Martech for 2023: The (Really) Big Picture

presented by
Scott Brinker & Frans Riemersma

chiefmartec MartechTribe

Sponsors: SAS Uptempo Calendly Goldcast Clearbit
Welcome!
2022 has been a roller coaster of a year

- Coming out a pandemic
- Sliding towards a recession
- Geopolitical conflict / political unrest
- NFTs are hot / NFTs are dead
- Metaverse is hot / metaverse is dead
- Twitter in chaos
- The Great Resignation/quiet quitting
2023 is looking like a pretty wild ride too

- Budgets tightened
- Performance challenged
- Media fragmented
- Talent stretched thin
- Global economy unknown
- Technology still changing rapidly
So, how are you doing?
From the crucible, we forge the future
We are writing the future of marketing
We’re taking this journey together

AGENDA

1. About our sponsors
2. Martech Map: updates & analysis
3. Martech trends in 2023
4. Martech management in 2023
5. Closing thoughts
6. After-session networking chat
About our sponsors
Just say no to disjointed marketing technology. And say yes to holistic MarTech solutions from SAS.

With SAS, you get:

- A single platform ecosystem that incorporates all the capabilities you need – right out of the box.
- Greater flexibility and faster deployment with a blended model of software and services.
- The ability to seamlessly integrate apps and channels that address your specific needs.

sas.com/ci
Run marketing like a business with Uptempo.

Uptempo delivers marketing business acceleration to organizations, a new operating model that gives CMOs clarity on the financial and business impact of their marketing efforts.

Learn more at https://www.uptempo.io/marketing-business-acceleration/
~1 Billion Meetings Scheduled

| 50K companies | 10M users | 116 countries | 100+ partner integrations |

calendly.com/solutions/marketing
Special thank you…

Event platform sponsor: Goldcast

Data sponsors: G2, Clearbit
Martech for 2023: The (Really) Big Picture
Replying to @adoseofjohn and @JU4NMEND0Z4

Do they still publish that annual scrambled egg mapping out the martech landscape?

3:40 AM · 10/29/22 · Twitter for iPhone
Martech for 2023: The (Really) Big Picture

#MartechDay May 2022
Clickable PDF + MartechMap.com (Beta)

Fall 2022
Country supergraphics

December 2022
MartechMap.com rebuilt and powered by Clearbit
Martech for 2023: The (Really) Big Picture

10,383 vendors!
Search and Filter at MartechMap.com... for free!
Martech for 2023: The (Really) Big Picture

Ads & Promotions

● The oldest martech categories can be found in adtech. Is disruption due?

Youngest martech is ABM (8 years on average)

● The older the martech, the more vendors in a subcategory — no consolidation in subcategories?
Martech for 2023: The (Really) Big Picture

- Green on the left, red on the right, i.e. the older the martech, the lower the rating — hmmm, legacy issues!?
- Lowest score: Display & Programmatic Advertising
- High scores for older Video Advertising vendors
### Rating by Vendor Size (Staff #)

- The smaller the vendor, the higher the rating
  - Shorter distance to the client (needs)?
  - Smaller tools / feature sets to maintain / optimize?

- Native/Content Advertising solutions perform worst in terms of rating.
- Affiliate Marketing & Management scores best; In Content Marketing & Print are exceptions.
Ratings, staff, revenue & age

- The older, the bigger, the lower the ratings — but not the number of reviews

- Hypothesis: older/larger companies are at risk of being disrupted by innovative new startups
New vendor growth over time

- Content and Social consistently produce the most new martech solutions
- Adtech has been pretty consolidated since 2015

We used the median to find trends over time and smoothened them by using 5 year steps.
Most liked (G2) vs. most used (MartechTribe Stacks)

![Diagram showing popular martech tools and categories]

- Most used AND liked martech!
- Aggregation?
- Atomization?

