Real Story GROUP
MAKE BETTER TECHNOLOGY DECISIONS

Webinar

AI Agents and the Future of Your MarTech Stack

July 31,2025

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.

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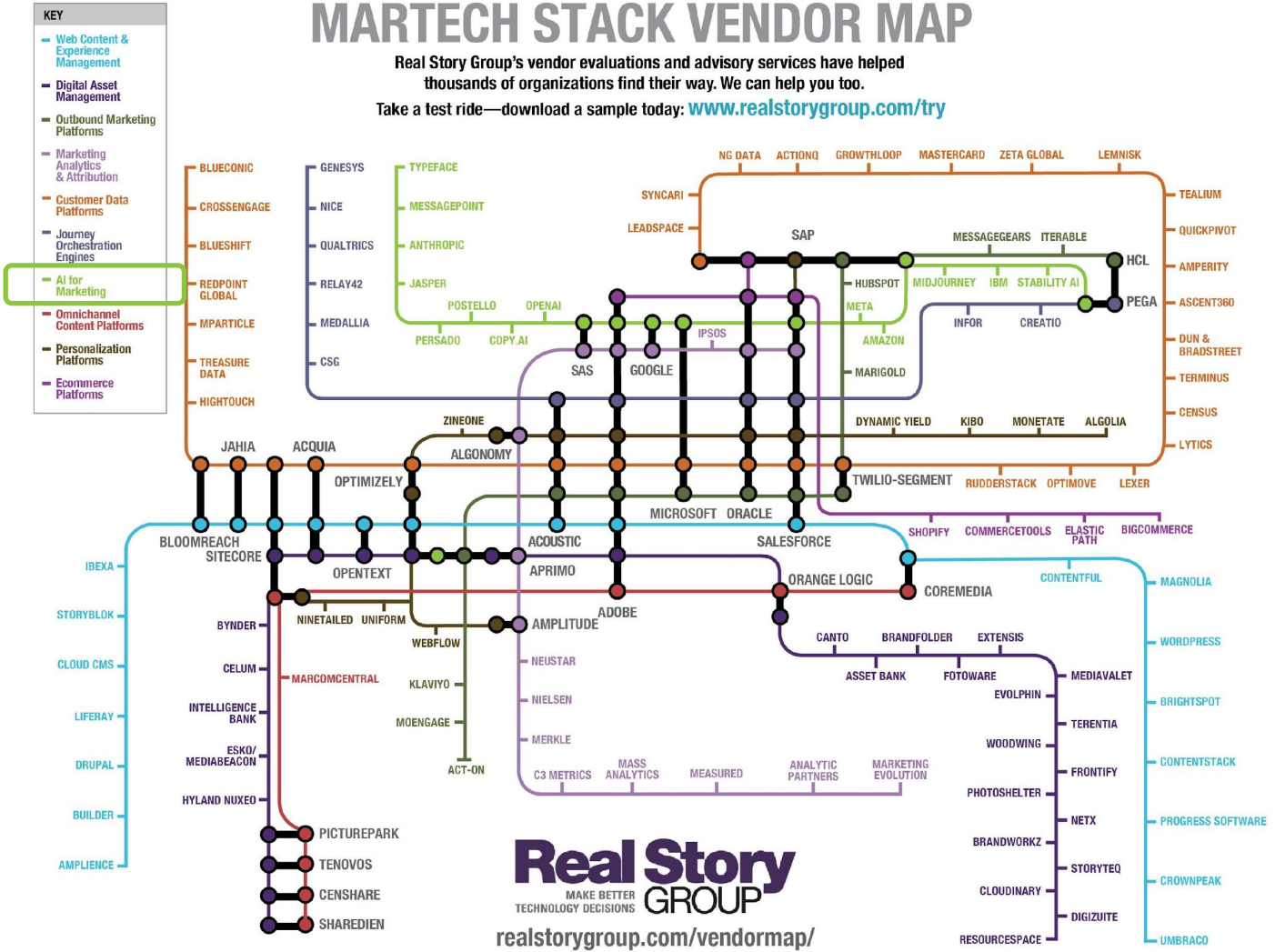

