

DMA advice: How to develop a unified marketing tech stack 2018

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Introduction

In today's data-driven, technology enabled world, both C-suite executives and consumers alike are demanding that marketers make better use of data to drive more personalised and connected experiences across channels.

However, with an ever-increasing volume and variety of technology providers offering new solutions to help brands deliver their marketing and personalisation ambitions, it is often difficult to know where to start. This is made more complicated with technology vendors offering individual and multi-product solutions.

This short guide is designed to provide a framework to help marketers identify the right technology stack and roadmap for your business – based on the aspirational customer experience, current capabilities, budget and desired commercial returns.

What are the benefits of a connected customer experience?

For brands, the challenge is to extract the maximum marketing value from what is increasingly being considered as a core competitive advantage; the huge volumes of data collected from its consumers across all available touchpoints.

Therefore, to make full use of this data, brands need the relevant technology components in place to not only capture the data, but to also integrate data across different technologies to enable marketers to deliver connected customer experiences across channels.

As consumers, we're also increasingly demanding of the brands we interact with to make better use of our data to provide more relevant, personalised experiences. In turn, we're more likely to engage with marketing messages that are tailored to our needs and previous interactions, driven by data – and so the benefit to brands is increased engagement, spend and long-term value.

For most brands, the process of implementing a marketing technology stack to support the delivery of more personalised and connected customer experiences is a journey that will evolve overtime. The following guide will outline how to take the first steps on this journey.

Alex Granat,
Commercial director, Transeo Media



Blue sky thinking or pragmatic increments?

A document and set of guidelines can be read in at least two ways, it be assumed we are in start-up mode with a blank sheet of paper providing an ideal solution.

However, the authors are all acutely aware that this is rarely the case, we anticipate that many organisational constraints exist, not least the requirement to continue with business as usual whilst developments are made. With this in mind, we offer this view of the end of the rainbow, to help to identify gaps in existing infrastructure and also to help with incremental choices along the way.

With an existing set of technologies in house, it is often tempting to keep on refining the elements of the process that are currently not working. A set of guidelines should help you identify the areas that you currently don't have available.

If nothing else, use the guide to guide your exploration of capabilities within your existing solutions as often some functionality can be well hidden, but would make for straightforward change without the need for yet more licences.

Tech stack requirements

Common challenges you will face:

- Confusion: Too much choice, noise and misdirection. Impossible to identify the best tool for the job
- Unwittingly compromising: Each tool does many jobs but often excels only a specific discipline Any tools that 'allegedly' solve this problem are often out of budget for most businesses
- Anti-GDPR Data duplication
- Internal culture: Ironically, business feel that a homogenous approach requires multiple tools/departments

Basics: What a connected martech stack generally includes:

- Content/design/brand homogenization tools
- A *GDPR compliant*, data-centric platform. This is usually a CRM
- A de-compartmentalised customer-centric approach
- Inbound, outbound, offline and digital connectivity
- Cross-channel, real time dashboards, analytics (reporting, trending, modelling)

An inbound toolset

An inbound toolset enables consensual data capture, making use of multiple media channels. For example, user registrations on your web site, clicking on an advert, or downloading some content.

Connecting your inbound processes to facilitate data-driven personalised outbound content means you can nurture the customer relationship.

