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Introduction

Marketing teams are using technology ... just not to its full potential

Marketing organizations keep investing in tech, even as confidence as to what it's delivering fades.

Industry benchmarks show MarTech utilization remains a persistent challenge. Marketing teams now actively use 49% of the MarTech tools they've purchased, and only 15% of organizations qualify as high performers — meaning they meet strategic goals and can clearly demonstrate positive ROI from their MarTech investments.

This gap isn't about activation. In just two years, marketing teams' use of the full range of their MarTech capabilities fell from 58% to 42%, indicating that stacks are growing faster than teams can operationalize existing technology — and in some cases, faster than strategy, workflow, or capacity require.

What teams hoped MarTech would deliver isn't what they're seeing in practice

Even when technology is in place, the payoff often falls short of expectations. Over 50% of marketing leaders report a clear gap between the outcomes they hoped MarTech would deliver and the results they actually achieved. Among those experiencing a gap, the average shortfall is 34% below expectations. At the same time, MarTech's overall impact on company performance is consistently described as modest rather than transformational, reinforcing a growing disconnect between investment and perceived value.

Leaders want proof that MarTech is paying off

As questions about performance persist, <u>pressure to demonstrate value has intensified</u>. Over 60% of marketing leaders report pressure from CEOs and CFOs, and 50% report pressure from boards, to prove that marketing investments are producing measurable business outcomes.

Despite this scrutiny, measurement remains uneven. <u>Over 34% of marketers say they rarely or never measure marketing ROI</u>, limiting their ability to clearly connect MarTech investment to business results.

Teams struggle to show what their MarTech is actually delivering

The gap between investment and impact is widely acknowledged. <u>90% of marketing leaders say achieving measurable value from new technology is a major challenge</u>, even as adoption and spending continue to rise.

Research also shows that MarTech is frequently deployed in isolated use cases, without sufficient integration into operating models or measurement frameworks — contributing to the perception of marketing technology as a cost center rather than a growth engine.

How most MarTech stacks ended up this way

Most MarTech stacks didn't become complex because of bad decisions. They grew one reasonable choice at a time without anyone stepping back to design the whole.

Organizations added tools to solve specific problems: launching campaigns faster, personalizing outreach, improving reporting, integrating data, responding to new channels. Each decision made sense in context. Taken together, they created ecosystems that are difficult to operate, harder to measure, and increasingly challenging to explain to leadership.

This report examines why that pattern is so common and its implications for utilization, credibility, and growth. It also outlines five shifts marketing leaders can make to:

- Move toward more intentional MarTech design

- Optimize existing investments in tools they already own

- Add technology only where it clearly supports meaningful outcomes

Shift 1: from accumulation to intentional design

MarTech stacks grow in response to real needs and new possibilities

Teams build MarTech stacks over time as marketing needs evolve and new channels, data sources, and technologies enter the market. Teams add some tools to close real capability gaps and adopt others because new platforms promise speed, scale, or advantage.

Each decision makes sense in context. Over time, those decisions compound. The stack expands without a shared view of how each tool fits into a broader system designed to support growth and leaves a trail of technical debt.

Tool growth often outpaces clarity about purpose

Many MarTech decisions begin with an immediate problem to solve. Teams need to launch campaigns faster, improve reporting, personalize outreach, or integrate new data sources. They select tools that address those needs quickly and move forward.

Over time, this pattern introduces functional overlap and redundant capability. Platforms enter the stack without clear success criteria tied to business goals. Teams evaluate features instead of performance, and ownership spreads across systems and stakeholders.

For IT and IS teams, this pattern creates a growing support burden over time. Shadow IT emerges as teams adopt overlapping tools outside standard governance. Redundant platforms become harder to maintain, integrate, and secure. As ownership fragments and support thins, tools fall out of active use or are abandoned altogether. The stack continues to grow, but its ability to deliver reliable results steadily declines.