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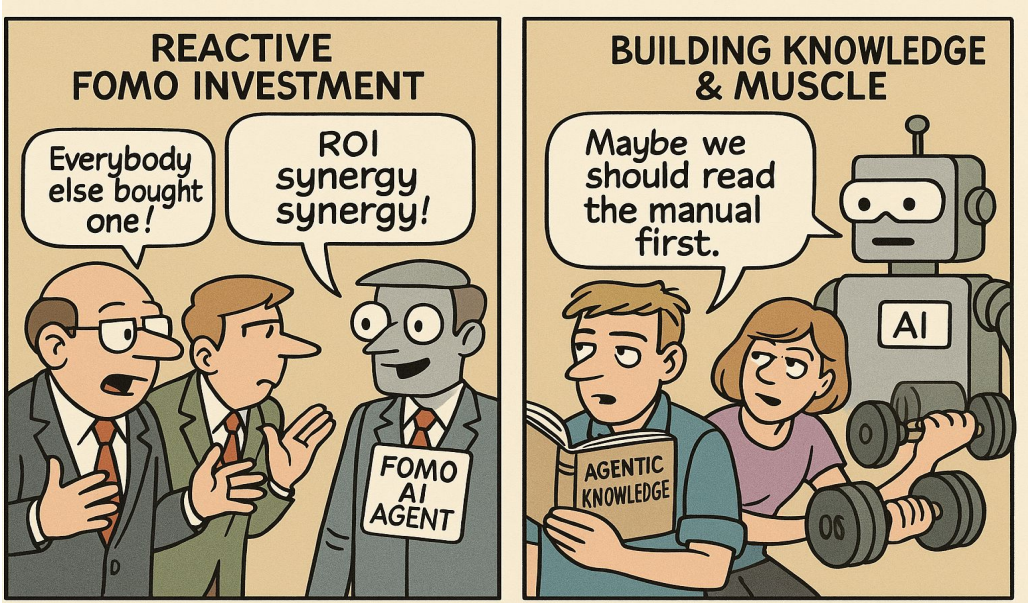

Avoid reactive, FOMO-driven investments and instead build internal knowledge and operational muscle to scale agentic technologies effectively.

Agenda

1. Core Reference Models
2. AI Agent Use Cases for MarTech
3. Agent AI Vendor Landscape
4. How RSG Can Help

MarTech Reference Architecture: B2C

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

Deeper Look: Agent AI Use Cases

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.

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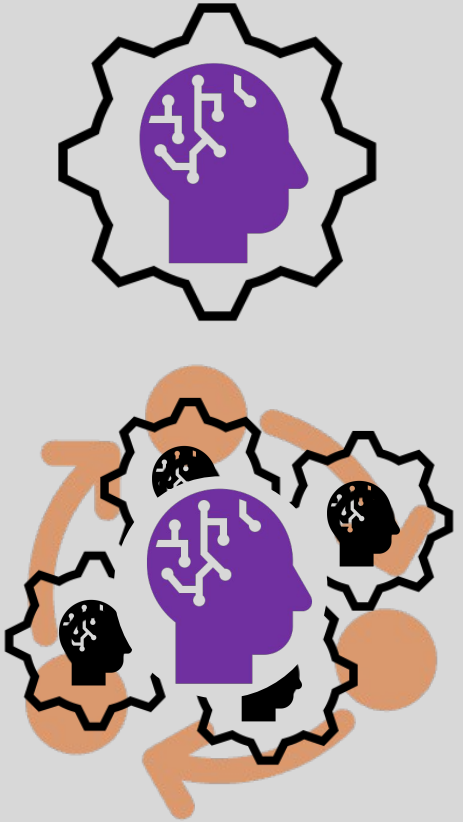
Agent AI Extends Established Use Cases & Offers New…

In most cases, **agents extend existing use cases** adding autonomy, memory, and goal-seeking to each siloed function (insight, decisioning, & generative)

New uses cases enable cross-functional orchestrations that link those capabilities into self-correcting loops

Traditional AI doesn't do this. Agent AI creates a "flywheel" effect of continuous self-improvement.

