integration and the value that they help aggregate

Aggregation > Consolidation in Expanding Tech Stacks

Aggregation is becoming a better way to think about managing tech stacks in The Great App Explosion than mere consolidation.

Consolidation works to reduce the number of things in a set, such as the number of apps in your environment. But that's increasingly hard to do as more and more specialist apps proliferate — delivering value that you want to harness.

Aggregation, instead, is about making a large number of things easier, safer, and more effective to work with, by integrating them through a common platform.

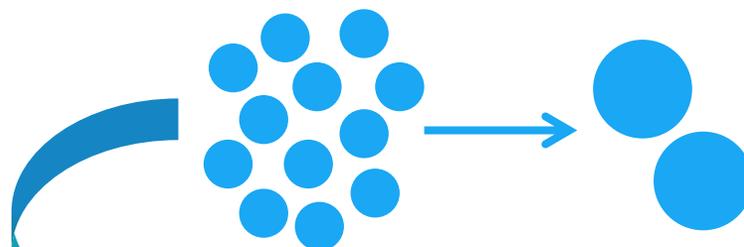
This is [a riff on Ben Thompson's Aggregation Theory](#). We see this pattern with social media sites, aggregating millions of social media creators and with Apple and Android, aggregating millions of mobile apps.

But we also see this pattern in company tech stacks, such as with data warehouses, aggregating dozens or hundreds of data sources, and with CRMs, aggregating dozens or hundreds of customer touchpoints.

Aggregation is powerful because the more things you're aggregating, the greater value you unlock from it.

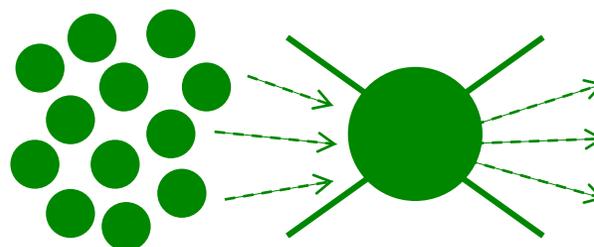
CONSOLIDATION

Reducing a large set of things into a fewer number of things — or just one.



AGGREGATION

Making a large set of things easier to consume or access through a single source.



Examples of Aggregation

Social Media Creators



Mobile Apps



Data Sources



Customer Touchpoints



Examples of Aggregation on Four Horizontal Layers

In recent years, we've seen the rise of many solutions that focus on aggregation within a particular horizontal layer across a company's tech stack (not just martech).

Data warehouses are the quintessential example at the data layer. But DAM, MDM, and some CDPs also serve to aggregate specialized kinds of data.

Processes are aggregated across teams and tools using iPaaS and workflow automation products. ETL/ELT and reverse ETL products are aggregating the workflow of data pipelines.

Shared collaboration tools, such as Slack and Microsoft Teams, aggregate UI to many other services, workflows, and data. Within the domain of marketing, sales, and customer service, CRMs provide an aggregated UI for all kinds of customer touchpoints.

SaaS management platforms, data compliance and privacy tools, and identity access management services are aggregating digital governance capabilities.

All these examples *increase in value* as you increase the number of inputs and/or outputs to them, often at near zero marginal cost.



examples of app platforms delivering aggregation benefits

Martech Data Aggregation in the Data Ops Ecosystem

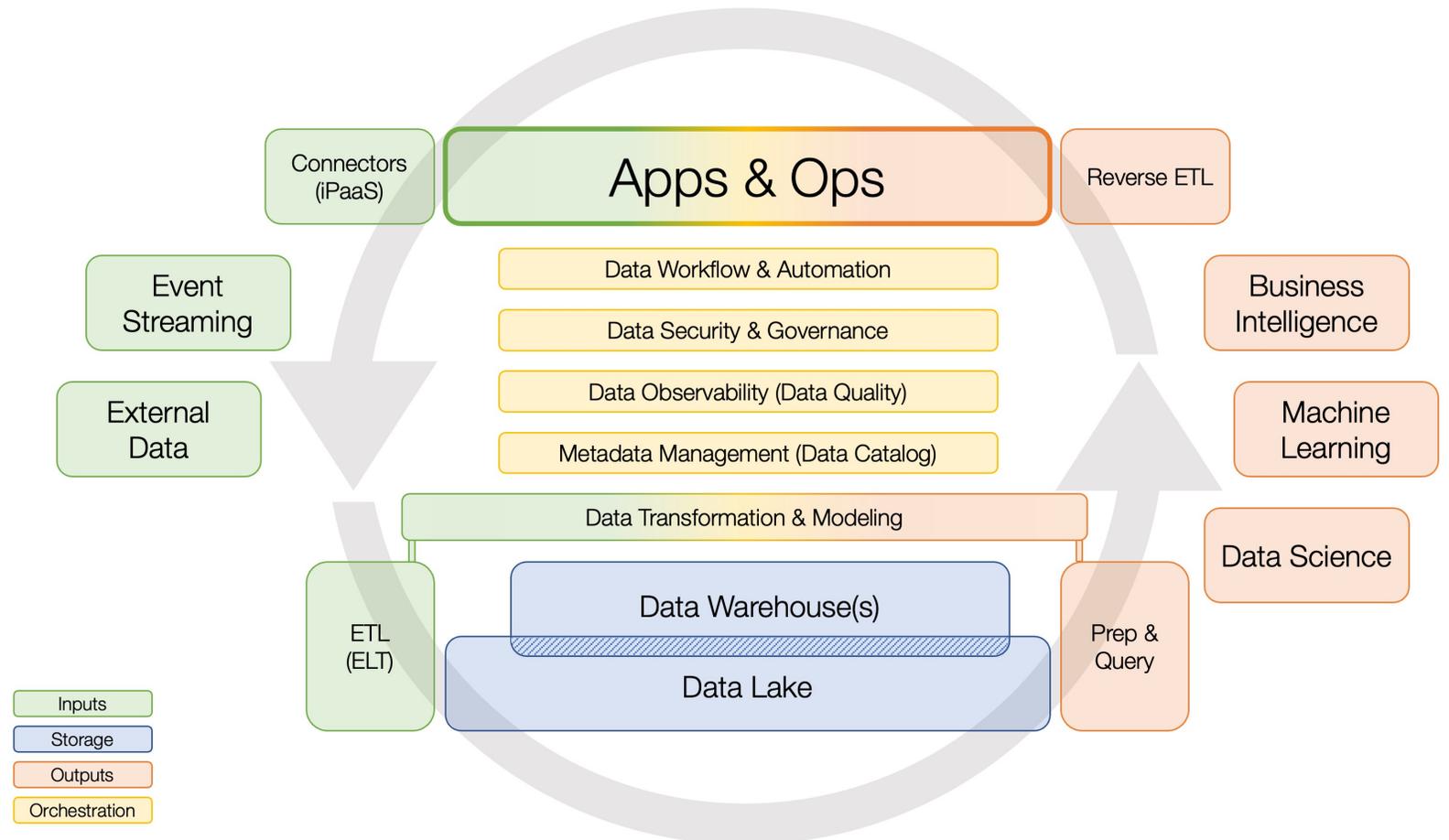
For many years, most martech products — and the data they collected and managed — were siloed in the marketing stack. (And martech wasn't the only siloed technology within most firms.)

But horizontal aggregation platforms are connecting data and services across the organization to break down these silos. The martech stack is increasingly blending with the broader business tech stack.

The best example is the integration of martech with a firm's cross-departmental "data ops" ecosystem.

Data ops has risen as a discipline specializing in the management of data across a business. Within this ecosystem, data is flowed from front-line apps and business operations — as well as from external data partners — into a data warehouse, to be managed, manipulated, and orchestrated. It then flows out to machine learning and business intelligence apps, as well as being fed back into front-line apps and ops.

This connected data ops ecosystem is a boon for marketers, as it gives them access to a much richer set of data for drawing customer insights as well as activating targeted campaigns.



flow of data across an organization's data ops ecosystem

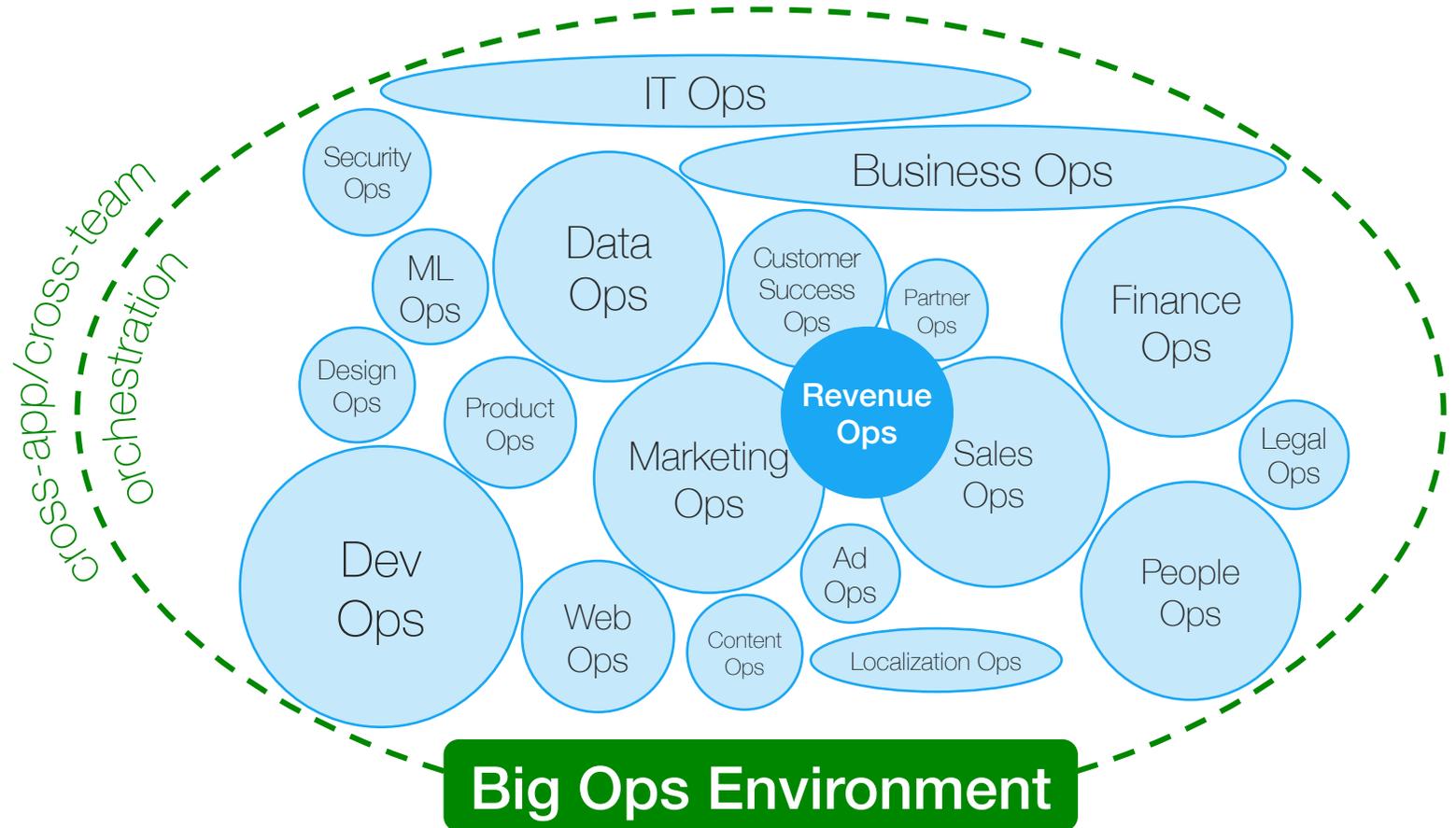
Big Ops: The Rise of Digital Ops Functions Everywhere

Martech and marketing operations (marketing ops) have grown together over the past decade. A great marketing ops function has become a competitive advantage for its ability to orchestrate technology, processes, and data underpinning effectively all marketing activities today.

This same pattern of digital orchestration has taken off with other teams across the organization, which has resulted in the proliferation of domain-specific ops functions: data ops, partner ops, product ops, machine learning (ML) ops, and so on.

Collectively, this is the blossoming of Big Ops. It is the natural successor to Big Data. Beyond volume, variety, and velocity of data, we're now wrangling the scale and complexity of all the apps, analyses, agents, algorithms, and automations running in parallel on top of that data.

Now, by leveraging aggregation technologies in the broader business tech stack, these different ops functions are increasing interconnected. The rise of revenue operations (rev ops) is one example of an organizational structure to better align marketing, sales, and customer service in this environment.



growth of digital “ops” functions across the organization

Martech Stack Dynamics

Launchpad by Nick Saraev (generated by AI)

Fact: We're Using More SaaS Apps Than Ever

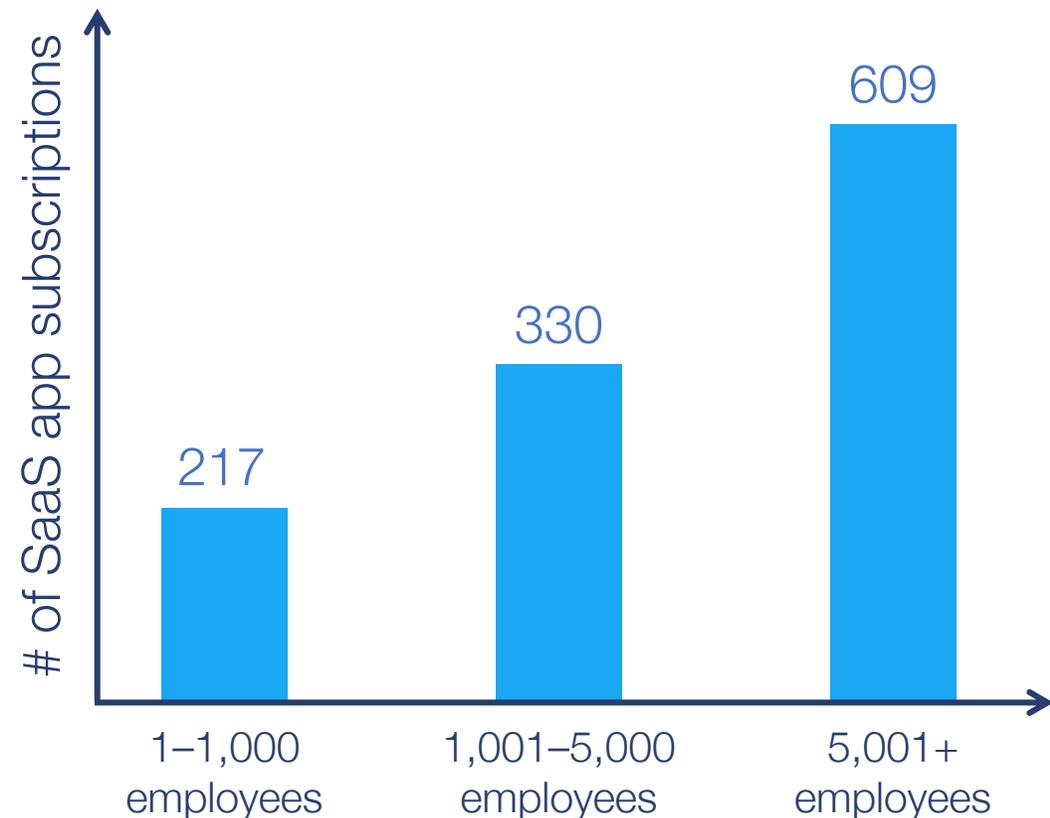
When people are asked how many SaaS apps they have in their tech stack, they almost always undercount them — in some cases by an order of magnitude. Because SaaS can be relatively easy to adopt, especially for specialist apps with freemium and free trial motions, businesses add many tools in an almost ambient fashion.

SaaS management platforms, such as BetterCloud, Torii, Zluri, and Zylo, which report on the actual number of SaaS subscriptions in use across an organization, tell a more complete story. The [latest data from Zylo](#) revealed that the average organization has 323 SaaS apps in its stack. Even companies with fewer than 500 employees are onboarding an average of 4 new apps every 30 days.

This is backed up by [latest estimates from Gartner](#) that worldwide spend on SaaS will grow 18% this year, from \$145 billion in 2021 to \$172 billion in 2022.

Martech is simply one category of SaaS in which this phenomenon is happening — albeit a relatively large one. The same pattern holds across salestech, fintech, devops stacks, and so on.

Although [larger martech stacks have been correlated with greater marketing performance](#), more recent data from Bain suggests that it's really [a larger set of adopted use cases powered by martech](#) that achieves greater competitive advantage.



