Real Story GROUP
MAKE BETTER TECHNOLOGY DECISIONS

Webinar:

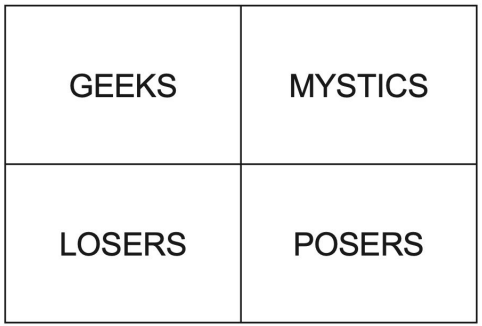
How to Turn AI / Agentic Pilots into MarTech Reality

Oct 30, 2025

A Different Kind of Firm…

- Martech Advisory and Consulting
- Deep understanding of the MarTech space
- An exclusive Council of top marketing experts across many verticals

Ask about RSG Membership and explore a seat on the private Council



"the mystical quadrant"

INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

Agenda

1. Where AI in MarTech really stands today
2. High-value use cases across channels
3. A practical path from pilot to production
4. How RSG can help

Think in layers not logos

ENGAGEMENT CHANNELS

Ads | Web | Email | Mobile | Social | Print | Voice | Chat | Call | F2F | In-Product

INTERACTION & DELIVERY ENVIRONMENTS

- **Advertising** generate demand
- **Sites** deliver information
- **Applications** deliver services
- **Distribution** deliver via channel
- **Storefront** sell things
- **Contact center** answer questions

ENGAGEMENT SERVICES

- **Customer Care** Manage customer inquiries
- **Loyalty** Improve customer stickiness
- **Social Media Mgmt** Engage in Social Media & Communities
- **Outbound Marketing** Campaigns and messaging
- **WCM** Manage web content & inbound experiences
- **Ecommerce** Manage commercial activity

ENTERPRISE FOUNDATION SERVICES

CONTENT & INFO

- Generative AI
- **Omnichannel Content Services** Manage components fueled with data
- **Digital Asset Management** Manage rich media & brand assets
- **Product Information Management** Manage catalog structure, info, pricing

DATA

- Insights AI
- **Customer Data Activation** Manage actionable data & segments
- **Customer Data Operations** Ingest, process, and unify customer data
- **Enterprise Data Intelligence** Analytics, Modeling, Reporting

DECISIONING

- Decisioning AI
- **Experience Optimization** Omnichannel test & improve
- **Omnichannel Personalization** Customize individual experiences
- **Journey Orchestration** Set decisions for omnichannel engagement

MarTech AI Reference Model Overview

DIVERSE ENGAGEMENT SERVICE EXAMPLES

- **Paid Media** — Purchase additional engagement
- **Customer Care** — Manage customer inquiries
- **Loyalty** — Improve customer stickiness
- **Social Media Mgmt** — Engage in Social Media
- **Outbound** — Campaigns and messaging
- **WCM / Inbound** — Manage web content & experiences
- **Ecommerce** — Manage commercial activity

AGENT AI

- Workflow Automation
- Stack Orchestration
- Core Services

INSIGHTS AI

- Audience & Customer Insights
- Marketing Intelligence
- Creative Analytics
- Predictive & CLV
- Attribution

DECISIONING AI

- Conversational AI
- Ad Targeting
- Behavioral Recommendations
- Dynamic Creative Optimization
- Next Best Action
- Customer Journey Optimization

GENERATIVE AI

- Writing & Editing
- Research & Analysis
- Graphics
- Audio
- Video
- Content Supply Chain Productivity

FOUNDATIONAL PLATFORMS

- **Customer Data Stores** — Manage and activate unified data and segments
- **Personalization / Orchestration Engines** — Set decisions for omnichannel engagement
- **Omnichannel Content Platform** — Manage content components fueled with data

FOUNDATIONAL CAPABILITIES

- Customer Data Ops
- AI / ML Ops
- Enterprise Content Ops
- Data & LLM Tuning
- Prompt Engineering