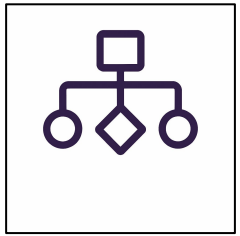


Agents in Your Customer Foundation Layer: Nine Scenario Categories

Customer & Prospect Intelligence

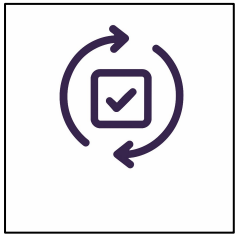
Personalized Content Activation

Audience & Segment Optimization



Orchestration & Decisioning

Campaign & Execution



Content Workflow Automation

Support & CX Automation

Meeting & Interaction Intelligence

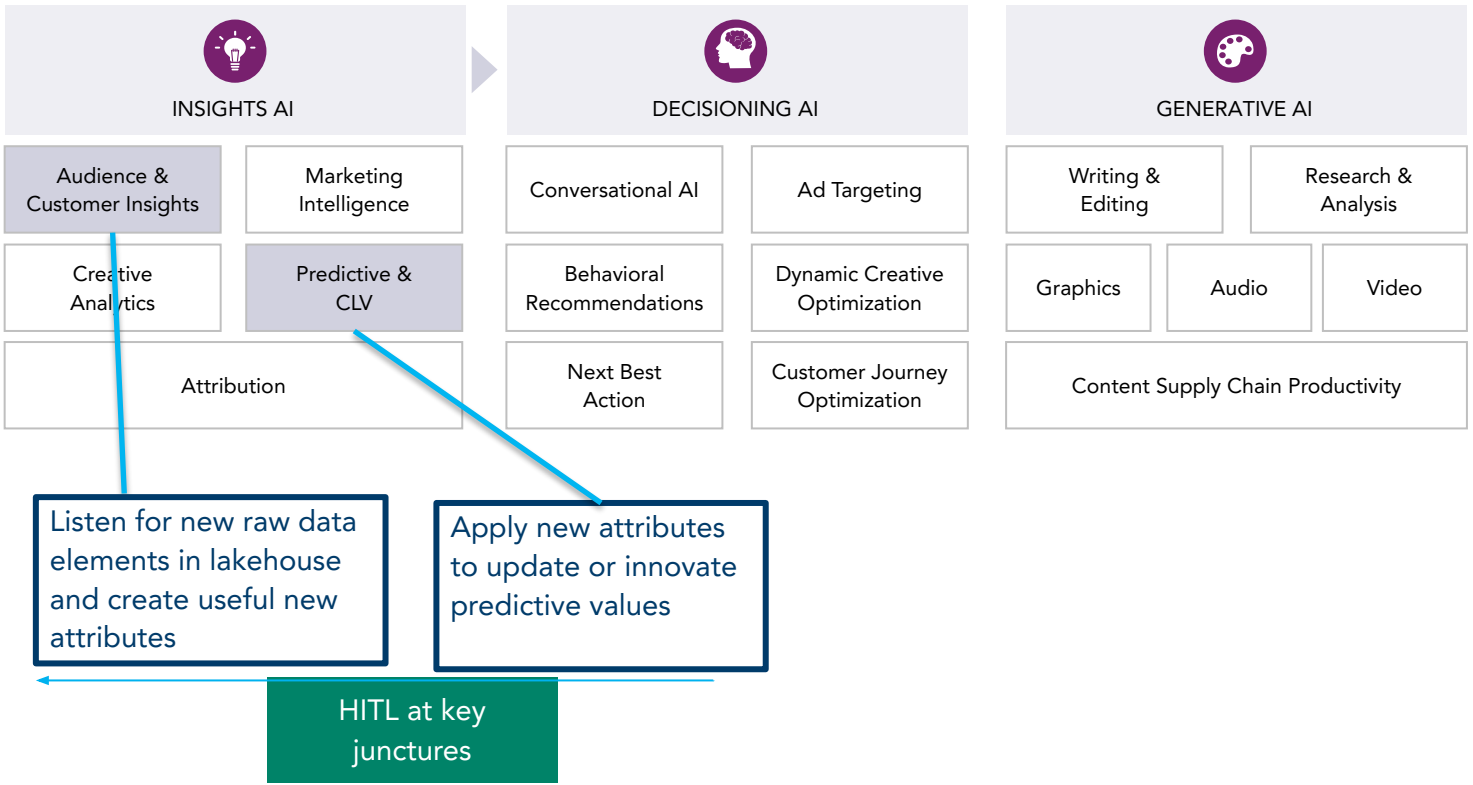
Operational Analytics & Forecasting

Agentic AI Categories – Example Customer & Prospect Intelligence

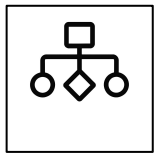
AI Use Case / Scenario	Traditional AI Approach	Potential Agent AI Add	Agent Category	Stage	What Agent AI Adds	Business Impact
Leverage New Customer Intelligence (Simple)	Uncover potential insights post-facto	Listens for new data in CRM and creates new attributes, while updating derived attributes	Workflow Automation	Reactive Agents	Always-on recommendations for higher-value data processing	Faster time-to-leverage from increasing data ingests
Leverage New Customer Intelligence (Advanced)	Separate algorithms for processing, analyzing, and acting on new data sources	Auto-configures new sources, updates schema, segments, and campaigns, based on new sources / metadata and suggests new segments with HITL & HOTL	Stack Orchestration	Full Autonomy	Auto-configuration without being explicitly asked, even for sources it has not encountered in the past.	Faster leverage of new data, improving efficiency and effectiveness