Instead of operating as a coordinated system, MarTech functions as a collection of utilities — difficult to govern, harder to support, and increasingly disconnected from outcomes.

Expanding stacks flatten priorities

As stacks grow, overlap increases. Multiple tools support similar functions without clear or strategic integration. Teams split attention across platforms. Data fragments across systems. Workarounds become standard operating procedure.

In this environment, teams focus on keeping things running. They manage complexity instead of improving performance. The stack continues to grow, but its contribution to measurable outcomes becomes harder to trace.

Highly calibrated teams design before they buy

Teams that extract more value from MarTech start with outcomes and use cases. They define what success looks like in business terms before they evaluate technology.

They map the capabilities required to support those outcomes. They assess how well existing tools already meet the mapped out needs and introduce new technology only when a clear gap remains.

Each addition serves a defined purpose. Teams add tools to strengthen the system, not to expand it indiscriminately.

Architecture shifts the focus from tools to outcomes

Intentional architecture design changes how teams make MarTech decisions. Conversations center on objectives and performance instead of platforms and features.

This approach doesn't default to fewer tools. It prioritizes the right tools, selected and evaluated based on how effectively they support outcomes that matter — utilization, performance, and measurable impact.

With an architecture lens in place, MarTech operates as an asset instead of a source of friction.

How this shift shows up in practice

Teams that move from tool accumulation to intentional architecture design can answer these questions with evidence — not opinions:

1 ───────────────────────────

Is this mission-critical or convenience-driven?

────── **2** ────────────────────

Is it measurably advancing a priority objective?

──────────────── **3** ──────────

Is it simplifying our architecture?

──────────────────── 4 ──────────

Is it earning its place in the stack?

> ***Clear answers create discipline.***
> ***Unclear answers allow accumulation to continue.***

Why this shift matters

Intentional architecture design is the foundation. It drives utilization, sharpens measurement, and reinforces MarTech's role as a growth engine. But clarity of design doesn't answer ownership. Once teams define what the stack must do, they still have to reconcile marketing priorities with technical constraints, data governance, and measurement standards.

> *Without design, stacks expand.*
> *With design, they execute.*

That transition — from architecture to accountability — determines whether the stack performs as designed.

The next shift focuses on aligning ownership across marketing, IT, and analytics so MarTech decisions drive outcomes instead of operating in silos.

Shift 2: from parallel decision-making to shared ownership

MarTech decisions span teams by default

Once teams define what the MarTech stack needs to do, they still have to decide how those choices move forward. In practice, MarTech decisions involve marketing, IT, analytics, and often finance or operations.

Each group brings real priorities. Marketing focuses on speed, usability, and outcomes. IT focuses on security, integration, and scalability. Analytics focuses on data quality and data-driven insights. Finance looks at cost, contractual leverage, and long-term risk.

Those perspectives exist for a reason. MarTech decisions affect the organization well beyond marketing.

Ownership clarifies how decisions move forward

MarTech decisions work best when teams agree on who owns outcomes, infrastructure, and measurement. That clarity gives teams a shared way to make tradeoffs when priorities compete.

Without clear ownership, decisions drift. Marketing relies on tools it doesn't fully control. IT is expected to support platforms it didn't select, license, or budget for. Analytics teams leverage what the system can provide instead of what leadership expects.

Over time, these gaps create friction and unintended expense. Support becomes reactive instead of planned. Tools operate outside standard maintenance and governance models. What started as a quick solution becomes a long-term liability for the system as a whole.

Technical rigor sets the boundaries for responsible choice

In healthcare, technology decisions carry real consequences. Data security, regulatory compliance, auditability, and access controls are not side considerations — they are structural requirements.

MarTech decisions influence patient trust, financial exposure, and operational resilience. That reality shapes what's viable, sustainable, and responsible.

