



# Selecting MarTech Platforms in Our AI Era

April 2026

# A Different Kind of Firm...

- Martech & AI 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

GEEKS	MYSTICS
LOSERS	POSERS

“the mystical quadrant”

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

# Agenda



- 1 Modernize Your Stack Thinking
- 2 AI in a Composable Stack
- 3 Avoid Pre-Modern Approaches
- 4 Modern Approach
- 5 Ten Key Takeaways

# MarTech Architecture for the 2020s: Customer Data As Foundation Layer

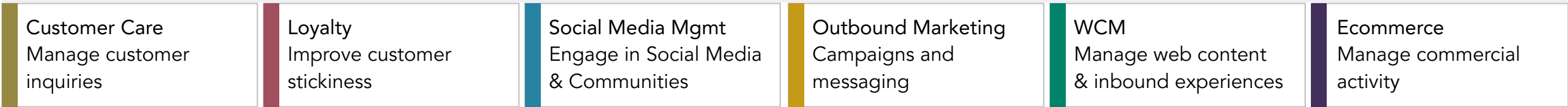
## ENGAGEMENT CHANNELS



## INTERACTION & DELIVERY ENVIRONMENTS

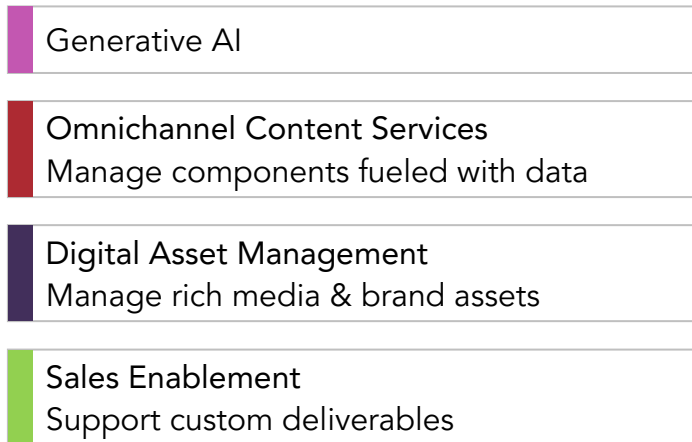


## ENGAGEMENT SERVICES

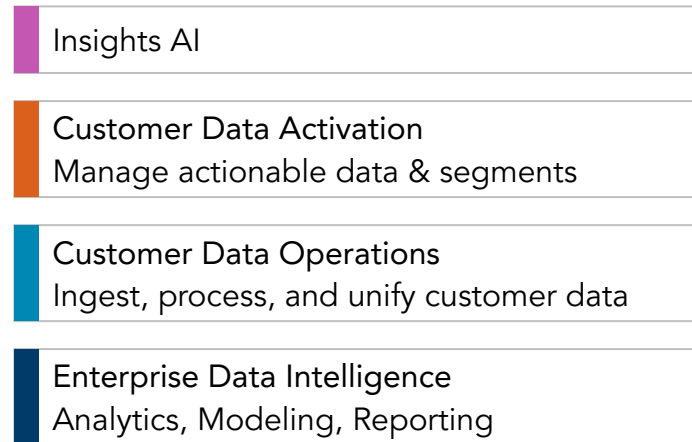


## CUSTOMER FOUNDATION SERVICES

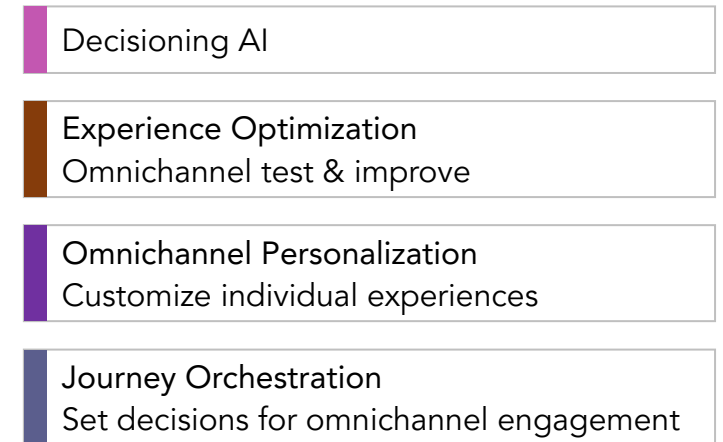
### CONTENT & INFO



### DATA



### DECISIONING



# Loosely Coupled...Strongly Backed

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

PLUGGABLE ENGAGEMENT SERVICES

<b>Customer Care</b> Manage customer inquiries	<b>Loyalty</b> Encourage stickiness with rewards	<b>Social Media Mgmt</b> Engage in social media & communities	<b>Outbound Marketing</b> Manage campaigns Deliver Messages	<b>WCM / CMS</b> Manage web content & inbound experiences	<b>Ecommerce</b> Manage commercial activity
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COMPLEXITY