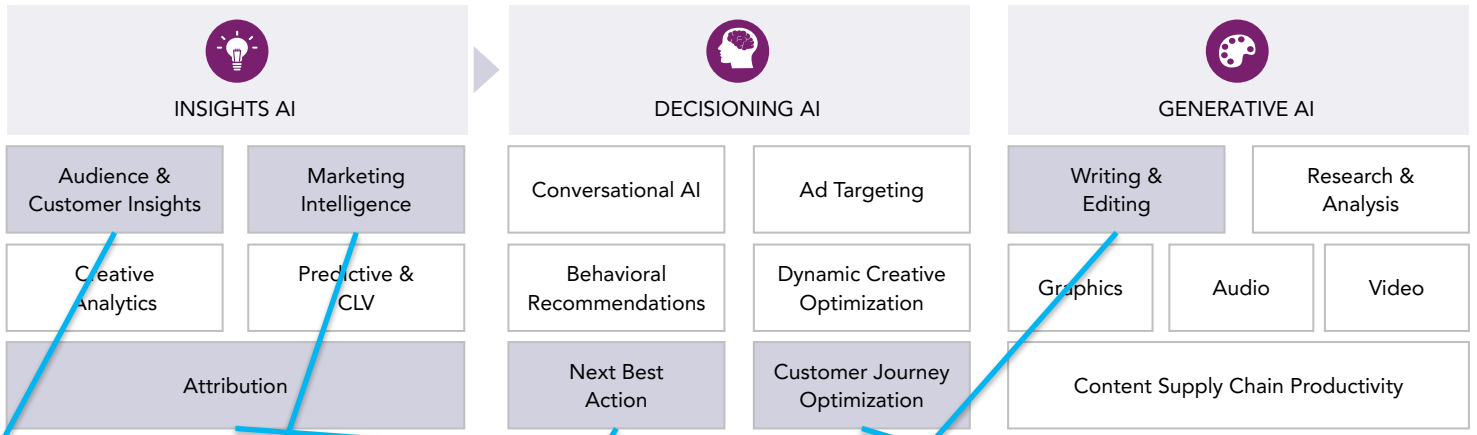
Note: Agent AI *not* a fit for *all* AI use cases
Value becomes clear when use case needs autonomy, orchestration, or tool use.

Example Workflow: Customer & Prospect Intelligence



Example Orchestration: Reactivation Agent for Dormant HVCs





- Agent detects dormant behavior in a high CLV segment
- Flags them as at-risk based on historic patterns

- Scans recent campaign data
- Finds that similar customers responded well to "VIP sneak peeks" and limited-time exclusives

- Picks a high-impact action:
- Offer an exclusive product preview + early access invite

- Generates a personalized reactivation email

- Inserts this message into a special fast-track path, skipping generic nurture flows