RESPONSIBLE AI

- Foundations and Governance
- Transparency
- Data Protection
- Security
- Risk Mitigation
- Human-AI Collaboration and Sustainability

Deeper Look Today: Agent AI Use Cases

AGENT AI

Workflow Automation

Stack Orchestration

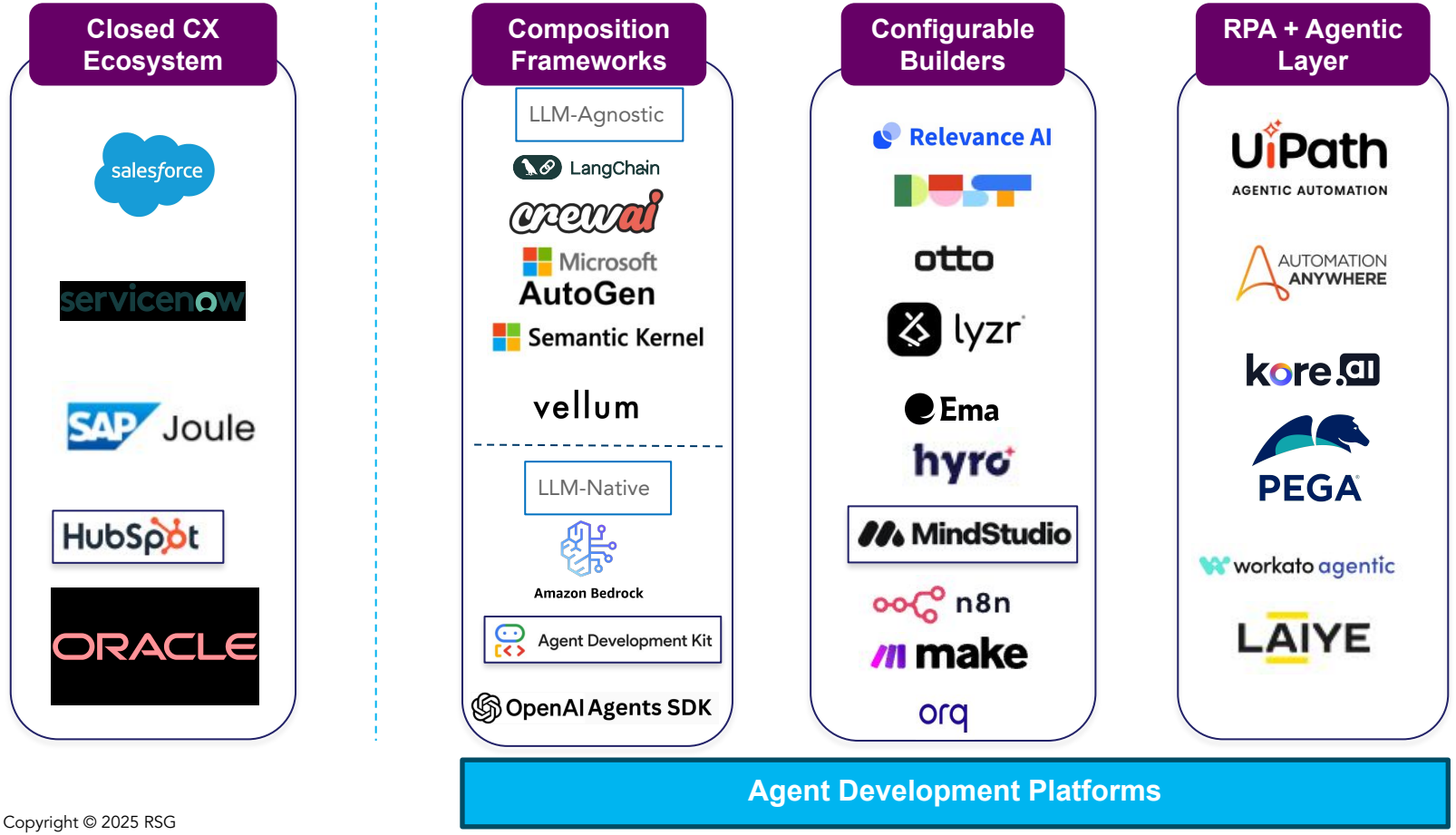
Core Agent Services

Agent AI

What It Does:
Agent AI automates and sequences tasks within a platform (workflow) or across your MarTech stack (orchestration) — without needing human input at every step. It acts as an independent, goal-driven system that uses real-time data to plan, adapt, take action and improve.

