



# Marketing Technology Best Practices and Tips

ANA convened a group of leading martech experts to discuss martech usage and related procurement strategies. Please see below for some helpful observations from this ANA task force to help guide your martech procurement decisions.

For more detailed guidance regarding martech procurement, please see the ANA Martech Procurement Checklist found [here](#). For a glossary of martech reference terms, please see the 2020 Martech Glossary found [here](#).

## Building Your Martech Stack

### Strive for optimization and efficiency

- **Need(s)**

Consider your current and future (next 12–24 months) business and marketing objectives and needs.

- **Build**

Build around the customer, not around your business structure.

- Understanding the customer's journey is key and will help guide your stack decision(s).
- Aim for a 360-degree view of your customers and their touchpoints.
- Try to avoid solutions that sit in channel silos, which will disrupt a consistent customer experience.

- **Review**

- Review your data subject matter and sources to avoid duplication (or overlap) and manage legal compliance needs.
- Review all available functionalities and capabilities of your current tools/solutions.

- **Optimize**

- Optimize use of the functionalities and capabilities of the tools/solutions that you already have.
- Appreciate that your current offerings and capabilities may meet current and future needs.
- Consider additional training or enhancement of your current stack before procuring new tools/solutions, add-ons, or enhancements.

- **Roadmap**

Roadmaps > current state

- Your and your vendor's landscape can change quickly.
- Understand how your tools/solutions can or will change with time.
- Where vendors see themselves in the future and how they are investing to get there can be more important than focusing only on what they have right now.



- **Choice**

- There are infinite possibilities, but most purchase trends are shifting to more holistic views of data and metrics.
- Consider the scale and scope of your marketing needs, what each component can influence, and how well the whole stack can be monitored.
- Consider not just the platform or tool, but the API connectors for data sources to understand what data is shared and what functions are triggered as a result.
- Evaluate the resources available for data visualization or budget management.

- **Integrate**

Roll up your sleeves to figure out interoperability.

- Tool/solution integration is key.
- Make sure data is in a form that is immediately usable by all tools/solutions.

- Interoperability can be a vendor blind spot despite what's in the sales pitch because a vendor isn't living with "your" stack, data, campaign, and customer needs.
- If your in-house resources are limited, bring in outside help (contractors or consultants) to assist.
- Ideally, outside help should be ready to go as soon as the new tool is purchased. Plan ahead.

- **Caution**

Avoid over-customization as it can sometimes lead to problems, including an ongoing need for extra training or support, difficulty with obtaining necessary vendor support/maintenance for a customized/outdated setup or configuration, fragmented or unusable data, and diversion from the intended and supported use or capabilities of a platform, solution, or tool.

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## Managing Your Martech Stack

### Strive for maximum utilization of each tool

- **Communicate**

Maintain communication with necessary IT resources as well as with other partnering departments (legal, procurement, etc.) about data management and budget needs.

- **Train**

- Training and understanding (available functionalities/capabilities) are key to optimizing use.
- Make sure new hires are adequately trained on your martech stack and how each tool is used.
- How a tool is used at your company may not be the same as how the tool was used at their previous company, particularly if you have heavily customized the tool.
- When implementing a new tool, use "Tiger" teams: a small group of individuals who will be in charge of disseminating knowledge regarding the tool. The Tiger team will learn the new tool and then tailor training to each individual's specific use of the tool.

- Overloading the training with unusable or unneeded aspects can cause a loss of focus. People just need to understand the aspects of the tool that they will use.
- Do not train more than two weeks before your company will begin using the new tool or people will forget the training. Time training to receipt of the martech tool or solution.
- Don't ignore the differences between geographic locations. Due to laws, language, and/or cultural differences, some locations may need a slightly different implementation training, particularly if they utilize or gather data in different ways.

- **Tag**

Make sure assets are tagged appropriately and have sufficient metadata.

- **Hire**

Hire engineers who understand marketing.

- **Survey**

Utilize surveys to help select KPIs and see what people think is missing or would be helpful.

## Vendor Selection

### Buy only what you need

#### • Budget

- Understand what works best for you.
- Appreciate that there is no single optimal approach and that different approaches can work. For example, aligning renewal terms by similar date or spreading renewals (and costs) throughout the year can be effective.
- Try to develop a business case based on best-case outcome(s) or scenario(s) to guide the appropriate level of investment/cost. Even a rough guess is better than nothing.
- Be wary of bundling payments around your fiscal year-end as ongoing financial exercises throughout the year can place unnecessary stress on maintaining payments.
- Be judicious about what you buy to avoid overbuying.
- To improve results and increase efficiency, centralize your budget rather than give each individual unit its own budget.

