



Should You Replace Your MAP or ESP?

January

2026

A Different Kind of Analyst Firm...

GEEKS	MYSTICS
LOSERS	POSERS

“the mystical quadrant”

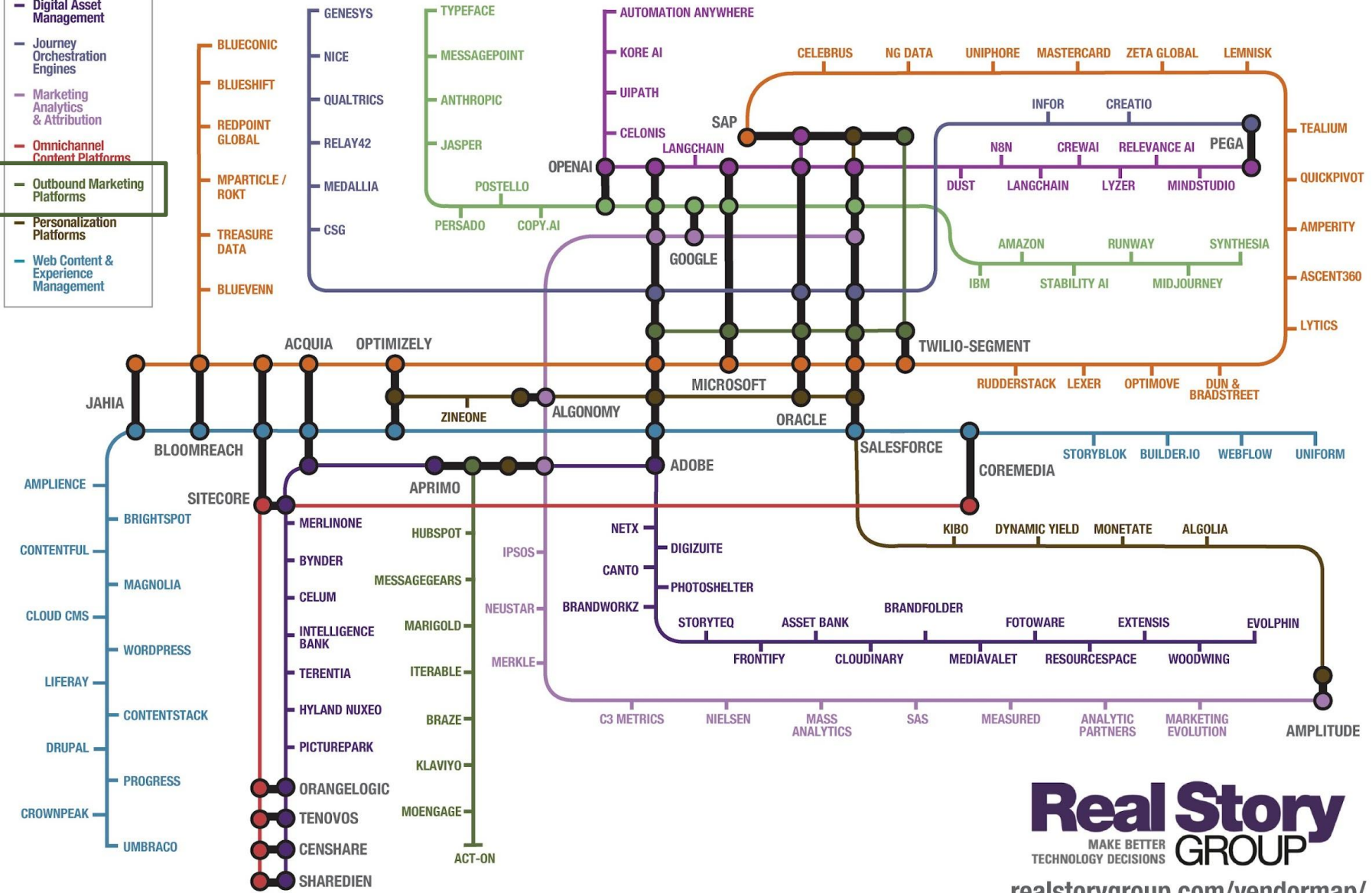
INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

MARTECH STACK VENDOR MAP

Real Story Group's vendor evaluations and advisory services have helped thousands of organizations find their way. We can help you too.

