Real Story GROUP
MAKE BETTER TECHNOLOGY DECISIONS

Webinar:

What's the Right MarTech Stack for Mid-sized Firms ?

November, 2025

MARTECH STACK VENDOR MAP

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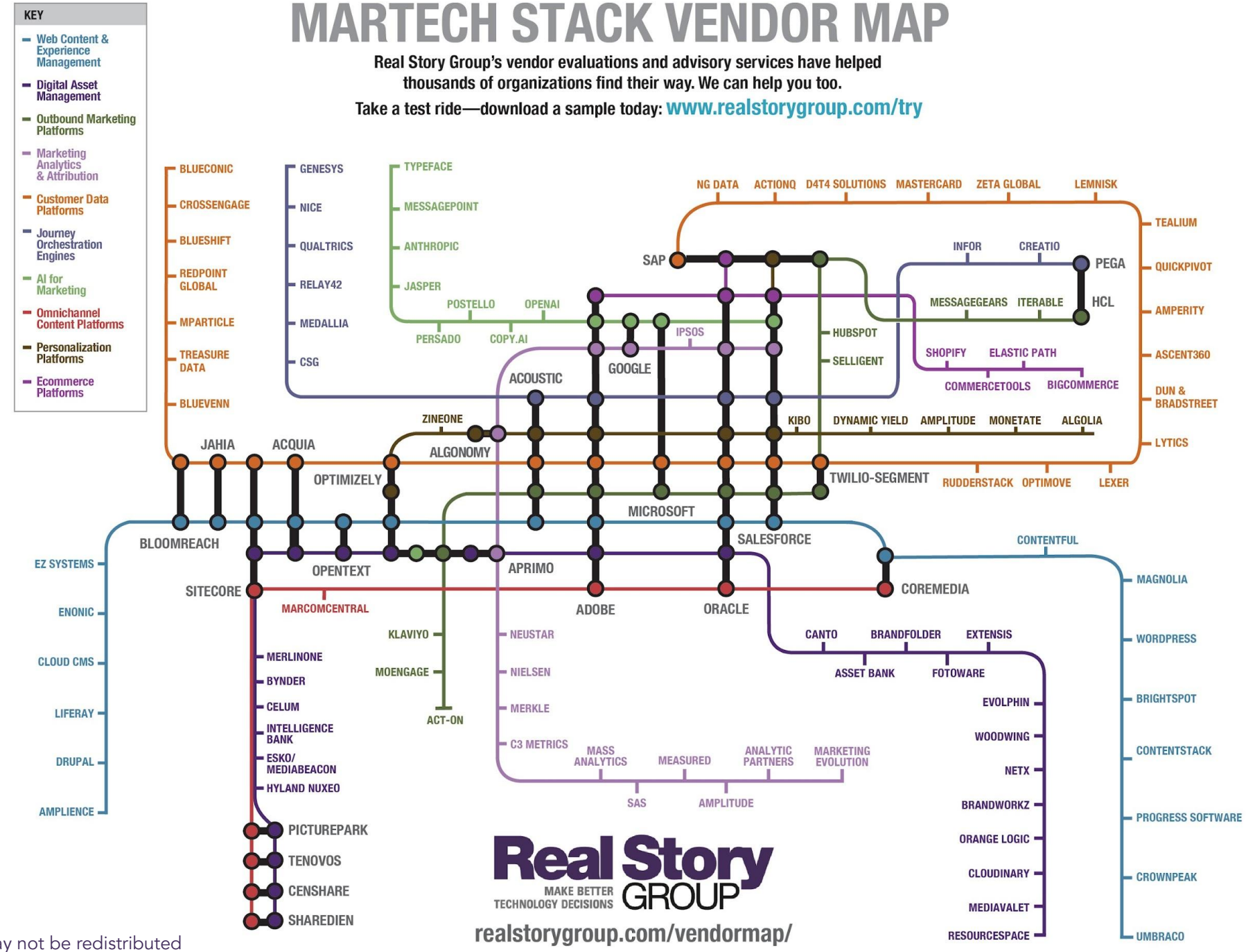

Agenda

1. The Enterprise Stack
2. What is Mid-Market?
3. Two Strategic Choices
4. Recommendations

The Composable Stack Model – B2C

ENGAGEMENT CHANNELS

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

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

CUSTOMER 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**
  Syndicate essential product information