Source: Zylo 2022 SaaS Management Index Report

Martech Stacks Often Evolve in a “Hype Cycle” Pattern

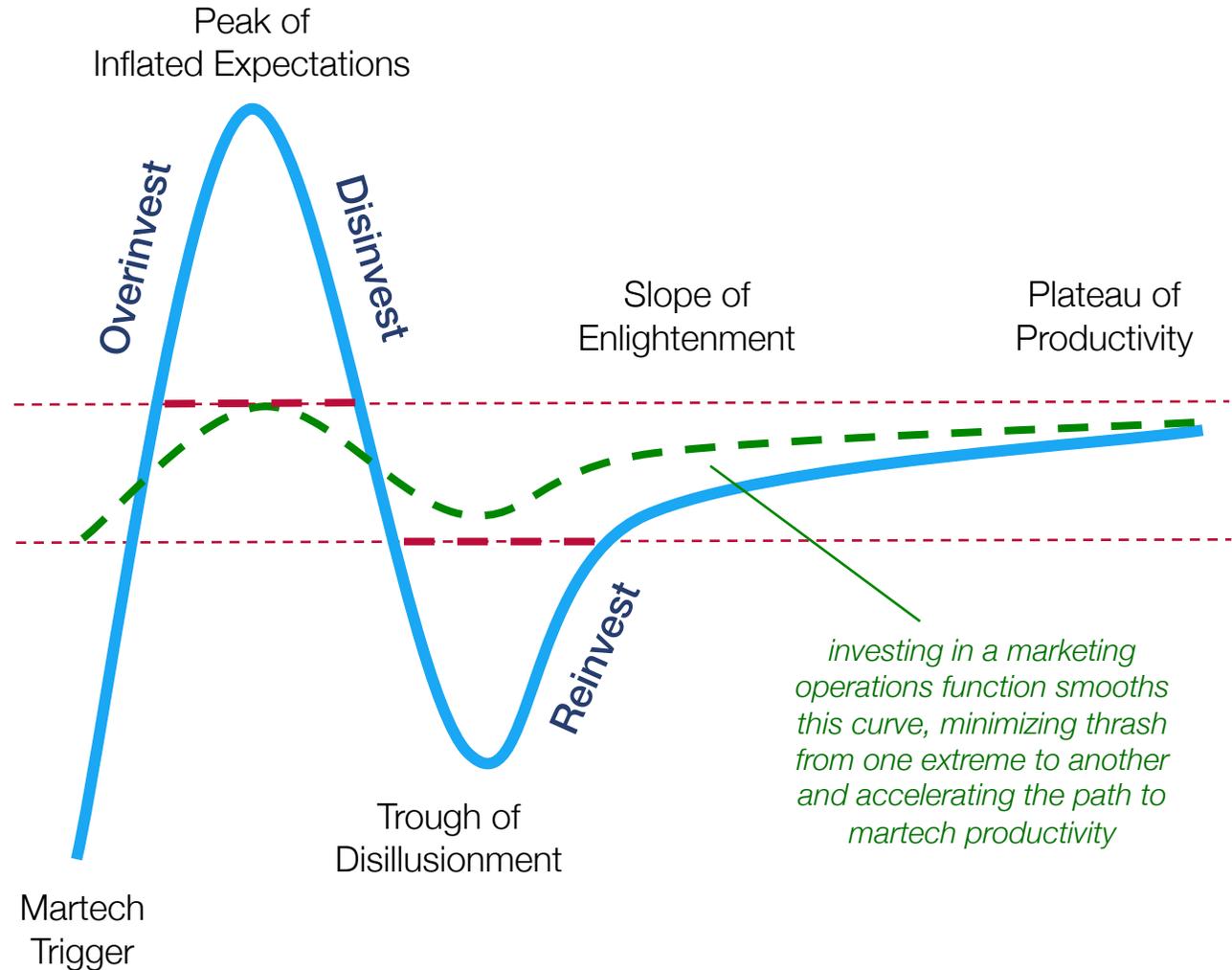
As with the martech landscape overall, the adoption of martech tools within a firm’s stack includes patterns of both expansion and consolidation over time.

When firms first realize they need martech capabilities — a trigger — they tend to overinvest in more tools than they have the skills and processes to effectively apply. This leads to inflated expectations of what the tools alone can achieve. A backlash of disinvestment often occurs into a trough of disillusionment.

As they develop the organizational capital to better use martech, they reinvest up a slope of enlightenment, eventually achieving a plateau of productivity. While tools are still added and removed in this stage, the process is more deliberate and better matched with appropriate investments in skills and enablement.

This, of course, is Gartner’s famous Hype Cycle.

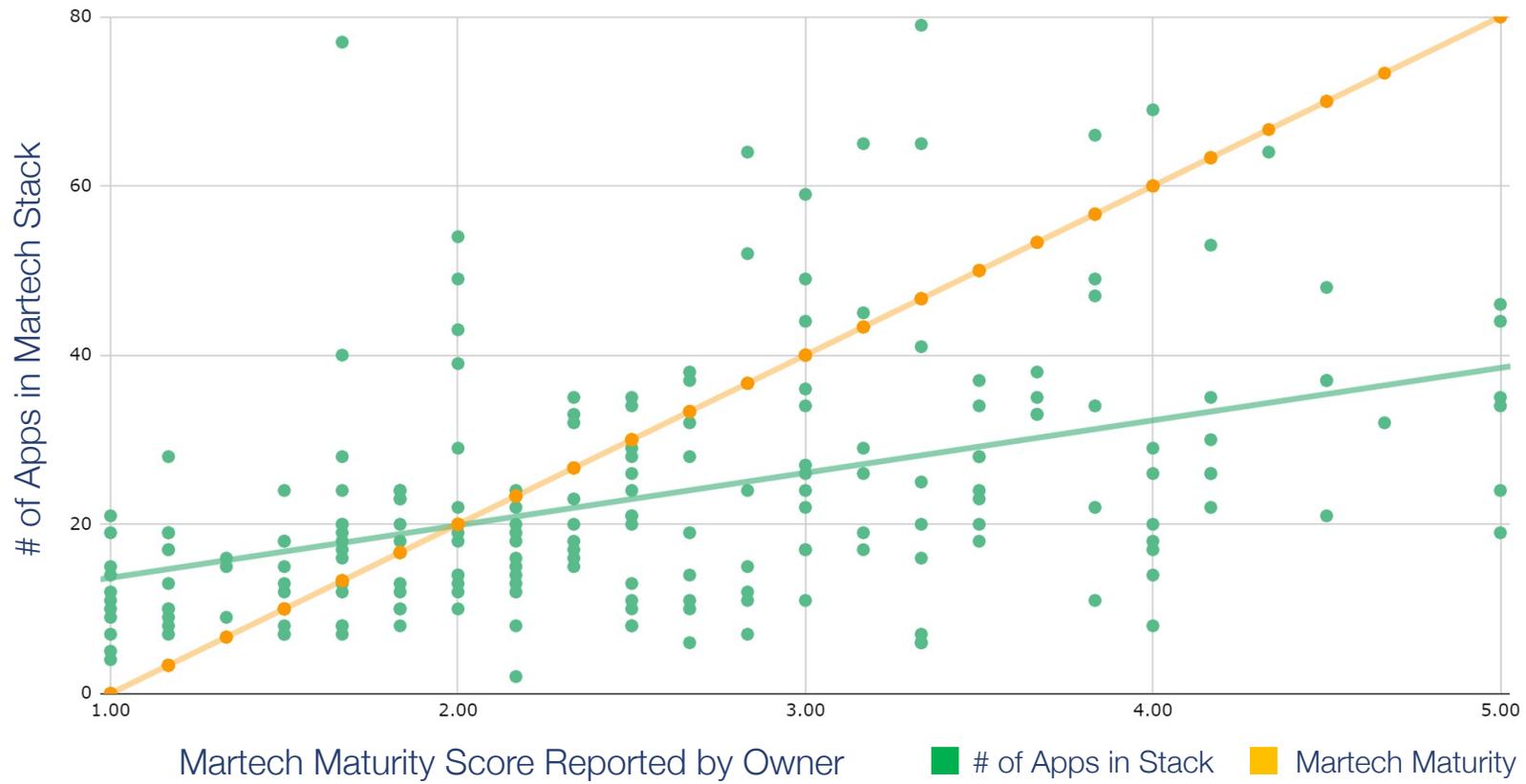
Perhaps not coincidentally, it resembles the cognitive bias of the Dunning-Kruger effect. People overestimate their ability before they invest the effort to develop that ability, which takes time and experience. Investing in a good marketing operations function can mitigate this.



Stack Size Tends to Grow with Martech Maturity

We collected 198 stacks where we asked the owners to rate their “martech maturity.” We defined maturity similar to the five levels of the [Capability Maturity Model Integration \(CMMI\)](#). While correlation is not causation, larger stacks were associated with higher maturity.

Level	Description
5	Optimized On Demand Anticipatory
4	Adjustable Flexible Adaptive
3	Defined Known Planned
2	Described Traceable Guided
1	Undocumented Unknown Ad hoc



the size of martech stacks tend to grow with reported maturity levels; stacks with low maturity average ~18 apps, while stacks with high maturity average ~40

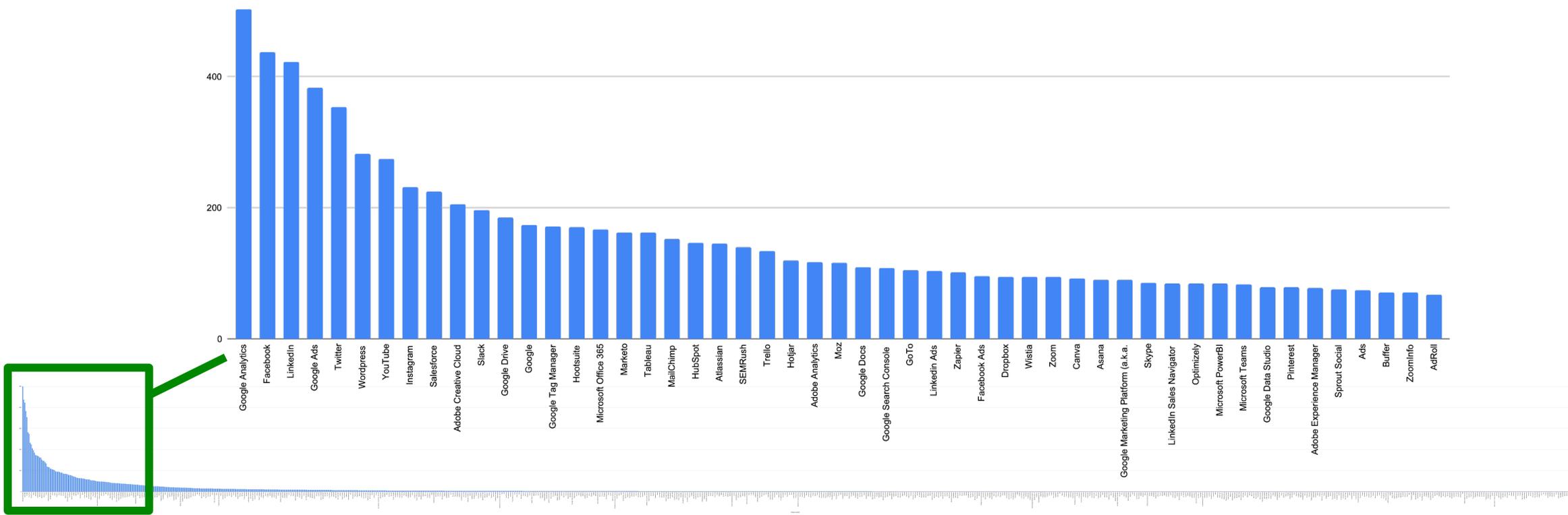
Source: Submissions to MartechTribe’s Stack Comparison Tool & The Stackies 2022, n=198

Martech Stacks Exhibit “Long Tail” Patterns Too

The martech landscape is a long tail, with a small set of large vendors in the head and thousands of smaller ones stretching into the tail. Unsurprisingly, this same patterns appears in the apps that firms report having in their martech stacks.

Using stack data that was self-reported by firms in The Stackies and services offered by MartechTribe, CabinetM, and Marketing Tech Lab, the frequency in which a tool appears is shown in the histogram below.

Many stacks contain instances of the most popular martech tools. But then the distribution of specialist apps quickly thins out, as firms adopt different tools for their particular needs and preferences.



Source: Self-reported data to The Stackies, MartechTribe, CabinetM, and Marketing Tech Lab, n = 659

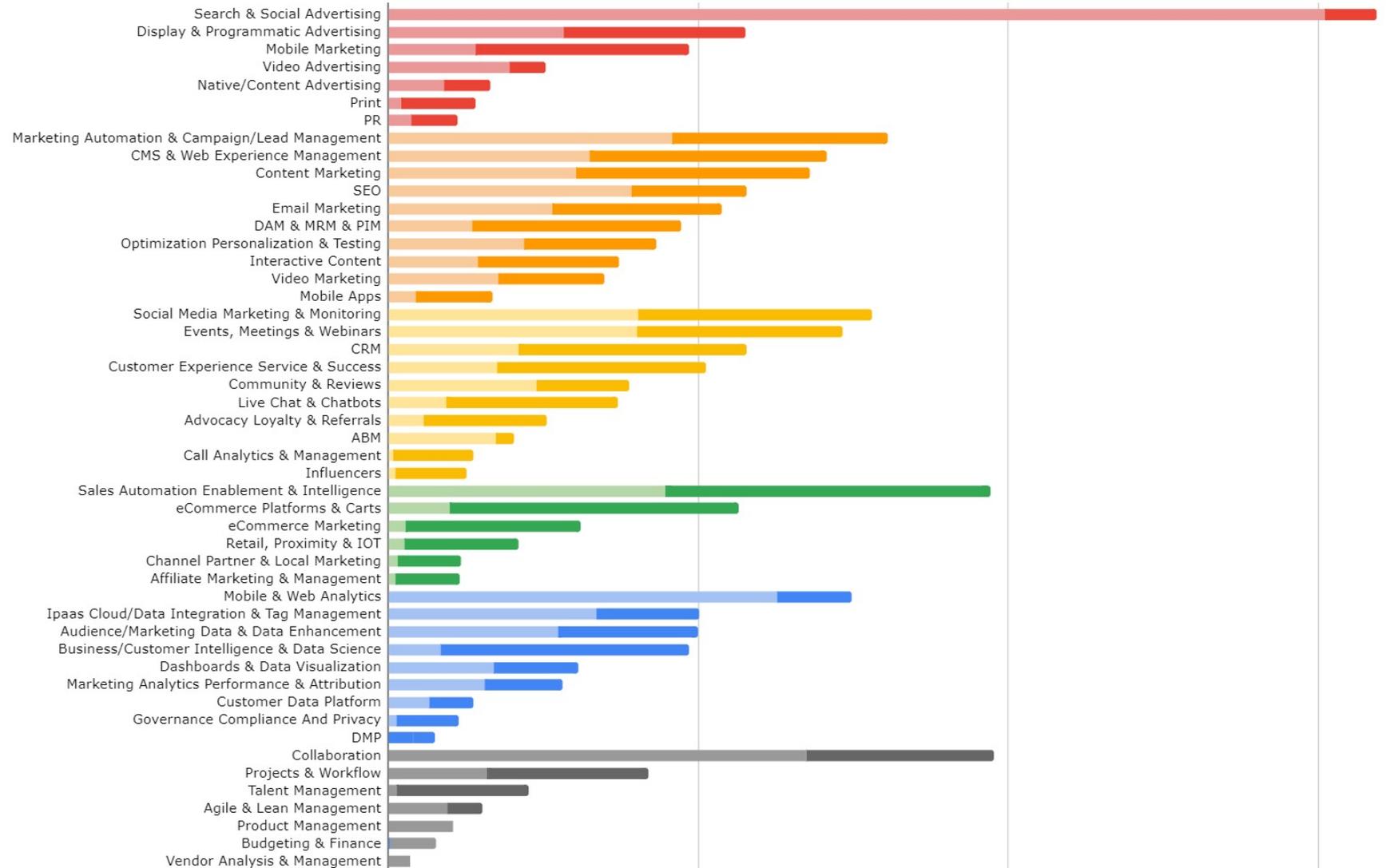
Relative Supply & Demand in Martech Categories

By comparing the number of vendors in a particular martech category with the frequency by which products from that category appear in martech stacks (in the data set from the previous page), we can get a sense of relative supply and demand in that category.

The light shading in the chart to the right represents the “demand” — the frequency by which apps appears in stack. The dark shading represents the “supply” of vendors in the category.

Categories with long light bars and short dark bars indicate that a relatively small number of vendors appear in a large number of stacks. This suggests a somewhat consolidated category. Social and search advertising epitomizes this.

Categories with short light bars and long dark bars indicate that many vendors are competing over relatively low penetration in tech stacks, such as with influencer management.



Relative Age and Adoption of Martech Categories

The age of different martech categories and the number of vendors in each have a fair amount of variance.

