



Defining Your **Optimal** Marketing Technology (MarTech) Stack

There are so many options for marketing technology today. The [Marketing Technology Landscape Supergraphic](#) updated annually by Scott Brinker at ChiefMartech.com grows dramatically every year, reaching 5000 products in 2017. With the vast number of options, how can marketers wrap their heads around what's available and the potential impact on their business?

We put together this worksheet to help you do just that. While this document isn't going to make technology recommendations or explain different products and their capabilities to you, it is designed to help you get clear on your marketing technology priorities and help you put an action plan to move forward.

Building a marketing technology framework for your business can help you make dramatic strides in performance improvement, customer acquisition, and so much more. We hope you find this tool valuable.

1. What martech products are you currently using?

2. What is currently integrated? What would you like to be integrated?

3. What products do you have in place that are NOT an option to change?

4. What is currently part of your marketing strategy today and what you will want to explore in the next 18 months?

Martech Category	Today	Plan to Explore
Advertising		
Mobile		
Display Advertising		
Programmatic Advertising		
Paid Search		
Paid Social		
Native Advertising		
Content Advertising		
Video Advertising		
Print		
Public Relations		
Content		
Interactive Content		
Content Marketing		
Email Marketing		
Video Marketing		
Marketing Automation		
Personalization		
SEO		
CMS		
Mobile Apps		
Events and Webinars		
Social		
Social Media Marketing		
Chat		
Channel		
Channel and Partner Marketing		
Sales Automation and Enablement		
Influencer		
Loyalty or Referral Programs		
Community and Reviews		
Channel		
Channel and Partner Marketing		
Sales Automation and Enablement		

Martech Category	Today	Plan to Explore
Commerce		
Retail and Proximity Marketing		
Affiliate Marketing		
Ecommerce Marketing		
Ecommerce Platforms and Carts		
Channel		
Channel and Partner Marketing		
Sales Automation and Enablement		
Data		
Social Media Marketing		
Audience and Market Data		
Data Enhancement		
Marketing Analytics		
Mobile and Web Analytics		
Predictive Analytics		
Dashboards and Data Visualization		
Business and Customer Intelligence		
iPaaS		
Cloud and Data Integration		
Tag Management		
Data Management Platform (DMP)		
Management		
Talent Management		
Product Management		
Budgeting and Finance		
Collaboration		
Projects and Workflow		
Agile and Lean Management		
Vendor Analysis		

Tip

When it comes to identifying products you want to prioritize for evaluation, we recommend doing research to find products that other companies like yours are using – whether it be your industry, or size, or your capabilities. Look at products that are leading, as well as up and comers that may offer a bit more for the price. Also read customer reviews and consider contacting the reviewers with your specific questions.

5. Priorities for Now

List out what you're looking to tackle for the next year. Choose on MarTech category per quarter and no more than 3 products you will evaluate for each category.

Q1	Q2	Q3	Q4
Category	Category	Category	Category
Category	Category	Category	Category
Category	Category	Category	Category

6. Considerations

As you go through your review process and start scheduling demos, here are some things to keep in mind and ask your vendor:

1. Is there an installation process or hardware requirements? Most marketing technology products are SaaS these days, so this should not be an issue, but best to get it out of the way.
2. List out what you are looking to do and verify that this solution can address it and ask the vendor to clarify.
3. Does the product integrate with your existing solutions? Do you want it to?
4. Get clear on pricing and licensing. If there are contracts, what are the terms? Do they routinely increase fees?
5. Understand how your data will be held, secured and protected. If this is something you need to handle separate from the solution, get clear on the storage requirements.
6. Is a dedicated administrator needed? How do other customers handle administration?
7. What training is available?

