

**PRIORITY:** Data, Technology, and Measurement

**MANDATE:** Lead the business and cultural transformation that is empowered by data and technology.

**WHY IT MATTERS:** Brand advantage is increasingly becoming based on how information is used in service of every interaction.

## OBJECTIVE

Help CMOs better understand how to compete effectively on personalization, drawing on brands with experience using new tools and focusing on core issues of strategy, operations, and organizational change required to scale personalization and realize potential ROI.

## DISCUSSION FOCUS

There are several trends that, collectively, are reshaping marketing disciplines in profound ways. This CMO intensive training session was about martech as a strategic and management “operating system” by which CMOs will run marketing in an ever more digital and hyper-connected world.

## SCOTT BRINKER’S “MOST EXCITING DEVELOPMENTS IN MARTECH TODAY”

- 1. Maturity of Data Management:** Marketers are becoming more effective at pulling together data from across the entire customer experience. We are also managing the quality of it and how it is organized more effectively. This proficiency is enabling marketers to “set loose the dogs of AI and machine learning to identify new behavioral patterns.”
- 2. Big Ops:** Data by itself has value. But by integrating data into the design and delivery of remarkable customer experiences, marketers can create exponentially greater value for their organizations. New revenue operating systems are enabling marketers to pull disparate data systems together. Digital, finance, governance, compliance, legal – they are all connecting “big ops,” the systems that weave big data together.
- 3. Wielding the Power of “No Code”:** This is software that empowers general business users to create things that previously only specialists could produce. There is a rise of new “no code-required” capabilities, allowing marketers to analyze data in ways that don’t require coding expertise and create campaigns. *Tools that allow non-experts wield the power.*



Scott Brinker from HubSpot and chiefmartech.com led this CMO training intensive on the future of the personalization stack, hosted by the ANA and facilitated by Dave Edelman, former CMO at Aetna.

## KEY TAKEAWAYS

- 1. Integration is the top priority for martech and data stack providers today.** The biggest challenge for marketers is to get all their tools to integrate.
- 2. It takes a village to create end-to-end flow.** You must work with your peers – both in the C-suite and below, to integrate systems and functions.
- 3. Look beyond the cookie.** Data exists across the entire spectrum of touchpoints along the consumer journey. Marketers have a big opportunity to mine this data, in the cookie-less future.
- 4. All businesses are snowflakes.** Your business is unique. You need a platform ecosystem that lets you add components based on your business needs and take advantage of all other systems.
- 5. Don't underinvest on the backend.** As you build out your customer experience, don't forget the employee experience and the backstage systems that allows them to deliver the best frontstage customer experience.
- 6. Use your tools to their fullest capacity.** Look for lift by working smarter with what you have, rather than replacing them.

## Scaling Personalization: Mastering the Transformation

*The Future of the Personalization Tech Stack*

**TARA AGEN**  
HP

**MARY RODGERS**  
Cuisinart

**RAYMOND AHN**  
PGIM Investments

**ROBERT TAS**  
1-800-Flowers.com

**ZENA ARNOLD**  
Kimberly-Clark

**JILL THOMAS**  
PGA Tour Superstore

**MATT BEREDA**  
Lenovo

**LYNN BLASHFORD**  
White Castle

**CHRIS TUSSING**  
Marco's Pizza

**LOUIS CALABRESE**  
Robertson Stephens

**MARTEN VAN PELTE**  
Plante Moran

**JENNIFER DIONNE**  
Bath Fitter

**GASTON VANERI**  
Cox Communications

**LISA HAKE**  
Great Clips

**DAN WILLIAMS**  
3 Day Blinds

**RODNEY HUTTON**  
Ethan Allen

**FACILITATOR**

**NADINE KARP MCHUGH**  
Goldman Sachs

**DAVE EDELMAN**  
Industry Leader, recently CMO at Aetna

**EMILY KETCHEN**  
Lenovo

**BRENT KORTE**  
Ameritas

**PANELIST**

**ANN MCGARRY**  
Securian Financial

**SCOTT BRINKER**  
VP Platform Ecosystem at HubSpot; Editor at chiefmartec.com; Program Chair of MarTech

**CHRISTY NAGLE**  
Clean Choice Energy

**EMILY PACHUTA**  
Invesco

**ANA**

**STEPHEN PALACIOS**  
Bush Brothers

**SMITI KUMAR**  
VP, Global CMO Growth Council

**GREG REVELLE**  
Kohl's

## HOW SHOULD MARKETERS THINK ABOUT INTEGRATING TECHNOLOGY?

The first generation of martech was about “dichotomy.” Suite versus best-in-breed? Build versus buy? Software versus service? Today, we are moving away from a hard dichotomy. Instead, CMOs are looking at ways to synthesize systems and tools. Here are three things to consider to build flexibility and adaptability into your tech stacks:

- **Every martech investment you buy should be open.** Marketers need platforms that provide a common foundation. Yet, it must be based on their own individual business needs so that it can adapt as the business grows.
- **Evaluate suppliers and service providers based on the platform ecosystem they offer.** Build or buy? Most marketers have no need to build a system from the ground up today. They can take advantage of platform ecosystems that enable them to plug in new components and adapt to other martech platform ecosystems. Marketers need ecosystems that can multiply and integrate.
- **Software versus service crossover.** Today, software companies are offering more and more service. And we are seeing traditional service companies offer insights and methodologies built into software.

## CapEx versus OpEx?

When it comes to planning and investing in martech, the way that CMOs frame their budgets can result in lower costs and be the difference between seizing an opportunity or missing it.

- **CapEx (Capital Expenditure)** is incurred by when you purchase new assets (software/hardware) or through an upgrade – resulting in an increased value. The asset will have a value and continue to be worth something after a year or more. The initial cost will be shown on a balance sheet, along with its depreciation.
- **OpEx (Operating Expenditure)** covers any expenditure incurred in the day-to-day operation of marketing. Unlike CapEx, it has an immediate effect on your profit and loss. You can treat the purchase of an asset as if it were an operational expense. Yet, you may also want to think about this decision, as it may not be the most cost-effective.

## MARTECH 2030

This collaboration between Scott Brinker and Jason Baldwin, global head of product management at WPP, looks at the major trends in marketing technology that they believe will shape the decade ahead for marketers.

Of the five trends researched, all are emerging in practice. You can and should harness them today. These trends are expected to grow exponentially over the next 10 years, redefining the very nature of marketing technology and operations.

[Click here to download a copy of the report.](#)



[3/31 - Personalized Customer Experiences](#)



[4/22 - New Analytic Tools to Drive Personalization Agility](#)

## ADDITIONAL RESOURCES

*The Future of the Personalization Tech Stack* is one of three sessions featured in the CMO Training Intensive series facilitated by Dave Edelman.

Click on the images to the right to download the recaps from the other two sessions.