Why It Matters:
By going beyond static decision-making, Agent AI introduces autonomy, adaptability, and self-improvement to marketing operations, enabling always-on, context-aware systems that respond to change as it happens.

How the vendors stack up - Agent AI marketplace, Q2 2025



How RSG evaluates agent tech: CrewAI

Scenario	Rating	Why
Customer & Prospect Intelligence	1	Agents can enrich data via APIs but lack live behavioral signal processing or pre-built integration modules
Personalized Content Activation	1	Agents can draft copy, but targeting external
Audience & Segment Optimization	0	No audience store or scoring engine
Orchestration & Decisioning	4	Core strength: Agents delegate tasks hierarchically (e.g., juniors → seniors). Dynamic multi-agent task routing fits NBA/journey use cases
Campaign & Execution	1	Lacks native ROI tracking
Content Workflow Automation	2	Role-based agents (researcher → writer → editor) can streamline content pipelines but no CMS/DAM integration
Support & CX Automation	2	Can handle queries via chatbots. No live channel connectors or ticket system integrations
Meeting & Interaction Intelligence	1	No built-in speech processing, transcript analysis, or conversation insight tools.
Operational Analytics & Forecasting	1	Can do some analysis but lacks predictive or forecasting capabilities

Strat Consideration	Rating	Why
Community Strength	4	Active GitHub community, Active Discord
Customer Support	2	GitHub issues backlog; Enterprise support in higher plans
Strategy and Roadmap	3	Focused on multi-agent systems
Viability & Stability	2	$18M Series A funding (2024) but typical startup risks apply
Value for Money	1	High cost for SMBs; unpredictable usage-based pricing
Observability	2	Guidance to use OpenTelemetry/Arize, but deep, observability features natively limited.
Transparency	3	Open-source core, but proprietary enterprise modules lack audit trails
Security / Isolation	1	No RBAC, encryption, or compliance tools
Human Oversight	1	Manual approval workflows only in Enterprise tier
Control Interfaces	1	CLI-only. No admin console

We evaluates vendors by using a scenario-based framework to assess how well each vendor meets a specific set of use cases. This is an in-depth evaluation, not just vague product claims.

Vendors: what's mature vs. what's hype

Works reliably in production now

- In-platform workflows with clear hand-offs. Agent drafts → human approves → platform schedules/publishes.
- Evidence-bound retrieval. Uses approved sources with a recency window (e.g., last 90 days) and regional rules/required disclaimers.
- Policy & budget checks before publish. Claims validation, IP/image risk, and capacity/budget caps enforced pre-launch.
- Observable runs. Every run records tools used, sources, decision reasons, approver, tokens/cost so you can answer "why this?" later.
- Guard-railed optimization. Safe, incremental improvements (e.g., subject lines/dynamic blocks with brand policy checks) rather than open-ended autonomy.

Breaks first in most pilots

- Cross-stack autonomy without a context packet. Agent acts on missing/stale facts and hallucinates sources.
- No single view of the customer. Optimizes for the wrong audience or pushes the wrong channels because there's no authoritative customer record.
- No recency rule. Recommendations cite outdated evidence; time relevance isn't enforced.
- No approval pause. Agent can schedule/publish without human gate or policy checks.
- No budget/capacity caps. Costs or output rates spike; there's no kill-switch threshold.
- No run log. You can't answer "why this audience/offer/budget?" for compliance or post-mortems.

Prioritize left-column patterns.