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

“Legless” Architecture: Loosely Coupled; Strongly Backed

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

PLUGGABLE ENGAGEMENT SERVICES

- **Customer Care** — Manage customer inquiries
- **CRM & SFA** — Automate sales & manage relationships
- **CPQ** — Configure, Price, Quote
- **Marketing Automation** — Campaigns, outbound messages, social, ABM
- **WCM** — Manage web content & inbound experiences
- **Future Channel “X”** — Some alternate engagement space TBD

COMPLEXITY | PEOPLE | BUDGET

CUSTOMER FOUNDATION SERVICES

- 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
- Insights AI
- Customer Data Activation — Manage and activate data & segments
- Customer Data Management — Ingest, process, and unify customer data
- Enterprise Data Intelligence — Analytics, Modeling, Reporting
- Decisioning AI
- Experience Optimization — Omnichannel test & improve
- Omnichannel Personalization — Customize individual experiences
- Journey Orchestration — Set decisions for omnichannel engagement

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Traditional View of Business Tiers

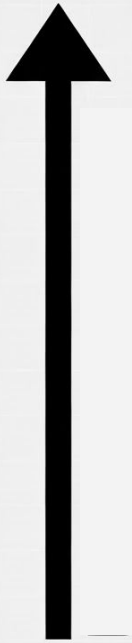
Typical Business Tiers

Tier	Employee Count	Revenues
Enterprise	1000+	> $1b
Mid-Market	100-999	$50m - 1lb
Small	< 100	< $50m

