Real Story GROUP
MAKE BETTER TECHNOLOGY DECISIONS

Benchmark Your AI Effectiveness

A Practical Framework for MarTech Leaders

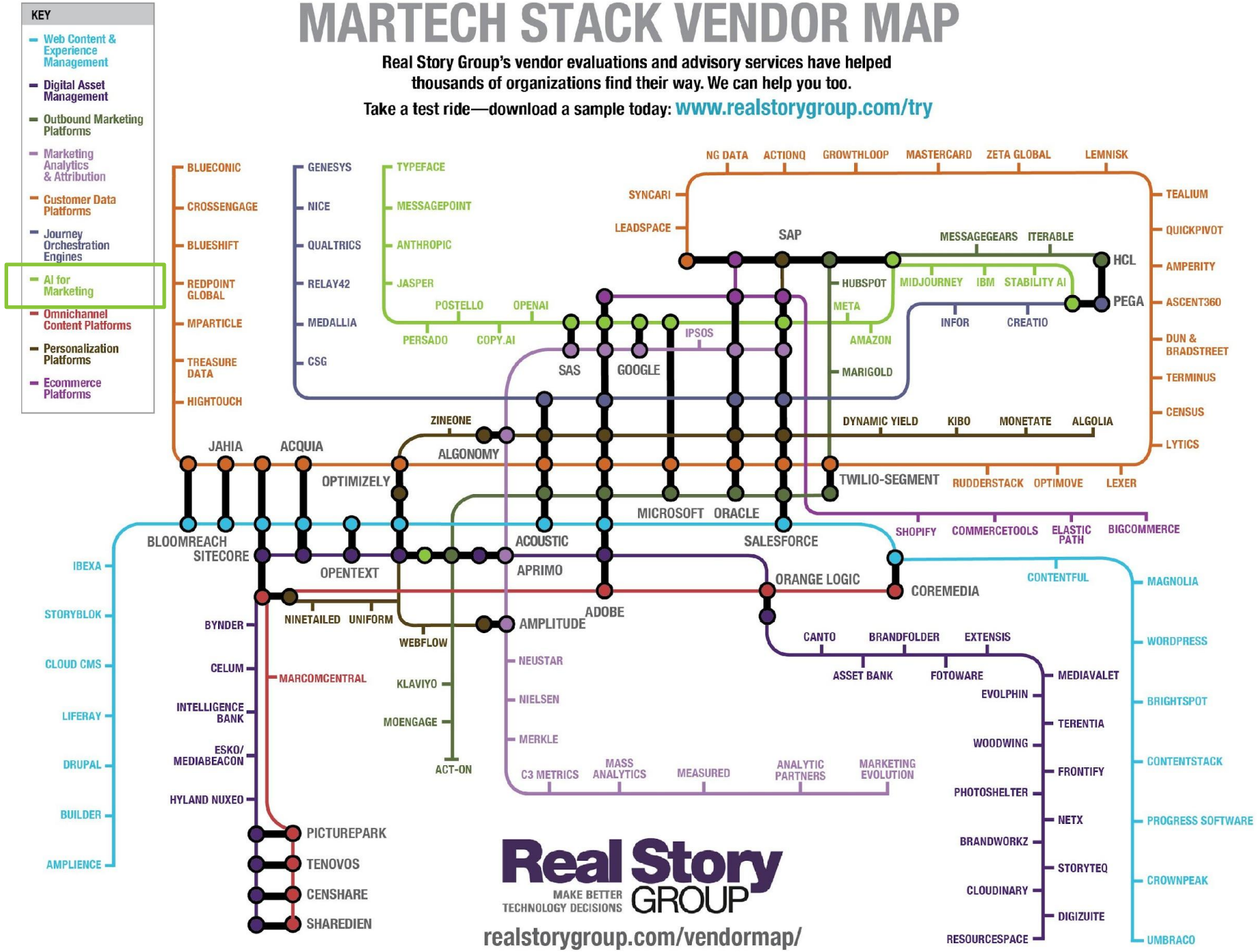
August 13, 2025

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



Webinar Agenda

1. Martech AI Reference Model
2. AI Effectiveness Model
3. A Path Forward

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

From Architecture to Effectiveness

1. How do you drive prioritization of AI use cases and investment focus

A reference architecture tells you what capabilities you need. But it doesn't tell you how mature or effective you are at actually using them.