Martech for 2023: The (Really) Big Picture
Balancing “opposing” forces in martech

1. Atomization
   - The younger & smaller, the higher the ratings. Less legacy/features to maintain/more UX focus?
   - Older/larger companies are at risk of being disrupted by innovative new startups
   - Adtech is the oldest martech category and is consolidated since 2015. Will Retail Monetization democratize adtech?

2. Aggregation
   - Most used AND liked martech is leaning towards integration, collection & collaboration.
Balancing “opposing” forces in martech

1. Atomization
   - **Level:** Macro or market
   - **Force:** Pulling apart (fragmentation)
   - **Focus:** Martech vendors doing one Job-to-Be-Done / one task really done intuitively
   - **Trend:** B2C-like experience of business software
   - **Integration:** Native / plug & play

2. Aggregation
   - **Level:** Micro or stack
   - **Force:** Pulling together (orchestration)
   - **Focus:** Martech stack covering key Jobs-to-Be-Done (driving value by mimicking the fluidity of customers)
   - **Trend:** Ongoing consolidation / rightsizing / replacements
   - **Integration:** Ongoing (workflow + data)

Martech for 2023: The (Really) Big Picture
Balancing “opposing” forces in martech

1. Atomization
   1. Level: Macro or market
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   1. Level: Micro or stack
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   4. Trend: Ongoing consolidation / rightsizing / replacements
   5. Integration: Ongoing (workflow + data)
Atomization + Aggregation enabled by MACH architectures
## Atomization + Aggregation Martech Trends

<table>
<thead>
<tr>
<th></th>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unit</strong></td>
<td>● Feature set</td>
</tr>
<tr>
<td><strong>Value drivers</strong></td>
<td>● Best-of-Feature</td>
</tr>
<tr>
<td></td>
<td>(components, microservices)</td>
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<td><strong>Democratization</strong></td>
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<tr>
<td><strong>Skills</strong></td>
<td>● Marketing Ops</td>
</tr>
<tr>
<td><strong>Service</strong></td>
<td>● Software as a Service</td>
</tr>
<tr>
<td><strong>Tech trends</strong></td>
<td>● Composable architecture,</td>
</tr>
<tr>
<td></td>
<td>Platform Ecosystems, Low</td>
</tr>
<tr>
<td></td>
<td>code/No code</td>
</tr>
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<td><strong>Unit</strong></td>
<td>Feature set</td>
<td>Data point</td>
<td>Digital asset</td>
</tr>
<tr>
<td><strong>Value drivers</strong></td>
<td>Best-of-Feature (components, microservices)</td>
<td>Best-of-Data (moments of truth data points)</td>
<td>Best-of-Content (evergreens, headless content, snackable content)</td>
</tr>
<tr>
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<td>Democratization of data</td>
<td>Democratization of content</td>
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<td>Composable architecture, Platform Ecosystems, Low code/No code</td>
<td>Headless CDPs &amp; Public Clouds, reverse ETL, Tag Management</td>
<td>Headless CMS &amp; eCommerce, Messaging gateways, AI generated content</td>
</tr>
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<td><strong>Best-of-Integration</strong></td>
<td>Workflow iPaaS</td>
<td>Data iPaaS</td>
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</table>

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Martech for 2023: The (Really) Big Picture
Major martech trends for 2023
Where useful martech innovation is thriving

1. Generative AI & Personalization
2. Activating Cloud Data Warehouses
3. Ecosystems & Communities
4. No-Code In-House Creators
5. Web3 & Metaverse?
Trend #1:
Generative AI & Personalization
Artificial intelligence and machine learning expected to grow

To what extent is your company using artificial intelligence or machine learning in optimizing and automating marketing efforts? (0% of the time-100% of the time)