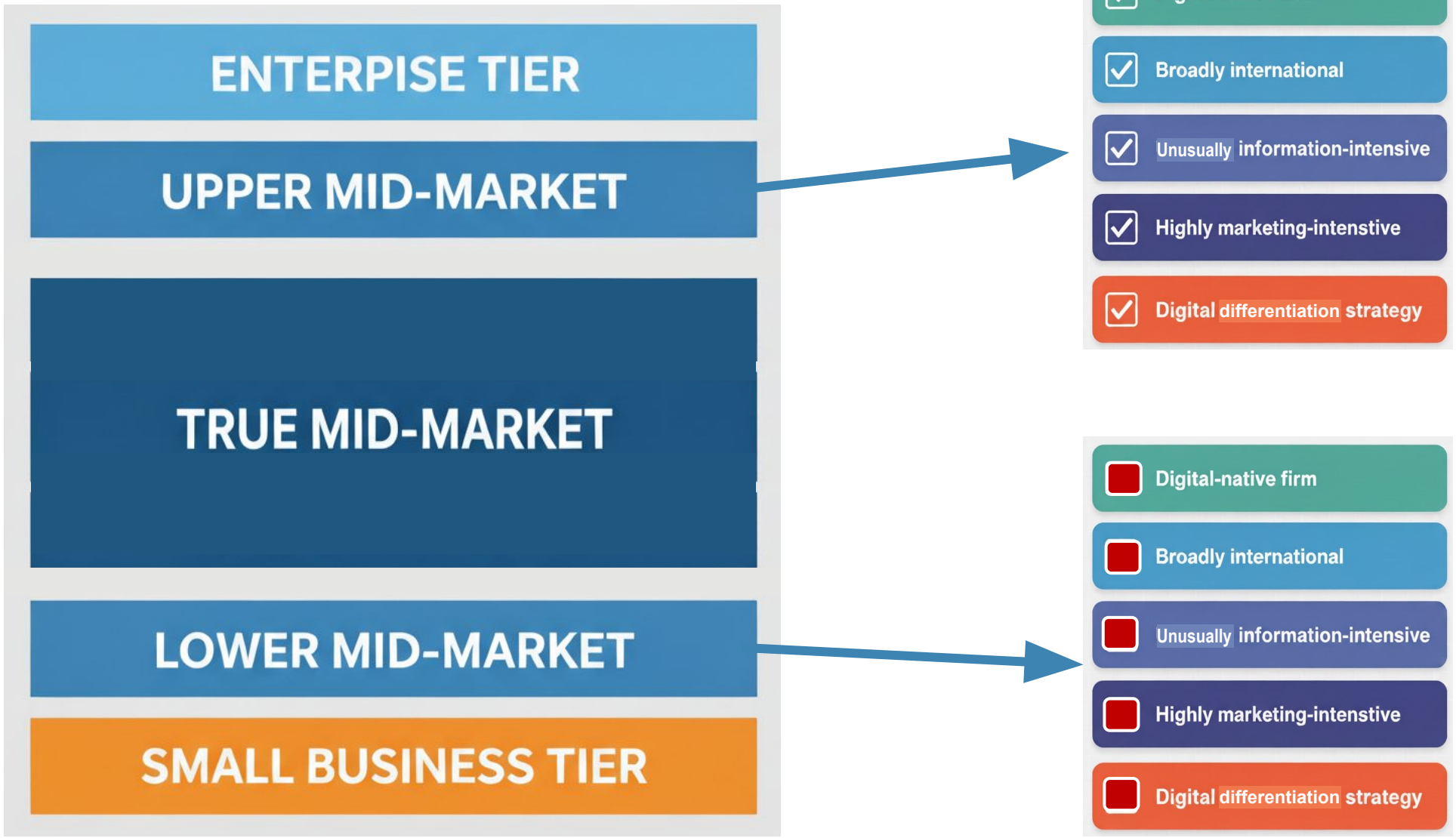
MarTech Accelerators

Factors that move a company up a tier

- Digital-native firm
- Broadly international
- Unusually information-intensive
- Highly marketing-intenstive
- Digital differentiation strategy

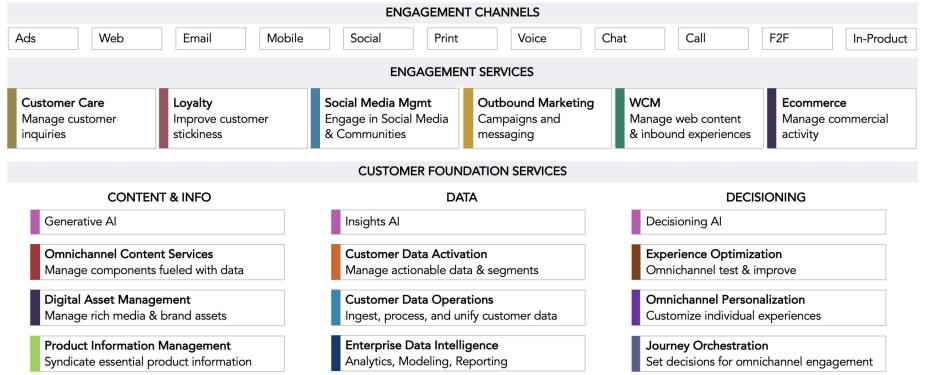


Three Tiers from a MarTech Perspective…

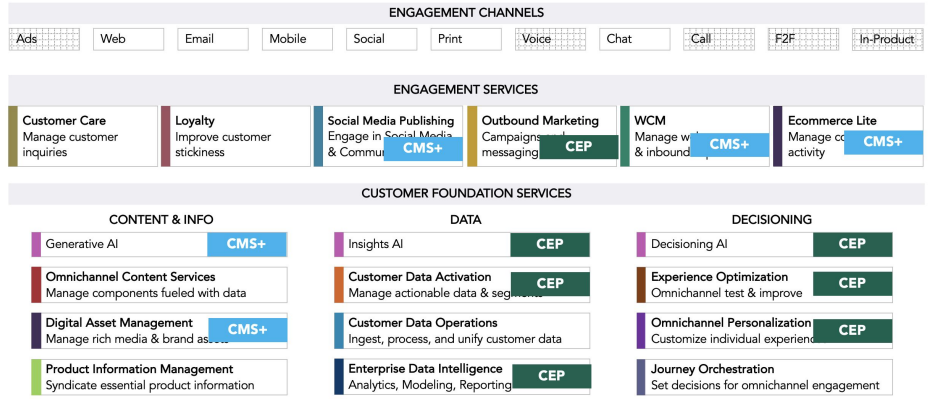


Three Tiers from a Stack Perspective…

Composable Stack



Boxed-Set Stack



Industry Suite

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1 The Enterprise Stack Model – B2C

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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

CUSTOMER 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** — Syndicate essential product information

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

Stack Composability Wins: MarTech Vendors Deployed by 30 Large / Global Enterprises

ENGAGEMENT SERVICES

Customer Care
SAP, servicenow, ATLASSIAN, salesforce, PEGA, zendesk, sprinklr, ORACLE

Loyalty
augeo, Epsilon, PHAEDON, COMARCH, salesforce

Social Media / Search
sprinklr, QUID, Brandwatch, emplifi, Resolver. A KROLL BUSINESS, MomentFeed An uberall company

Outbound Marketing
Adobe, salesforce, ITERABLE, braze, klaviyo, twilio, MessageGears, dotdigital, HubSpot, uberall, SlickText, ORACLE, MARIGOLD ENGAGE

Web Content Mgmt / CMS
contentful, Adobe, COREMEDIA, SITECORE, Optimizely, BRIGHTSPOT, bloomreach, Jamstack, ACQUIA, magnolia, WordPress, storyblok, Drupal