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Nine agentic scenarios you can deploy now

Insight Acceleration

Customer & Prospect Intelligence

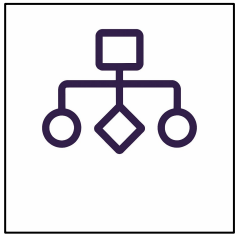
Operational Analytics & Forecasting

Audience & Segment Optimization

Campaign & Execution Acceleration

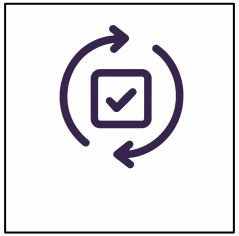
Personalized Content Activation

Campaign & Execution



Orchestration & Decisioning

Support and Process Improvement



Content Workflow Automation

Support & CX Automation

Meeting & Interaction Intelligence

Example quick wins across channels

Email / Lifecycle: Dynamic blocks & subject lines with brand policy checks:

What it is
Agent assists writers by proposing subject lines and small content block variants for journeys.

Web / Commerce: Onsite search re-ranking & recommendations

What it is
Re-rank search results and nudge offers using behavioral signals and approved product content.

Ads / Acquisition: Guardrailed ad-creative variants & feed tuning

What it is
Generate/evaluate small creative or copy variants and optimize product/ad feeds for channels.

Content Ops: Content QA & auto-tagging in the supply chain

What it is
Speed review cycles by auto-tagging assets and flagging risk/consistency issues.

Contact RSG for details on...

- How it works
- Key success metrics
- Essential source alignment

Example strategic bets to queue next

Cross-stack Next Best Action & Journey Orchestration

What it is
Agents coordinate the next offer/action across site, email, paid, and service, not just within one tool.

Autonomous budget pacing & channel mix

What it is
Daily reallocation of spend across paid channels based on performance and constraints.

Suppression & rescue flows across the stack

What it is
Automatically suppress inapt audiences and trigger rescue offers across MAP, ads, and onsite based on CRM truth and recency.

Agent-assisted CX automation with human hand-off

What it is
Agents triage inbound (chat/case/email), propose responses, and escalate with a full decision trail.

Contact RSG for details on...

- How it works
- Key data and success metrics
- Essential source alignment
- Critical maturity and SDLC considerations

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Where Pilots Break

Data & meaning failure

What it looks like: Agents act on stale or missing facts, cite outdated sources, or push the wrong audience/channel.

Why it happens: No CRM truth/identity, no recency rule, no approved source list—the agent lacks a common context.

Governance failure

What it looks like: Content/flows move to calendars or live channels without claims/disclaimer checks; spend or volume spikes.

Why it happens: No approval pause and no budget/capacity caps before publish.

Observability failure

What it looks like: You can't answer "why this audience/offer/budget?" for compliance or post-mortems.

Why it happens: No run log—no tools /sources /decisions /cost trail

Adaptivity failure

What it looks like: Pilots never get smarter; repeat the same mistakes; can't learn from overrides.

Why it happens: Outcomes and reason codes aren't fed back; no mechanism to pull last outcomes into planning.

Three solutions to the four problems

Context packet

A bundle of required facts the agent must read before it act.

Solves: Data & meaning (prevents stale/missing facts, wrong audience/channel) and enhances Adaptivity by pulling last outcomes into next run.

Approval gate & policy checks

A mandatory pause after drafts and before any calendar/publish.

Solves: Governance (prevents out-of-policy content and spend spikes).

Run log

A per-run decision trail

Solves: Observability (creates plan-vs-execution trail) and contributes to Adaptivity by storing reason codes/overrides for learning

Contact RSG for specific advice on these two…

Example coming up!