Check out Corporate Memberships today: www.realstorygroup.com/Memberships

- KEY**
- Agentic for Marketing
 - AI for Marketing
 - Customer Data Platforms
 - Digital Asset Management
 - Journey Orchestration Engines
 - Marketing Analytics & Attribution
 - Omnichannel Content Platforms
 - Outbound Marketing Platforms
 - Personalization Platforms
 - Web Content & Experience Management



realstorygroup.com/vendormap/

Webinar Agenda



- 1 Your Current Outbound Platform in Context
- 2 The Marketplace
- 3 Some Critical Decisions
- 4 Key Takeaways

A Like-Hate Relationship...



MarTech Reference Architecture for the 2020s

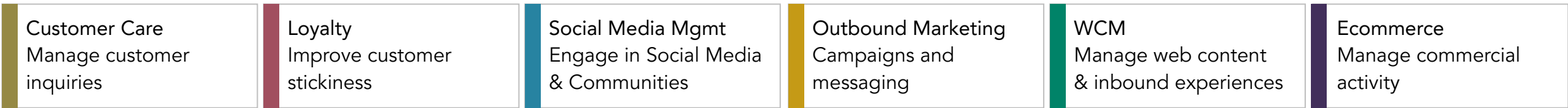
ENGAGEMENT CHANNELS



INTERACTION & DELIVERY ENVIRONMENTS

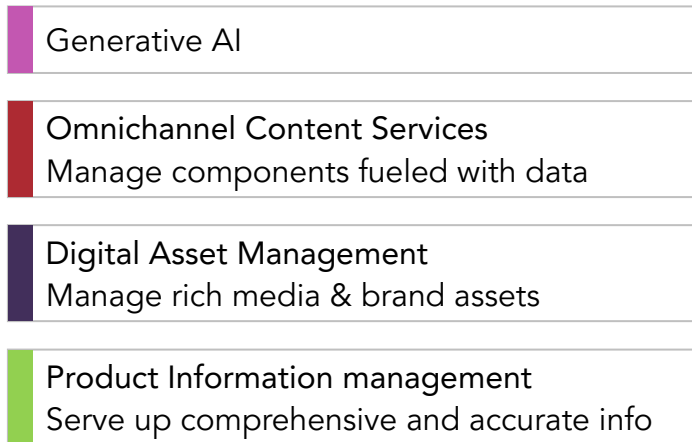


ENGAGEMENT SERVICES

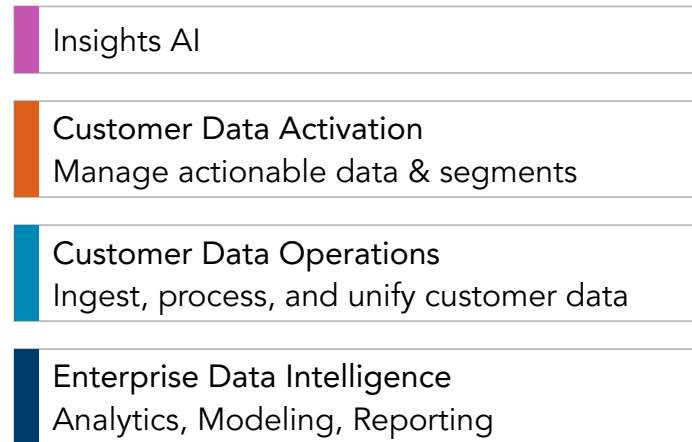


CUSTOMER FOUNDATION SERVICES

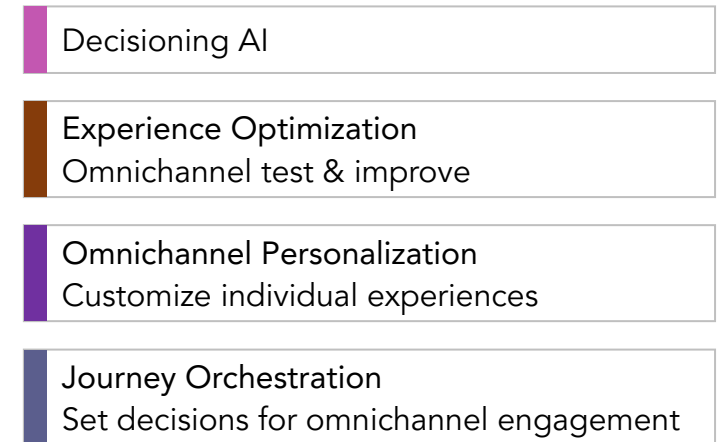
CONTENT & INFO



DATA

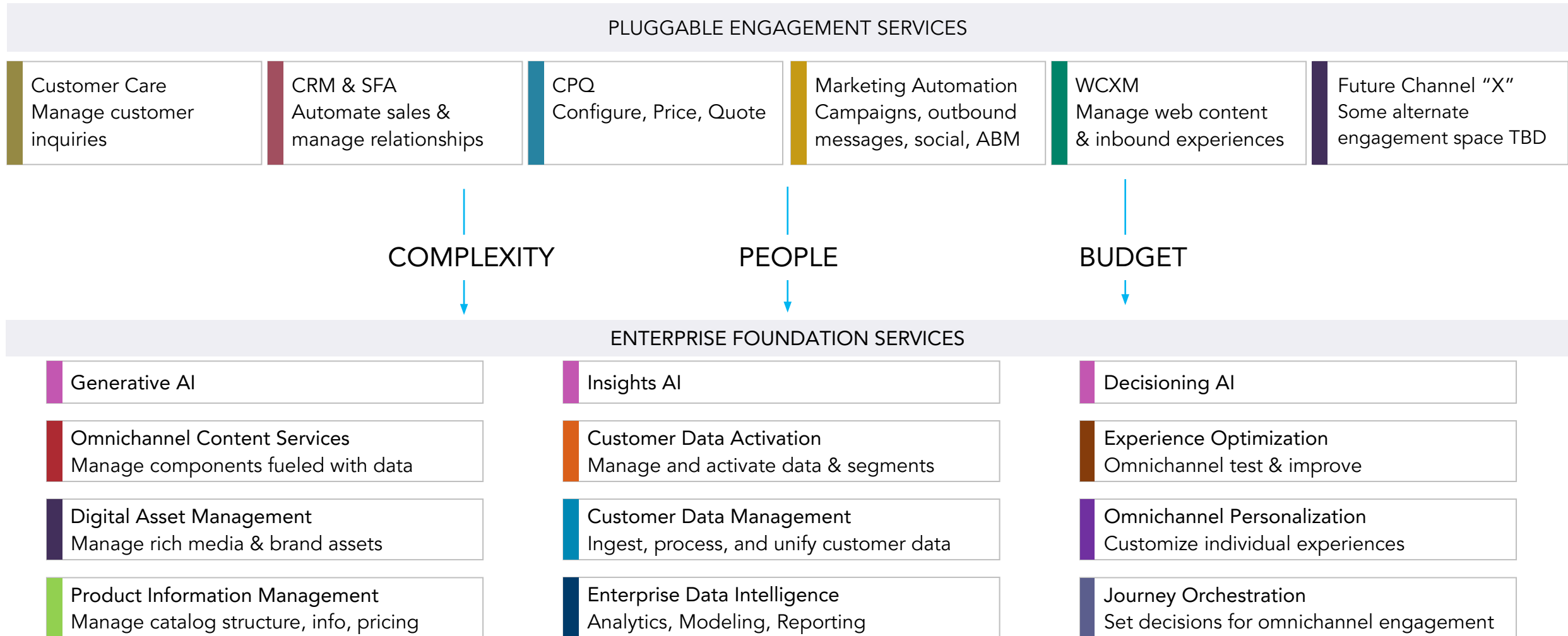


DECISIONING



Omnichannel Architecture: Loosely Coupled; Strongly Backed