- Monitors opens, clicks, bounces
- Adjusts follow-up strategy

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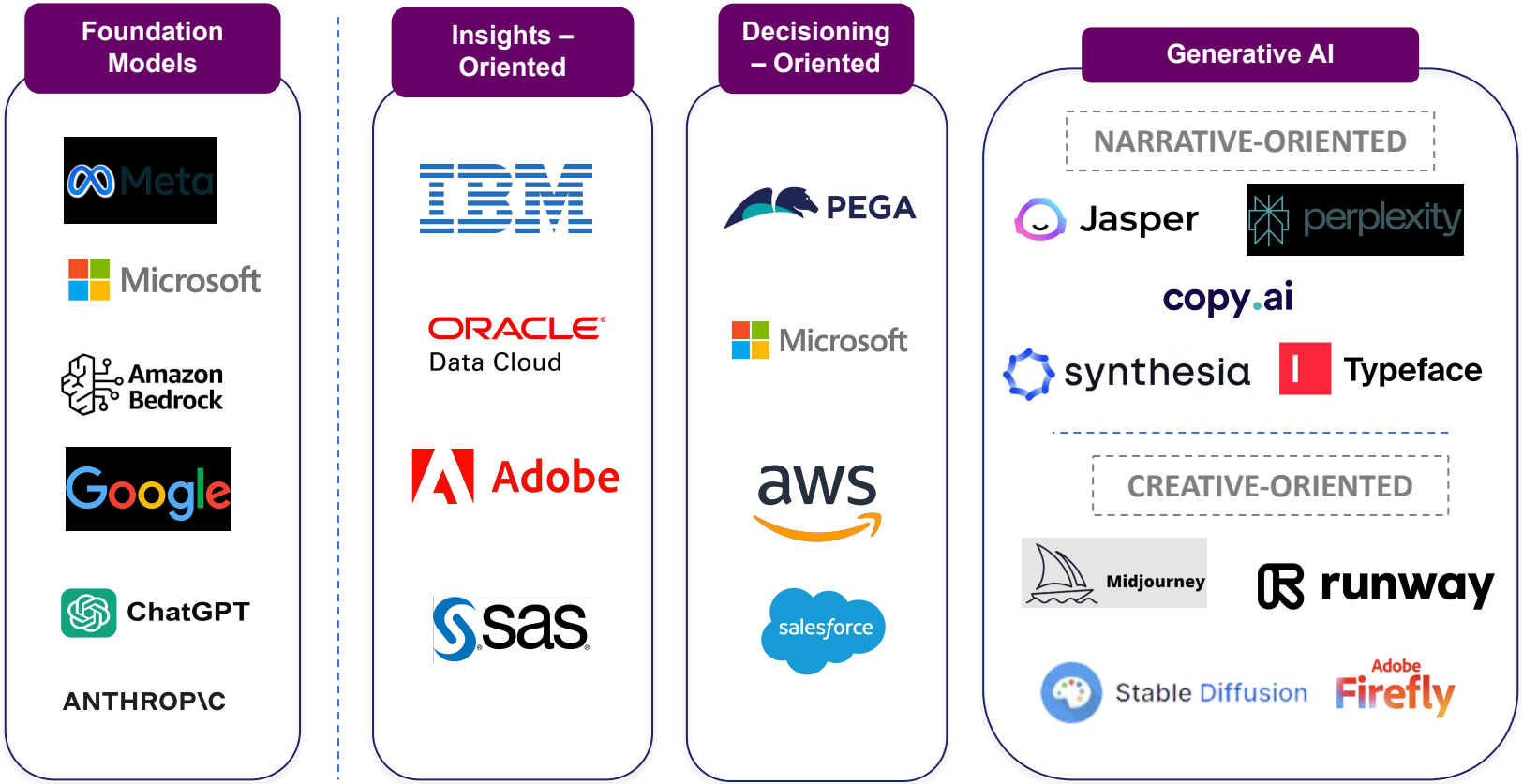
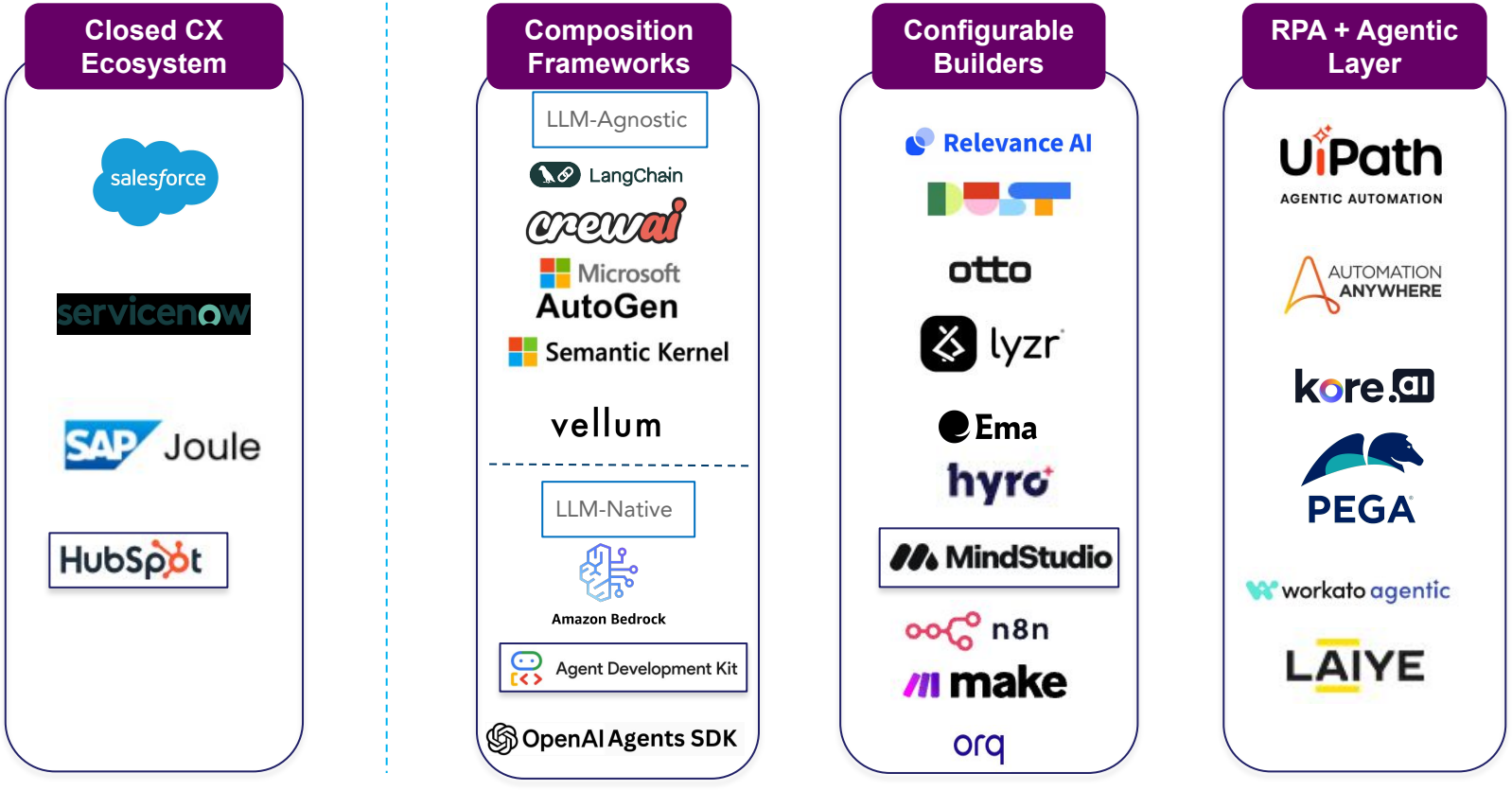
AI for Marketing Marketplace, Circa 2025