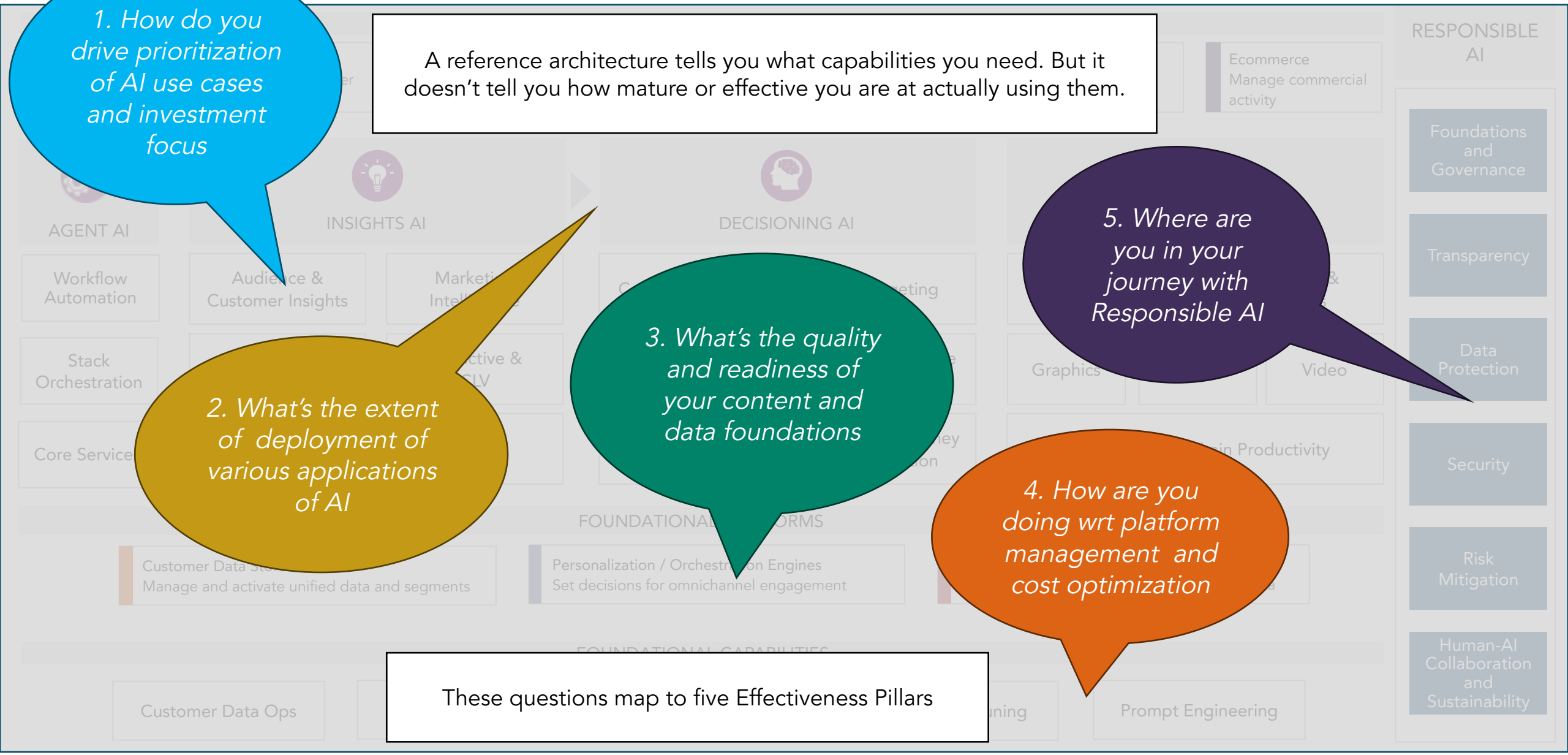
2. What's the extent of deployment of various applications of AI