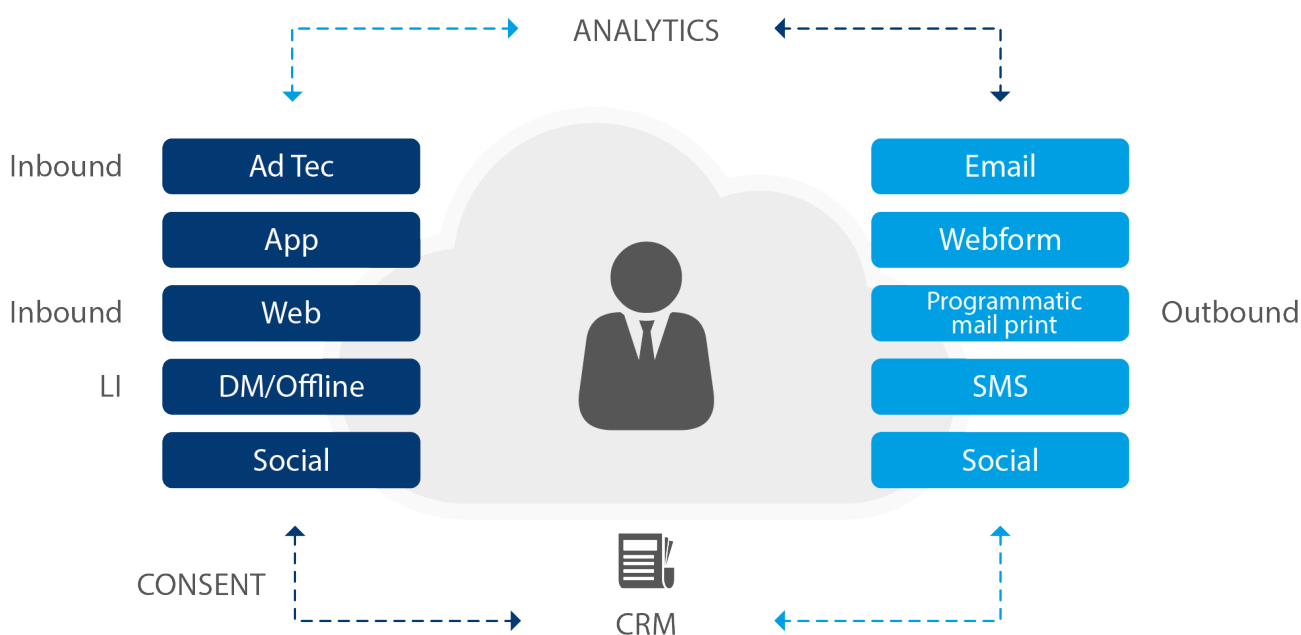
A multi-channel outbound toolset

If you want to achieve a genuinely unified engagement process, the outbound toolset needs to be totally integrated with your inbound data-set. This will enable personalised, varied event or schedule-driven communications via a single dataset.

Imagine you are running a direct response campaign using email (consent), social (peer) and DM (LI). By connecting the processes through data, every outbound message can be timed and personalised with content driven through the original inbound interaction.

What the ideal platform includes:

- Campaign activity managed through an aggregated data set (such as through a CRM and other external feeds)
- Homogenized personalised content for all channels
- Post-GDPR offline bias to allow multiple offline channels to feed *from* and *into* the same data set
Genuine 'on-the-hoof' adaptability and channel-attribution through real time dash boarding and access to all channels through the same system
A built-in compliance kit
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Your business: Choosing the right campaign management and analytics technology platform

Think like your customer and create a storyboard

Unsurprisingly, it is often overlooked that before you decide what technology you may need, you need to consider the overall marketing strategy. This means fully understanding main customer touch-points and journeys that a customer is expected to take after a strategy is implemented.

Once you have a deep understanding of the customer journey and their common touch points you can use the associated data to leverage the most potential from every engagement to support strategy delivery.

Building a storyboard supports clarity across a team as to the aims of a proposed strategy.

Example Story Board; Pan European Travel Operator

Stage	Research & Planning	Shopping	Booking	Pre-Travel (Documents)	Travel	Post-Travel
Channels						
Website	Maps Test itineraries Timetables Destination Pages FAQ General product & site exploration	Schedule look-up Price look-up Multi-city look-up Pass comparison	Web booking funnel • Pass • Trips • Multiple Trips	Select document option (from available options) • station e-ticket • home print e-ticket • mail ticket	Contact page for email or phone	
Call Center	Order brochure Planning (Products) Schedules General questions	Site navigation help	Automated booking payment Cust. Rep booking Site navigation help	Call re: ticket options Request ticket mailed Resolve problems (info, payment, etc.)	Call with questions regarding tickets General calls re: schedules, strikes, documents	
Mobile	Trip ideas	Schedules	Mobile trip booking		Access itinerary Look up schedules Buy additional tickets	
Communication Channels (social media, email, chat)	Chat for website nav help	FB Comparator Email questions Chat for website nav help	Chat for booking support	Email confirmations Email for general help Hold ticket	Ask questions or resolve problems re: schedules and tickets	Complaints or compliments Survey
Customer Relations						Request for refund, escalation from call center.
Non-REI Channels	Trip Advisor Travel blogs Social Media General Google searching	Airline comparison Kayak Direct rail sites	Expedia		Travel Blogs Direct rail sites Google searches	Trip Advisor Review sites Facebook