PEOPLE

BUDGET



- 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 actionable 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

ENTERPRISE FOUNDATION SERVICES

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

## ENGAGEMENT SERVICES

<p>Customer Care</p>	<p>Loyalty</p>	<p>Social Media / Search</p>	<p>Outbound Marketing</p>	<p>Web Content Mgmt / CMS</p>	<p>Ecommerce</p>
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## CUSTOMER FOUNDATION SERVICES

### CONTENT & INFO

<p>Generative AI</p>
<p>Omnichannel Content Services</p>
<p>Digital Asset Management</p>
<p>Product Information Management</p>

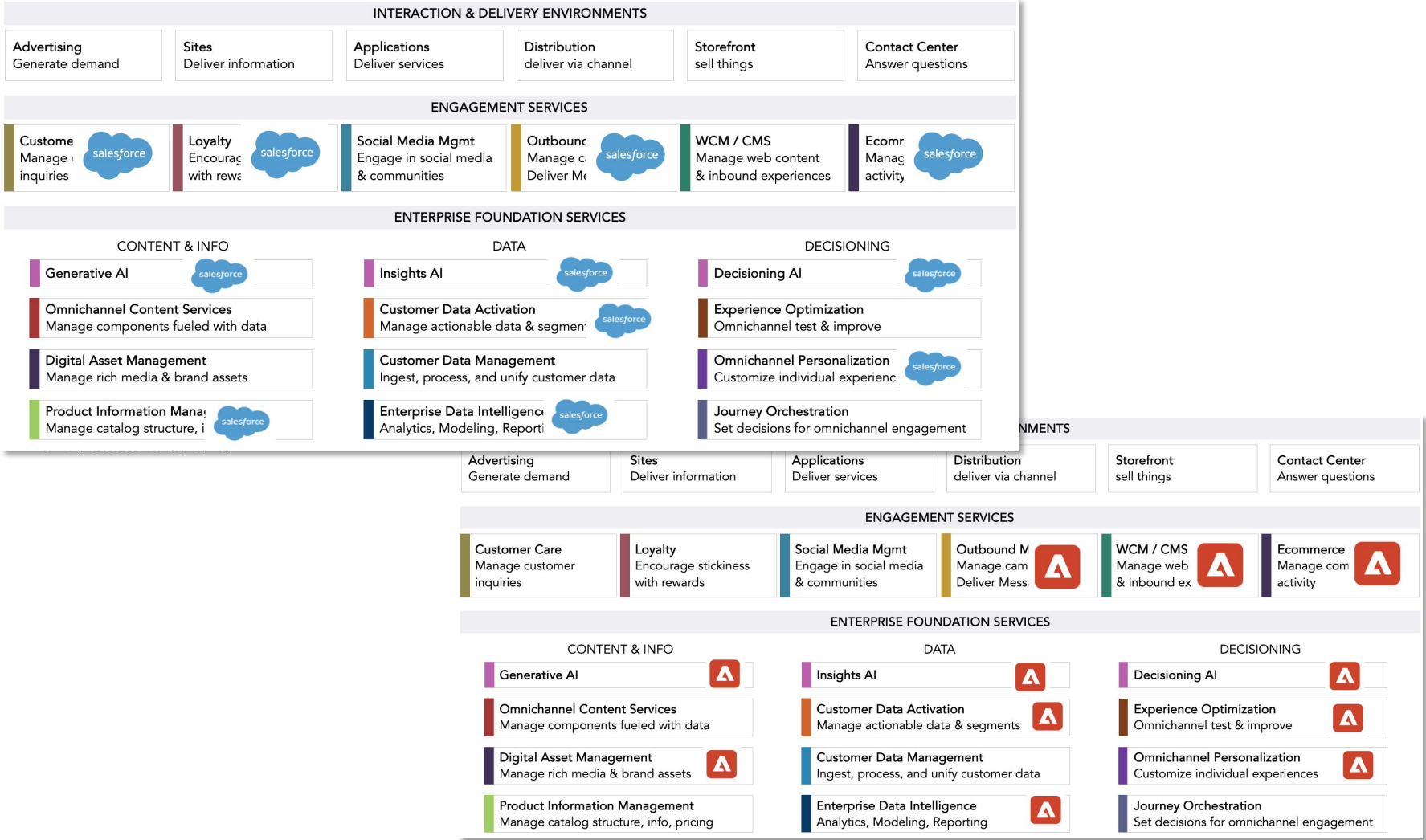
### DATA

<p>Insights AI</p>
<p>Customer Data Activation</p>
<p>Customer Data Ops</p>
<p>Enterprise Data Intelligence</p>