- **Current**: 8.6%
- **Projected Growth**: 166%
- **In Three Years**: 22.9%

© Christine Moorman
Martech for 2023: The (Really) Big Picture

Highest value AI use cases in marketing

2022 State of Marketing and Sales AI Report

01. Measure return on investment (ROI) by channel, campaign, and overall. (3.95)
02. Discover insights into top-performing content and campaigns. (3.87)
03. Recommend highly targeted content to users in real-time. (3.81)
04. Adapt audience targeting based on behavior and lookalike analysis. (3.79)
05. Optimize website content for search engines. (3.77)
06. Create data-driven content. (3.77)
07. Forecast campaign results based on predictive analysis. (3.73)
08. Predict winning creative (e.g. digital ads, landing pages, CTAs) before launch without A/B testing. (3.72)
09. Create performance reports based on marketing data and analytics. (3.71)
10. Construct buyer personas based on needs, goals, intent, and behavior. (3.68)
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The Generative AI Application Landscape

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Create amazing blog posts 10X faster with AI.

Jasper is the AI Content Platform that helps you and your team break through creative blocks to create amazing, original content 10X faster.
AI Content Generation - Price of AI Writing Software

- Free/Trial available
- Free/Trial Available & Reviewed in AI Content Generation ScoreCard
- Free/Trial not available
- Free/Trial Not Available & Reviewed in AI Content Generation ScoreCard

https://aicontentgen.com/WriterPrices

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1. Price survey conducted 10/15/2019 - 12/15/2019
2. Prices per month for the lowest subscription price option.
**TIRED:**
The arms race between virus makers and anti-virus software companies.

**WIRED:**
The arms race between AI content writers and search engine algorithms.
Consumers want communication that is human, empathetic, and real. So hopefully our AI can learn to generate content like that for them.
Write a template for a follow-up sales email to a prospect who just attended a virtual event that my company sponsored.

Subject line: Thanks for joining us at [Event Name] – Let’s connect!

Hi [Prospect Name],

I hope this email finds you well. My name is [Your Name] and I am the [Your Title] at [Company Name], the leading provider of [Product/Service].

I just wanted to reach out and personally thank you for attending [Event Name] and for stopping by our virtual booth. I know that there were a lot of great sessions and exhibitors at the event, so I appreciate you taking the time to learn more about [Product/Service] and how it can help [Target Audience] with [Problem or Need that your Product/Service solves].

Based on the conversations we had at the event, it sounds like you may be interested in learning more about [Product/Service] and how it can benefit your business. If that’s the case, I would be happy to schedule a call at your convenience to discuss your specific needs and answer any questions you may have.

During our call, we can also discuss next steps for implementing [Product/Service] at your organization and how we can help you achieve your goals.

Best,
[Your Name]
[Your Title]
[Company Name]
[Phone Number]
[Email Address]
Made for your team.

Marketing

Sales Development Reps

Regie helps SDRs write cold outbound email campaigns 10x faster. But that’s not all – with Regie, SDRs can create:

- Personalized LinkedIn InMail messages
- Powerful personal social posts
- One-off emails, multitchase sequences and more
- Inbound lead response campaigns

Whether you’re creating, personalizing or storing, regie offers tools for the modern SDR workflow.

Account Executives

The Whole Team
Regie works where you work

Use regie inside your favorite sales engagement platform, email service provider, or on social to leverage the power of our AI platform where you’re already working.

- **Outreach.io**
  Full API integration. regie can write sequences, one-off emails, and analyze content.

- **Salesloft**
  Full API integration. regie can write cadences, one-off emails, and analyze content.

- **Hubspot**
  Full API integration. regie can write workflows, sequences, emails, and analyze content.

- **Apollo**
  Regie writes sequences and one-off emails in Apollo.

- **Zoominfo Engage**
  Regie can write sales flows and one-off emails.

- **Google Workspace**
  Power your front line with regie.ai to write single emails, edit copy, and analyze content.

- **Outlook**
  Write emails, edit copy, and analyze content using regie.ai.

