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6 Steps to Design the Ideal Martech Stack

Introduction

Over the course of one day, a single marketer may use email, chat, spreadsheets, phone calls, their team's project management software, their client's project management tool, a file storage program, and a reporting app to get their work done. And that's a good day. On other days they will have to use additional tools to manage resources, create and review content, or perform any number of other tasks.

Regardless of their purpose, the sheer number of tools creates problems. One-third of marketing operations teams say they manage six to ten digital tools for their department every workday.[1] All of this tool-switching wastes time and leaves marketers with tool—"whiplash"—ongoing pain caused by inefficiencies and not being able to remember what information exists where.

Data collection and analysis present an additional predicament. Information lives in many marketing tools, but those systems don't integrate with each other, so it's hard to get a big-picture view of the state of projects, campaigns, or marketing efforts. Instead, teams spend hours manually collecting and analyzing data from different tools, and in the time it takes to create reports, the information is already outdated.

Marketing technology is usually created to simplify work, but the cluster of systems in a martech stack often does the exact opposite. Almost 70 percent of marketing ops professionals say using so many tools makes their jobs more complicated.[2] This is why every best-in-class marketing operations team needs a solid strategy for crafting and connecting their ideal martech stack. This strategy should consider the needs of the entire marketing department (and other stakeholders,) be designed specifically to connect teams, eliminate inefficiencies, automate workflows, and provide a single view of the truth—all without sacrificing the functionality and flexibility your team members need.

24.8%
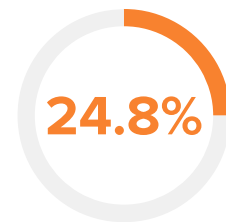
24.8% of marketers say their department uses a mixture of spreadsheets, email, and instant messaging to manage tasks, projects, and workflows.[3]

Here are 6 simple steps to building the ideal martech stack.

Step 1. Craft a vision.

Develop a strategy and vision for how your martech stack will evolve to meet future business needs. Begin by determining marketing's role in achieving business goals, then outline your long-term martech objectives based on how they support those goals.

Building the ideal martech stack will require marketing ops to consider marketing workflows and data flow for the company as a whole.

Every enterprise is different. In some cases the functions managed by marketing ops (e.g. web, SDR, analytics, technology) are spread across many departments. Consider how software and systems of record are set up in departments like sales, customer support, legal/regulatory, business intelligence, and elsewhere before beginning to design your martech stack.

ANSWER THESE QUESTIONS:

Which tools should high-performing marketing teams use?

> According to marketing expert Scott Brinker, marketing operations professionals are tasked with balancing automation and humanization, as well as centralization and decentralization.[4] Software is always evolving, so technologies that support balance and adaptability are key to meeting these goals. Make sure you are up to date with industry analysts about which solutions are highest quality and enterprise-grade.

Which best-in-class marketing systems of record should your enterprise use?

> Your martech stack may need to either expand, mature, or both. Set your sights on where you want your marketing team to be—not on where they are. One example of a martech stack is: Adobe + Marketo + Salesforce + Workfront + Tableau + Google. (See Figure 1 on the next page.) In addition, consider which solution can be the single source of truth to integrate and connect the enterprise, helping you to manage the entire lifecycle of work, from end to end. An operational system of record can give you the visibility you need to make smarter decisions and refine focus.
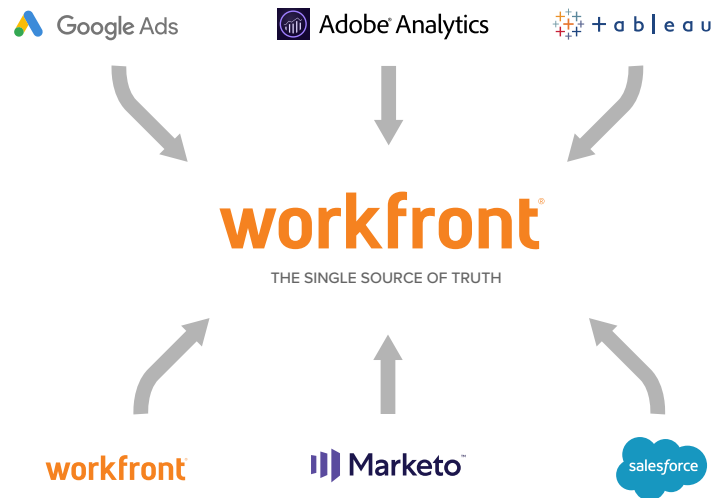
Figure 1.