#### • Costs/Payment Terms

- Be aware of the details and options to associate payments to unit delivery, such as CPM or per use, and particularly in the activation or data purchase spaces. But be wary of pricing tied solely to volume if you can't reliably predict usage. It can be hard to manage and lead to unexpected costs.
- Having a firm grasp of your expected use volume, on the other hand, can make fixed payment/cost arrangements work. However, the fluidity of martech use can make predictions difficult, leading to over-pay situations.
- To make it easier to manage costs, consider tier pricing as opposed to minimum thresholds.
- If something is a tool that other companies would use, don't pay for it to be custom-made because the vendor may sell it to other clients.
- In cost discussions, leverage the value a new or customized tool can add to the vendor's business if the improvement or modification will be utilized with other customers.

#### • Own

- In cases where the vendor (or a third party) will own the associated data, work to obtain an appropriate license to cover the necessary rights for access, use, or modification.
- Make sure you own the algorithm generated by any AI output, which will make it easier to walk away from the vendor.
- Ask for ownership of new or custom developed work but understand that many vendor arrangements utilizing cloud tools/solutions may not permit such an allocation of proprietary rights.

#### • Team

- Involve in the purchasing decision the individuals who procure the tools (or solutions), who build the use case(s), and who use the tools.
- Everyone needs to be on the same page regarding necessary terms and the procurement process before you reach out to vendors.
- Work with legal in advance to provide them with an understanding of key marketing and data needs and terminology.
- Balance the respective roles of different members of the negotiating team, such as procurement versus marketing, to include all perspectives.
- Don't limit discussion to just the vendor's sales team as they may over-sell what the solution or tool can accomplish to get the sale.
- Make sure someone who will be involved in helping you run the tool/platform from the vendor side is involved in the sales discussions so they can provide a realistic perspective of what the vendor is and isn't capable of providing.

#### • Plan

- Tap your business network both within and outside your organization to research appropriate rates, fees, or terms with potential vendors.
- Do more orientation before negotiations to get everyone on the same page internally.
- Ensure that everyone understands the use case and data concerns before you enter into negotiations with potential vendors.

- If you have any unique compliance or legal requirements for your vendor, such as HIPAA (BAA) compliance, ask and screen whether the vendor can accommodate these needs early on in the procurement process.
- Ask for real-world examples of use or results from your potential vendor(s).
- Make sure you have implementation resources (whether internal or external) ready to go when you sign.
- Consider hiring consultants/attorneys with the right expertise if you don't have the necessary talent in-house.

### • **Protect**

- Limit disclosure by using an NDA during preliminary discussions.
- Perform a business risk assessment of the vendor to identify current risks and threats, particularly data risks and information security threats.
- Be mindful of disclosing confidential or proprietary processes or methodologies — e.g., insight into your “black box” algorithms.

### • **Document**

- To drive vendor performance, detail your expectations in an SLA-type document, including timelines, services, support, and performance milestones. Include penalties (e.g., credit[s], refund[s], or termination) for the vendor not fulfilling these expectations.
- Always give yourself a way out of the relationship (i.e., termination rights) if it isn't going according to plan.
- Consider an initial POC or evaluation phase.
- If a pilot or POC is not practical, consider implementing the tool in one region of your company (e.g., only using it in one country) before you commit to purchasing the tool and using it worldwide.

## **Contract Negotiations**

### **Focus on what's most important**

### • **Negotiation**

- It's important to consider what your sticking points will be before negotiations. Use these to narrow down vendors so you won't waste time negotiating only to be stuck on your non negotiables.

### • **Term**

- Contract terms are typically one to three years. Consider negotiating hard for an initial 12-month contract that can be extended at your discretion for the next 24 months.

### • **Document**

- To gain a cost advantage as well as leverage or speed negotiation, consider bolting on or utilizing existing MSA or enterprise-level agreements, particularly within larger corporate structures with multiple department touchpoints.

### • **Review**

- Add specific KPIs to the contract for semi-annual or quarterly performance reviews and audits.
- Request (on a periodic basis) to sit in on or hear about product feedback/development/roadmap advisory discussions to understand longer-term development of your solution or tool.
- Use regular performance reviews to track progress against KPIs or other (service, adoption, or result) objectives.

### • **Cost Management**

- Focus on quality, not quantity.
- Focus on quality metrics instead of volume (active users, stickiness, and engagement).