Run log

- What we record per run: run_id, date, who triggered; inputs and step order
- Tools called, sources used with links, decision reasons, violations
- Approver and outcome, tokens and cost, status
- Why it matters: answers why email, why this budget, and what did it cost

run_id	company	geo	tools	sources	reasons	violations	approver	tokens	cost	status
RUN-2025-07-31-001	Acme Industrial Pumps	EMEA	read_context, draft, policy_check	SRC-001,SRC-014	WHY_EMAIL, BUD_CAP_MAX_EMAIL	CLAIM_UNSUBSTANTIATED	J.Doe	84,210	$3.12	Approved

More production blocks will be demoed in next month's council meeting

Develop a 30-60-90

Move Beyond Pilots

30 days - Level 1 – Ship-worthy:

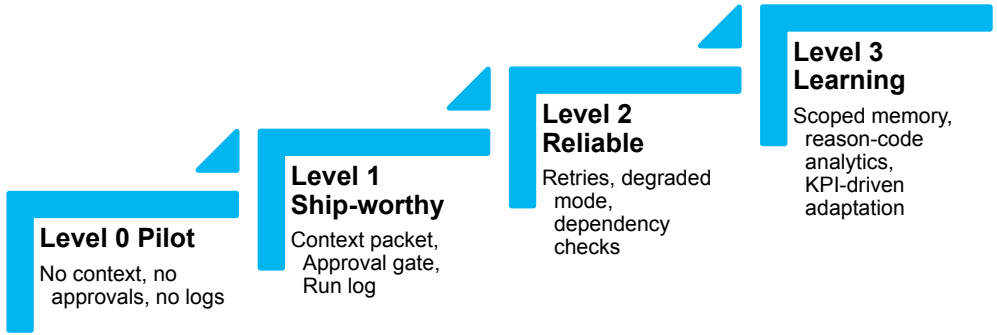
- Choose a “Quick win” scenario to start
- Ship context packet, approval gate, run log for one brand and two channels
- Define ten core marketing terms and link them to data objects

60 days – Level 2 - Reliable:

- Add degraded mode, budget and capacity caps.

90 days – Level 3 - Learning:

- Add scoped memory, track evidence coverage and edit distance KPIs, review reason codes monthly
- Begin exploring “Strategic bets” to show true value



Governance decisions required before scale

- Where agents may act vs only advise
- Which sources are authoritative and who owns them
- Approval thresholds and log retention policy
- Budget and capacity caps to encode

What MarTech Leaders Should Do…

Development Tactics

- **Prototype fast, then pivot to code**: Let marketers sketch the flow; hand it to engineers before PII or money enters the picture
- **Budget for token (cost) audits**: Set a ceiling on token spend, rate of outputs, or API errors. When the metric crosses that line, the workflow halts, alerts Ops, and prevents runaway bills or brand-damage
- **Mandate Red-Team reviews**: Run prompt-injection, data-leak, and adverse-output tests every sprint
- **Treat no-code like Excel macros**: Great for ad hoc tasks; reckless for core ops without IT oversight

Strategic Considerations

- **Balance value and speed:** For agentic use cases in particular, the highest-value use cases are also the most resource- / risk- / time-intensive; some quick-hit AI deployments deliver trivial returns
- **Vet in-platform AI features before lighting them up:** even simpler workflow enhancements may not fit within your enterprise guardrails; better to find out now rather than later
- **Don't underestimate the amount of real software development** required to go from prototype to production (see left)
- **Take a use-case approach to vendors and opportunities**, rather than deploy something ad-hoc because it's available

If you’re a Council Member…

Next month’s Council Meeting : full teardown and build plan

- Live demo with failure injections
- Consolidated limitation map and mitigations
- Production artifacts you can reuse

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How RSG can help

Turn pilots into reality with short, scenario-first engagements that add guardrails and produce a pragmatic plan.

GenAI for Content Supply Chain

- Assess real workflows across create, review, publish
- Test in-stack tools; add context, approval, run-log
- Deliver a scale plan with quality and governance gates

AI Use Case Rationalization

- Inventory AI features and use cases across teams
- Score by impact and feasibility; cut overlap
- Prioritize investments with a 4-quarter roadmap

Agent AI Readiness

- Identify where agentic flows make sense today
- Define context, HITL, and observability to ship safely
- Prove in a narrow slice before you scale