### DECISIONING

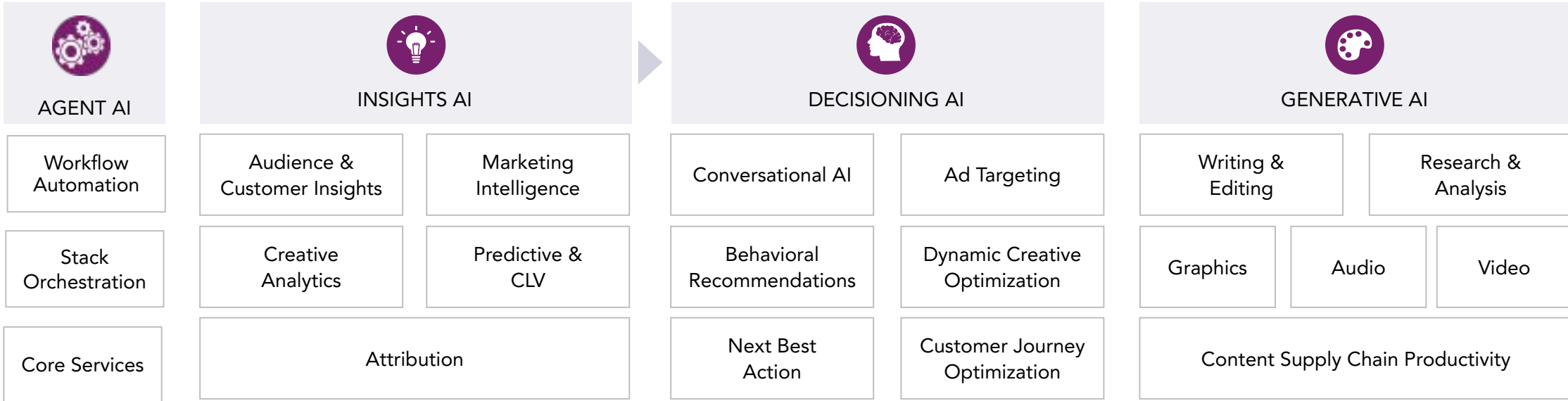
<p>Decisioning AI</p>
<p>Experience Optimization</p>
<p>Omnichannel Personalization</p>
<p>Journey Orchestration</p>

# What Major Vendors Pitch...



# MarTech AI Reference Model: AI as a Layer

## DIVERSE ENGAGEMENT SERVICE EXAMPLES



## FOUNDATIONAL PLATFORMS



## FOUNDATIONAL CAPABILITIES



## RESPONSIBLE AI



# Nine agentic scenarios you can pursue\*

Insight Acceleration



Customer & Prospect Intelligence



Operational Analytics & Forecasting



Audience & Segment Optimization

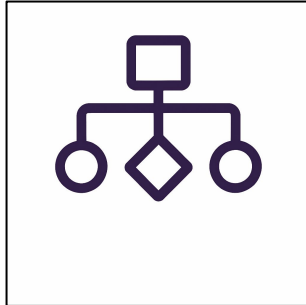
Campaign & Execution Acceleration



Personalized Content Activation



Campaign & Execution



Orchestration & Decisioning

Support and Process Improvement



Content Workflow Automation



Support & CX Automation



Meeting & Interaction Intelligence

\* To some degree: crawl/walk/run...

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# Six Traditional Approaches to Evaluation...and a Bonus



Don't Let It Come Down to This...