Framework

Before you start, clearly answer these questions:

- What am I trying to achieve?
- Have I a set of user cases that illustrate this clearly?
- Who might be able to help within my organisation?
- Who might this affect within my organisation.
- Does my organisation have any specific 'must do' policies when it comes to using in-house or partner resources?
- How will any investment be paid for and justified? i.e. What is the business case and how can it be built/verified?

Customer first, but you need internal buy in

Now you have mapped your customer journey you are ready to ascertain and document key requirements and define your scope.

As your strategy will inevitably affect many people in your organisation, take care to involve key stakeholders at this stage, considering that your eventual marketing tech stack could involve a cultural and process change.

Getting started

Determine recommendations with a high-level situation assessment:

- Does a solution already exist within my organisation that I can utilise?
- Who might be able to help me ascertain this?
- What does it cost?
- Can I use it under any existing terms if something does exist?
- Within my organisation, has anyone looked into this before or are there colleagues who in previous roles can use their experience to support in defining what I/we might need?
- Do we have the data to feed a new technology? If so where is it and is it compliant? If not what do we need and is it available?

Establish functional, process and change requirements:

- Is this a complete revolution, or can I evolve any existing platforms?
- Do I need an interim or scalable ongoing solution?
- What resources might be needed to both select, implement and support ongoing?
- What project management approach suits our need and business? Who is going to manage this?
- Agree tech selection team/steering group?

Review and document technical infrastructure and data management processes:

- What data do I have available and want to use; is it available and/or accessible?
- How will I manage ongoing data quality and 'hygiene'?
- Will I be able to introduce new data feeds at a later date?
- Am I complying with the regulatory landscape in using and/or hosting this data in my preferred platform?

Note: preparation and planning mean everything in helping inform a good or bad decision. Ensure you have thought about the above steps before reaching a decision.

Use documented requirements and a methodical selection rationale to help identify potential platform solutions:

- What research/support is available to help in building out a short list of options? Can this list be independently verified as being suitable for my needs?
- Consider examples of analyst reports and/or Industry Association Partnerships and research

Make a conscious decision to ignore bells and whistles. Stay on scope.

Draw out high level business drivers to derive quantitative and qualitative business case benefits:

- Link to Business casing approach agreed in phase 1

Review and score submitted proposals and so use to provide guidance towards a final decision:

- Ensure that as part of the scoring/selection process an objective assessment of assessing desire and ability to partner (by the bidder) can be established. Both financially and with available resource
- Who will we work with day to day?

What you need

Clearly define the features you need versus the features you think you need:

Using all the collated information, map your project needs in terms of marketing and data management 'features'.

Now is not the time to consider integrations or specific vendors. Each element of your marketing technology stack should excel on its own merits, based on your requirements.

The features cribsheet

Referring to your business justification, you should now be able to construct a simple feature requirements table. Here's an example to get started:

Discipline	Required	Nice to have	Don't need
Predictive Modelling			
CRM, DMP			
Inbound content marketing			
Data-driven personalised content			
Email			
Web			
Social			
Offline/direct mail			
SMS			
Proximity			
Dashboards/analytics			
Automate personalised content across channels			
Triggered communications			
Scale/expected throughput			
An intuitive visual workflow			
Ease of use for non IT people			
Multichannel management			
Allows creative reuse			
Competition forms			
Automate campaigns (always on)			
Testing scenarios before execution			
Analytics, reporting & dashboards			
Drive-time analytics			
Offline media (ad, direct mail)			

Selecting the right platform(s)

For each of your chosen requirements complete a SWOT template.
It is at this point that you consider each platform's openness to integration.