What you get

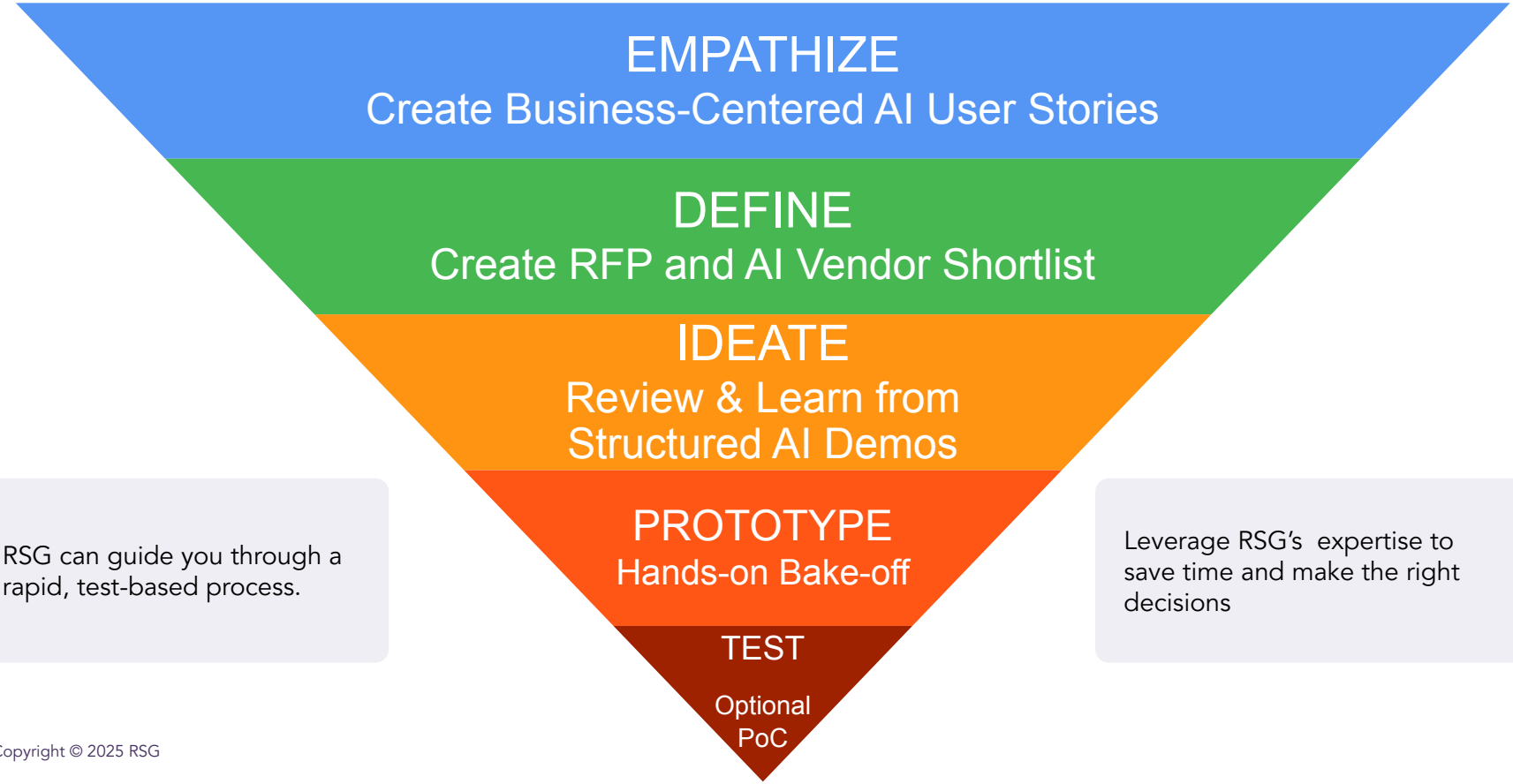
- Content AI fit heatmap
- Workflow evaluation results
- Readiness checklist
- Rationalization roadmap
- Guardrails starter kit
- Exec read-out with next steps

Optional services

- AI Insights Accelerator
- AI Scenario Modeling
- AI-CDP Integration Review
- GenAI Maturity Audit
- AI Buying Decision Support
- Composable AI Stack Design

Scenario-first. Stack-agnostic. Governance-backed. We test in your context and leave you with decisions you can act on.

