

OVERVIEW

Following a Martech audit and inventory, most organizations see the need to dive deeper into the stack. The obvious next step is to evaluate the user's perspectives about the technology and get a sense of how much the technology is being used and whether it is providing value to them. This playbook is a guide to understand how to rank the technology through this lens. As a next step, this can build trust with the users who may have been frustrated with an initial technology rollout or have struggled with an ongoing technical concern.

OUTCOMES OF THIS PLAY



Martech Usage Insight

Most marketing leaders are not fully in tune with the technology gripes and successes their teams have on a daily basis. By evaluating technology against a consistent scale, you will uncover gaps and opportunities in your team's daily workflow.



Improved ROI

Many marketers will suffer in silence with problems and challenges in their Martech access points. By listening and evaluating, marketing leaders will build trust about listening to feedback to improve daily workflow for junior team members. and see improved ROI by driving more utilization of the technology.

PROCESS

Evaluate

Use the following stages to evaluate each technology category that you've captured in your Inventory. This is a four stage spectrum that evaluates technology usage against the full capabilities and required use cases for it. Gathering this information can best be done via phone/in-person conversations with an initial set of users. Following the phone conversations, many marketers choose to do an online survey to get additional data points and reach more users across the marketing organization. It is important to balance both data points when receiving this information.

- Abandoned

A technology that was purchased but is no longer in use, this could be due to redundancy in capabilities or the power user(s) leaving the organization. It is critical that these technologies be identified and contracts be reviewed immediately.

- Adopted

Adopted refers to a group of technologies that is used, but often only begrudgingly. Workarounds for trying to avoid using it can be prevalent within teams. This often applies to systems of record where the only point of access for certain tasks or data is this technology. Users will generally express frustration with using this technology but it has become a required evil. There is often times a lack of integration with this technology with others requiring manual processes.

- Embraced

Embraced technologies have some power users or champions within the organization. Login and access is widespread across the marketing organization and usage is consistent. The technology is well integrated into the rest of the organization, preventing unnecessary manual processes. Ongoing team training is sporadic and requires more consistency.

- Adored

This is technology where the users with a marketing organization are often advocates for those vendors. Users see this technology as critical to doing their jobs and advancing their careers. They have created innovative use cases and integrations for the technology. It is seen as a complete value-add to the team. Consistent training, leveraging internal or external resources, is a key to success in sustaining a technology within this categorization.

Data

Evaluation of technologies against Utilization categories

of technologies per category

% of technologies per category

Next Steps

Marketers that are empowered with a complete inventory of Martech with an evaluation of how well they are utilized hold the keys to the castle. They will be able to better negotiate with vendors and evaluate opportunities to save money. Further, they are the team members that can also identify areas of opportunity for additional training and learning to empower their technology users. It is important to remember that technologies can shift within these categories based on team and organizational changes. Keeping a finger on the pulse is critical to keeping teams productive with technology.