AI Agents for Marketing Marketplace, Q2 2025



Agent Development Platforms

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

What MarTech Leaders Should Do…

Instead of Buying the Hype

- **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 audits**: Track cost per step; set kill-switch thresholds. In other words, configure 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.

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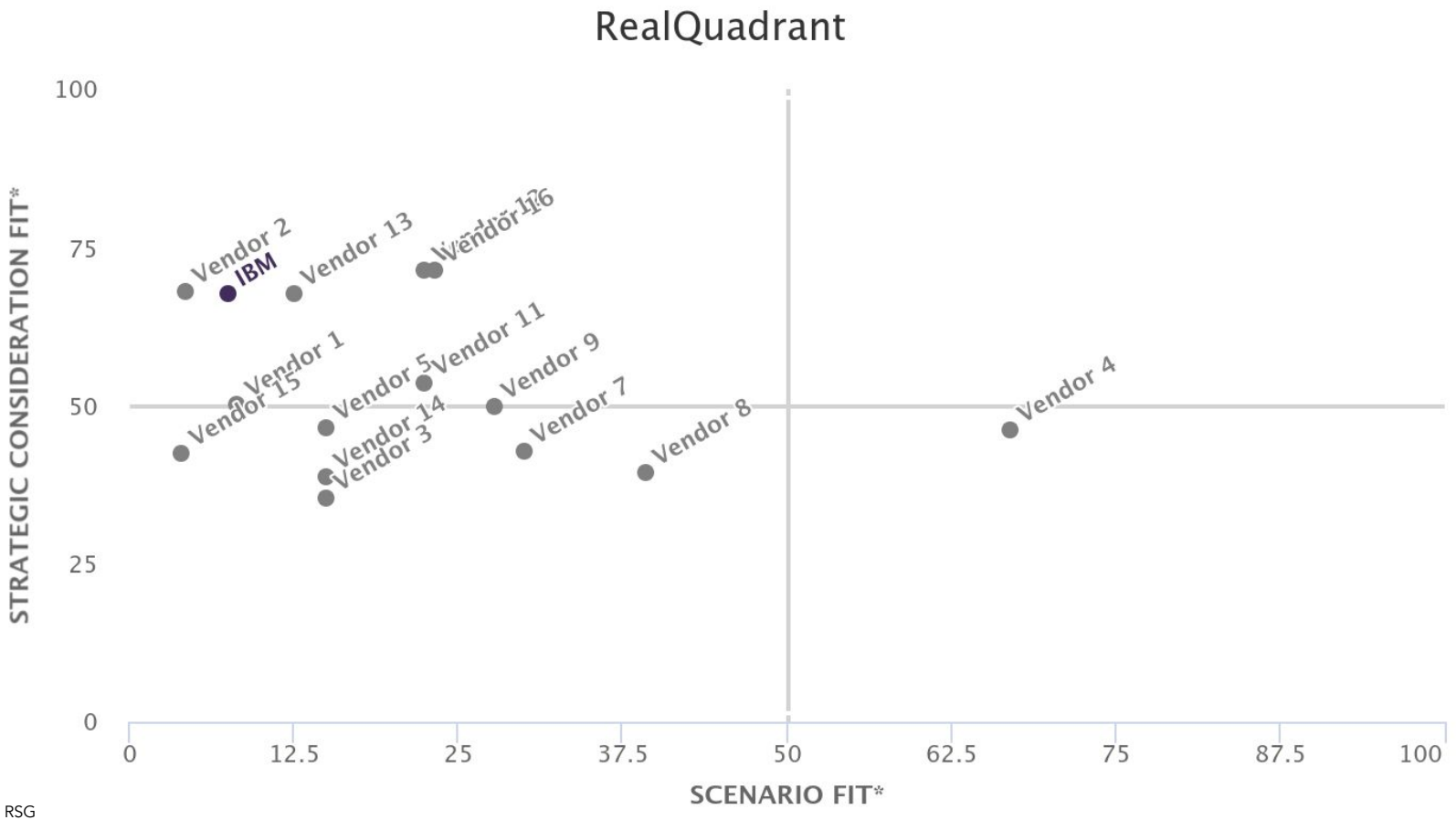
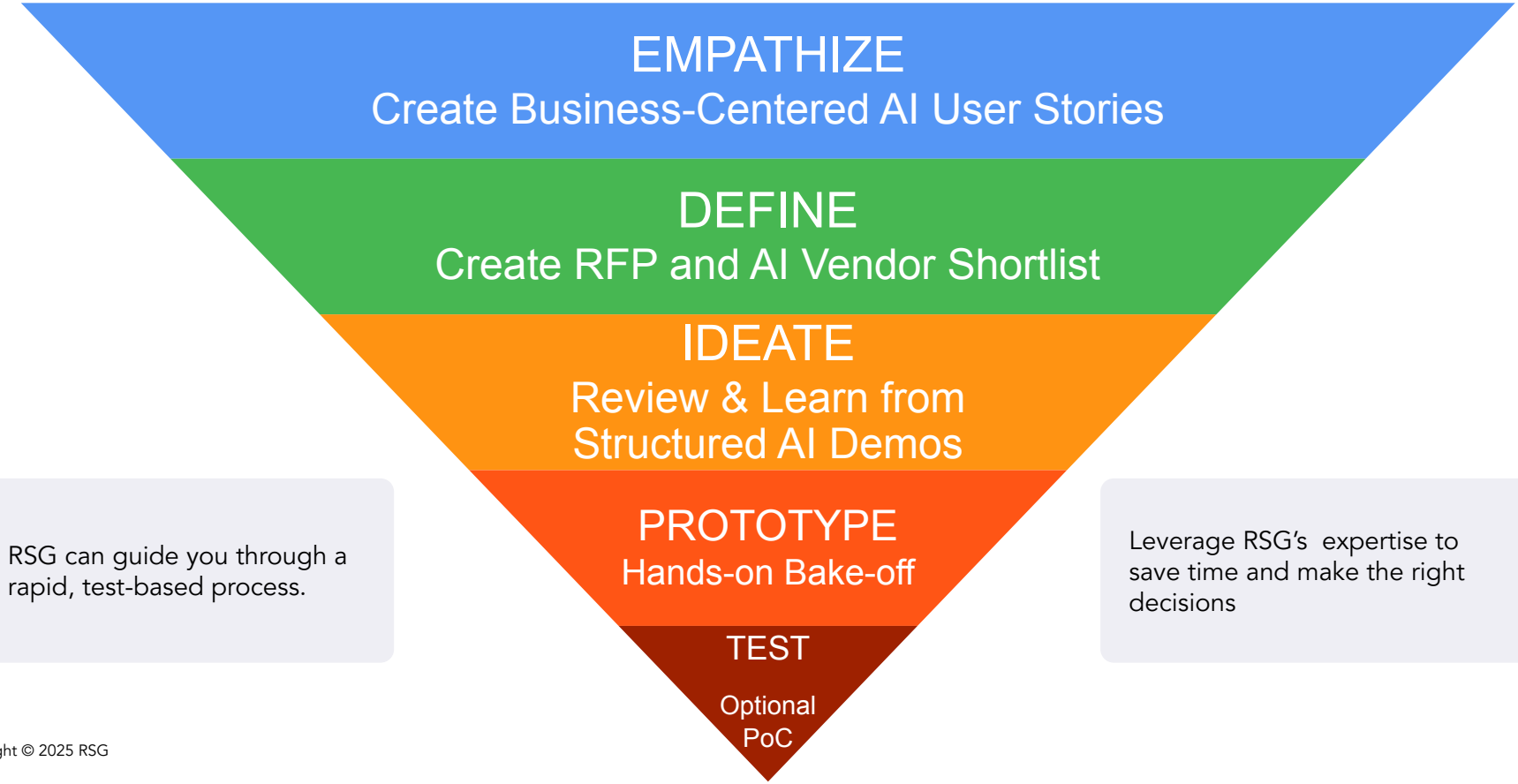
Crawl-Walk-Run Status for Agent AI Use Cases