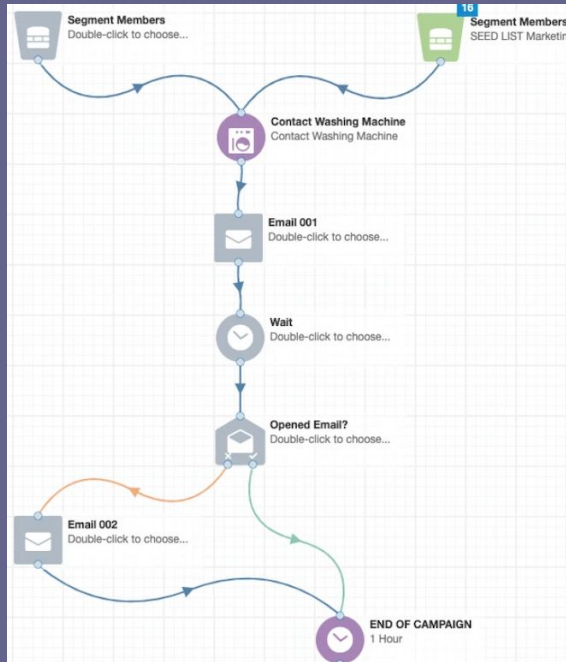
Only way to speed & scale
 Only way to omnichannel
 Only way to effective AI



Future of Decisioning: From Campaigns to Journeys

CAMPAIGNS

Provoke and channel



JOURNEYS

Listen and respond

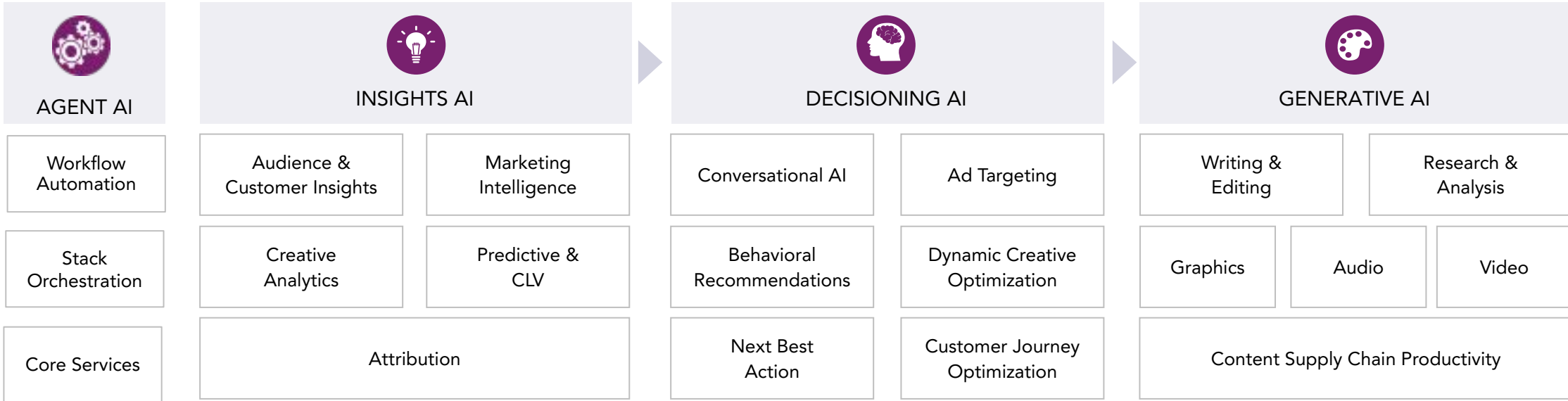
- Journeys put customer at the center of engagement
- Many vendor “journeys” are really outbound campaigns
- Journeys incorporate omnichannel touchpoints
- Journeys are always-on and not ad-hoc
- This takes hard work, and entails multi-year phase-in