RSG Can Help: Vendor Selection via Design Thinking

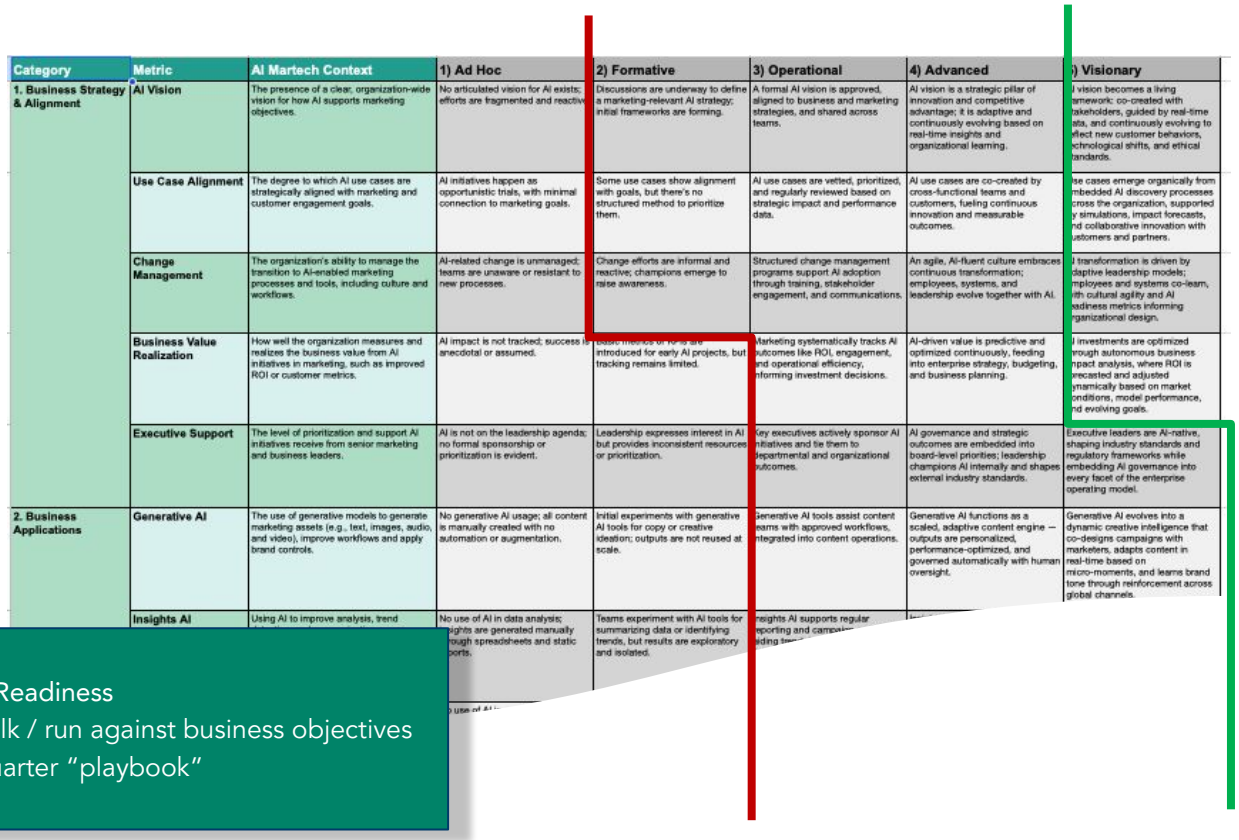


RSG can guide you through a rapid, test-based process.

Leverage RSG's expertise to save time and make the right decisions

RSG Can Help: Agent Audit and Readiness Assessment

RSG can guide you through a rapid, test-based process.