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# Modern Concepts

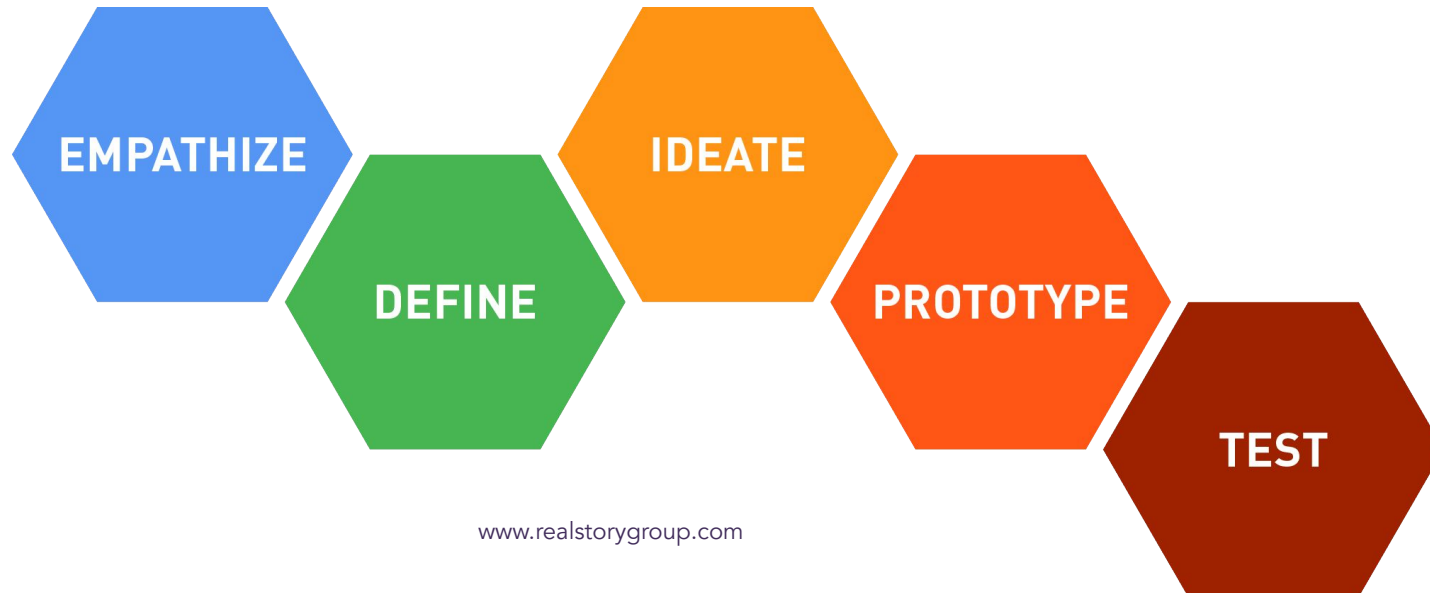
“Design-Thinking”  
Business-focused  
Team-based  
Empirical  
Iterative  
Adaptive