Stages	Assess and Educate	1 Optimization	Enhancement
	588k	245k	227k
Threshold	Up to 5 touchpoints per month	Up to 3 touchpoints per week	No stage threshold
Touchpoints	<ul style="list-style-type: none">General newsletterLike our page!Like what we do?Consider subscription	<ul style="list-style-type: none">Online assistantNeed help deciding?Export for analysis to S3	<ul style="list-style-type: none">Recover basketExtra 15% offWrap up your order

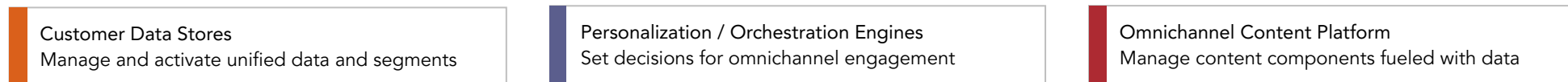
Journeys are phase-based and typically long-term. Customer-focused, channel-independent. Particularly apt for lifecycle marketing or long acquisition cycles. Tactics to be driven by Decisioning AI.

MarTech AI Reference Model Overview

DIVERSE ENGAGEMENT SERVICE EXAMPLES



FOUNDATIONAL PLATFORMS



FOUNDATIONAL CAPABILITIES



RESPONSIBLE AI



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Outbound Marketing Marketplace(s)