By looking at the average founded date of vendors in a particular martech category (shown on the x-axis in the graph on the left) and the frequency by which products in those categories appear in martech stacks that have been submitted to us over the years (the y-axis), gives a sense of the relative “maturity” of a martech category:

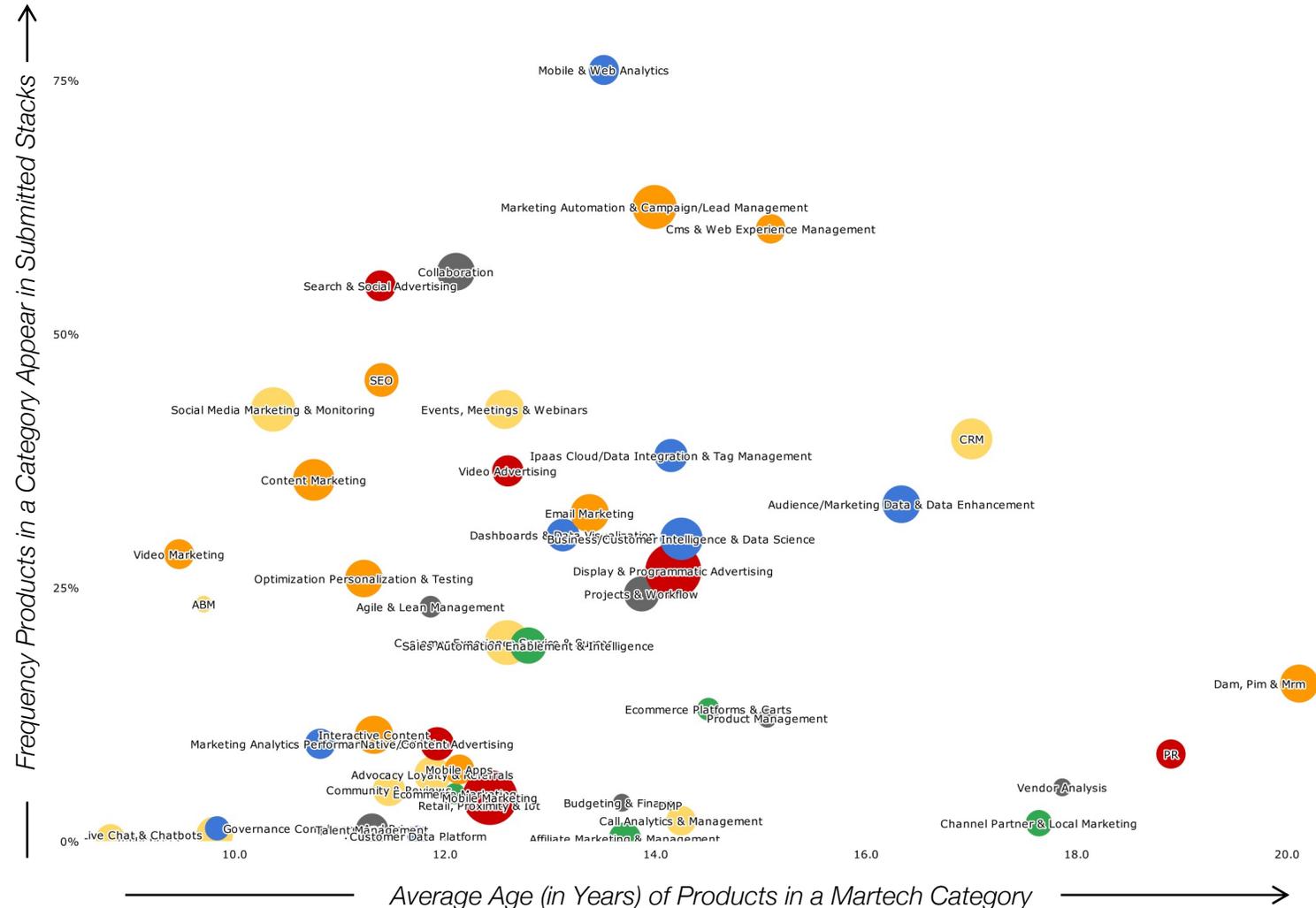
Established & Niche (*lower right*) — Call Analytics, Budgeting, Affiliate & Channel Partner, PR, etc.

Established & Growing (*upper right*) — Web Analytics, Email, Marketing Automation, CRM, Display Ads, DAM, etc.

New & Growing (*upper left*) — Mobile Marketing, Content Marketing, Social Media, BI, Interactive Content, etc.

New & Upcoming (*lower left*) — Influencers, CDP, Chat, IOT, Governance, Video, ABM, Agile Management, etc.

Of course, these are averages. Even the oldest categories in the martech landscape have new challenger vendors who enter the market each year.



Martech Stacks Are Bought and Built

While the martech landscape covers commercially packaged apps, martech stacks often include custom-developed software too.

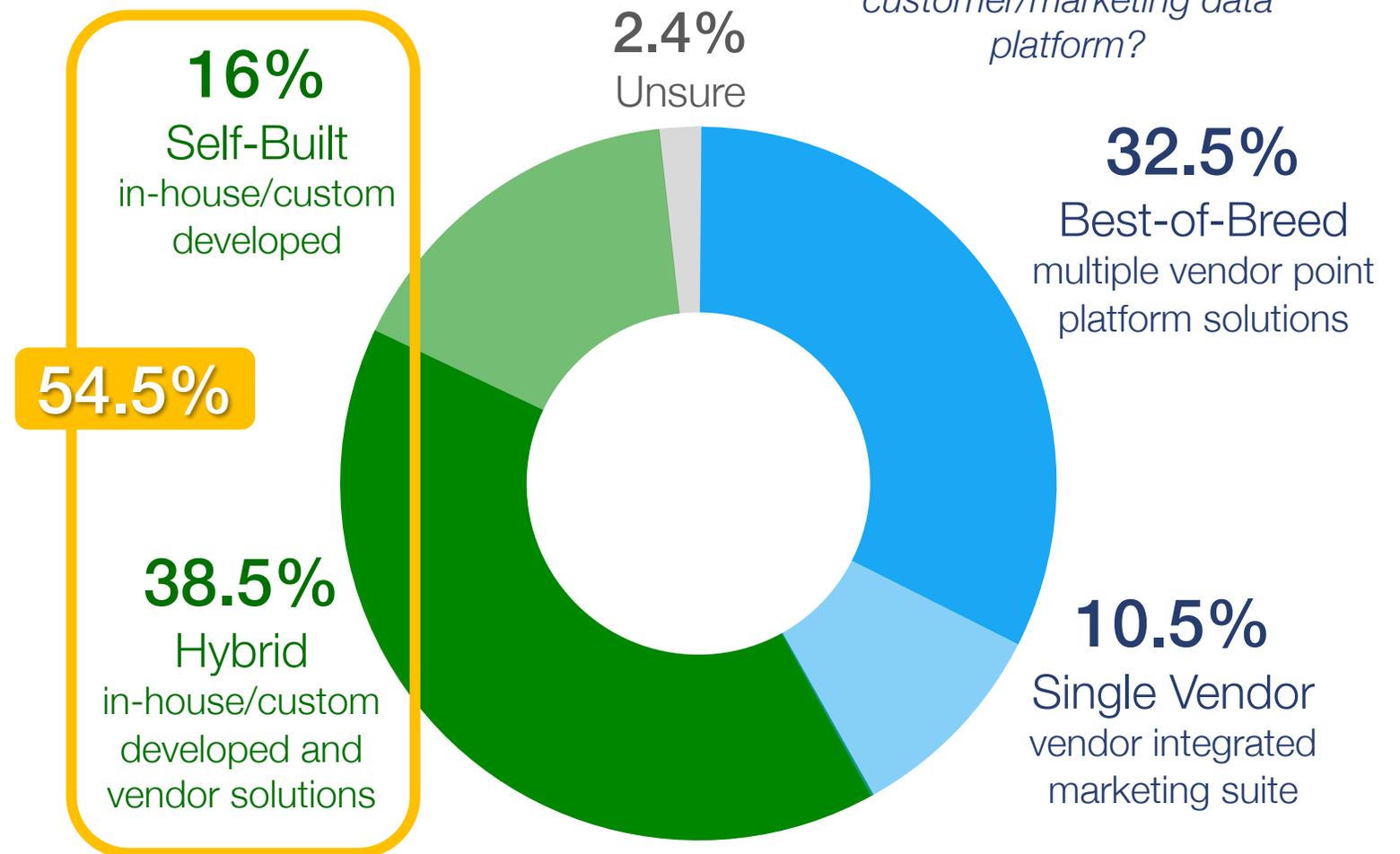
A study by MarTech Alliance (now rebranded as the Learning Experience Alliance) reported last year that 54.5% of customer/marketing data platforms — a foundational layer of martech stacks — were either custom-developed or incorporated custom development with a commercially packaged app.

The classic build vs. buy question is increasingly answered as “both.”

This aligns with the growth in cloud platforms, API platforms, and app platforms that we discussed earlier in this report — the raw materials for firms to custom develop martech solutions are richer than ever. At the same time, the demand from marketers to tailor martech capabilities and digital customer experiences uniquely to their business

The growth of low-code/no-code products is also accelerating the development of both commercial specialist apps and custom apps.

Which of the following best describes your organization's customer/marketing data platform?



Source: <https://www.martechalliance.com/cx-research-report>

The Stackies 2022

Marketing Tech
Stack Awards

Pillars of Love by Nick Saraev (generated by AI)

32 Examples of Illustrated Martech Stacks

Every year since 2015, we've run The Stackies, an awards program that invites marketers to send in a slide that illustrates their marketing tech stack.

These visualizations often identify the specific tools that marketers use. This is helpful for us to identify trends of popular products, but also to discover new specialist apps that are being adopted.

But the best part of these illustrations is they give us a window into how marketers think about their martech stacks conceptually. They might align them to stages of the customer journey or the flow of work within their department.

Each year, we pick five entries as the “winners” that we thought were particularly creative, interesting, or useful to the community. This year, we selected Autodesk, Rabobank, REA Group, Sargento, and Verizon. However, ultimately your martech stack is a winner if it is effective for your organization.

As in previous years, we're donating \$100 to a non-profit for each qualified stack entered. This year, we're donating \$3,200 to the [International Rescue Committee](#).



A collage of the over 300 martech stacks that were contributed in [2015](#), [2016](#), [2017](#), [2018](#), [2019](#), [2020](#), and [2021](#).

MARKETING TECH STACK

ENGAGEMENT

ActiveCampaign >

eventbrite

Hootsuite®

in | | | f

COLLABORATION

slack | zoom

*Enabling us to help
prepare today's marketers
for tomorrow's opportunities*

DATA & ANALYTICS

 Analytics

qualtrics^{XM}

ActiveCampaign >

CONTENT

 WORDPRESS 

 WPengine®

Canva  SEMRUSH



AM> | AMERICAN MARKETING ASSOCIATION
Philadelphia

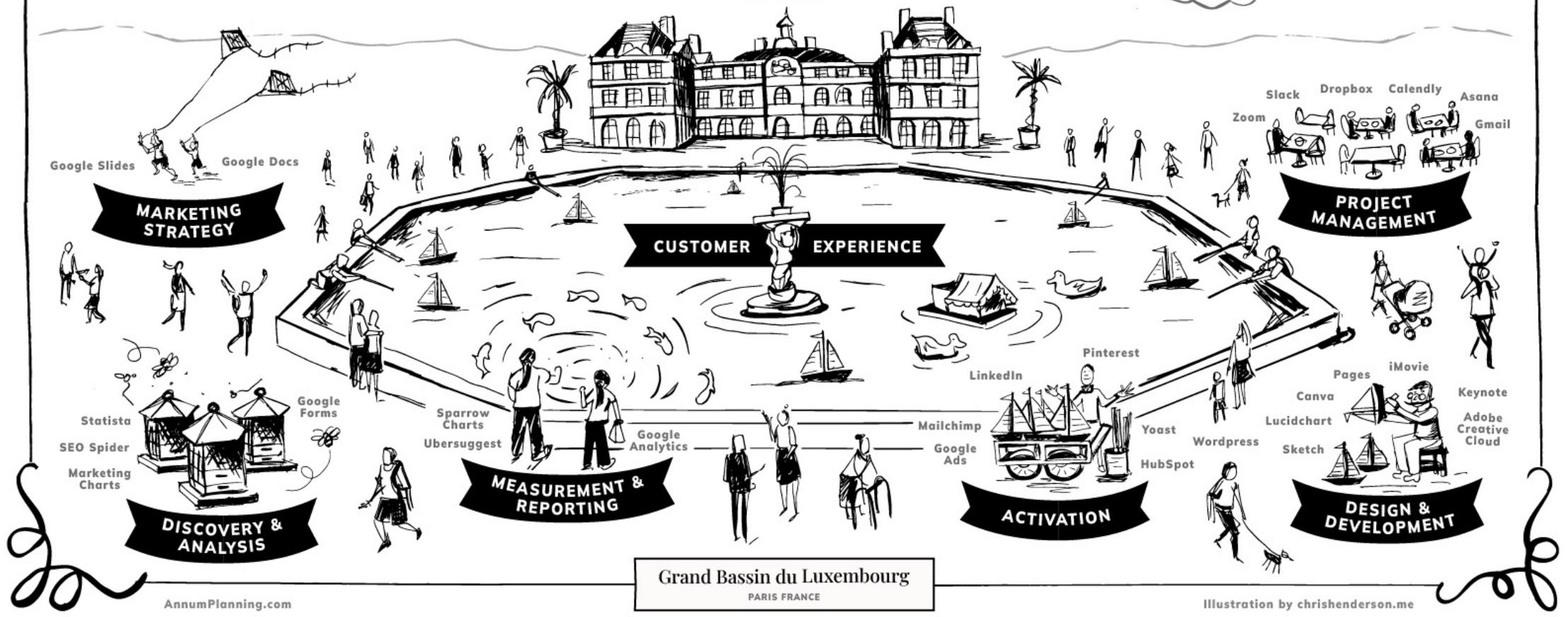


ANNUM

Plan smarter.

Annum's omnichannel marketing calendar gives you the visibility and insights you need to make more informed decisions, build stronger integrated plans, and achieve better outcomes.

Our marketing technology stack is centered on the customer experience which is defined by the integrated marketing plan. Tools are grouped by job within the cyclical marketing process.

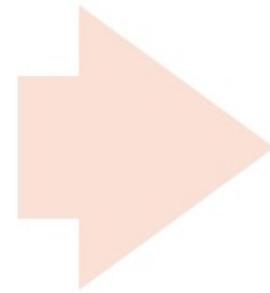


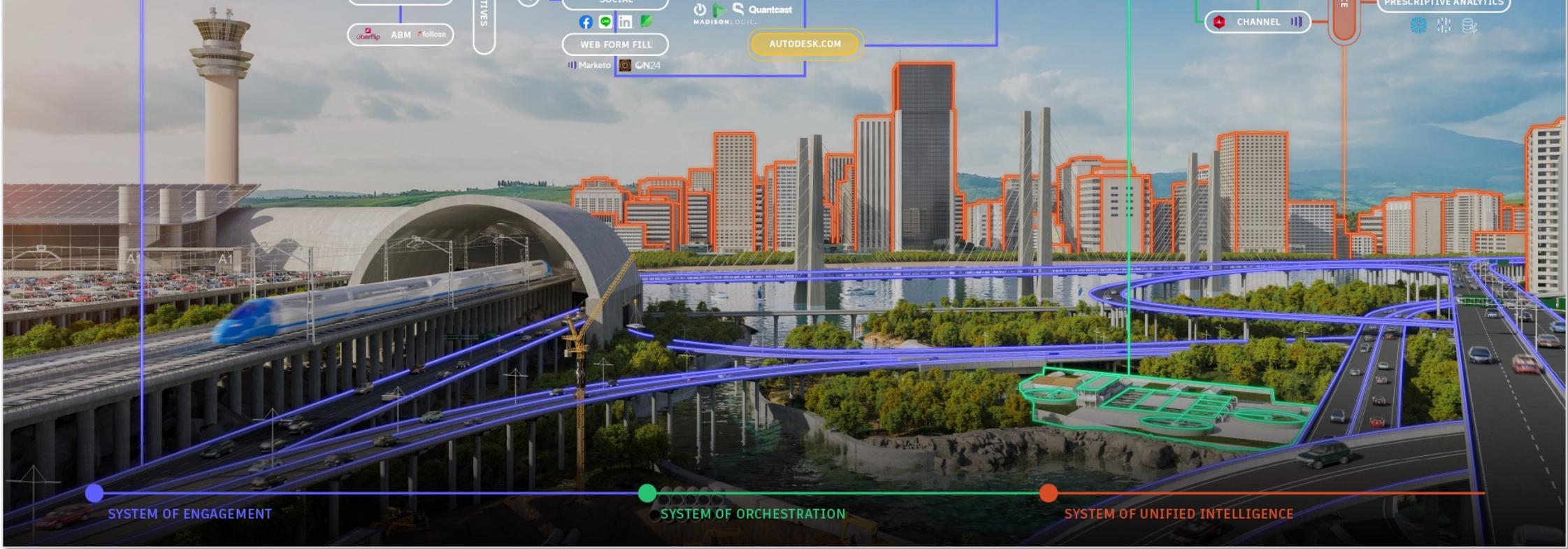
AnnumPlanning.com

Grand Bassin du Luxembourg
PARIS FRANCE

Illustration by chrishenderson.me

Adverity's Marketing Reporting TechStack





SYSTEM OF ENGAGEMENT

SYSTEM OF ORCHESTRATION

SYSTEM OF UNIFIED INTELLIGENCE



Cvent MarTech Stack 2022

MEETING OUR CUSTOMERS WITH MARTECH

We use our marketing technology stack to create experiences that continuously engage and drive value for our prospects and customers, wherever they're at on their journey in the new event landscape.