What is the foundation of your martech stack?

The best tech stack strategies include an enterprise application platform at the foundation, with the ability to create seamless integrations between core solutions and workflows. Technologies to consider in this lineup are your financial, marketing automation, customer relationship, data, and operational systems of record.

How will marketers get the reporting they need?

Different roles in the marketing department require different types of reporting. Executives are interested in the big marketing picture; campaign managers need a multi-channel view; channel managers need a single-channel view; and individual contributors need to see where they can adjust their efforts to be more successful. Look for a single solution or potential integration that will meet these needs.

What reporting do you need to prove the value of your team?

Marketing ops is responsible for tracking marketing success but must also demonstrate their own value to the business. Your team needs the ability to justify resources and budgets, as well as any plans to grow.

Take your answers to these questions and use them to make your vision a reality. A key aspect of building the ideal martech stack is the ability to simplify, centralizing as much marketing data as possible. Therefore, most of your tools and information should live in one place, as your **single source of truth**.

Step 2. Audit your existing tools.

You need to see exactly which tools each marketing team is using—and not using—before you can begin to consolidate and centralize. Create a list or chart that identifies the name of each solution, which teams use it, what it's used for, the total number of users, and cost per user.

- Calculate **how many** pieces of technology all marketing teams are using across your department.

- Determine **why** your teams use each piece of technology. What problems does it solve? What functionality do they expect it to provide? Do they use it as intended? Does it align with the vision you've crafted in step 1? Is it providing value/ROI?

- Evaluate the **adoption** for each solution. What do team members like and dislike about each?

- Examine where **functionality** overlaps. Are team members choosing tools based on personal preference rather than purpose, thereby creating duplication and redundancy?

At the end of this step, you should have a clear idea of the use cases for each tool and where there is opportunity for improvement.
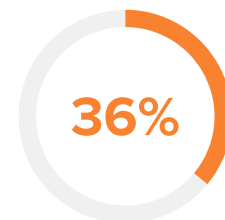
Step 3. Document your ideal marketing workflow.

Decide what you want the end-to-end flow of work to look like in your marketing department. It will usually be a variation of this basic marketing workflow:

Intake ➡ **Plan** ➡ **Create** ➡ **Review** ➡ **Store** ➡ **Fulfill** ➡ **Measure**

Your vision of the ideal workflow will most likely look different from the way work currently happens in your marketing department. If your current workflow isn't ideal, you're not alone. Only 36 percent of B2B marketers consider their workflow to be "excellent" or "very good."[5] Another 34 percent of marketers say one of their top frustrations is that the workflows across teams are disconnected or not defined.[6]

The process of documenting your ideal marketing workflow is the first step in helping you see where your tools hinder work. It's also a chance to kick off the development of your ideal martech stack. Once you can see technology's role in where work goes wrong, you can begin to remedy it.

36%

Only 36% of B2B marketers say their workflow is "excellent" or "very good."[7]

Step 4. Map your existing tools to your workflow.