Ecommerce
Adobe, salesforce, SAP, shopify, adimo, VTEX, MikMak, HALO, Shiji

CUSTOMER FOUNDATION SERVICES

CONTENT & INFO

Generative AI
[PERSADO], Jasper

Omnichannel Content Services
SITECORE, censhare

Digital Asset Management
Canto, censhare, Adobe, SITECORE, orangelogic, aprimo, bynder, ACQUIA, opentext, wistia, RevBase, Extensis, ECS Media Suite, xytech

Product Information Management
SALSIFY, inriver, salesforce, servicenow, STIBO SYSTEMS MASTER DATA MANAGEMENT

DATA

Insights AI
ThoughtSpot, qualtrics XM, Google, aws

Customer Data Activation
blueconic, Optimizely, Adobe, Meta, Google, salesforce, /LiveRamp, TEALIUM, lytics

Customer Data Ops
TREASURE DATA, TEALIUM, snowflake, adverity, aws, Informatica, Microsoft, panoply by SQream, Google

Enterprise Data Intelligence
Google, Microsoft, Adobe, Numerator, Heap by Contentsquare, alteryx

DECISIONING

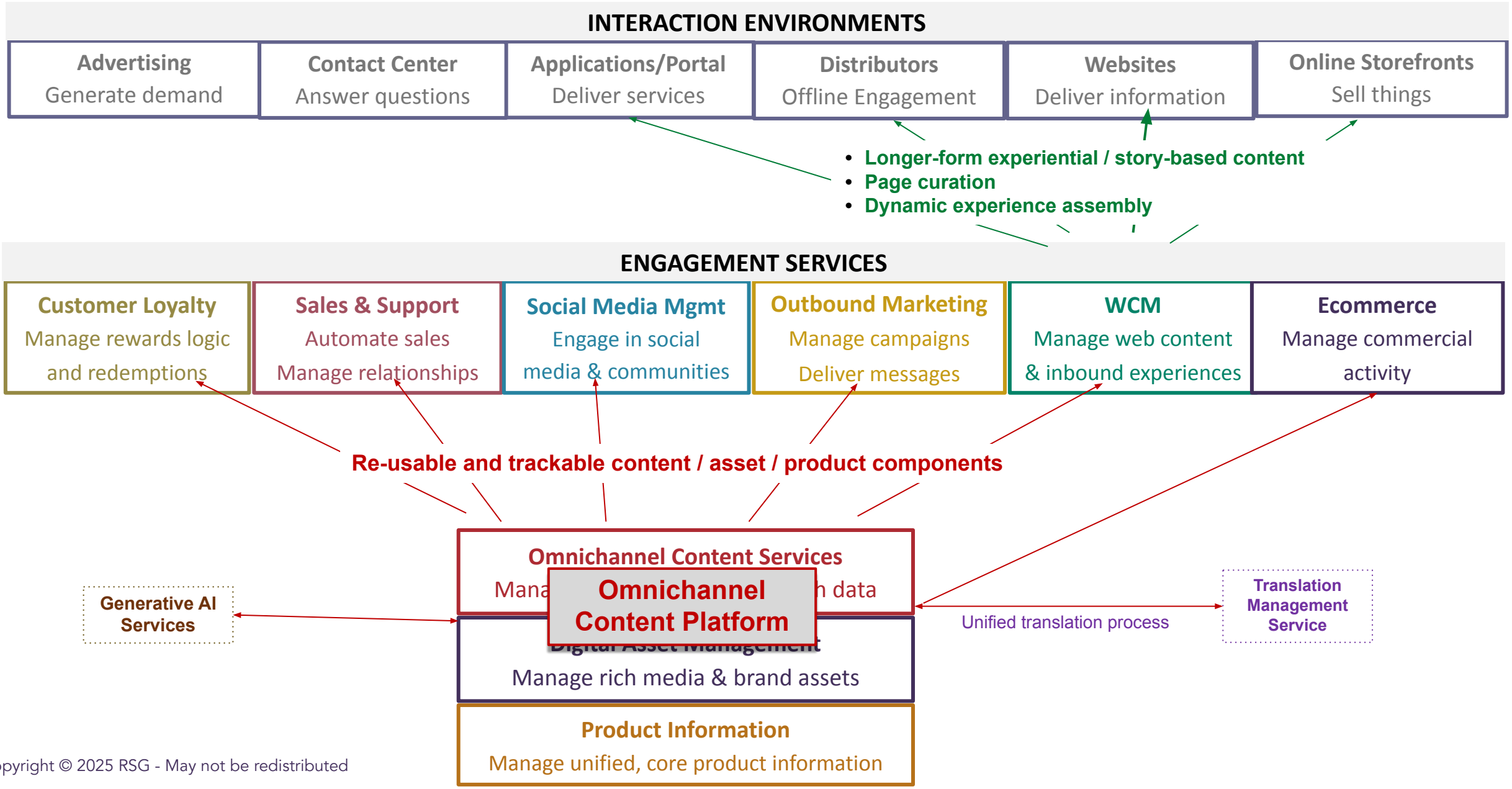
Decisioning AI
PEGA

Experience Optimization
folloze, PathFactory, Bannerflow, Optimizely, conversica powerfully human, creativex