IT and security teams steward these standards because they manage enterprise risk. Finance evaluates long-term cost, exposure, and remediation implications. Marketing drives growth and patient engagement objectives.

Technology selection is a coordinated decision about capability within responsible guardrails, not a tradeoff between innovation and caution.

Platform expansion often feels safer than integration

In healthcare, expanding existing platforms is often the default. These systems already meet security standards, integrate with core infrastructure, and sit within established contracts. Activating additional modules or

capabilities inside tools the enterprise already owns feels controlled and responsible.

And often, it is.

But expansion subtly reframes the decision. The question shifts from *What will drive performance?* to *What best fits what we already have?*

Those are not the same question.

Without shared accountability, decisions can favor architectural convenience over operational effectiveness. Leveraging existing platforms should be a strategic choice — not an automatic one.

Marketing's role isn't to advocate for "new." It's to bring evidence: adoption, usability, speed to execution, measurable lift. If expanding a current platform advances those outcomes, it's the right move. If it doesn't, safety alone isn't a strategy.

It's rational to be cautious in healthcare. But disciplined evaluation — not default expansion — is what ensures the stack supports growth rather than simply preserving the status quo.

Shared ownership keeps rigor and results aligned

Technical rigor sets the guardrails. Shared ownership determines how decisions move within them.

When marketing, IT, analytics, and finance evaluate MarTech decisions together, tradeoffs are surfaced early — not escalated late. Security, integration, cost, usability, and measurable impact are weighed in the same conversation, not in sequence.

That shift changes outcomes. Rigor remains intact, but it no longer defaults decisions toward the safest architectural option or the loudest growth argument. It creates joint accountability for both compliance and performance.

Shared ownership doesn't dilute standards. It clarifies them — and ensures the stack is governed responsibly and built to deliver results.

How this shift shows up in practice

Teams with shared ownership can answer these questions without hesitation:

1

Who is accountable for the business outcome this tool is expected to drive?

2

Who is accountable for the platform's technical integrity, security, and compliance?

3

Who is accountable for measuring performance and determining whether it earns continued investment?

Clear answers keep decisions moving and performance visible.

Why this shift matters

Intentional design sets direction. Shared ownership determines whether that design holds up under real-world pressure.

Without it, MarTech decisions favor safety over performance by default. With it, teams balance rigor and results without sacrificing either.

Shared ownership clarifies how MarTech decisions get made, but it doesn't guarantee teams can use what they've chosen effectively. Even with clear accountability, strong governance, and responsible platform choices, performance stalls when tools don't fit day-to-day workflows. The next shift focuses on how utilization breaks down — and what it takes to close the gap between capability and execution.

Shift 3: from feature coverage to operational fit

MarTech performance depends on how teams actually work

Selecting the right tools and clarifying ownership is necessary — but it doesn't end there. Performance ultimately depends on how work gets done day to day. MarTech succeeds when platforms fit naturally into workflows, roles, and rhythms of work.

Many stacks include powerful capabilities. Teams log in, run campaigns, pull reports, and move data across systems. Usage exists, but utilization plateaus when teams struggle to apply advanced features consistently or integrate tools into how work actually gets done.

In many cases, the technology isn't the constraint. The operating model is.

Performance gaps rarely originate at the strategy level. They surface in execution — in handoffs, approvals, data flow, and unclear process ownership. Without defined processes, even well-designed stacks underperform.

Features only matter when teams can use them repeatedly

As technology advances, innovators continuously expand what it can do. New features promise efficiency, control, or competitive advantage. Over time, the question shifts from whether technology can do more to whether it's doing what teams actually need — or simply adding clever functionality that rarely gets used.

Feature creep shows up everywhere, from cars and home appliances to MarTech platforms. Products ship with layers of advanced capability, while daily use narrows to a small set of familiar functions that feel reliable under pressure. Complexity grows faster than behavior.