KEY(NOTE) TECH: The core systems of record for our martech

BEHIND THE SCENES: Critical non-customer facing systems

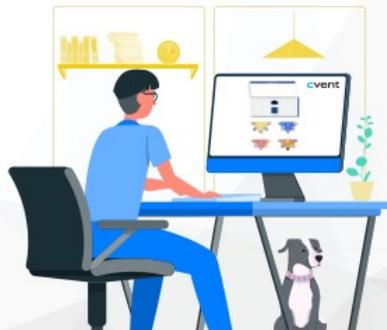
UNDERSTAND AUDIENCE: Identify and understand target markets

CONVERT INTEREST: Interact with prospects and customers

NURTURE: Captivate with personalized content

GROW RELATIONSHIPS: Build and enhance connections

LEARN & OPTIMIZE: Analyze marketing program performance



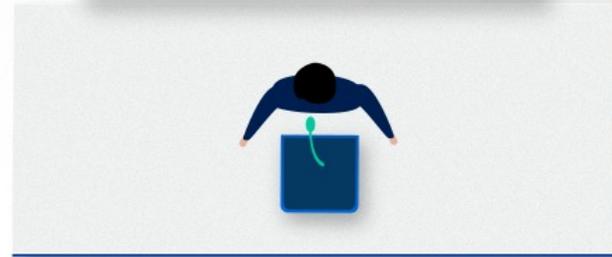
KEY(NOTE) TECH

Marketo | Drupal | snowflake | Salesforce



BEHIND THE SCENES

clarizen | zoom | Meltwater | Brandfolder | visme | litmus



LEARN & OPTIMIZE

bizable | +ablev | Google Analytics | Adobe Analytics | mouseflow | Optimizely



GROW RELATIONSHIPS

Allbound | docebo | higher logic | Gainsight | inFluitive | TANGO CARD | Reachdesk | Gravy

CONVERT INTEREST

DRIFT | Bing ads | Google Ads | LinkedIn | facebook | Quora | Salesloft | Instagram



NURTURE

SEISMIC | Opensense | PathFactory | sproutsocial | vidyard | YouTube | Salesloft



UNDERSTAND AUDIENCE

zoominfo | SLINTEL | Leadspace | SEMRUSH | MOZ | Screamingfrog | OneTrust

Your Marketing Goals are Within Reach



PACKING LIST:

- Anchors - Ad platforms**
Your ad platforms are the anchors of your digital marketing efforts, just like anchors are your base to getting clipped into the wall.
- Rope - HubSpot**
Our CRM is the thread that ties everything together and ensures that various teams are operating in sync and have total connectivity.
- Chalk brush - Seamless.AI / bombora**
What do extra chalk and audience targeting have in common? Having too much of it can make things difficult to stick. Using tools like Seamless.ai and Bombora helps you target the right audience and brush off the excess.
- Belay glasses - Google Analytics & Oribi**
Google Analytics and Oribi allow us to keep our eyes on results without craning our necks digging through individual ad accounts.
- Quickdraw - SEMRUSH & SpyFu**
SEMRUSH and SpyFu help us plan strategic moves and bring strategy to action. A quick draw brings your anchors and your rope together.
- Climbing shoes - Google Tag Manager**
Tagging a website for goal completions and analytics helps make sure we are scaling upwards to our goals.
- "On-belay"/ "Belay-on" - slack & teamwork.**
Communication is key! Using tools like Slack helps team members communicate with each other across time zones. Our project management tool Teamwork gives the go signal that it's time to do a task.

- Hangboard - POSTAL.IO**
Forget strengthening your grip, ready to strengthen some relationships? We use Postal.io to welcome new clients or new employees and to maintain good vibes with current clients.
- Guidebook - Lucidspark**
Having a clear map and plan is a huge factor in success. LucidSpark is the schematic building tool we always use to map out our plans.
- Helmet - databox**
We all like to feel safe, and Databox is the helmet we wear for our check-ins with clients. Databox has all the receipts and even alerts the team when metrics are changing to protect us from scary client reporting meetings.
- Chalk bag - Canva / Adobe Photoshop**
You can learn a lot about a person by their chalk bag. Crazy colors, fun prints, funny designs - chalk bags are out there making a statement. Our creative tools for graphics, gifs, or and jazzing up regular ol' images help us make statements, too.
- Rope bag - G2 / Capterra**
A rope bag is a catch-all for, well...ropes! Platforms like G2 and Capterra are a catch-all for software tools to come together and show off what they can do.
- Blocks - zoom / Google Meet**
Zoom and Google Meet help us come together and build up relationships.





Reach the Bilingual English/Spanish market through a 360 print and digital marketing strategy.

STACKOS

SCRUMPTIOUS CUSTOMER SATISFACTION

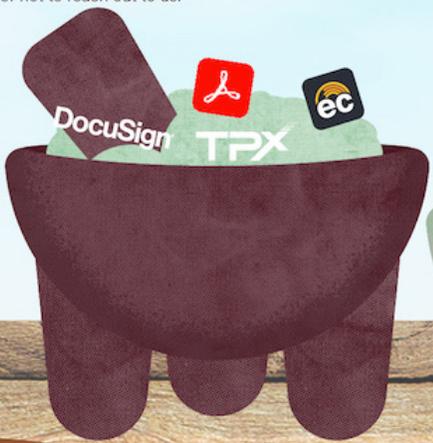
Our marketch stack is a comprehensive set of technologies that allow us to consistently satisfy the needs of our clients, just like how a taco satisfies a hungry customer.

Whether we build the tools ourselves or purchase them from a third party, our top priority is ensuring that we can easily pinpoint at which point of the sales journey we are at with a particular client, and can communicate effectively between departments to ensure we delight clients and exceed expectations. We pass the information along, just like a plate of tortillas!

Once we have delivered our services to the customer, we use a variety of tools to measure the success of our campaigns. This allows us to further optimize campaigns, websites, and other services we provide, so we can enable them to savor their increasing return on

PHASE 1

Potential clients become aware of our brand and begin considering whether or not to reach out to us.

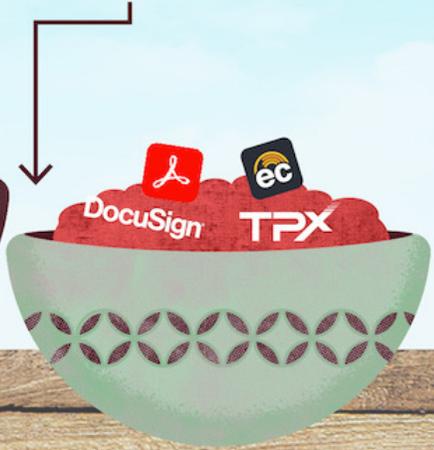


PHASE 2

Clients come into contact with one of our sales reps, who interviews them and gathers the necessary information for us to complete our services.

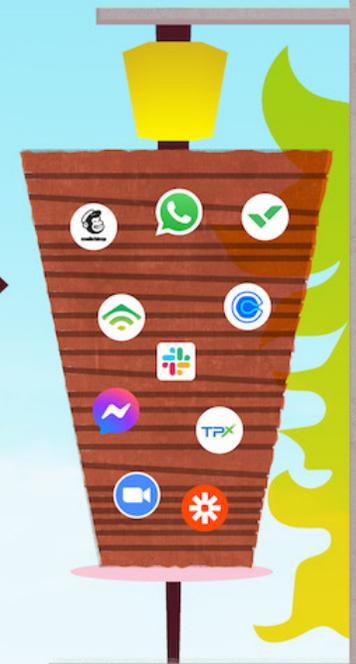
PHASE 3

Our digital operations team gets involved and executes the necessary tasks to satisfy our customer's cravings.

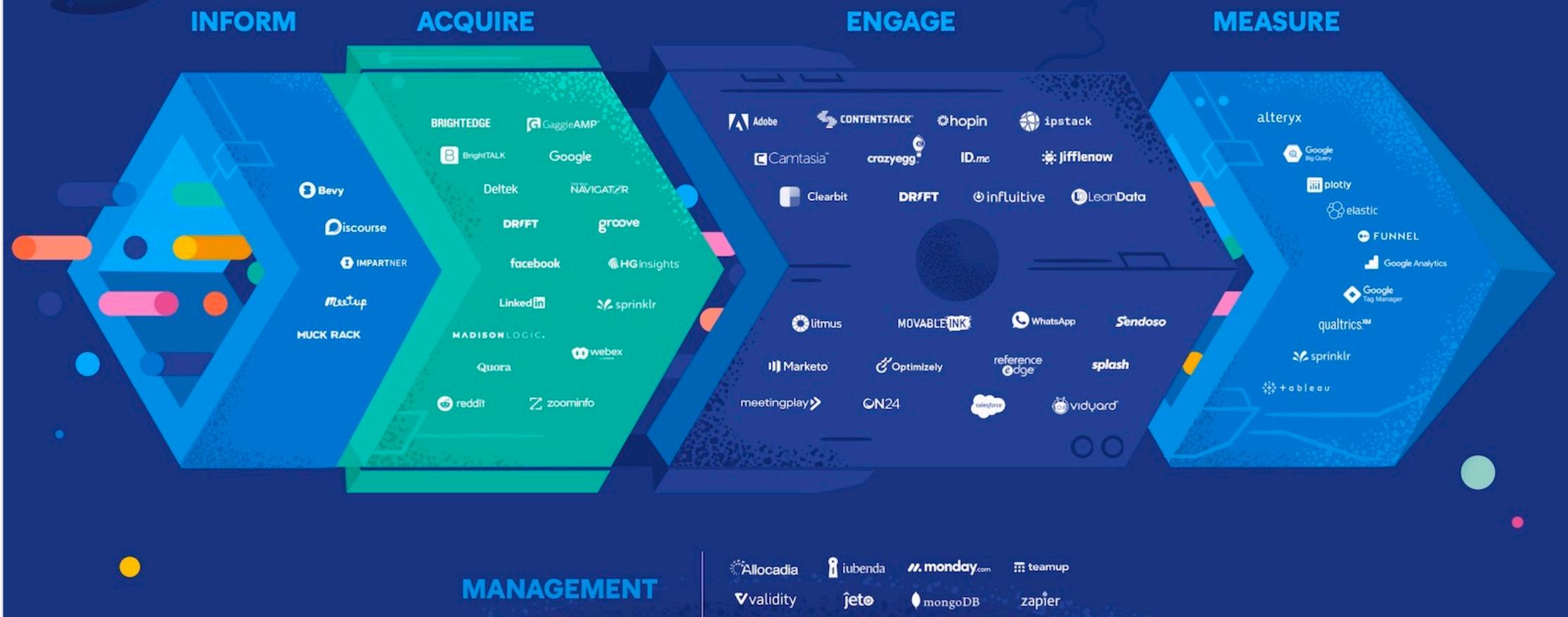


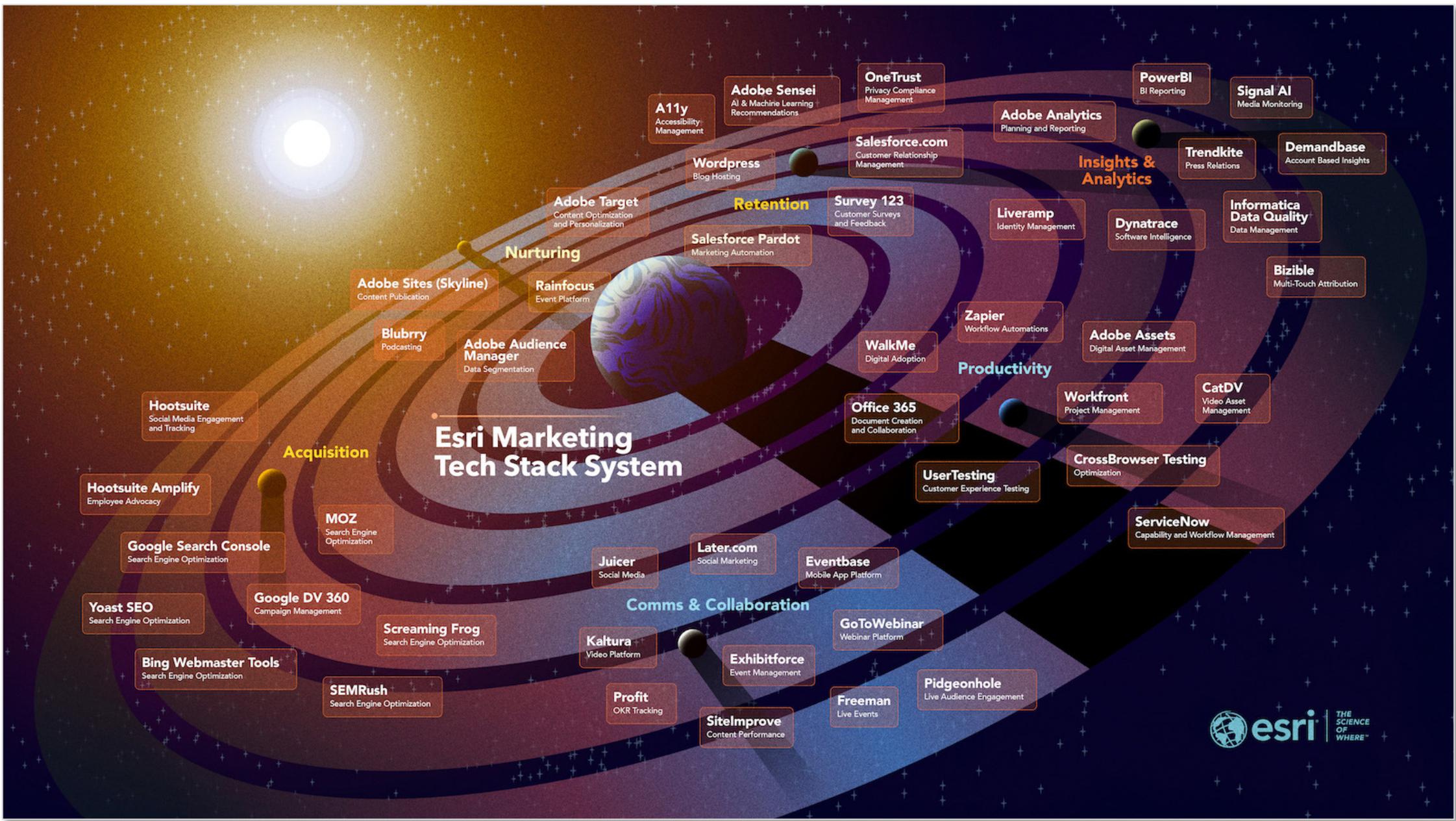
PHASE 4

Our digital operations team follows up and monitors the effectiveness of our services. We optimize to ensure that our clients receive the highest return on investment.