B2C-Oriented Email Service Providers

salesforce marketing cloud | Adobe® Campaign

MARIGOLD™

acoustic | emarsys
An SAP Company

MORE LEGACY

braze > 250k database <

ITERABLE

dotdigital

KLAVIYO

MORE MODERN

Brevo

NEWSLETTER-ORIENTED

Programmatic Senders

SINCH Mailgun

mailersend

twilio SendGrid

Postmark

Amazon SES

mailtrap by railware

B2B-Oriented Marketing Automation Platforms

Marketo™
An Adobe Company

ORACLE | eloqua

action

HubSpot

Microsoft Dynamics Marketing

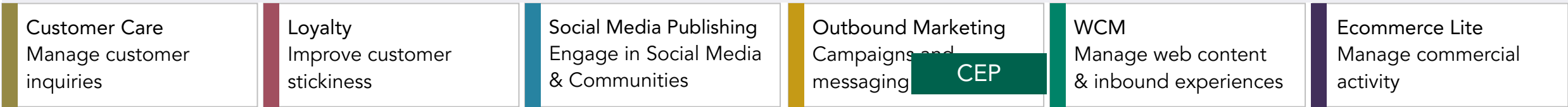
salesforce pardot

CEPs as Mid-Market “Boxed-Set*” of Services

ENGAGEMENT CHANNELS

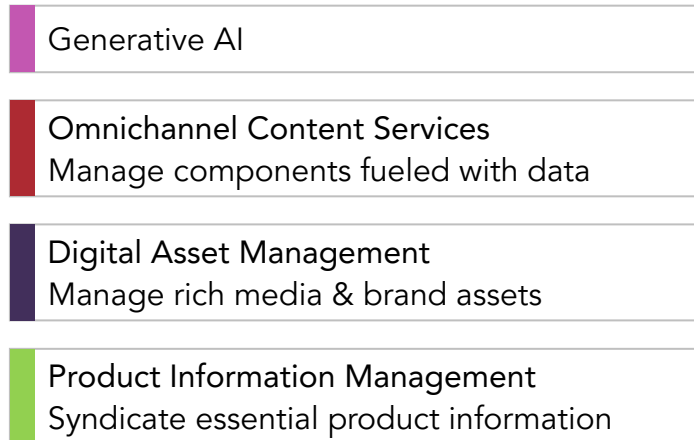


ENGAGEMENT SERVICES

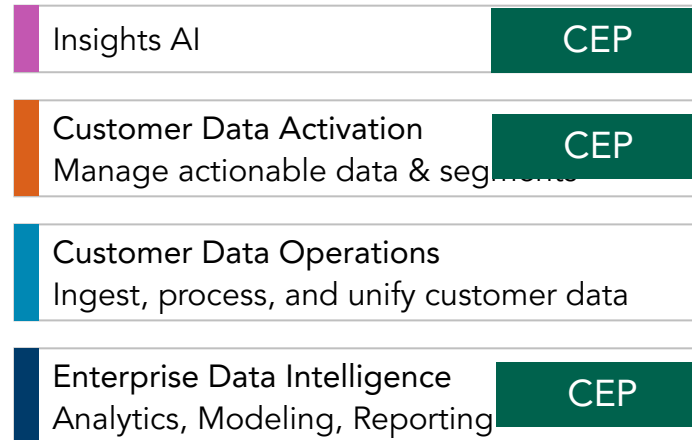


CUSTOMER FOUNDATION SERVICES

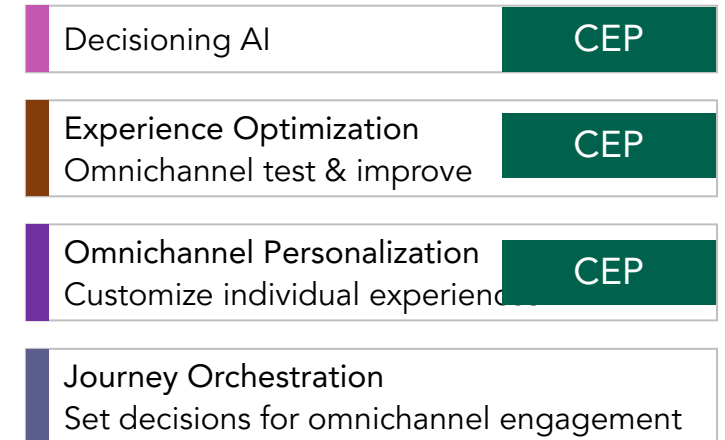
CONTENT & INFO



DATA




DECISIONING



*Not all vendors will provide all services

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Unhappy with Your Incumbent – What to Do?

MID-MARKET BUSINESS



CEP

- Can “get by” with incumbent for 2-to-3 more years
- Robust customer data ecosystem and ambitious AI strategies
- Componentizing your core customer content
- Can build decisioning services atop CDP / JO or similar

DECOUPLE & DECOMMISSION

- Slowly decouple services and information from your ESP/MAP
- Plan to build campaigns elsewhere
- Begin to transition email and then other message services to programmatic senders
- Sit back and enjoy the late ‘20s...