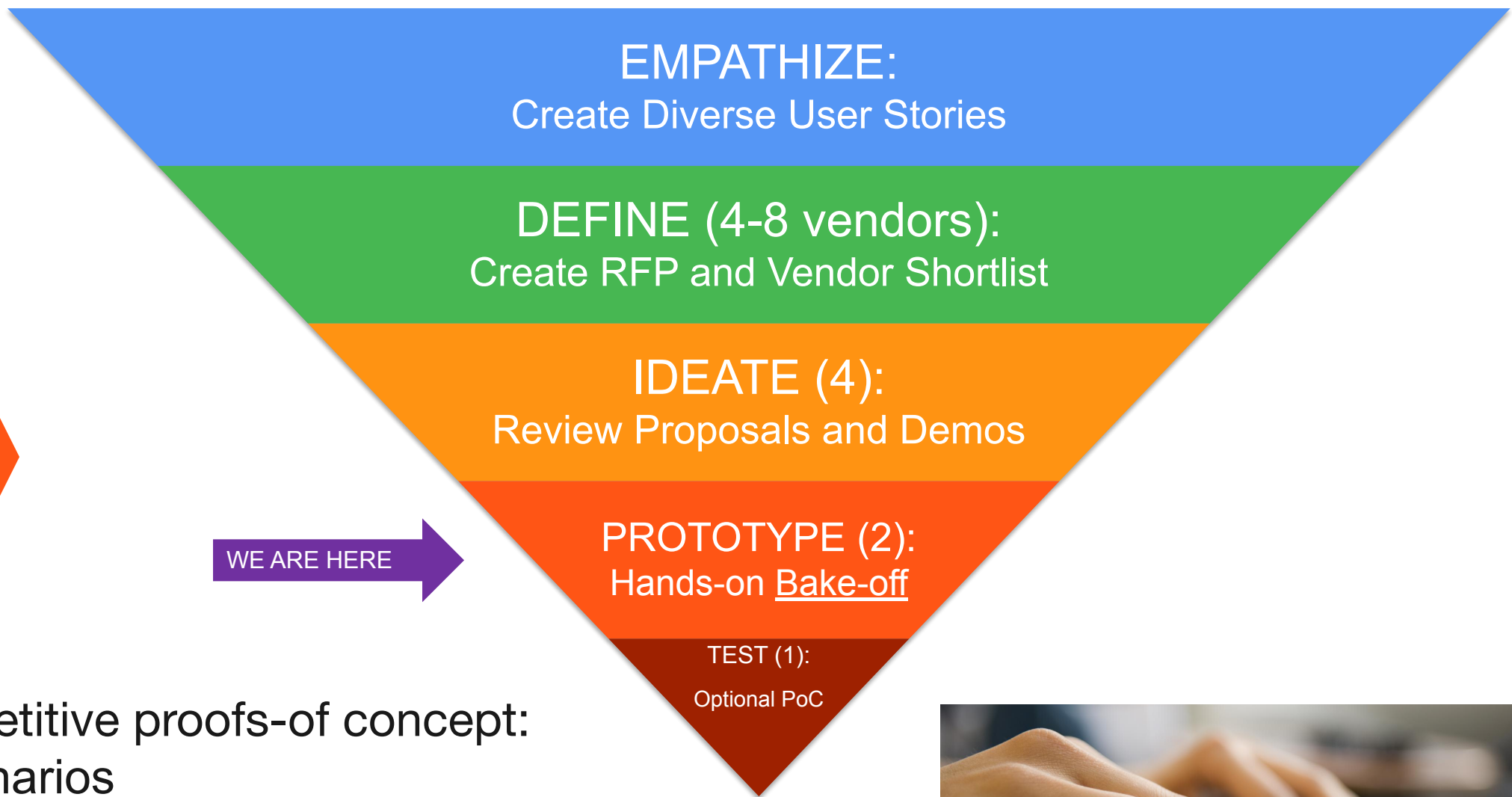
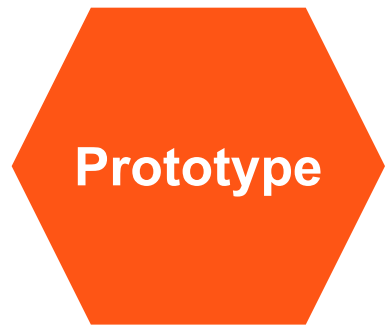


# What Is Design Thinking?

“A **human-centered** approach to innovation that draws from the **designer's toolkit** to **integrate** the needs of **people**, the possibilities of **technology**, and the requirements for **business success**.”

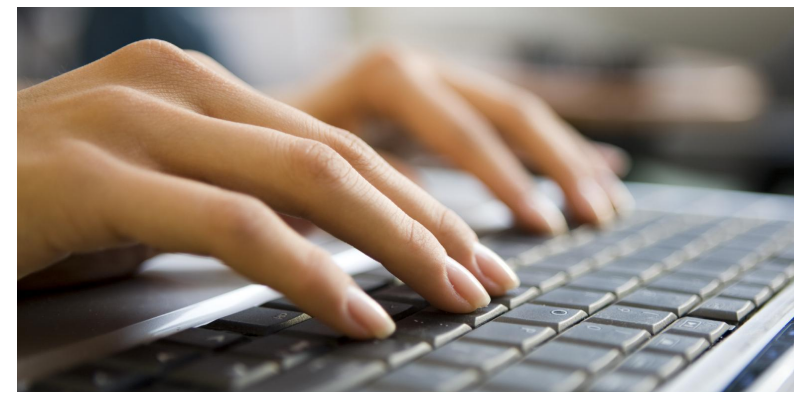
- Stanford University Professor and founder of design firm IDEO, David Kelley





Conduct competitive proofs-of concept:

- Real scenarios
- Real content / data
- Real people
- Real environment



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# Key Takeaways

1. Get clear about your stack and exploit tectonic changes
2. Get clear about your business case & cross-departmental team
3. Never default to an incumbent vendor in your stack
4. Center your RFX on people-oriented use cases
5. Don't fixate on embedded AI services – these are *features*
6. Prepare for a long term where AI and Agentic are *layers*
7. Follow an adaptive model that focuses on iteration and learning
8. Therefore, never skip a bake-off
9. Negotiate early and often
10. RSG can guide you to success!

# Thank you

Stay in touch!

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- [linkedin.com/company/realstorygroup/](https://www.linkedin.com/company/realstorygroup/)

Get RSG on your side...  
[realstorygroup.com/Membership](https://realstorygroup.com/Membership)

Questions?