Elastic Marketing Tech Stack







Where the best work
gets approved

Remote-friendly martech for a global team and user base

✓ Approved

Collaborate

Asynchronous work made easy



✓ Approved

Create

Bringing ideas to life for every market



✓ Approved

Grow

Meeting our audience where they are



✓ Approved

Nurture

Building an engaged community



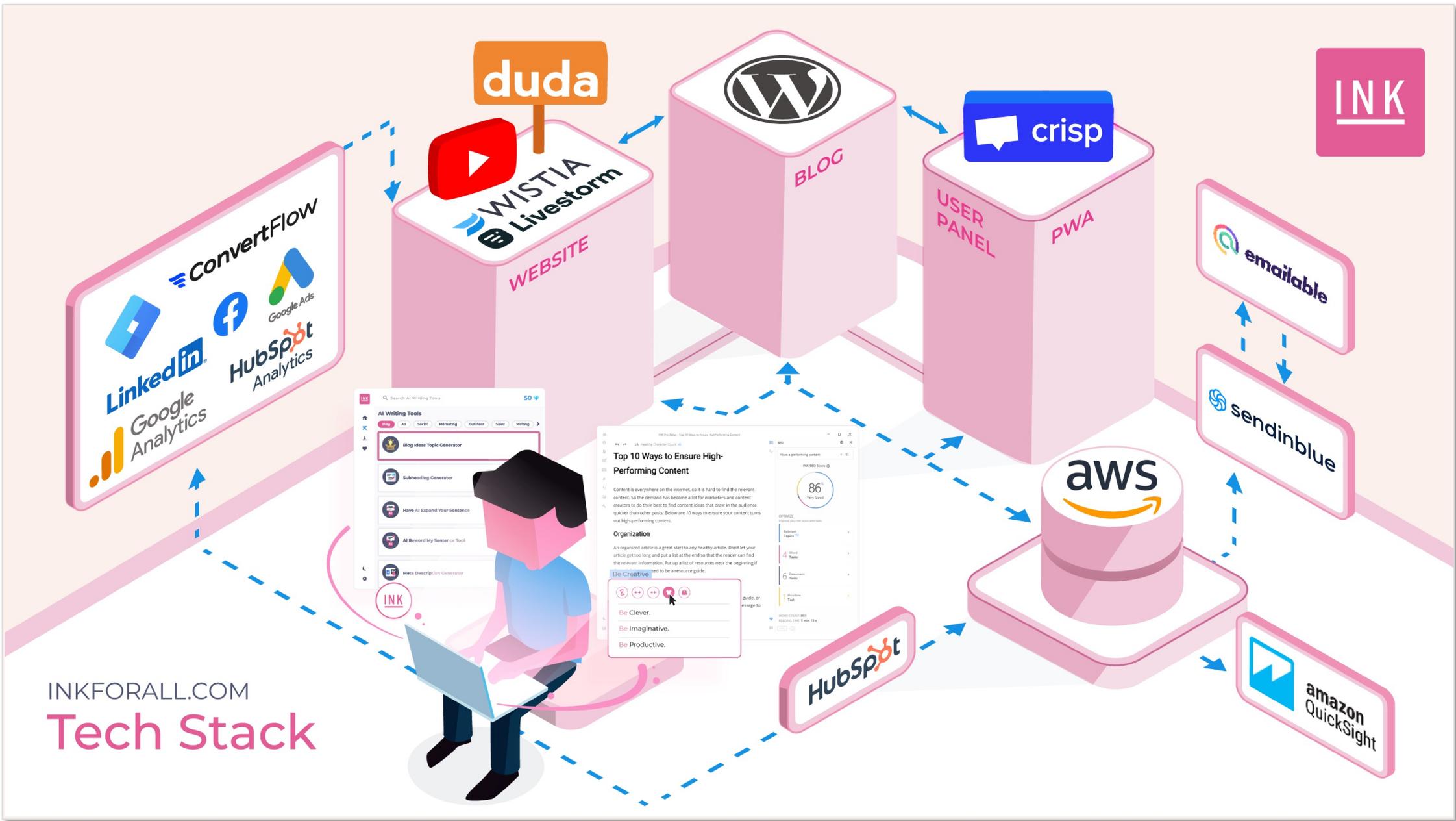
🔍 In review

Future

Looking out for the next big thing

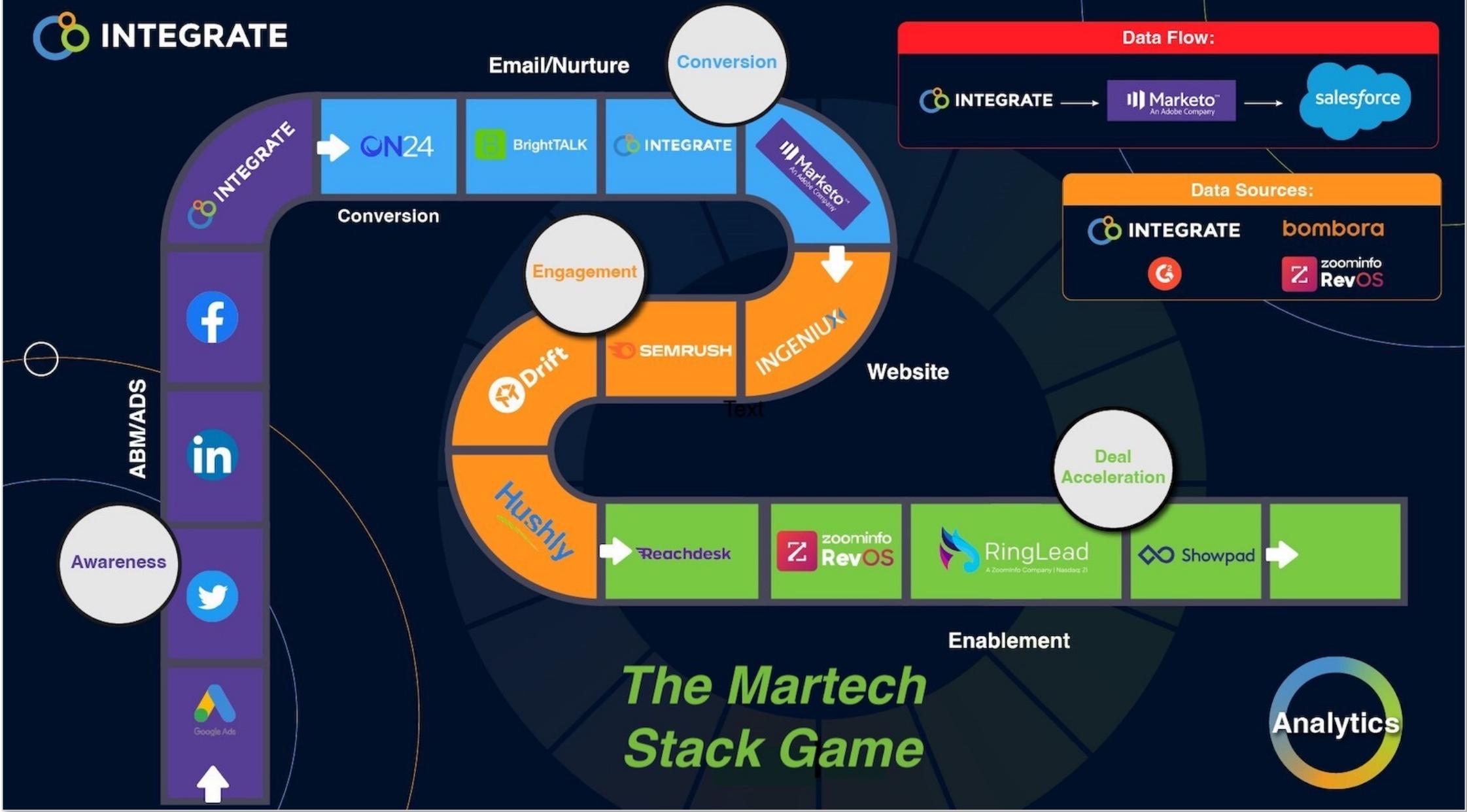






INKFORALL.COM
Tech Stack

INTEGRATE



intelligencebank

Digital Asset Management BrandHub Portal Marketing Operations



OPERATIONAL



RESEARCH / ANALYTICS



DIGITAL



CREATIVE PRODUCTION



PROMOTION



COMMUNICATION



Suite Office 365



zoominfo
+ a b l e a u
pendo

Salesforce



WORDPRESS
zapier

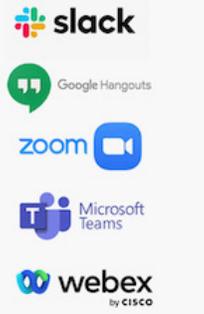


Adobe® Creative Cloud™
BEE Pro
salesforce pardot

Marketing Operations

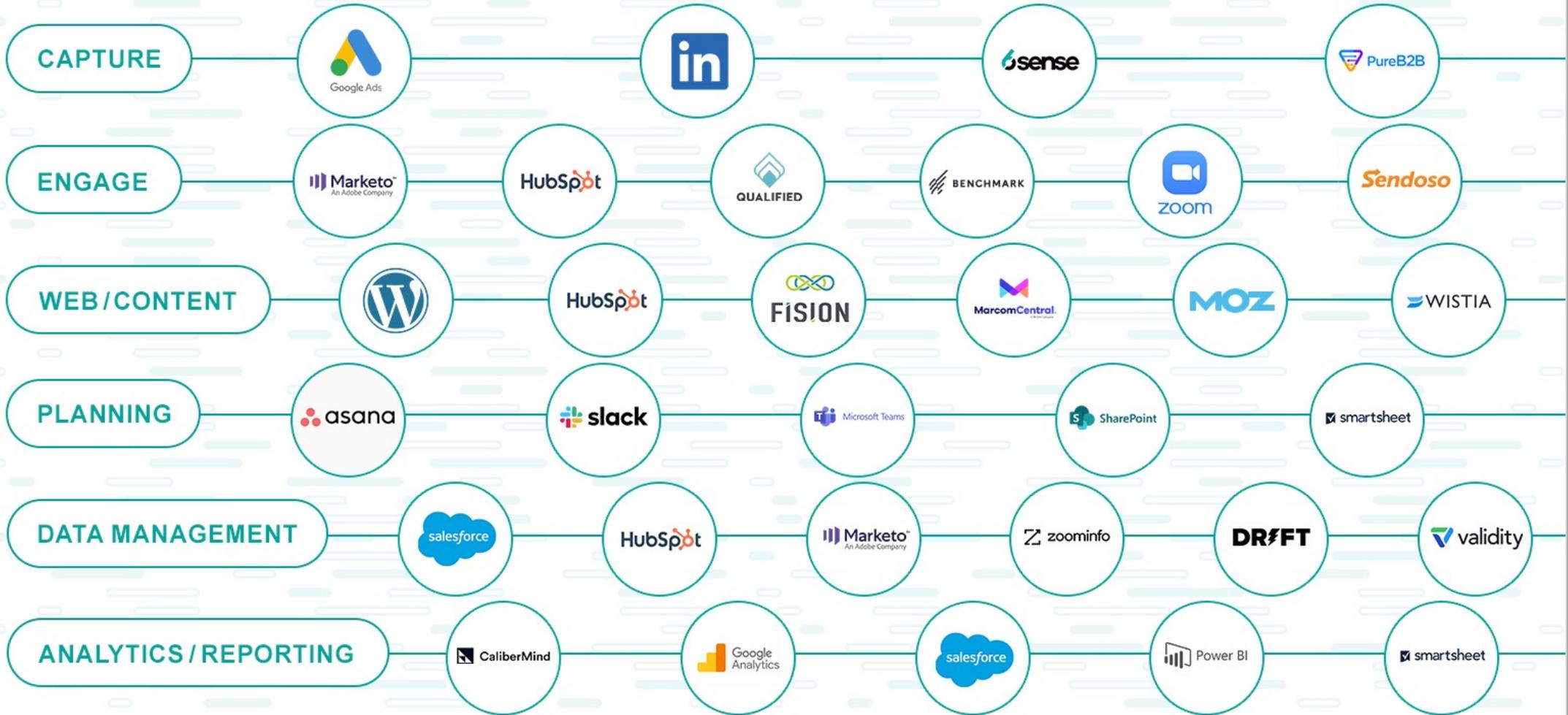


LinkedIn ads
FACEBOOK Business Suite
Instagram
salesforce pardot
Google Ads



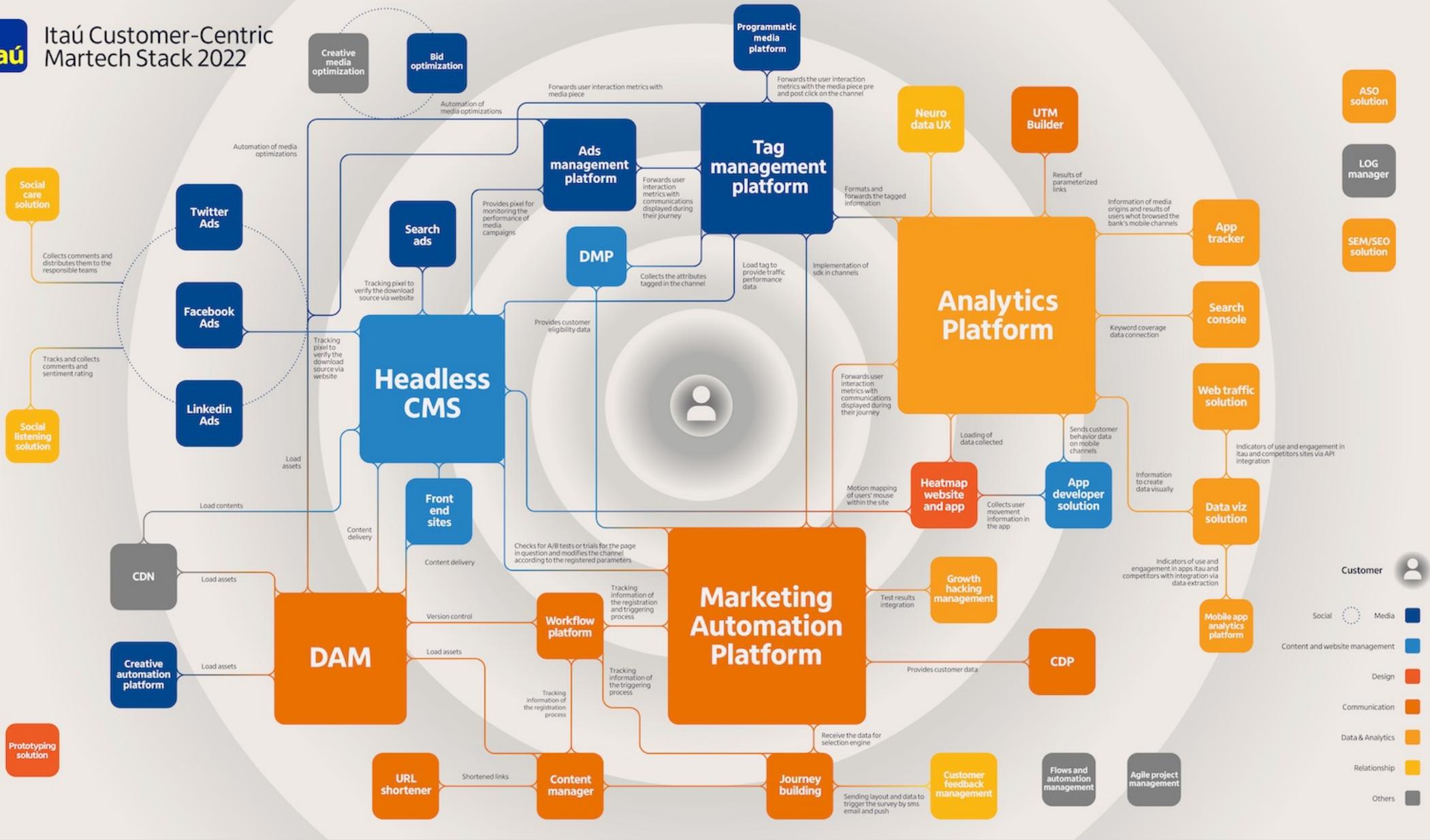
slack
Google Hangouts
zoom
Microsoft Teams
webex by CISCO

Collaboration





Itaú Customer-Centric Martech Stack 2022



JUNIPER NETWORKS

DECONSTRUCT

MARTECH STACK 2022

DISCOVER

INQUIRE, CONSIDER & BUY

PREPARE & DEPLOY

ADOPT & GROW

DECOMPOSE

ADVERTISING

CONTENT & EXPERIENCE

EVENTS MARKETING

SOCIAL & RELATIONSHIPS

SALES

MANAGEMENT & REPORTING

DATA FOUNDATIONS

in f y t G metadata.io

DEMANDBASE mindtickle BRIGHTEDGE Adobe Target TrustArc
PathFactory HIGHSPOT WIDEN Adobe DTM eloqua Adobe Experience Manager

hopin BrightTALK splash ON24 zoom

Spredfast bitly in higher logic f GetFeedback everyone social Maritz CX reference edge

salesforce SAP

Adobe Analytics + a b l e a u MARKETING BOT smartsheet JIRA ALLOCADIA

bombora Leadspace zoominfo Verity databricks amazon web services
LeanData HGinsights

ARCHITECT

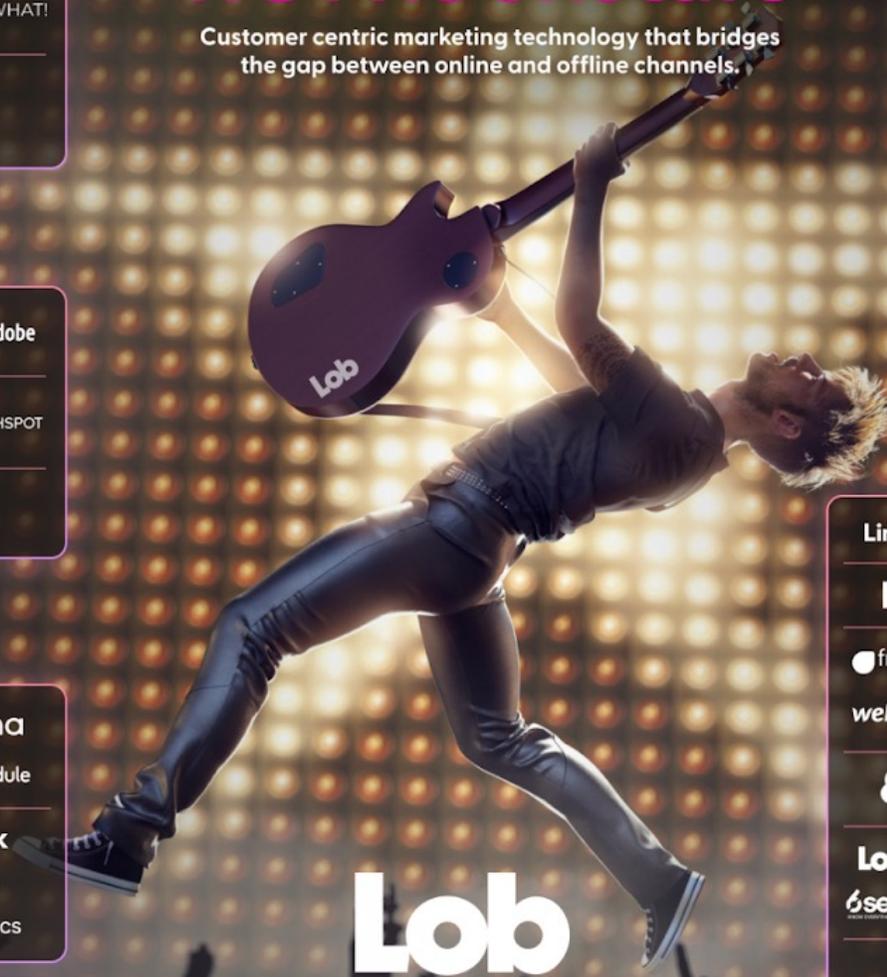
011010

JUNIPER.NET

OMNICHANNEL MARKETERS ARE

ROI Rockstars

Customer centric marketing technology that bridges the gap between online and offline channels.