3. What's the quality and readiness of your content and data foundations

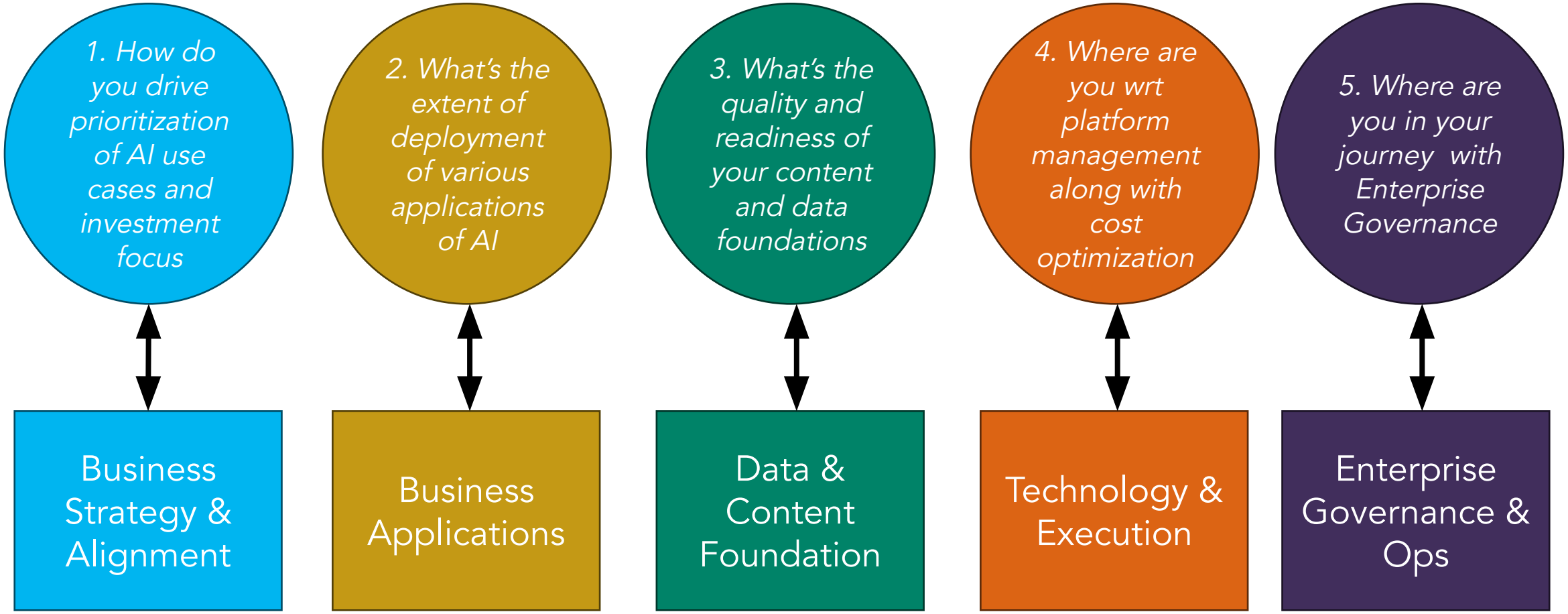
4. How are you doing wrt platform management and cost optimization