- **Salesforce**
  Write one-off emails, edit copy, and analyze content using regie.ai.
GPT-4 rumored to be 500X more powerful than GPT-3

GPT-3: 175 billion parameters

GPT-4: 100 trillion parameters?
The Generative AI Application Landscape

Martech for 2023: The (Really) Big Picture
All the “art” in this presentation was generated by DALL-E for less than $20
AI is used for meta-tagging assets, but can also be used to detect best converting content (Return on Content)
Midjourney is already quite good at coming up with landing page designs for websites, don't you think?

Prompts:
- backup website landing page, flat vector, Figma, dribbble, user interface
- website that monitors your finances, flat vector, Adobe Illustrator, dribbble, user interface
Martech for 2023: The (Really) Big Picture
Martech for 2023: The (Really) Big Picture
Make short videos from long ones **instantly**.

Use powerful AI to create short clips from your existing videos +
Save 90% time and effort

After

AI selects the top moments for short videos
Subtitles
Progress Bar

Make gorgeous short videos that perform on

- TikTok
- Instagram
- YouTube
- LinkedIn
Create videos from plain text in minutes

Synthesia is the #1 rated AI video creation platform. Thousands of companies use it to create videos in 65 languages, saving up to 80% of their time and budget.

Create a free AI video

No credit card required

Used by 12,000+ companies of all sizes

Teleperformance saves $5,000 and 5 days per video created with Synthesia. See case study. →
Dynamically generating personalized content from...

- Demographics
- Firmographics
- Technographics
- Psychographics
- Behavioral signals
- Engagement histories
- Experimental cohorts
The perfect pitch for every buyer

Adapt your emails, calls, and meetings to resonate with any personality type.

Haley responds well to...
- Verbal affirmation and recognition
- Exciting new ideas

Ryan makes decisions by...
- Asking direct questions
- Thinking through all the details

Meet Crystal, the adaptive selling platform
Martech for 2023: The (Really) Big Picture
Crystal
View DISC insights directly within prospects using our CRM integration

View Crystal's Insights from within your HubSpot Contacts
Build audiences based on psychographics
The best startup ideas tend to be found when there’s a technology shift that enables customers to solve problems 10X faster, cheaper, or better. Cloud was one of those. Mobile was one of those. AI will be one of those.
Trend #2: Activating Cloud Data Warehouses
### The biggest barrier to personalization at scale

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to integrate key platforms/components of our martech stack</td>
<td>7.2%</td>
</tr>
<tr>
<td>Data not available/accessible in real time</td>
<td>12%</td>
</tr>
<tr>
<td>Audience segments vary by channel</td>
<td>25.1%</td>
</tr>
<tr>
<td>Lack of timely or actionable insights</td>
<td>14.8%</td>
</tr>
<tr>
<td>Teams (e.g., marketing &amp; IT) are siloed and/or have different priorities</td>
<td>24%</td>
</tr>
<tr>
<td>Incomplete customer 360/unable to resolve customer identity data</td>
<td>11%</td>
</tr>
<tr>
<td>Lack of customer experience strategy</td>
<td>6%</td>
</tr>
</tbody>
</table>

69% biggest barriers to personalization are not having access to the right data

*Merkle, 2022 Q3 Customer Engagement Report*
Tomasz Tunguz, *The Feedback Loops in Data that will Change SaaS Architecture*
Data flowing through multiple paths

![Diagram showing data flow through CRM, CDP, (Reverse) ETL, and Cloud Data Warehouse](image)
Martech products with native Snowflake integrations

- HubSpot
- Salesforce
- Demandbase
- Simon
- Zeta
- Epsilon
- LiveRamp
- Neustar
- Braze
- Amperity
- Infutor
- and more…
Martech for 2023: The (Really) Big Picture

Data Layer

- Data extraction
- CRM
- CDP
- Feedback (CLF/VOC)
- DMP
- ... and more

- Data harvesting
- CRM
- CDP
- Website
- Chat
- Data lake
- Feedback (CLF/VOC)
- ... and more

Content Layer

- Content Source
- Data Extraction
- Content AI?
- Content harvesting?
- Social Media Marketing
- Influencer Marketing
- Viral Marketing
- Mobile Marketing
- Pay Per Click
- Search Engine Optimization
- Electronic Billboards

The Key Traits of MACH Technology

- Microservices
- API-First
- Cloud-Native
- Headless
Trend #3: Ecosystems & Communities
Twelve distinct ecosystems have started to form within the integrated network economy.