Stage	Description	Reality for Most Enterprises
🐢 Crawl	Early exploration or manual POC. Use cases are **experimental, scripted, or HITL-heavy.**	This is where ~85-90% of RSG clients are today
🚶 Walk	Repeatable workflows with some autonomy. Agents act **partial orchestration or supervision.**	10–15% are piloting here
🏃 Run	Live, autonomous agents making **goal-driven, cross-stack decisions** in production.	RSG has not yet seen large enterprises undertake this, though many are exploring

How RSG Can Help: Vendor Evaluations



RSG Can Help: Vendor Selection via Design Thinking

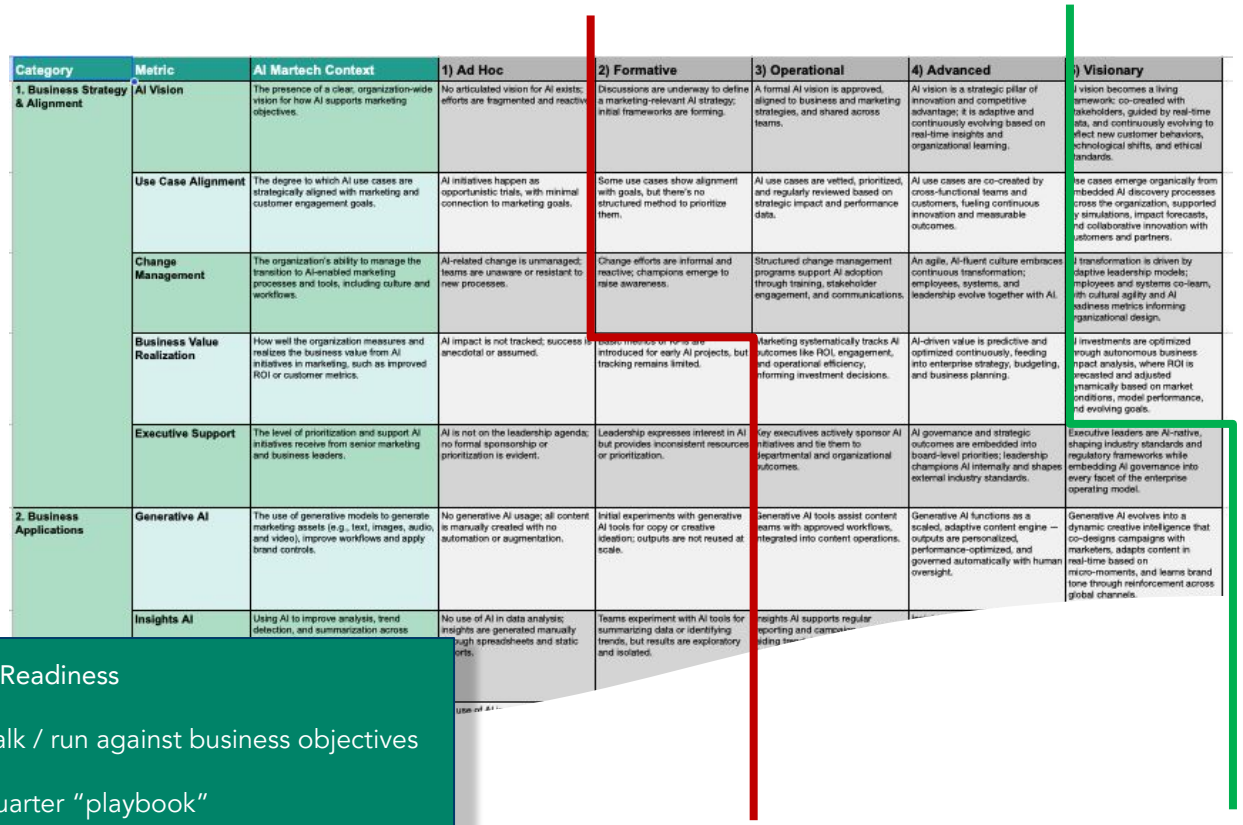


RSG can guide you through a rapid, test-based process.

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 tandards.
	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.	asic metrics or ROI are 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 detection, and summarization across	No use of AI in data analysis; insights are generated manually ough 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 eporting and campaign ding t		

AS-IS

TO-BE

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

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