List your additional questions here:

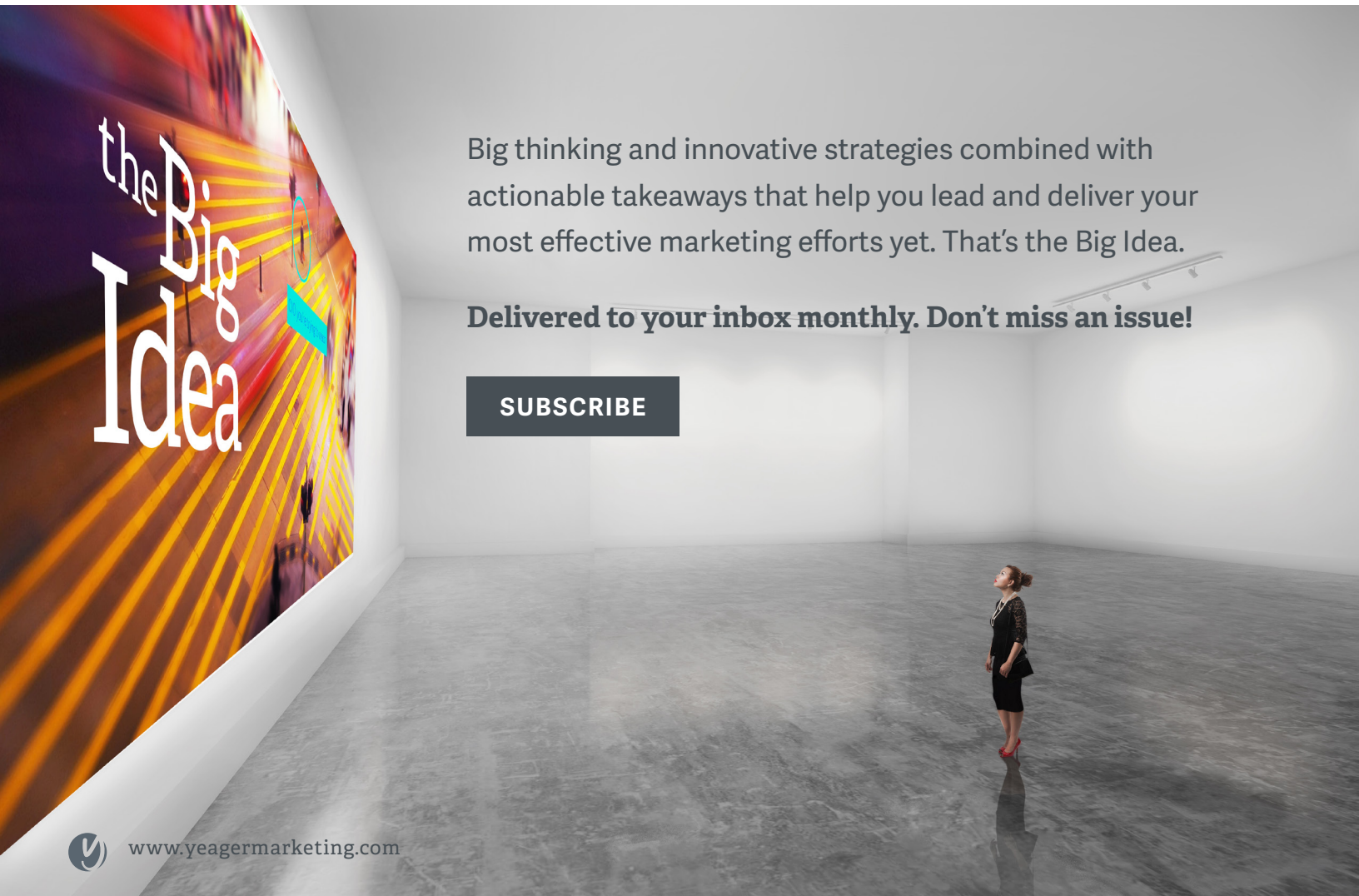
7. Technology You Plan to Explore in the Following Year

List out what you're looking to tackle for the next year. Choose on MarTech category per quarter and no more than 3 products you will evaluate for each category.

Q1	Q2	Q3	Q4
Category	Category	Category	Category
Category	Category	Category	Category
Category	Category	Category	Category

Tip


There are point products and products that can be leveraged for multiple categories. Use this document and share your technology products with your vendor to see if one solution can solve more than one problem. Evaluate the pros and cons of each option.



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