$ trillion

Housing: ~4.0
Digital content: ~2.5
Education: ~3.1
Health: ~6.2
Public services: ~5.7
Wealth and protection: ~0.9
Global corporate services: ~4.7
B2B services: ~14.3
B2B marketplace: ~6.8
Travel and hospitality: ~2.7
Mobility and logistics: ~2.2

~$70 trillion global revenue pool of integrated network economy in 2030

Source: McKinsey analysis

McKinsey & Company
Customer
Has a need, wants to buy an outcome

Ecosystem of partners
Partners work alone or with each other to provide complimentary and value add on top of vendor’s offering to meet customer’s needs

Technology Providers (vendors / suppliers)
Have an offering that meets part of the customer’s needs, based on a platform

The importance of new, collaborative relationships
Please indicate your agreement with each of the following statements:

- Partners need partners: Developers will be crucial to enabling the next generation of solutions.
  - 38% Strongly agree
  - 49% Agree

- As the world moves to solutions, partner-to-partner collaboration is more important than ever.
  - 41% Strongly agree
  - 45% Agree

- The industry is reaching an inflection point where technology can enable seamless vendor-partner-customer connections and increased opportunities.
  - 35% Strongly agree
  - 49% Agree

- The future of our business depends on an ecosystem that fosters innovation and collaboration.
  - 40% Strongly agree
  - 43% Agree

- Partners will need to focus on offering joint solutions and services with vendors over low-margin products and services (e.g., resale)
  - 33% Strongly agree
  - 49% Agree

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Innovators outperform financially and lead in innovation

Ecosystem innovators
Ecosystem embracers
Ecosystem pragmatists
Ecosystem observers

### Martech for 2023: The (Really) Big Picture

<table>
<thead>
<tr>
<th></th>
<th>1st Age of Martech (2000's/2010's)</th>
<th>2nd Age of Martech (2020's)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Software</td>
<td>Suite vs. Best-of-Breed</td>
<td>Platform Ecosystems</td>
</tr>
<tr>
<td>Professional Services</td>
<td>Software vs. Services</td>
<td>Blended Models of Software &amp; Services</td>
</tr>
<tr>
<td>Custom Software</td>
<td>Build vs. Buy</td>
<td>Custom Apps on Commercial Platforms</td>
</tr>
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</table>

**Increasing convergence in the cloud**

![Chart showing the evolution of Martech from 2000's/2010's to 2020's, comparing commercial software, professional services, and custom software with newer approaches involving platform ecosystems and blended models.](chart-url)
It’s ecosystems all the way down…

- Business
- Specialist App
- App Platform
- Cloud Infrastructure
Canalys Channels Ecosystem Landscape 2022

- **223 companies**
- **US$3.9 billion** software revenue (from 2021)
- **US$8.9 billion** forecast channel software market (by 2027)

- **Channel incentives management:** US$793 million
- **Ecosystem marketplace and integrations:** US$275 million
- **Ecosystem management and orchestration:** US$82 million
- **Ecosystem data and mapping:** US$54 million
- **Ecosystem influence and attribution:** US$231 million
- **Channel finance, pricing and inventory:** US$618 million
- **Channel learning and readiness:** US$541 million
- **Through-channel marketing automation:** US$581 million

Source: Canalys estimates, June 2022
Mobile and cloud drove the last wave of enterprise software disruption. Now there are huge opportunities to disrupt markets with multiplayer experiences, apps with built-in ecosystems, down market solutions, and lower cost tools due to cloud economics. Tons of opportunity ahead.