Lob

CONTACTS

DATABASE BUILDING



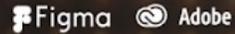
WHO'S MAILING WHAT!

DATABASE HYGIENE

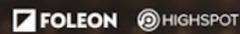
Clearbit

CONTENT

DESIGN



CONTENT

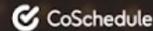
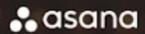


PR

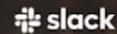
CISION

COMMUNICATIONS

PROJECT MANAGEMENT



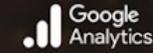
INTERNAL COMMUNICATION



ZOOM

Google Docs

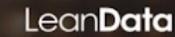
CUSTOMER DATA



PERFORMANCE MANAGEMENT

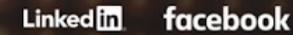


DATA VISUALIZATION



DATA CONNECTIONS

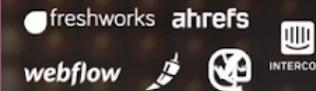
CONNECTIONS



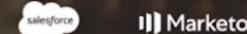
SOCIAL



MAIL & GIFTING



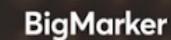
WEBSITE/ SEO



EMAIL



ADVERTISING



INTERACTIVE



Introduction to the Brand: **Appetizers**

Curating the perfect "first bite" comes in many forms of software to introduce, engage, and reach our audience.



Delivering Excellence: **Entrees**

The main course is a MarTech stack used everyday to deliver personalized content and experiences our audiences want.



Satisfy the Craving: **Desserts**

Our MarTech stack empowers us to sweeten the experience throughout the customer journey.



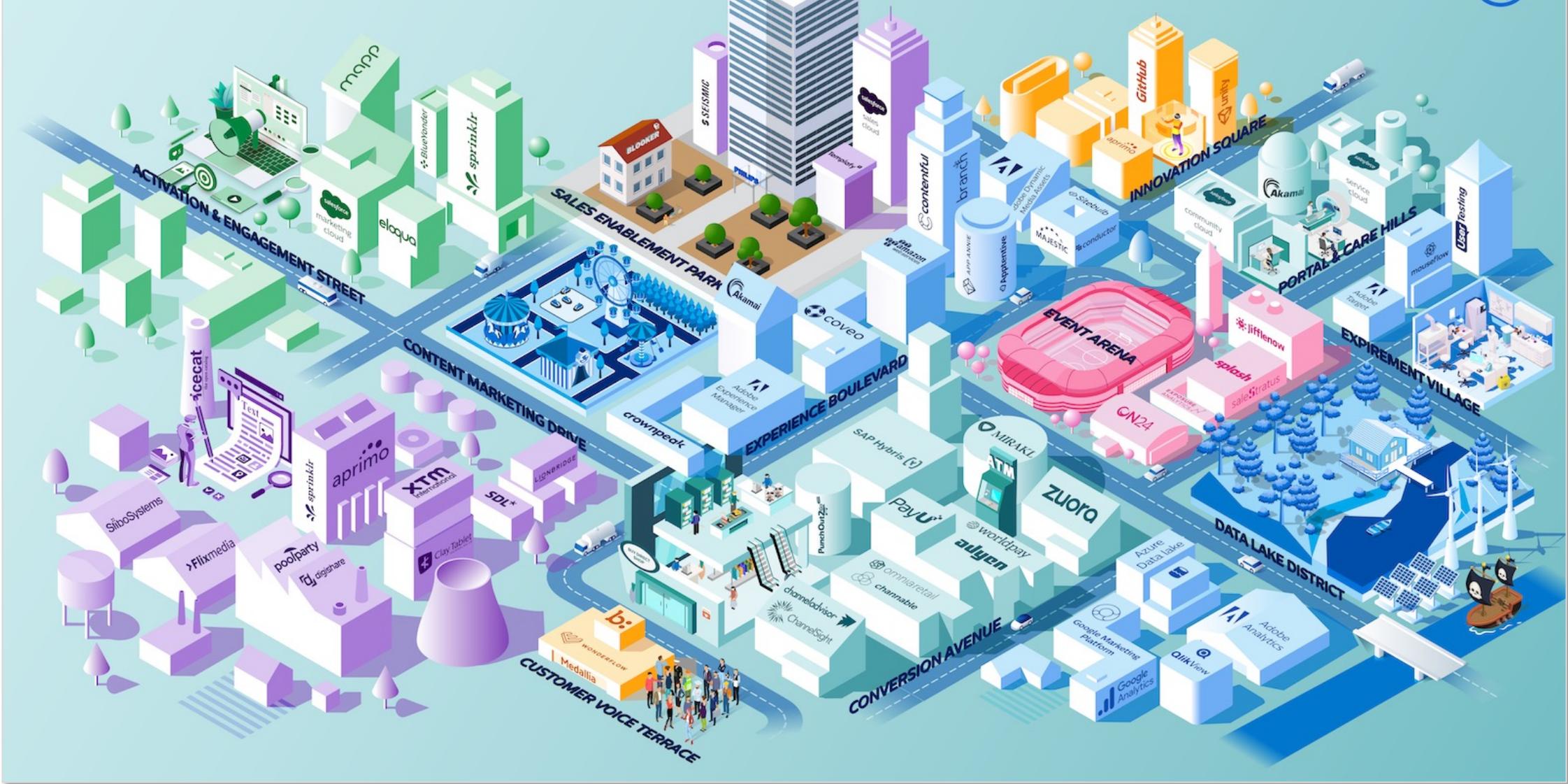
lumavate

Serving Up a 5★ Digital Experience

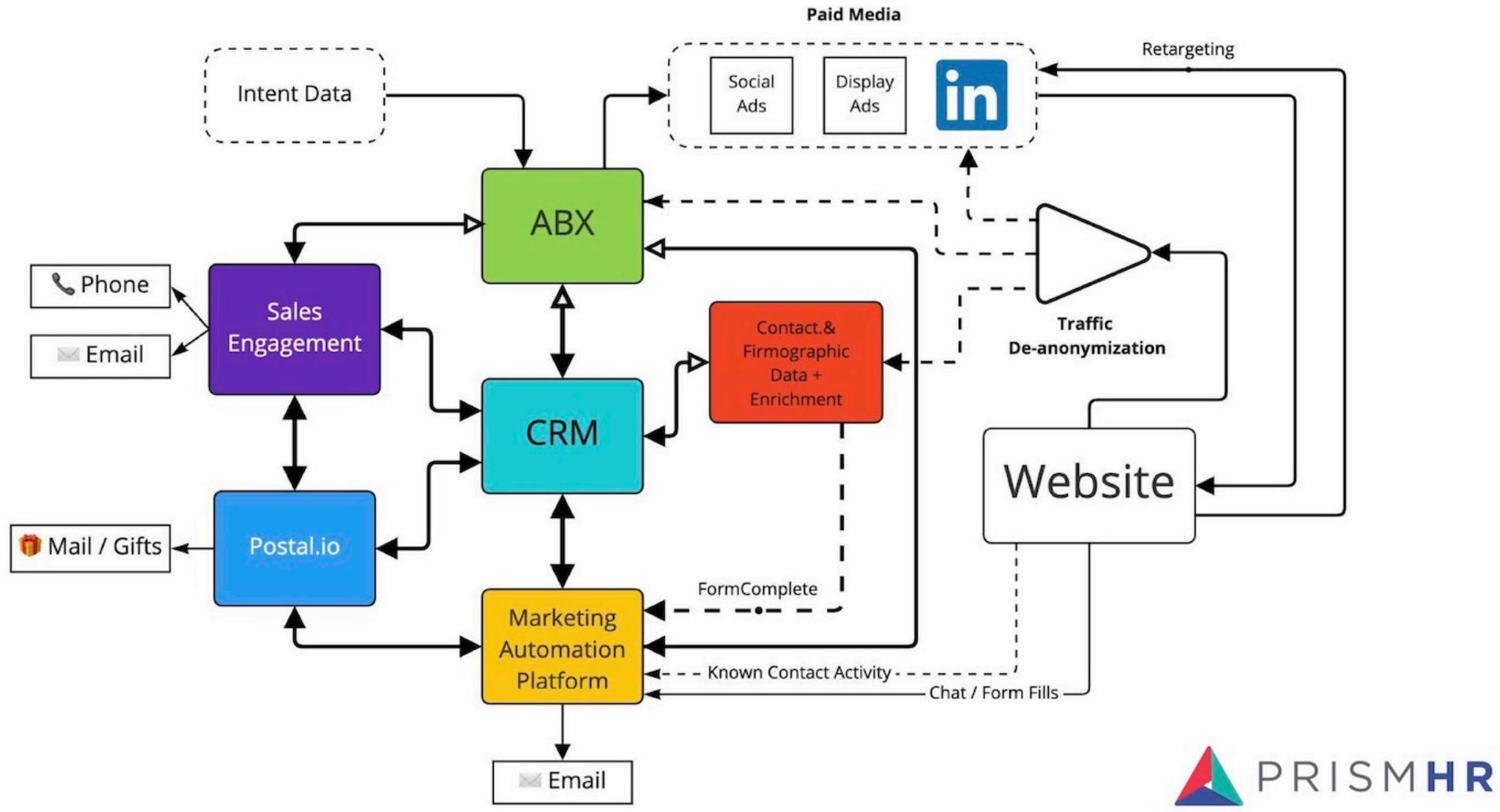
Similar to the dining experience, every customer touchpoint should be personalized and memorable. Our MarTech stack brings together all parts of the customer journey by exceeding expectations and leaving customers wanting more.

Philips Marketing & e-Commerce eco-system

Our building blocks to support and engage with our customers



Go-to-Market Tech Stack v1.2 by Nolan Clemmons



Marketing automation landscape



From raw data to the right message for every customer

1 Collect



2 Unify



3 Enrich



6 Activate



5 Create

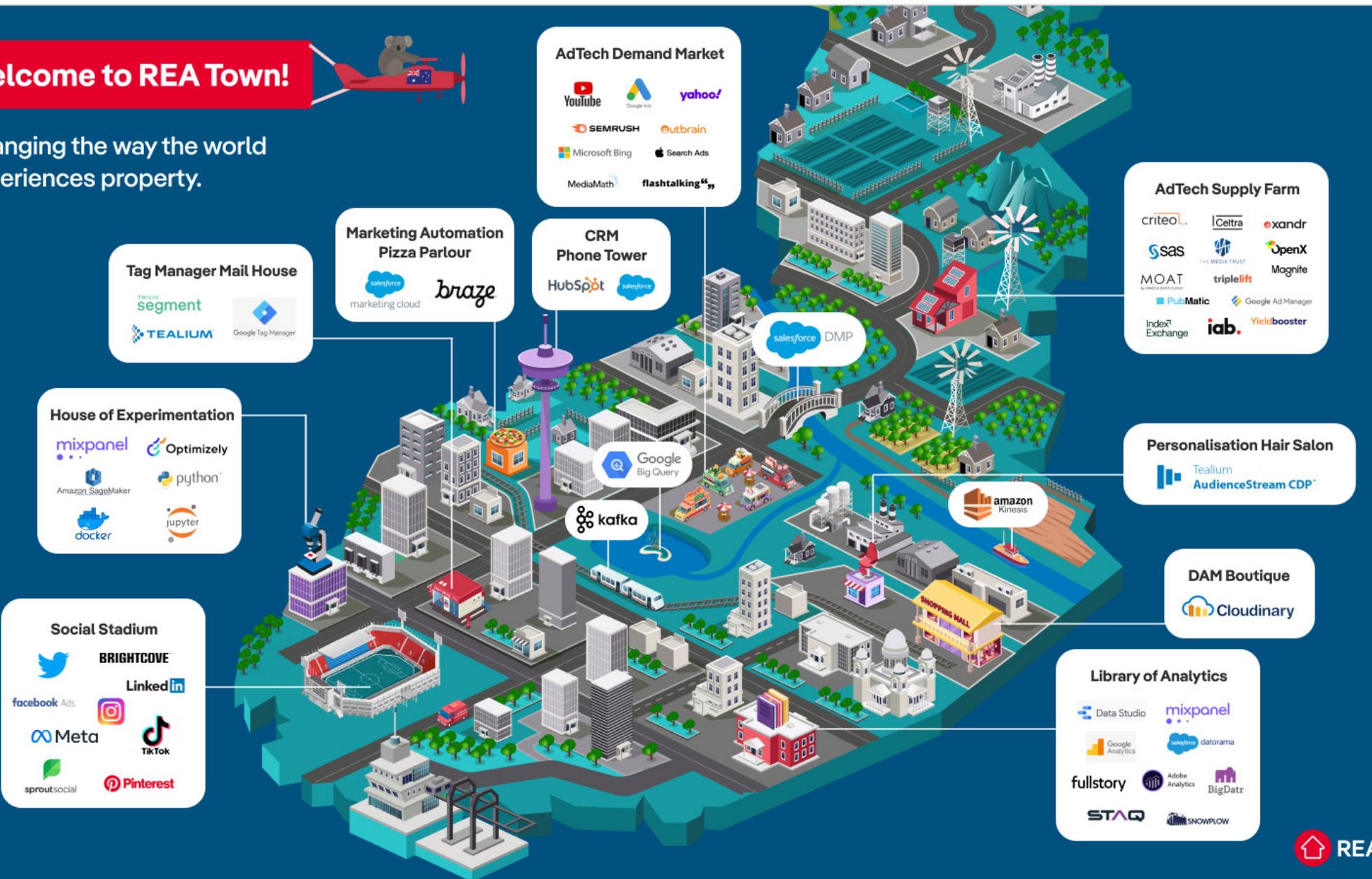


4 Predict



Welcome to REA Town!

Changing the way the world experiences property.