LARGE ENTERPRISE



1

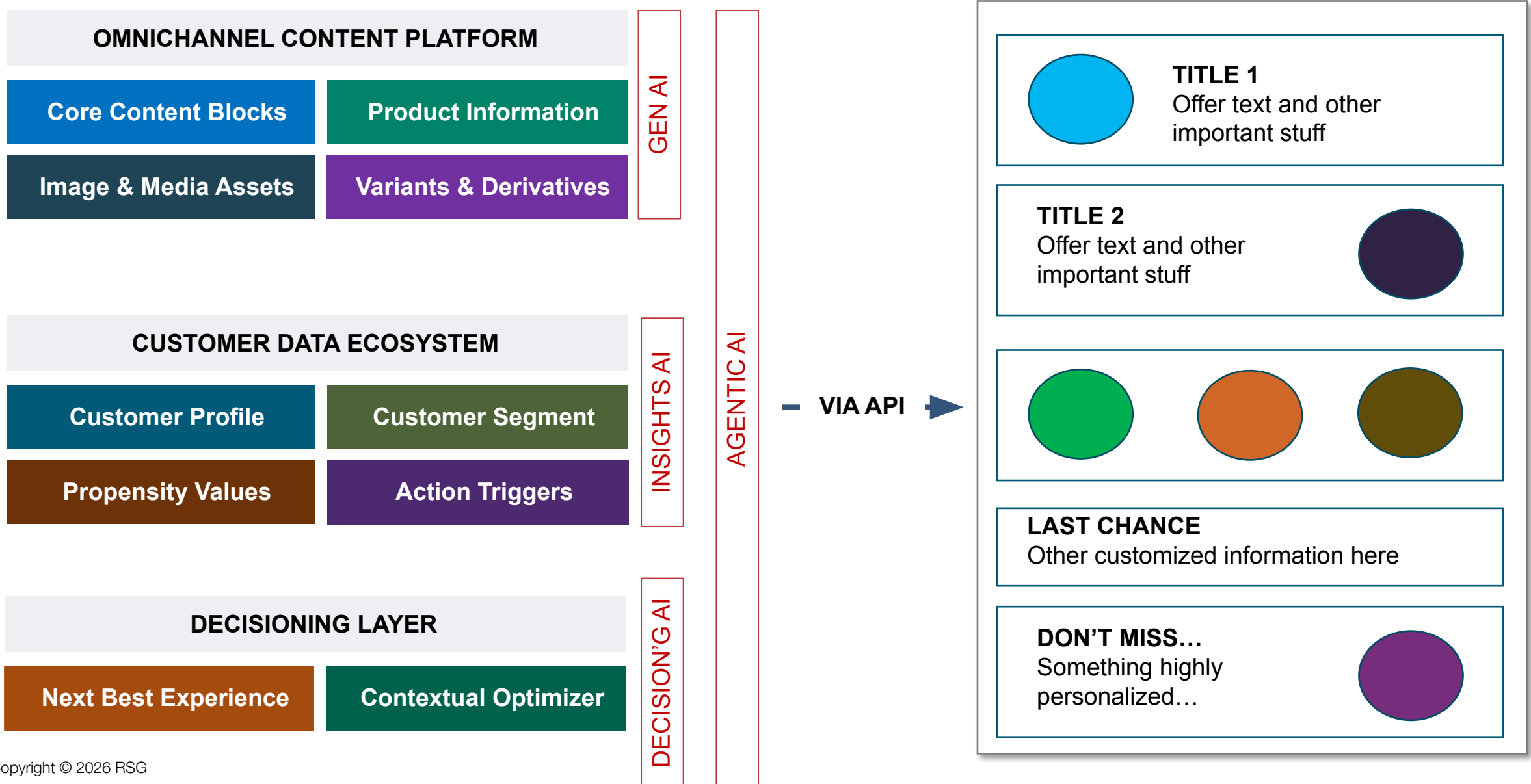
- You have largely not built out your “foundational” core services
- You have a pressing business need to switch platforms
- 5- to 8-year lifespan is justifiable and worth the migration hassle
- Outbound messaging is unusually important as a marketing motion and will remain so

REPLACE & DOWNSHIFT

- Perform an *agile* selection for a replacement platform
- Only consider “modern” platforms
- Some lower-end or newer entrants could prove plausible
- Don’t rely on Outbound Platform as CDP+CMS+Messaging source of truth

2

What “Decouple & Decommission” Looks Like...

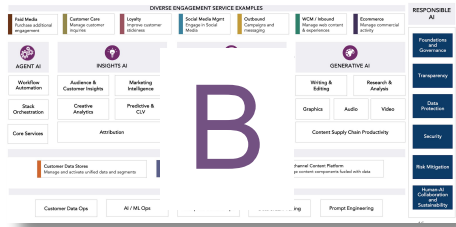


Webinar Agenda

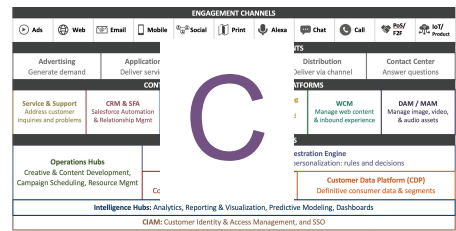
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Key Takeaways

- 1.** Consider Outbound Marketing in a Stack Context
And your stack is going to need to change for the new era
- 2.** Remain Cautious about Lighting AI in All Your Engagement Vendors
This can lead to higher costs, higher risks, and lower value due to silo-ization
- 3.** Begin to Prep for a World without ESPs and MAPs
This world is coming; it's just a question of when...
- 4.** Don't Hesitate to Replace Your Incumbent This Year If It's a Burning House
You can do better, and sometimes cheaper, in the market – just chose wisely
- 5.** Rethink Engagement in the Era of AI
Automation is going to change all your motions; focus on your core!