11:39 PM · Oct 5, 2022 · Twitter for iPhone
Trend #4: No-Code In-House Creators
Common Complaints from Internal Customers

What are the most common complaints from internal customers about IT’s response to these requests?

- Length of backlog: 41%
- Security & governance concerns: 37%
- Unable to easily make changes or tweak: 34%
- Reliability of code: 32%
- Poor documentation/training: 31%
- Incomplete or features not aligned with business needs: 29%
- Usability: 29%

Note: Maximum of three responses allowed. Data: InformationWeek survey of 120 IT professionals at companies with 500 or more employees, May 2022
75% take 3+ months (or don’t know)

Data: InformationWeek survey of 120 IT professionals at companies with 500 or more employees, May 2022
How long does it take to update your website?

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 week or less</td>
<td>20%</td>
</tr>
<tr>
<td>1-4 weeks</td>
<td>22%</td>
</tr>
<tr>
<td>1-3 months</td>
<td>34%</td>
</tr>
<tr>
<td>4-6 months</td>
<td>19%</td>
</tr>
<tr>
<td>More than 6 months</td>
<td>6%</td>
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© 2022 Pantheon Systems, Inc.
### The benefits marketing teams experience from using no code tools

<table>
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<tr>
<th>Benefit</th>
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<tr>
<td>Greater ability to adapt to changing business needs</td>
<td>59%</td>
</tr>
<tr>
<td>Ability to customize tools to suit your needs</td>
<td>54%</td>
</tr>
<tr>
<td>Easier cross-departmental collaboration</td>
<td>47%</td>
</tr>
<tr>
<td>Increased problem-solving at the individual contributor level</td>
<td>43%</td>
</tr>
<tr>
<td>Faster ship time for content and campaigns</td>
<td>39%</td>
</tr>
<tr>
<td>Reduced reliance on IT</td>
<td>34%</td>
</tr>
<tr>
<td>Cost savings</td>
<td>23%</td>
</tr>
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</table>

*Airtable, Marketing Trends Report, July 2022*
Who builds automations

- IT (53%)
- Business (47%)

- Engineering/DevOps: 13.3%
- IT Operations / IT Service Management: 14.1%
- Business Systems: 3.9%
- Business Technology*: 1.2%
- Business Intelligence / Data Science: 5.2%
- Enterprise/Solutions Architect: 12.5%
- Product/Project Management: 5.3%
- Application Admin: 10%
- Other: 8.8%
- Business Operations (Sales, Marketing, Finance, People, Revenue, CS): 23.2%

Martech for 2023: The (Really) Big Picture
The No-Code Landscape

Mobile
- thunkable
- MIT App Inventor
- AppSheet
- draftbit
- Adalo
- apprati.io
- Fliplet
- Glide
- openasapp
- FlutterFlow
- one

Databases
- Airtable
- Baserow
- Rows
- XANO
- Grist
- smartsheet
- Dataland
- NocoDB
- rowy
- stackby

Web apps
- softtr
- W
- 8base
- bubble
- Saltcorn
- AppGyver
- backendless

Website builders
- sheet2site
- WiX
- umso
- Squarespace
- curse
- WordPress

Internal tools
- Retool
- CO
- budibase
- appsmith
- tadatabase

eCommerce
- shopify
- thirty bees
- WooCommerce
- sharetribe

Productivity
- ClickUp
- Zenkit
- monday.com
- coda
- asana
- Notion

Forms
- Jotform
- Paperform
- Typeform

Automation and integrations
- zapier
- clay
- make
- BRYTER
- tray.io
- automate.io
- actiondesk
- IFTTT

https://baserow.io/blog/no-code-landscape

Martech for 2023: The (Really) Big Picture
Total creators

https://stripe.com/blog/creator-economy, October 2021
Which of the following best describes your organization’s customer/marketing data platform?