AdTech Demand Market

- YouTube
- Google Ads
- yahoo!
- SEMRUSH
- Outbrain
- Microsoft Bing
- Apple Search Ads
- MediaMath
- flashtalking

AdTech Supply Farm

- criteo
- celtra
- exandr
- sas
- the media trust
- openx
- MOAT
- triplelift
- Magnite
- PubMatic
- Google Ad Manager
- Index Exchange
- iab
- Yieldboost

Marketing Automation Pizza Parlour

- salesforce marketing cloud
- braze

CRM Phone Tower

- HubSpot
- salesforce

Tag Manager Mail House

- TEALIUUM
- Google Tag Manager

House of Experimentation

- mixpanel
- Optimizely
- Amazon SageMaker
- python
- docker
- jupyter

Social Stadium

- BRIGHTCOVE
- facebook Ads
- Meta
- sproutsocial
- LinkedIn
- Instagram
- TikTok
- Pinterest

Personalisation Hair Salon

- Tealium AudienceStream CDP

DAM Boutique

- Cloudinary

Library of Analytics

- Data Studio
- Google Analytics
- fullstory
- STAG
- mixpanel
- dataroma
- Adobe Analytics
- BigData
- SNOWFLOW





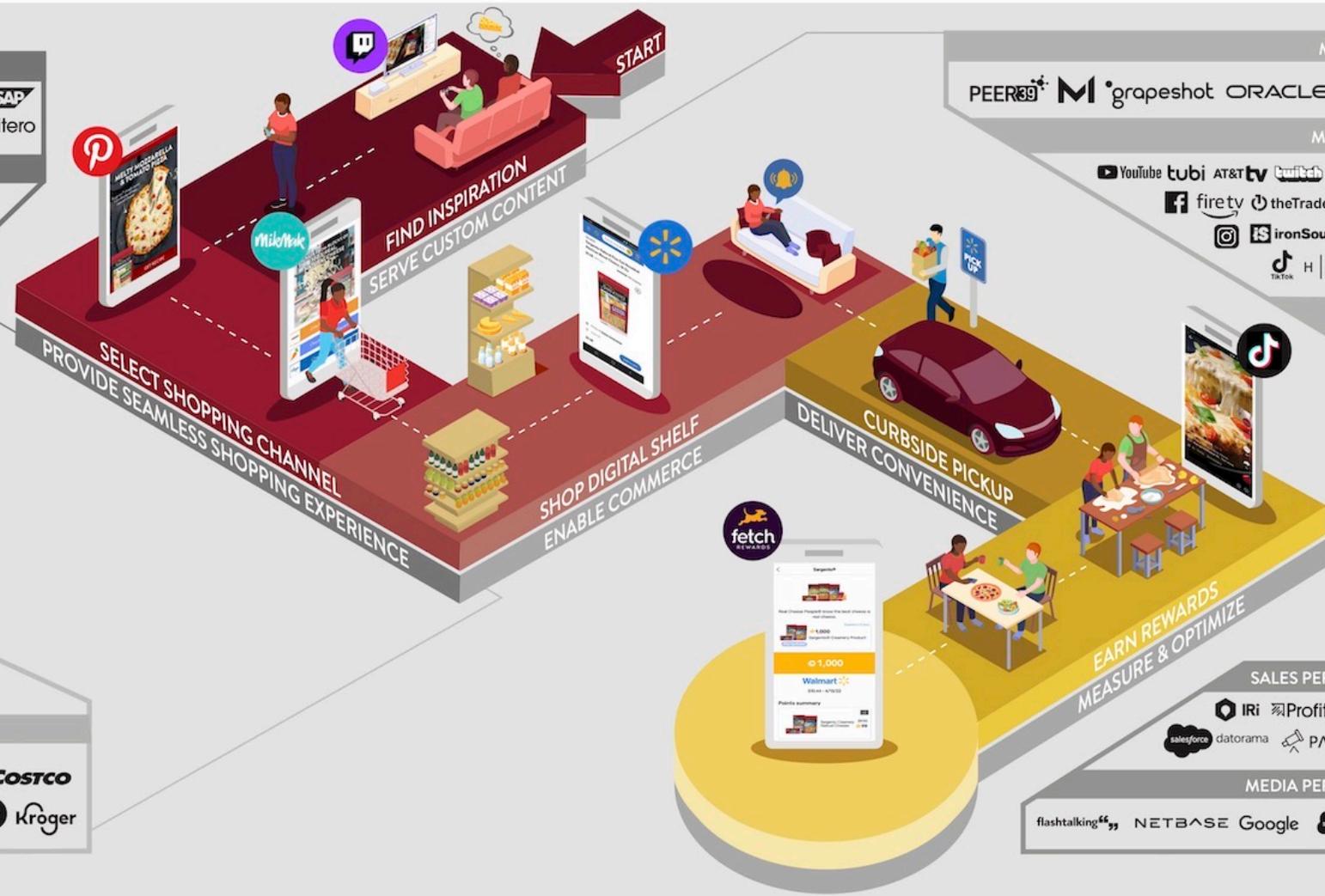
MARTECH STACK FOR CONNECTED COMMERCE

CUSTOMER JOURNEY
SARGENTO ROLE

PRODUCT INFO & SYNDICATION
 WIDEN BRANDBANK SALSIFY SAP
 ALIGNTRAC Syndigo WORLD SYNC Profitero

RETAIL MEDIA NETWORKS
 ROUNDDEL Walmart amazon
 Quotient Connect advertising
 criteoL CitrusAd

WEBSITE
 destini nielsen
 Silverstripe



MEDIA PLANNING
 PEER89 M'grapeshot ORACLE flashtalking

MEDIA PLATFORMS
 Youtube tubi AT&T tv twitch hulu sproutsocial
 fire tv theTradeDesk Google
 ironSource ROKU sling
 H | CODE Teads

CRM
 A

ECOMMERCE PURE PLAY
 Shipt goPuff
 amazon instacart

CLICK & COLLECT AND DELIVERY
 meijer B's sams club COSTCO
 Ahold Delhaize SAFeway Walmart Albertsons Kroger

SALES PERFORMANCE DATA
 IRI Profitero ib nielsen
 salesforce datorama PACVUE fetch

MEDIA PERFORMANCE DATA
 flashtalking NETBASE Google salesforce datorama MilkMilk

Growth With Purpose

A customer journey that thrives on martech

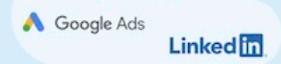
Awareness and Consideration

I want to understand the market and market trends.

Public Relations and Influencers



Advertising



Land

I need to solve my business problem.

Email and MRM, Personalization and Marketing Automation



Social Media Monitoring and Marketing



Adopt

I need support and best practices to maximize ROI on my tech investment.

Content



Event and Webinar



Expand-Renew

I want to deepen my relationship and martech maturity.

Community, Advocacy and Chat



The Foundation

Our growth is rooted in tech that helps us effectively deliver on customer needs.

SEO and Metrics



Optimization



Visualization, Marketing Analytics and Digital Insights



Governance, Compliance and Privacy



Marketing Data and Enhancement



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Marketing Technology Stack as of April 2022

Ensure Client Success

Digital Platforms

DepositFix, Google Analytics, FLOORFORCE, HubSpot, Google Search Console, Shopify, BIG COMMERCE, WordPress, HubSpot (Search Engine Optimization, Calls-to-Action, Landing Pages, Lead Management, Email Marketing, Marketing Automation, Marketing Analytics), network solutions

Collaboration

HubSpot CRM, DHQ DEALERHQ.COM, Google Forms, ClickUp, Ads Manager, Dropbox

Communication

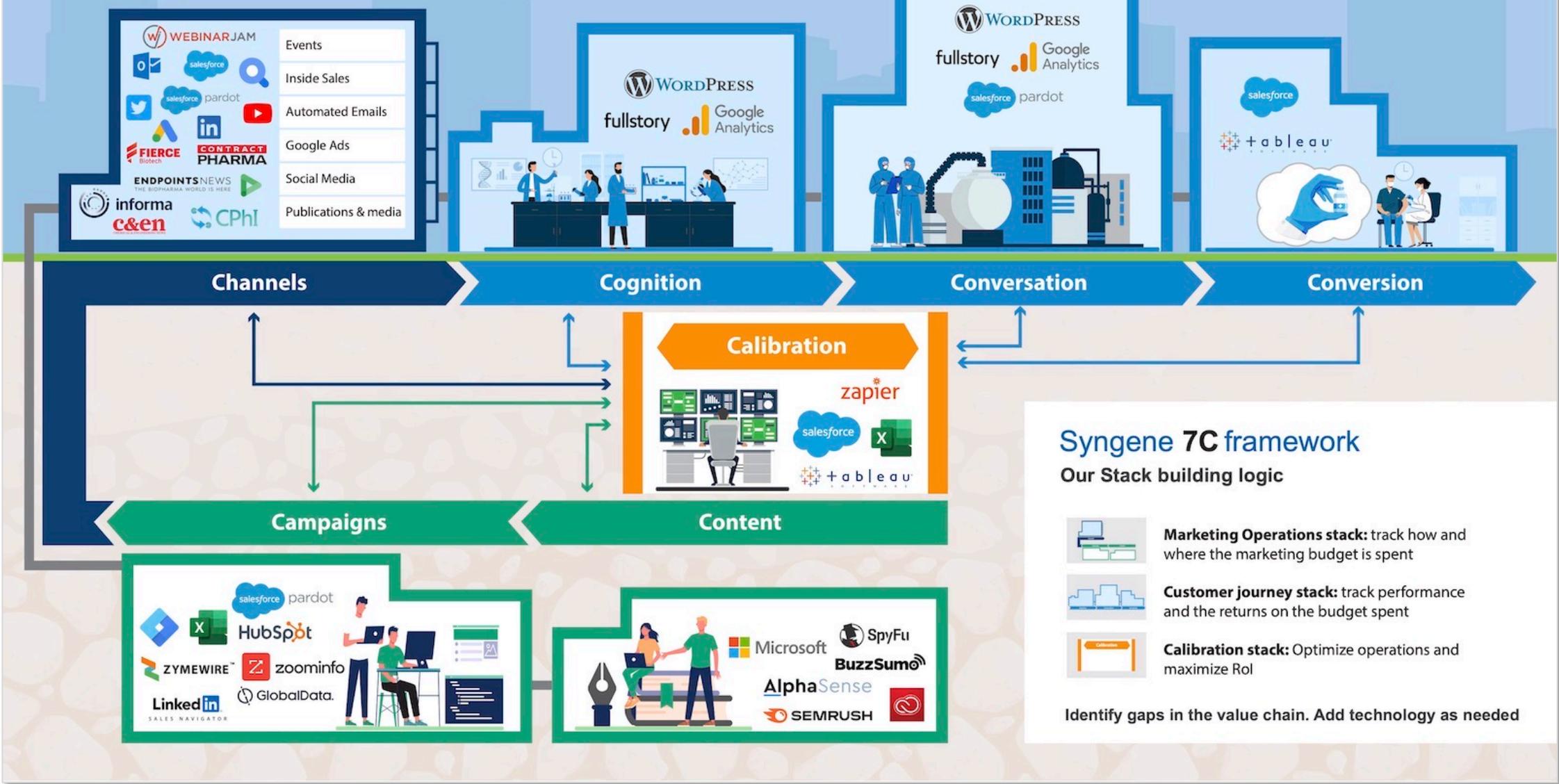
Storemapper, Google Ads, NCR CUSTOMER CONNECT, LinkedIn, Facebook, Twitter, Pinterest, Microsoft Teams

Simple MARKETING NOW

travelocity, QuickBooks Online, Facebook, Twitter, Instagram, LinkedIn, HubSpot (Search Engine Optimization, Calls-to-Action, Landing Pages, Lead Management, Email Marketing, Marketing Automation, Marketing Analytics), HubSpot CRM, smartsheet

Run the Business

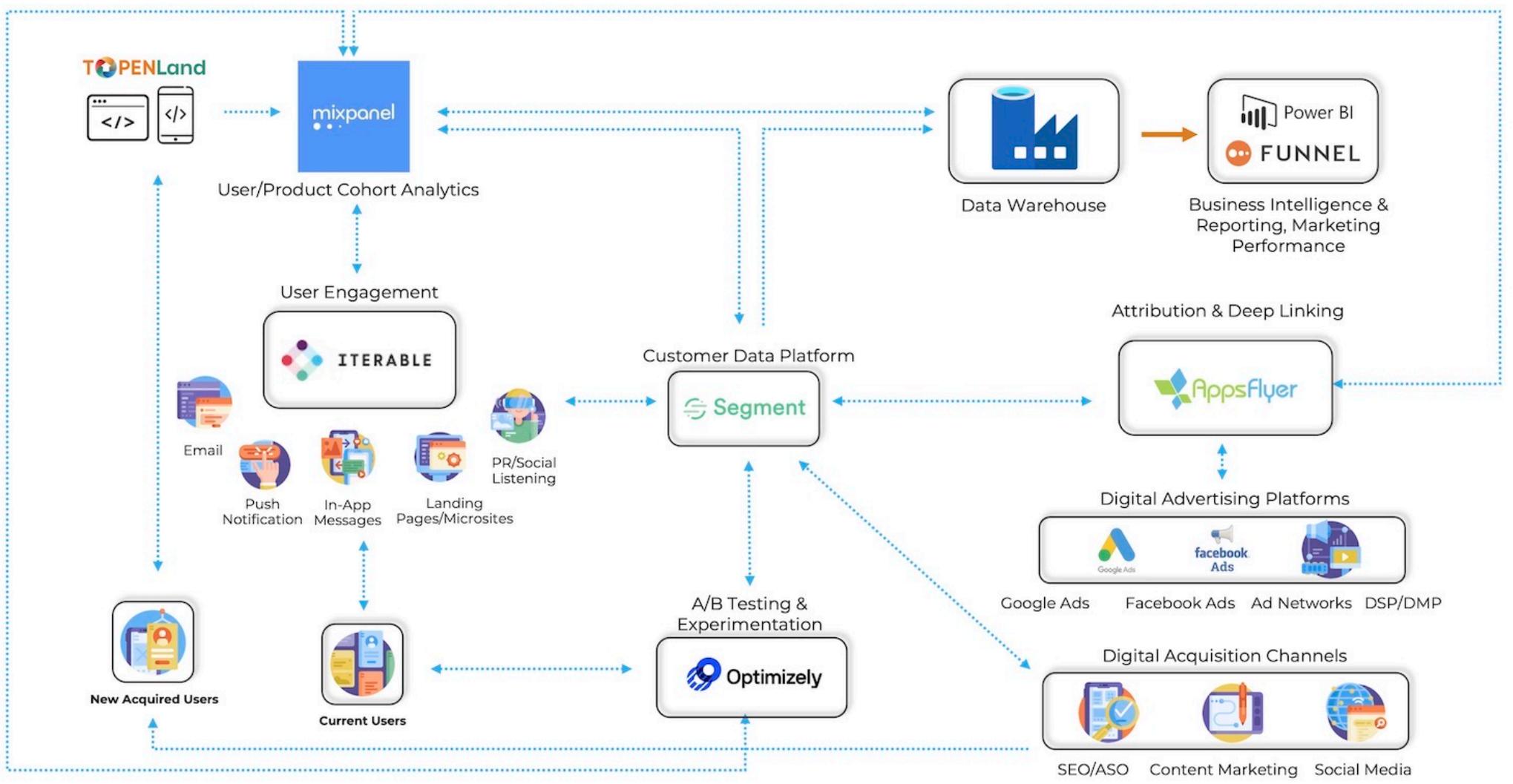
MarketMuse, Outranking, Trello, ahrefs, HyperWrite, Microsoft Teams, Canva, Grammarly, W, X, P, S, Ai, Photopea, visme, SCREENCAST MATIC, 20 TIGHTY20

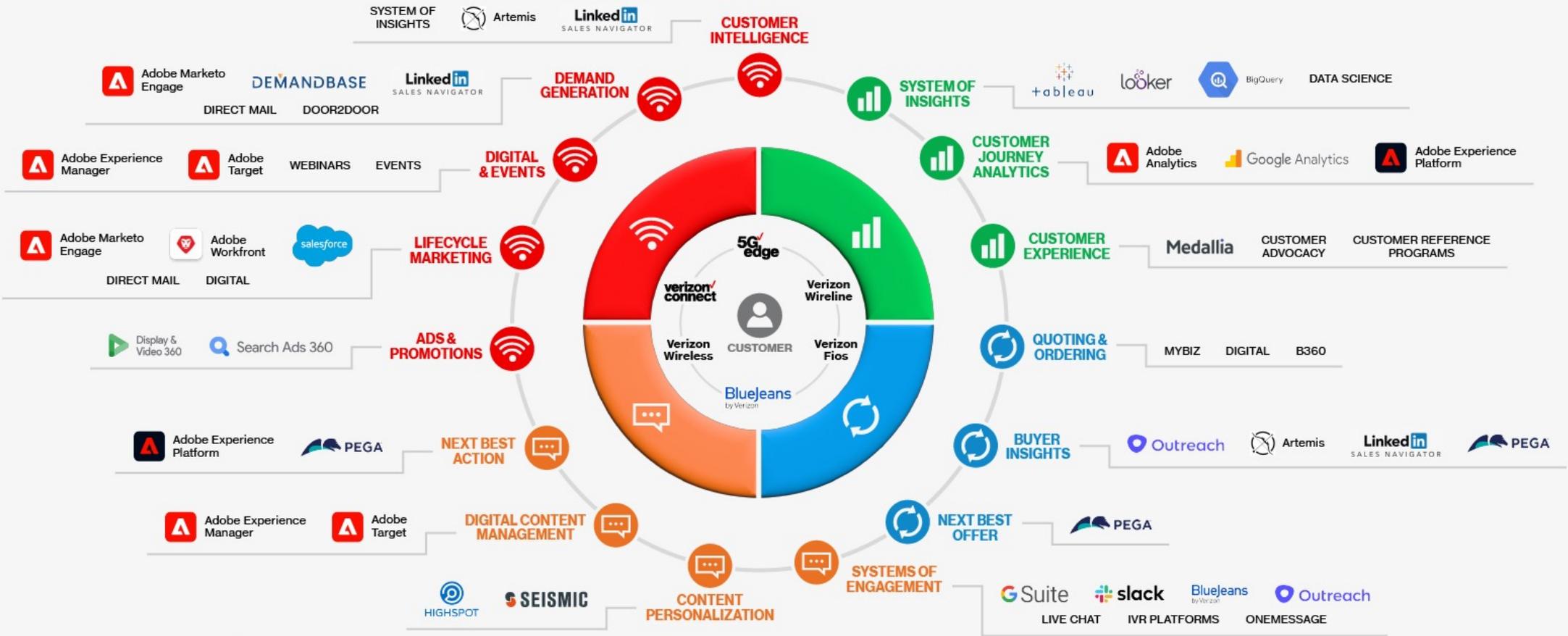


Syngene 7C framework Our Stack building logic

- Marketing Operations stack:** track how and where the marketing budget is spent
- Customer journey stack:** track performance and the returns on the budget spent
- Calibration stack:** Optimize operations and maximize RoI

Identify gaps in the value chain. Add technology as needed





We build the networks that move the world forward.