5. Where are you in your journey with Responsible AI

These questions map to five Effectiveness Pillars



The Five Pillars of AI Effectiveness



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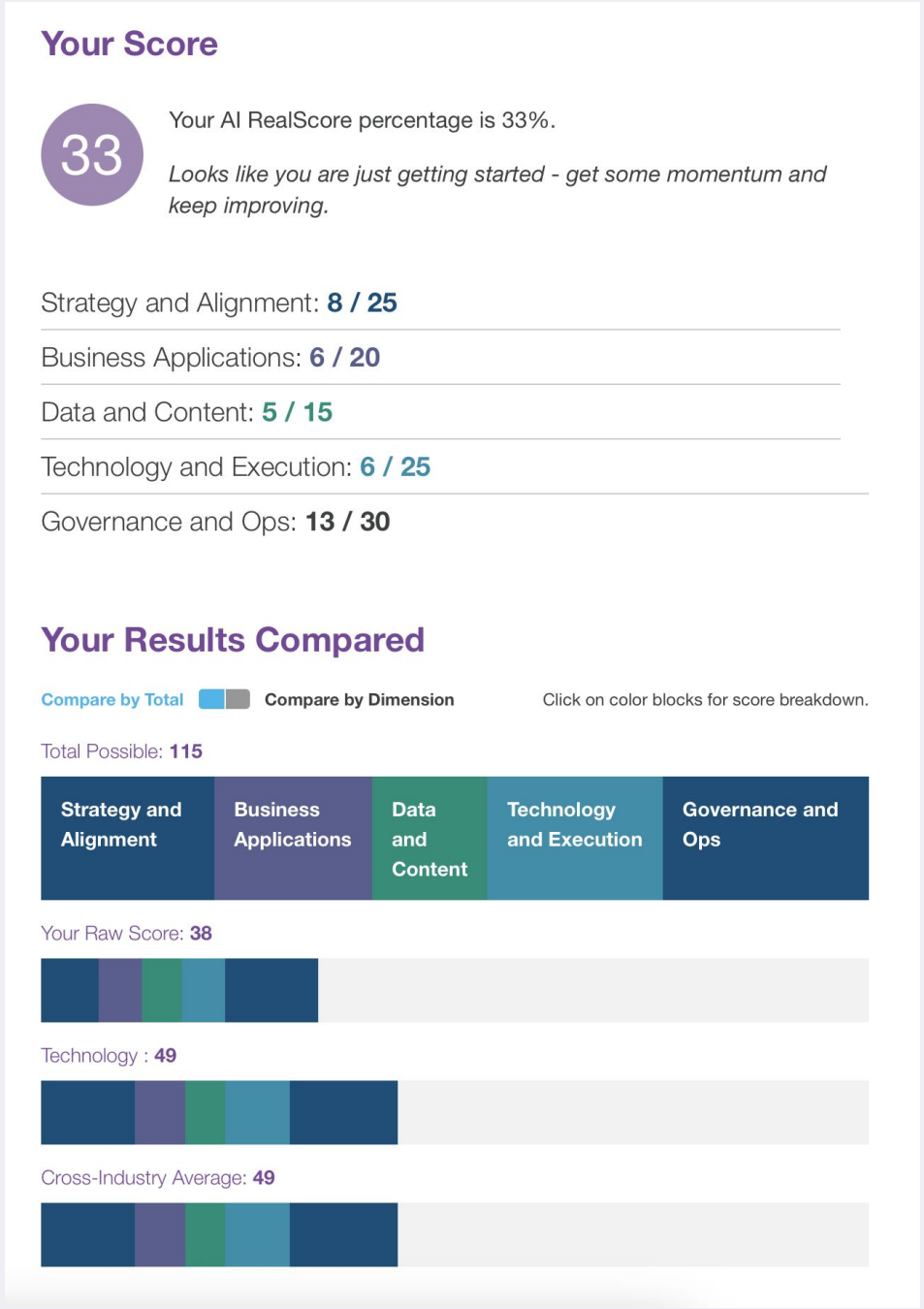
How to Get To the Assessment

www.realstorygroup.com/RealScore

Effectiveness Model: Business Value

- Identifies exactly what to improve e.g., strong governance but gaps in resources or execution
- Exposes imbalances that can limit results
- Focuses attention on pillars that unlock the most value
- Benchmarks against peers
- Tracks your own progress over time



AI for MarTech Benchmarking: Initial Results from Early Respondents

GOOD — MarTech leaders are thinking and planning

BAD — Poor foundations and execution limiting results

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The MarTech Leader's Dilemma

- Top-down pressure to deliver quick wins:

  Mandates to implement AI solutions and prove cost savings fast

- Proof-of-concept overload:

  Multiple pilots running with no clear path to production or scale

- Tactics without strategy:

  Growing patchwork of disconnected initiatives lacking a unifying vision

RSG Can Help	Vendor-neutral strategic direction to accelerate business value

Strategic Roadmap with Custom Dimensions*

- AI Readiness Assessment: Where to invest to get the best results
- Use Case Discovery: Identify the foundations for any business case
- AI Build vs. Buy Analysis: Get to business impact faster and more sustainably
- Integration Acceleration: Get results faster from external integrators
- Process & Information Optimization: Better leverage the tools you have
- Specific Recommendations: Focused investment advice and timings

Keep up Momentum

- Everyone:

  Complete RealScore to baseline & track progress

- Subscribers:

  Book a walkthrough & interpretation of your results

- Non-subscribers:

  Start with a custom AI Readiness Assessment

Stay in Touch…

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