MarTech follows the same pattern. Platforms offer broad capability, but teams gravitate toward what they can use confidently and repeatedly. Features that require additional setup, coordination, or sustained attention fade into the background, even when they promise real value.

Workflow friction limits adoption

Teams work across channels, timelines, and competing priorities. MarTech earns adoption when it reduces friction and supports that velocity.

Friction shows up in small ways. It surfaces in extra steps, fragmented data, unclear handoffs, and manual workarounds to compensate for system gaps.

Under pressure, teams choose speed and predictability over sophistication. Utilization narrows as pressure increases.

Highly calibrated teams design MarTech around real workflows

Teams that extract meaningful value from MarTech focus on how work and data flow across people and systems. They align tools to roles and decision points, not just feature sets. They simplify handoffs. They standardize processes where it helps and allow flexibility where it matters.

In healthcare organizations, this discipline is especially difficult. Technology approvals often happen once or twice a year, limiting the ability to architect systems precisely in real time. As a result, stacks can evolve in phases — more like a house with additions made over time than a blueprint executed all at once. That reality makes intentional sequencing, integration planning, and dependency mapping even more critical. When approval windows are limited, each decision has to strengthen the overall system rather than introduce another disconnected layer.

Teams build platform fluency over time and stay current as platforms release meaningful enhancements. They reinforce best practices and update workflows as priorities and standardized processes evolve.

Operational fit turns capability into repeatable execution.

Utilization improves when systems support execution

MarTech works best when platforms reinforce how teams plan, launch, measure, and optimize work every day. Tools earn sustained adoption when they are intuitive, reliable, dependable, and meaningfully connected.

In that environment, teams expand use of what they already own. Features move from optional to embedded. Measurement becomes standard practice. Performance improves without constant oversight.

Operational fit makes complexity manageable.

How this shift shows up in practice

Teams focused on operational fit can answer three questions clearly:

1

Which day-to-day workflows does this tool directly enable?

2

Who uses it consistently, and what decisions or actions depend on it?

3

Which capabilities drive measurable value — and which simply increase cost or complexity?

Clear answers guide optimization and drive adoption.

Why this shift matters

Design sets direction. Ownership establishes accountability. Operational fit determines whether MarTech produces consistent, scalable value.

Without it, utilization plateaus and performance drifts. With it, teams extract more from existing investments and build momentum over time.

Operational fit helps teams use MarTech more effectively, but it doesn't resolve how platforms function as ecosystems. As stacks grow and workflows mature, integration points multiply. Redundancies surface. Boundaries blur. The next shift focuses on how organizations move from platform gravity to right-fit ecosystems that support flexibility without adding unnecessary complexity.

Shift 4: from platform gravity to right-fit ecosystems

Enterprise platforms pull decisions toward convenience

As MarTech stacks mature, a form of platform gravity sets in. Enterprise vendors expand their footprint, bundle adjacent capabilities, and make it easier to remain within an existing ecosystem than to introduce a new solution. Over time, convenience, familiarity, and perceived risk reduction begin to shape decisions as much as performance.

Fewer vendors simplify contracts and reduce administrative overhead. Shared infrastructure streamlines integration and ongoing maintenance. Familiar interfaces reduce onboarding time and expand the available talent pool. For organizations already managing complexity, expanding within an existing ecosystem often feels like the safest and most cost-effective path forward.

Convenience shapes ecosystems more than performance

As a dominant platform expands, decisions increasingly optimize for internal fit. New requirements are absorbed into existing contracts. Gaps are addressed with modules, extensions, or configuration workarounds rather than purpose-built solutions.

Over time, the ecosystem consolidates inward. Capability expands, but optionality contracts. Workflows bend to the platform's architecture instead of the architecture supporting the work.

The system remains coherent. Performance becomes uneven.

Bundled capability delivers consistency across functions

Platform ecosystems often deliver consistent experiences across functions. Shared data models, unified permissions, and centralized administration provide structural stability.