A Smarter, Faster, Personalized B2B MarTech Stack.

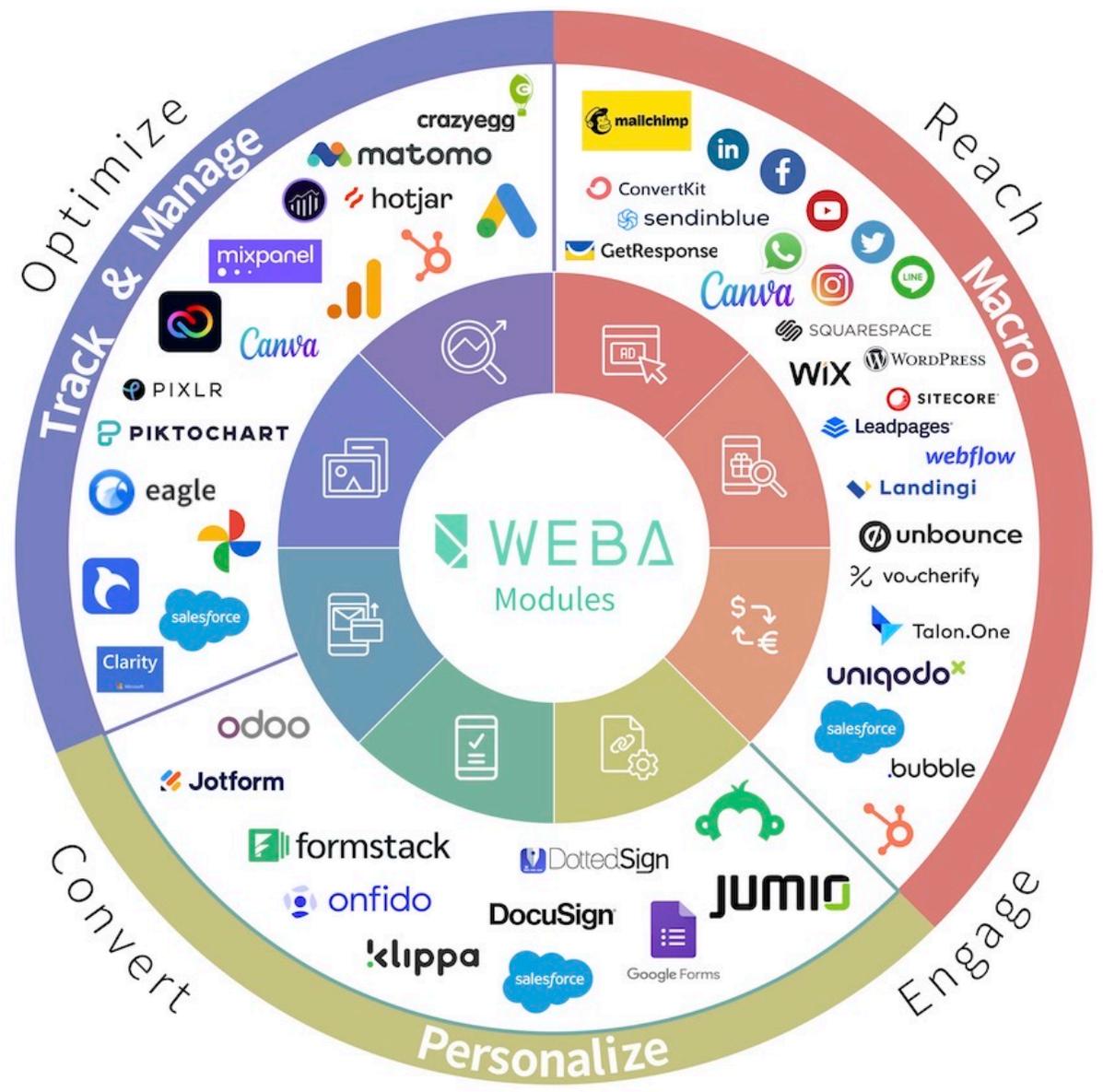
Our ecosystem vision is to create a connected and scalable B2B stack powered by data and AI, driving seamless experiences for customers across all channels.



WEBA MarTech Stack

Our stack showcases the buyer's journey and how WEBA can be incorporated into any marketing/sales strategy already in place. The highly customizable structure fits into each touch point allowing **DESIGN, CREATION,** and **LAUNCH** all in one place.

WEBA is a mobile-first, all in one **NO CODE** engagement platform. Simplify the work, and magnify your efforts in the most cost effective manner. Empower your team with the ability to create without code!



Whirlpool

Whirlpool®

Whirlpool NAR MarTech Stack:
A continuous martech cycle to improve life in your home.

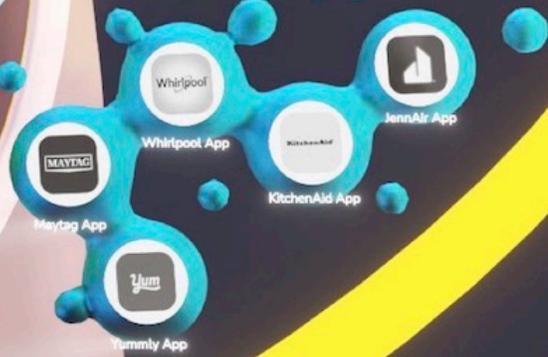
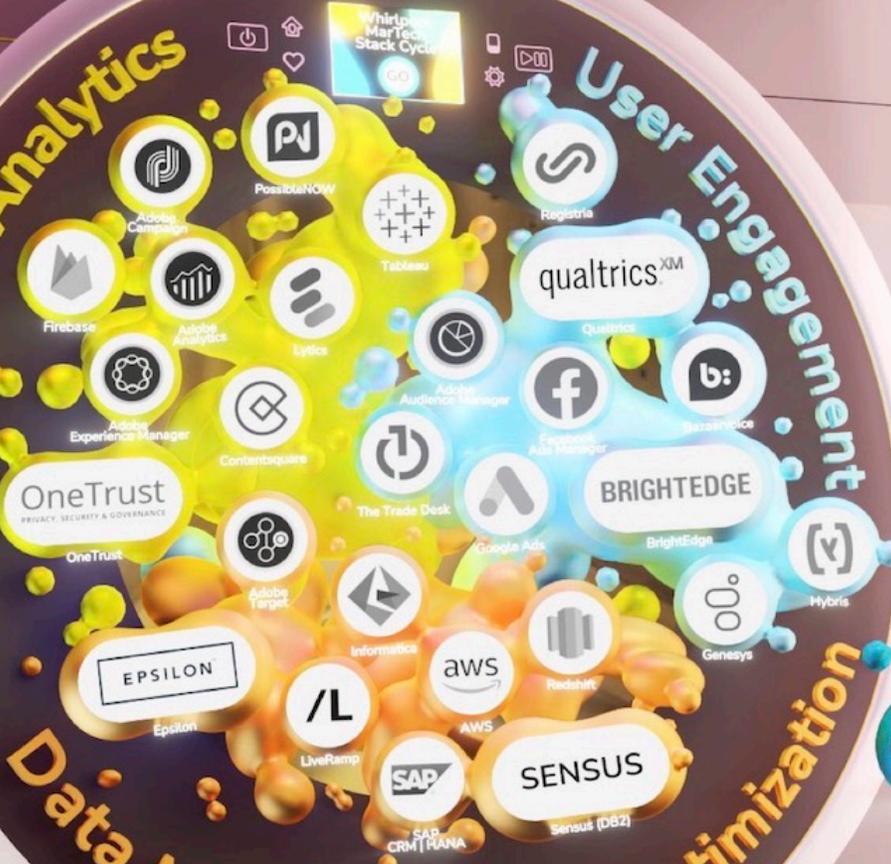
Activations & Analytics

User Engagement

Data Management & Optimization

Collaboration

IoT Apps



Sponsors

Six Martech Companies
That Helped Fund Our
Research & Report

The Silver Sea by Nick Saraev (generated by AI)



#KeepUpgrading

SKILLS / KNOWLEDGE / NETWORK

Events, courses & resources for
**MarTech & Marketing Ops
Professionals**

LXAhub.com



Pssst...get certified with our digital courses today!



OFFERFIT



Make the leap from A/B to AI with OfferFit's Automated Experimentation Platform

A/B testing can be effective for lifecycle marketing (i.e., campaigns to existing, identified customers), but it takes too long and it doesn't scale. OfferFit replaces A/B testing with self-learning AI that proactively experiments and automatically makes unique, optimized decisions for each of your customers along multiple dimensions (such as channel, message, incentive, timing, and frequency). Companies using OfferFit AI have seen campaign performance lift of at least 20%, and in some cases as much as 300%.

offerfit.ai hello@offerfit.ai
<https://www.linkedin.com/company/offerfit>

Elevate marketing outreach across every stage.



Automated planning & performance management



Asset searchability & collaboration bot



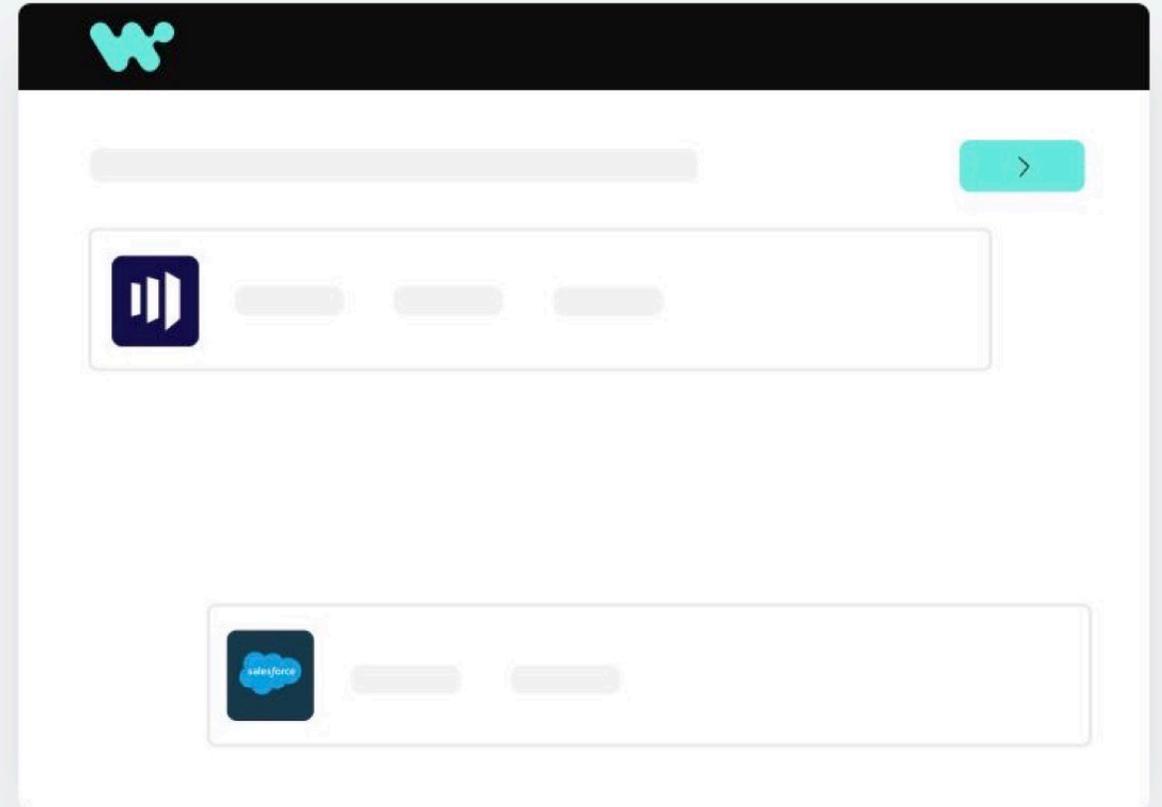
Lead Management, respond to inbound leads in less than 5 minutes



Automated upsell/cross-sell activities based on product usage



Capture multi-touch revenue attribution



Go beyond what you think is possible with SAS®

Surpass traditional CDP capabilities and take your marketing to the next level

- Join offline and online data in real time with a hybrid marketing architecture.
- Detect digital events across channels and in real time.
- Orchestrate AI-powered customer journeys.
- Extend customer insights beyond the marketing department.

sas.com/ci



#1: Product Analytics



#1: Mobile App Analytics

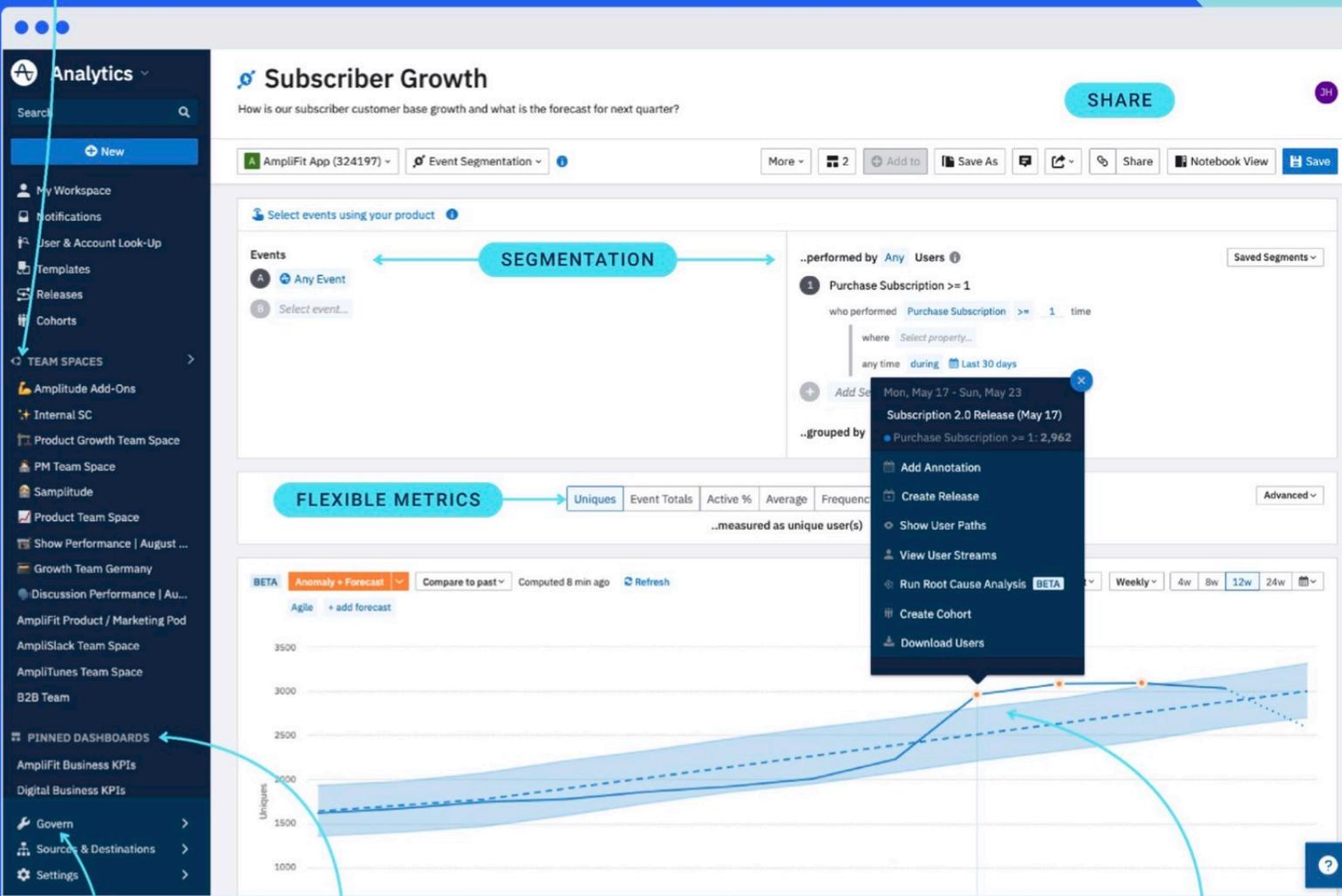


Leader: Digital Analytics



#34: All Marketing Products

TEAMS



DATA GOVERNANCE

DASHBOARDS

INTERACTIVE CHARTS

Goldcast helps B2B marketers run more engaging events that drive revenue.

Revenue = Simple to Build and Run + Best Attendee Experience + Actionable Data

DRIFT

GitHub

toast

SISENSE

Amperity &

bloomreach

Kong

alyce

clari

AUTODESK

Starburst

Bolt

attentive

Salesloft.

LEVER

Avalara

Benchling

weave

G2

ThoughtSpot

Thank You

Authors

Scott Brinker, sbrinker@chiefmartec.com
Frans Riemersma, fransriemersma@martechtribe.com

MartechMap
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