Now that you've decided on the ideal marketing workflow, visualize where your **existing tools fit**. Create a diagram to help you see which technologies you have and if and where they belong in your new workflow. See figure 2 for an example of how best in class, enterprise marketing solutions map to the marketing workflow.
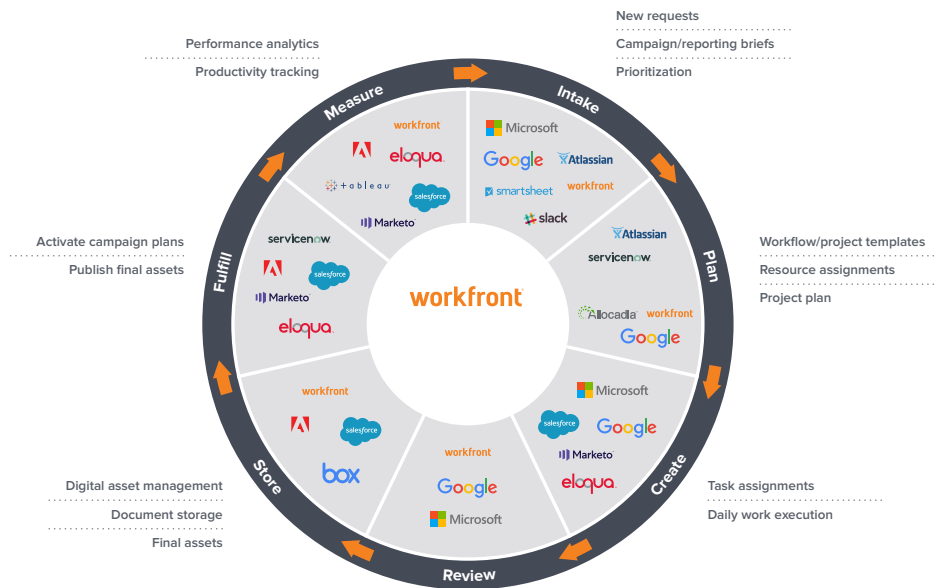

Figure 2.

- Flag the holes in your marketing stack, noting areas that could be **automated** with new technology or integrations.

- Locate stages with **weak** technology support.

- Figure out where there is significant functionality **overlap**.

- Decide where can you **consolidate** and eliminate tools.

- Determine where you can **integrate** technology for better efficiency.

- Consider whether marketers have a **single source for truth**.

- Find out whether different teams are using different tools to do the same thing and determine whether you can **standardize** solutions across teams.

- Research tools that help **manage more than one step** of the workflow, therefore allowing you to eliminate point solutions.

- Decide whether existing tools do what you need to **reach marketing goals**.

- Determine where you can standardize processes for better **efficiency**.

Step 5. Conduct a gap analysis.

By visualizing which solutions your teams use at each phase of work, you'll be able to easily identify gaps and redundancies in your current martech stack.

COMPARE

Compare the map of your ideal workflow using existing tools to the tech stack vision you created in step 1.

- Identify where new technology should fill in gaps.

- Determine which foundational solution will cover the span of the workflow.

- Document opportunities for integrations.

EVALUATE

Evaluate new solutions that could fill holes, enable integrations, eliminate redundant or excess tools, and promote marketing growth.

- Narrow down your list.

- Discuss the options with executives and users.

REFINE

Refine your tech stack based on your evaluation and the feedback you've received.

- Give priority to solutions with several built-in tools to simplify and improve efficiency.

- Begin to plan when and how to implement new solutions.

2/3

Less than 2/3 of marketing ops leaders feel confident that their teams can successfully implement new technology."[8]

Step 6. Prioritize next steps.

Address critical platforms first, including:

PLATFORM TYPE	EXAMPLES
Web Analytics	Adobe
Marketing Automation	Marketo or Eloqua
CRM	Salesforce
Data Warehouse	SAP
Modern Work Management	Workfront
Enterprise Application Platform	Workfront Fusion
Enterprise Digital Content Hub	Workfront Library

Marketing platforms are constantly evolving and it can be difficult to keep up. Many platforms have similar features and functionalities. Determining which is superior or more suitable for your organization can be time-consuming and overwhelming. That's why it can be tempting to focus on solutions that are the newest, flashiest, or that save the most money. However, it's important to concentrate on the solutions that will be at the foundation of your martech stack, basing your judgments on their capabilities, ease of use, and ability to integrate with other solutions.