That consistency comes with tradeoffs. Bundled tools may not lead in every category. Some capabilities may lag behind best-in-class alternatives, while others can feel rigid or overengineered for specific workflows. At the same time, best-in-class tools introduce their own considerations — particularly how cleanly they will integrate with existing systems and what that integration will require in time, risk, and operational effort.

Teams often compensate for these gaps by layering processes, customizing configurations, or accepting performance constraints. The ecosystem remains intact, but effectiveness depends on how closely the platform's strengths align with real operational needs.

Highly calibrated teams define ecosystem boundaries deliberately

Teams that balance flexibility and control treat ecosystems as architectural decisions, not defaults. They determine which capabilities belong inside the core platform and which ones require specialized solutions.

They define boundaries based on function, performance, and operational fit. Core systems anchor shared data models, governance, and foundational workflows. Specialized tools support use cases where depth, speed, or usability matters most.

Design-led teams use clear criteria when deciding to step outside an enterprise platform. They don't default to best-in-class for its own sake, but they also don't assume the core platform is always the right answer.

Common decision signals include:

- Material performance gaps where specialized tools produce measurable lift

- Persistent workflow friction that increases manual effort or delays execution

- Adoption constraints driven by usability or role misalignment

- Speed-to-market requirements that outpace the enterprise platform's roadmap

- Quantifiable outcome impact tied directly to business objectives

When those conditions exist, teams evaluate whether the added complexity is justified — and whether integration, data flow, governance, and support can be planned responsibly.

That approach keeps ecosystems open enough to adapt without fragmenting the stack.

Right-fit ecosystems support change without adding drag

When teams design ecosystems intentionally, they gain options. They can adopt new capabilities without reworking the entire stack. They can phase out underperforming tools without disrupting core systems.

Right-fit ecosystems reduce dependency on any single platform's roadmap. They allow teams to respond to changing priorities, channels, and expectations without restarting the design process.

The ecosystem supports the work instead of shaping it.

How this shift shows up in practice

Teams with right-fit ecosystems can answer three questions clearly:

1 ————————————————————————

Which capabilities are strategically anchored in the core platform — and why?

————— **2** ————————————————

Where do specialized solutions deliver demonstrably superior performance or usability?

——————————— **3** ————————

How are systems integrated to ensure clean data flow, clear ownership, and no redundant functionality?

Clear answers keep ecosystems flexible and focused.

Why this shift matters

Design defines intent. Ownership governs decisions. Operational fit drives execution. Ecosystem design determines how adaptable the stack remains over time.

> Platform gravity simplifies decisions in the short term.
> Right-fit ecosystems protect performance in the long term.

Ecosystem design preserves structural integrity, but it doesn't resolve how success is evaluated across interconnected systems. As stacks extend across platforms and specialized tools, attribution fragments, data definitions diverge, and visibility degrades. The next shift focuses on how organizations connect MarTech to outcomes and build measurement frameworks that restore confidence in performance.

Shift 5: from reporting results to guiding decisions

Analytics shapes what teams do next

As MarTech stacks mature, analytics expands beyond reporting. It informs what teams choose to do next, where they invest, what audiences to focus on, and how strategy adjusts as conditions change.

That shift depends on MarTech systems that capture behavior consistently across channels and touchpoints. When data flows cleanly across platforms, teams gain the context required to act with precision rather than assumption.

In healthcare, this also requires privacy-safe design. Secure conversion tracking, anonymized data models, and compliant integrations allow teams to measure performance without exposing patient information. When

governance and instrumentation are sound, analytics can guide decisions confidently and responsibly.

High-performing organizations use analytics to identify opportunities, evaluate tradeoffs, allocate resources deliberately and prioritize action.

Analytics earns trust when it drives decisions and when systems generating insight accurately reflect reality. When measurement and execution stay aligned, MarTech becomes not just a reporting layer, but a performance engine.