Category	Metric	AI Martech Context	1) Ad Hoc	2) Formative	3) Operational	4) Advanced	) Visionary
1. Business Strategy & Alignment	AI Vision	The presence of a clear, organization-wide vision for how AI supports marketing objectives.	No articulated vision for AI exists; efforts are fragmented and reactive.	Discussions are underway to define a marketing-relevant AI strategy; initial frameworks are forming.	A formal AI vision is approved, aligned to business and marketing strategies, and shared across teams.	AI vision is a strategic pillar of innovation and competitive advantage; it is adaptive and continuously evolving based on real-time insights and organizational learning.	l vision becomes a living amework: co-created with takeholders, guided by real-time ata, and continuously evolving to flect new customer behaviors, chnological shifts, and ethical andards.
	Use Case Alignment	The degree to which AI use cases are strategically aligned with marketing and customer engagement goals.	AI initiatives happen as opportunistic trials, with minimal connection to marketing goals.	Some use cases show alignment with goals, but there's no structured method to prioritize them.	AI use cases are vetted, prioritized, and regularly reviewed based on strategic impact and performance data.	AI use cases are co-created by cross-functional teams and customers, fueling continuous innovation and measurable outcomes.	se cases emerge organically from mbedded AI discovery processes cross the organization, supported y simulations, impact forecasts, nd collaborative innovation with ustomers and partners.
	Change Management	The organization's ability to manage the transition to AI-enabled marketing processes and tools, including culture and workflows.	AI-related change is unmanaged; teams are unaware or resistant to new processes.	Change efforts are informal and reactive; champions emerge to raise awareness.	Structured change management programs support AI adoption through training, stakeholder engagement, and communications.	An agile, AI-fluent culture embraces continuous transformation; employees, systems, and leadership evolve together with AI.	l transformation is driven by daptive leadership models; mployees and systems co-learn, ith cultural agility and AI eadiness metrics informing rganizational design.
	Business Value Realization	How well the organization measures and realizes the business value from AI initiatives in marketing, such as improved ROI or customer metrics.	AI impact is not tracked; success is anecdotal or assumed.	[illegible] introduced for early AI projects, but tracking remains limited.	Marketing systematically tracks AI outcomes like ROI, engagement, and operational efficiency, informing investment decisions.	AI-driven value is predictive and optimized continuously, feeding into enterprise strategy, budgeting, and business planning.	l investments are optimized rough autonomous business mpact analysis, where ROI is recasted and adjusted ynamically based on market onditions, model performance, nd evolving goals.
	Executive Support	The level of prioritization and support AI initiatives receive from senior marketing and business leaders.	AI is not on the leadership agenda; no formal sponsorship or prioritization is evident.	Leadership expresses interest in AI but provides inconsistent resources or prioritization.	Key executives actively sponsor AI initiatives and tie them to departmental and organizational outcomes.	AI governance and strategic outcomes are embedded into board-level priorities; leadership champions AI internally and shapes external industry standards.	Executive leaders are AI-native, shaping industry standards and regulatory frameworks while embedding AI governance into every facet of the enterprise operating model.
2. Business Applications	Generative AI	The use of generative models to generate marketing assets (e.g., text, images, audio, and video), improve workflows and apply brand controls.	No generative AI usage; all content is manually created with no automation or augmentation.	Initial experiments with generative AI tools for copy or creative ideation; outputs are not reused at scale.	Generative AI tools assist content teams with approved workflows, integrated into content operations.	Generative AI functions as a scaled, adaptive content engine — outputs are personalized, performance-optimized, and governed automatically with human oversight.	Generative AI evolves into a dynamic creative intelligence that co-designs campaigns with marketers, adapts content in real-time based on micro-moments, and learns brand tone through reinforcement across global channels.
	Insights AI	Using AI to improve analysis, trend	No use of AI in data analysis; ights are generated manually rough spreadsheets and static orts.	Teams experiment with AI tools for summarizing data or identifying trends, but results are exploratory and isolated.	nsights AI supports regular porting and campa- ding t-		

RSG's Approach to Readiness

- Assess crawl / walk / run against business objectives
- Develop multi-quarter "playbook"

Leverage RSG's expertise to save time and make the right decisions

AS-IS

TO-BE

Q&A

Stay in touch….

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