Modern work management solutions like Workfront allow you to centralize all your marketing planning and execution as well as automate workflows. By adding an enterprise application platform like Workfront Fusion, you can connect all your business-critical applications. This platform allows you to bridge the gaps between different technologies with tailored integrations—creating a single, connected solution across systems.
And instead of employing a full-time staff of developers or a third-party firm, to build, manage, and maintain your integrations, Workfront Fusion can codelessly connect all your applications, centralize all your data, and automate workflows across solutions, teams, and departments.

Once you've laid the groundwork for your stack, continue with these steps:

1. Create a rollout plan.

2. Encourage adoption with incentives

3. Plan milestones to evaluate optimization opportunities

4. Watch your marketing thrive.

5. See how your technology stack compares to award-winning martech stacks decided by MarTech Today ("Stackie Awards")

The Stackies are awarded by the MarTech® Conference in recognition of outstanding marketing technology stacks as submitted by organizations in visual presentations. The submissions are judged on business alignment, conceptual organization, clarity, design, and level of detail.

As you can see, it can be rewarding to thoughtfully evaluate and strategically structure the technology that powers your marketing team.
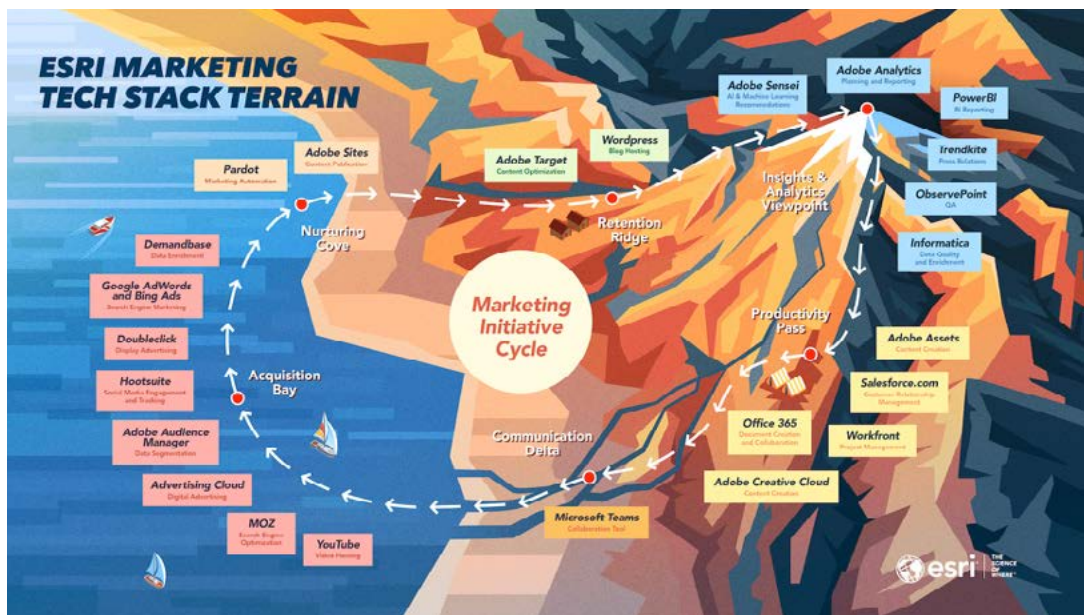

Figure 3.

Connect your teams, workflows, and martech stack with Workfront.

Workfront is more than just project management software. Workfront provides an operational system of record for your marketing department that allows you to centralize and manage all marketing work within one solution. With Workfront Fusion at the heart of your martech stack, you can innovate and integrate all your tools for greater automation and efficiency. You can also store and manage all of your digital content in Workfront Library, which fully integrates into your marketing workflow. With Workfront, you can confidently transform your teams into a unified, rockstar marketing department.

workfront

Connect and empower marketing teams with Workfront.

Implementing Workfront, as well as Workfront Fusion and Workfront Library, will help you create a unified and intuitive martech stack that allows you to:

- Connect teams
- Improve marketing speed and efficiency
- Access data and reporting in real time
- Prove the value of marketing and marketing ops

workfront.com/marketing-ops

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