<your chosen feature here>

Platform	Strengths	Weaknesses	Opportunities	Threats	Access points/ Integrations/APIs

Joining it all up

You should now have a solid map of your requirements and the solutions that you regard as being best in class to do the job, and within budget.

The biggest challenge is how to tie it all together. Here are some key steps to consider:

Remember, it all begins and ends with the customer. When building your stack, make your data management platform the foundation, and ensure it is consistently applied throughout your strategy.

Avoid data duplication

This is also where you can make some easy GDPR wins. Even though you may be considering separate platforms to reach your aim, you must still strive to minimise the data set. Duplication means more access points; which severely increase the risk of breach, and the lower the degree of data minimisation.

Data minimisation matrix

Here are a few ideas to consider when looking to minimise data:

Method of Integration	Benefits	Disadvantages	Data Implications
Third party connector services	Convenient, maximise choice of platforms	Additional dependency/control	Duplication of data
Minimize the number of systems	Convenient, control, maintenance costs	Limited choice of platforms. May not suit functional requirements	Mitigated duplication of data
Select systems that synchronously use the same DMP/CRM	Potential integration overhead	Limited choice of platforms. May not suit functional requirements	Data optimized – easiest GDPR compliance

If you are starting from scratch, the foundation of your tech stack must be the CRM. If implemented correctly it should be the only data set to run your complete strategy. It is critical that you check that it offers easy and accessible access for other marketing systems to securely read and write customer data. Then you'll find it far easier to connect your chosen platforms, which must be able to connect to each other.

Product research

You will discover that many solutions focus on one or two specific disciplines. For example, whilst selling under the same 'marketing automation' banner, there are those that focus on inbound marketing or CRM.

Similarly, most email service providers will bundle what they call 'marketing automation', but that may mean little more than provisioning triggered emails.

Many CRM vendors offer marketing automation solutions that they also own or have partnered with. It is not advisable to take this at face value. It should not be assumed that, just because a software vendor excels in one area that they also excel in others. Furthermore, in many cases, there may be little real benefit in their integration compared to third party platforms.



Budgeting

Budgetary consideration will be determined on whether you intend to use systems in situ or are looking to bring in a complete solution.

As previously discussed in most cases, part of the required solution will make use of at least one incumbent platform and the introduction of new ones.

Basic budget checklist

1. License (purchase or annual)
2. Usage fees (if applicable)
3. Infrastructure costs (If SAAS, check for usage limitations. Cloud hosting costs, server configuration options)
4. Implementation costs (include time)
5. Testing (consider including staging environments to test updates, backup policy, inline disaster recovery (DR), penetration (PEN), data integrity)
6. Integration overhead
7. Maintenance and support agreements (SLA's, upgrades, legacy support etc)

Know where the risk is and mitigate

As previously mentioned, the biggest unknown is the real cost of integrating different platforms together seamlessly. This is the most common for project budgets and timelines to overrun and it is critical to consider these costs from the outset.



Conclusion

When building your marketing tech stack consider these critical requirements: maintain absolute focus on your business aims, the desired customer journey, and take a solid methodical approach.

Thinking like your customer will help you clearly define the features you 'need' compared to the features you 'think you need' and cut through the noise.

About the DMA

The DMA is the professional association representing companies working in the UK's multi-billion pound data-driven marketing industry. Its vision is to create a vibrant future for Britain by putting 1-to-1-to-millions communication at the heart of business, even society: promoting organization-customer relationships that are genuine, in touch with the individual's needs, inspiring, helpful and mutually beneficial. It provides members with the strongest framework for driving success: the DMA code, unlimited legal advice, political lobbying, business-critical research, educational and networking events, niche tools and resources, the latest and most creative thinking and the greatest community of digital and direct marketing experts, leaders, shapers and creators to support and inspire.

For further information: www.dma.org.uk

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