- **54.5%** Self-Built in-house/custom developed
- **38.5%** Hybrid in-house/custom developed and vendor solutions
- **16%** Best-of-Breed multiple vendor point platform solutions
- **10.5%** Single Vendor vendor integrated marketing suite
- **2.4%** Unsure

https://www.martechalliance.com/cx-research-report
Web3 & Metaverse?
A realistic Web3 glossary

**Web3**
A made up name VCs use to distract from the scams and massive losses in crypto. It fancifully promises decentralization but looks more like centralization under new ownership (so more like Web2.1).

**Crypto**
A decentralized technology solution for speculation and illicit money transfer; awaiting a legitimate use case. Still waiting.

**Blockchain**
Real technology for distributed files best suited for static and high value commodities (money, contracts) and not low value, massive volume, real time transactions (digital advertising) for which latency and cost make it a non-starter.

**NFT**
A jpeg with provenance.

**Metaverse**
A silly name Facebook (re)invented to distract investors with a massive bet-the-company pivot. It doesn’t exist but expect proponents to take credit for advancements in VR and AR (which are real).

**Zero**
The total return of all marketing investments made in the above areas.
Blockchain continues to have little effect on marketing strategies

To what extent are blockchain technologies affecting your company's marketing strategies? (1= Not at all; 7= Regularly)

Insights

Effects of blockchain on marketing strategies remain the same as February 2020, the last time this question was asked. Companies with 50-99% of sales through the Internet say blockchain technologies currently affect company marketing strategies to an above average extent (1.9), a trend that is anticipated to continue in the next three years (2.5). In terms of industry sector, Communications/Media companies report a higher effect from blockchain technologies on their marketing strategies than other sectors.
Web3 Growth Technology Landscape 2022

Note: This map was compiled by Safary. Fill out this form to add a new company and DM us on Twitter with updates.
Metaverse: Pioneer Opportunity

Opportunities in a metaverse (now and in the future)

- **Brand Influence**
- **Games**
- **Meetings**
- **Retail**
- **Customer Service**
- **Training**
- **Events**
- **Sales**
- **Trading**

**Metaverse**

- **Digital Humans**
- **Gaming**
- **Virtual Spaces**
- **Shared Experiences**
- **Spatial Computing**
- **Tokenized Assets**

Source: Gartner

Gartner, Top Strategic Technology Trends 2023

Martech for 2023: The (Really) Big Picture
Martech management in 2023
“Marketing is the customer story well told at the boardroom table.”

– Scott Vaughan
CMOs: Martech is at the heart of marketing strategy

11% Neutral

21% Strongly disagree/disagree

68% Strongly agree/Agree

up from 61% in 2021

LXAhub.com, The State of Martech 2022/23
Digital Transformation 1.0

Companies using more software.

Digital Transformation 2.0

Companies becoming software.
Non-martech is eating martech

And by the way, it turns out everyone's getting into marketing. Every company with large consumer data touchpoints is launching some sort of marketing or advertising or media capability, companies across the spectrum, and we expect that trend will continue.
Harnessing Martech and AI

Applications of AI & machine learning in the customer journey.

- **REACH**
  - Who?
  - What?
  - Where?

- **ACT**
  - Lead Scoring
  - Re-targeting
  - Dynamic Pricing

- **CONVERT**
  - Chat Bots
  - Micro-moments
  - CRM

- **ENGAGE**
  - 1:1 Dynamic content emails
  - Marketing Automation

Customer Interactions and Value

Demand generation and purchase intent

Smart Content Curation

Proven Loyalty

Voice Search

Programmatic Media Scheduling

Predictive Analytics

Ad Targeting

AI Generated Content

Source: Digimarcon

Martech for 2023: The (Really) Big Picture
The hype cycle is more universal than anticipated…

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.