Analytics helps teams anticipate and choose

Forward-looking analytics starts before campaigns launch, and it depends on MarTech systems that preserve signal integrity over time. Clean tagging, consistent definitions, and reliable data flows allow teams to plan based on evidence instead rather than instinct.

In this model, analytics informs prioritization. Teams size opportunities before committing resources. They align service lines, audiences, and channels to projected impact. They define success upfront.

As conditions shift, analytics continues to guide decisions through the same systems that execute the work. Teams adjust targeting, messaging, and channel mix based on response and performance signals while it still matters.

That's the difference between analytics layered on top of MarTech and analytics embedded within it.

Activity data needs context to guide decisions

Many organizations generate dashboards. Impressions, clicks, opens, and conversions update in near real time. These metrics show activity — not intent.

In healthcare, behavior reflects context. People search differently when they're anxious. They pause when next steps feel unclear. They abandon journeys when access feels complicated or messaging doesn't reflect their situation.

Analytics creates value when it translates activity into insight, an understanding that teams can act on. MarTech then turns that understanding into better execution — clearer pathways, more relevant messages, and reduced points of friction.

Highly calibrated teams apply analytics across the full journey

Teams that get more value from MarTech integrate analytics before, during, and after engagement. Before execution, they quantify opportunity and expected lift. During execution, they monitor leading indicators and adjust. Afterward, they refine targeting models, creative strategy, channel allocation, and system configuration.

This approach depends on orchestration across the stack. When systems share audiences, definitions, and outcomes, teams can see the full journey instead of channel snapshots. They can also align engagement to intent — reaching people in the moments and channels where action makes sense.

Analytics informs not only what to say, but who to prioritize, where to engage, and how the system should evolve.

Measurement guides prioritization, not just accountability

Effective measurement aligns analytics to the decisions leadership needs to make. Teams track outcomes tied to access, volume, experience, and retention — and connect those outcomes to what MarTech is doing across channels.

Teams use measurement to answer practical questions:

- Which components of the stack produce measurable impact?

- Where does complexity add cost without proportional value?

- Which capabilities should scale, simplify, consolidate, or retire?

When teams treat measurement as governance, the MarTech stack stays accountable to performance. Decisions become evidence-based rather than opinion driven.

MarTech and analytics form a continuous loop

MarTech enables analytics by capturing behavior, delivering experiences, and measuring outcomes at scale. Analytics then shows which parts of the system drive progress, where friction persists, and how performance aligns with strategic objectives.

That insight feeds back into configuration, optimization, and evolution over time. Teams refine workflows, adjust integrations, reallocate spend, and improve targeting and messaging based on what the data reveals.

In mature organizations, analytics evaluates not just campaigns — but the effectiveness of the MarTech system itself.

Confidence grows when insight drives the system

When analytics shapes both strategy and system design, confidence follows. Leaders see how decisions connect to outcomes. Teams understand which choices move the organization forward and which ones introduce drag.

MarTech becomes a learning system. Analytics closes the loop. Improvement becomes continuous instead of episodic. Clarity replaces guesswork. Confidence becomes structural.

How this shift shows up in practice

Teams that use analytics to guide the MarTech system can answer three questions clearly:

1

Where should we prioritize next — and
what evidence supports that choice?

2

Which components of the stack
measurably advance our objectives?

3

What must we refine, reallocate, or
retire as behavior and results evolve?

Clear answers turn technology and data into direction.

Why this shift matters

Design shapes intent. Ownership governs decisions. Operational fit drives use. Ecosystem design supports flexibility. Analytics connects those pieces and keeps them advancing together.

> Without this feedback loop, MarTech stays reactive.
> With it, organizations plan deliberately, adapt
> continuously, and move closer to their goals over time.

Organizations that maximize MarTech don't rely on analytics to explain results after the fact. They use it to shape strategy, prioritize investment, and adapt continuously. The final section looks at what high-performing teams do differently—and how organizations can move toward that model without rebuilding everything from scratch.