Omnichannel Personalization
SAP, PEGA, salesforce, Google, blueconic, Adobe, Optimizely, ORACLE, lytics

Journey Orchestration
TREASURE DATA, Relay42, PEGA, csg

Example: Content Management Future Vision



The Composable Stack in the Upper Mid-Market

Pursue an "Enterprise Lite" technology strategy

- ❑ Less developer-heavy platforms
- ❑ No bundled suites
- ❑ More "Switzerland" vendors
- ❑ Consider iPaaS-based integration services
- ❑ Keep your dreams and edge cases in check

Decouple for capabilities and agility…

WCM / CMS
Manage web content & inbound experiences

Digital Asset Management
Manage rich media & brand assets

Social Media Publishing
Engage in Social Media & Communities

Outbound Marketing
Campaigns & messaging

Customer Data Activation
Leverage actionable data & segments

Data Intelligence
Analytics, Modeling, Reporting

2 The True Mid-Market "Boxed-Set" Model: A Superset* of Services

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Loyalty
Improve customer stickiness

Social Media Publishing
Engage in Social Media & Commu… CMS+

Outbound Marketing
Campaigns and messaging CEP

WCM
Manage w… & inbound… CMS+

Ecommerce Lite
Manage co… activity CMS+

CUSTOMER FOUNDATION SERVICES

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- **Omnichannel Personalization** — CEP
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INBOUND | DATA + OUTBOUND

*Not all vendors will provide all services

Customer Engagement Platforms (CEPS)

Definition:

CEPS are integrated plafforms that combine lightweight customer data management with enagement capabilities, and optionally a range of other services, enabling muti-channel interactions.

Core Characteristics:

Engagement-First Approach: Focus on customer data data for for personalized experiences across channels

Stack-in-a-Box: Offer bundeles like customer dat ustomer data agrregation, campaign management and delivery in a single platform

Ease of Use:
Simplife marketing team operations, reducing IT deperdency for integration or implementation

A Closer Look

Useful When….

- You lack significant MarTech staff or expertise
- You're willing to trade off depth for breadth
- Your budget precludes enterprise-tier vendors
- You don't need to or don't have resources to heavily customize key features

Problematic When….

- You hit a functional ceiling in the platform
- The vendor should become unstable
- You fit or drift outside the vendor's sweet spot for clientele

CEP Market Summary

- Young marketplace where vendors don't always neatly fit into categories, so take these boxes with grain of salt
- Typically modularized with capabilities that can be purchased a' la carte
- Fall into three categories, on a spectrum of complexity / robustness / cost
- Industry overall faces some maturity issues, so prospective licensees should vet carefully

Simpler Outbound

Very messaging oriented with only light other marketing services

Est. Cost: $12-24k / year

Mid-Market CEPs

MarTech "stack in a box" with wide range of potential services

Est. Cost: $30-120k / year

Engagement CDPs

CDPs that optionally bundle outbound marketing services

Est. Cost: $90-200k / year

CMS+
Site-in-a-Box

CMS+ Vendors

Progress Sitefinity™

WordPress

Drupal™

Other bundled inbound* services

+ SEO / AEO
+ Forums
+ Comments
+ Polls
+ Commerce Lite
+ Chatbot
+ Custom Apps

+ A/B Testing
+ Site Search
+ GenAI
+ Forms
+ Newsletter
+ Registration
+ Still more…

Potential CEP Overlap

* Mostly

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Closing Advice…

1. Important to distinguish between Upper vs True Mid-Market
   - Defines how composable your stack should be; avoid mismatches
2. There are always exceptions
   - Intensivity, transformation appetite, internal capacity, other variables can be decisive
3. Putting your firm in the right category offers opportunities
   - Upper Mid-Market: outcompete on advanced services for customer engagement
   - True Mid-Market: outcompete on breadth of services run by leaner teams
4. RSG can ensure you take the right direction 🎯
   - Discern where you stand
   - Quickly set the right roadmap
   - Make sure you pick the best-fit, best-value solutions

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