The State of Martech 2022

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Martech for 2023: The (Really) Big Picture
Four stages of competence
Markets, companies & individuals all have their own learning curves

- Unconscious Competence (Wrong Intuition)
- Conscious Competence (Wrong Analysis)
- Conscious Competence (Right Analysis)
- Unconscious Competence (Right Intuition)
Martech for 2023: The (Really) Big Picture

Dunning–Kruger Ability Curve
Markets, companies & individuals all have their own learning curves

- Peak of Inflated Expectations
- Trough of Disillusionment
- Plateau of Productivity
- Technology Trigger
- Slope of Enlightenment

Dunning–Kruger Effect

Markets, companies & individuals all have their own learning curves.
Kübler-Ross Grief curve

Read the signs. Know you, your team and your company is in the hype cycle

Denial

Technology Trigger

Anger

Peak of Inflated Expectations

Bargaining

Slope of Enlightenment

Acceptance

Plateau of Productivity

Depression

Trough of Disillusionment
The Martech Maturity Curve
Read the signs. Listen to what stakeholders say (between the lines)

Our business is unique. We have to customize the new system.
The new solution will cover and streamline our processes.
The new solution has to cover all of our needs once and for all.
Everyone has to use the new solution. It is not a choice.
Adoption is sacred. No adoption, no data. Users own the tools they picked themselves.
Teams pick own tools, adhering to compliance and reporting standards.

We killed our darlings. We know what works now. Let's fine tune.
We use the 20% features that support 80% of our turnover.
The new solution has to be futureproof.
We need one system or else data will be all over the place.
The new solution has to serve our entire company (all our business units).
We need to get it right the first time around.

It is inefficient that the teams pick their own solution.
Anything is better than what we have today.
Because we have built something home-grown, we have to start all over.
We bought a Ferrari, but needed a Volkswagen....
We only use features that support our 3 year strategy. Not beyond.
Let's take small steps. No more 9 months implementations. Only 3 months MVPs.

Our core requirements are crystal clear, documented and tracked.
Adoption is sacred. No adoption, no data. Users own the tools they picked themselves.
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If we customize it is because we tried all the other routes for that business critical process.
We don't need one system for a 360 customer view. We integrated our Systems of Records.
Due to our Data Model we only move the essential data between systems quickly.

The Martech Maturity Curve
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Rightsizing the martech stack

Read the signs and know where you, your team, company is in the hype cycle
Flatten the Martech Hype Cycle

Navigate your team through the different stages

- Overinvest
- Disinvest
- Reinvest
Productizing Marketing
Define, standardize and automate customer experiences

Productization comes in many forms:
- Sellable product or service
- Platform
- Microservices
**Productizing Marketing**
Define, standardize and automate customer experiences

**Products**
Anything that is standardized can be automated. The standardized processes allow for automated experiences and services.

**Processes**
Over time clusters of similar projects emerge. This allows for standardization, e.g. templates, taxonomy, KPI framework, etc.

**Projects**
Most projects are campaigns, with a beginning and end date. This allows for experimentation and iterations.
3. The “Stack-version”
Refactor into a scalable zero-maintenance version and integrate into the ecosystem.

2. The “Pack-version”
Once there is proper customer traction, clean up the hack by leaving out anything that can be left out (data, content, lists, ETL).

1. The “Hack-version”
Create a stand alone version to find out if it can be done technically and data-wise AND if the customer likes it.
Productizing Marketing
Driving the Best-of-Feature, Best-of-Data and Best-of-Content backlogs

Martech for 2023: The (Really) Big Picture
When, which approach?
Design Thinking, Lean Startup, Design Sprint, Agile (by Geert Claes)
Drive your Marketing Backlog

Combine Tech, Data and Content while running Projects, Process and Products

Personas, audiences, regions

Propositions, product groups

2022

2022 2023
Martech Stack Visualization

Every company needs a shared view on what tech, data and content delivers what (value driving) experience
Closing thoughts
From the crucible, we forge the future
We are writing the future of marketing
Questions?

Join us for an open discussion in the networking room for the next 30 minutes.
Thank you!