Tune Your AI Strategy



Optimize Your Stack



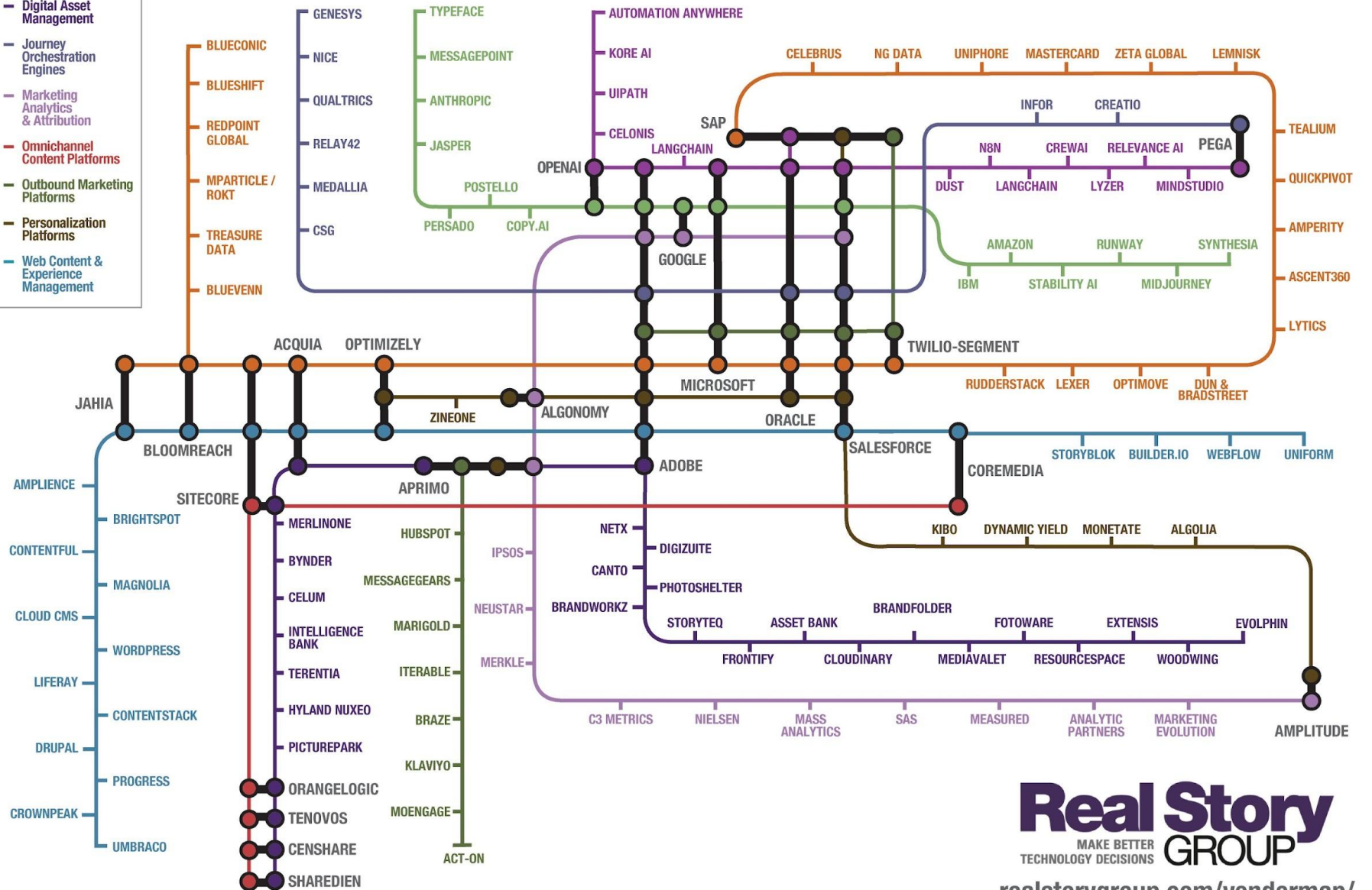
Learn from Peers

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Ecommerce Platforms
Comprehensive Product Evaluations

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AI for Marketing
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