Conclusion

How to assess MarTech maturity — and what to do next

By this point, most teams recognize pieces of themselves in the five shifts. The harder question is where those patterns show up most clearly and how far the organization has progressed beyond them.

High-performing MarTech organizations don't arrive at maturity all at once. They evolve through stages, often unevenly. Design may be strong while ownership lags. Tools may fit workflows, but measurement may still trail behind decision-making. Ecosystems may be stable while analytics remains reactive.

The goal isn't perfection. It's awareness and direction.

Start by assessing where your system breaks down

A useful way to gauge MarTech maturity is to look for friction, not just in tools, but in decisions.

Teams that lag behind often experience the same signals:

- Strategy discussions stall because it's unclear which tools or data to trust

- Ownership questions surface after performance issues appear

- Teams rely on a small subset of features while paying for far more

- Platform decisions default to safety or convenience instead of fit

- Reporting explains what happened, but doesn't guide what to do next

These are indicators of where the system needs attention.

Compare current state to desired state

Once friction points are visible, the next step is to clarify what "better" actually means for your organization.

That usually requires answering a different set of questions:

- Are MarTech decisions anchored in defined outcomes — or reactive to incoming requests?

- Is accountability established before new tools or capabilities are introduced?

- Do workflows reflect how work actually happens — or how systems were originally configured?

- Does the ecosystem balance flexibility with architectural discipline?

- Does analytics inform prioritization and investment — or merely report results after the fact?

The gap between those answers and today's reality defines the work ahead.

Focus on sequencing, not overhaul

Teams often assume progress requires major transformation. In practice, improvement comes from sequencing changes intentionally.

Some organizations start by clarifying ownership. Others simplify workflows. Others focus on measurement discipline or ecosystem boundaries. The right starting point depends on where friction is most acute.

What matters is choosing a starting point that unlocks progress elsewhere and letting improvements compound.

Treat MarTech as an operating system, not a project

Organizations that make steady progress stop treating MarTech as a build-and-finish effort. They treat it as a system that requires ongoing design, governance, and learning.

They revisit decisions as conditions change. They refine workflows as teams evolve. They use analytics to guide what to adjust next.

Maturity comes from iteration, not reinvention.

A final thought

Maximizing MarTech doesn't mean having the most tools or the newest capabilities. It means knowing how well your system supports the work you're trying to do — and having a clear path to improve it.

The organizations that move forward with confidence aren't the ones that chase every new option. They're the ones that understand where they are, where they want to go, and how to close the gap deliberately.

That work starts with clarity.

Appendix

MarTech system self-assessment

This assessment is designed to help marketing leaders step back and evaluate how well their MarTech system supports their goals today and where gaps may be limiting performance.

It is not a scorecard and not a maturity test. Most organizations will see themselves in more than one column at the same time. The goal is to surface patterns, spark discussion, and clarify where improvement will have the greatest impact.

How to use this assessment

> **Review each dimension and mark the column that best reflects your current state.**

> **Don't overthink individual answers — look for themes.**

> **Use this as a starting point for prioritization, not a checklist to complete.**

MarTech system assessment

Review each dimension and mark the column that best reflects your current state.

Dimension	Early stage	Developing	More mature
Stack design	Tools added reactively to meet immediate needs	Some capability mapping, but legacy tools remain	Stack intentionally designed around outcomes
Decision ownership	Decisions split across teams with unclear accountability	Partial clarity on who decides and who supports	Shared ownership with clear accountability for outcomes
Operational fit	Teams rely on a small subset of features	Core workflows supported, advanced features underused	Tools fit how teams actually work day to day
Ecosystem design	Platform choices default to convenience or safety	Some boundary-setting between platforms and tools	Right-fit ecosystems with deliberate boundaries
Analytics role	Reporting explains what happened	Analytics informs direction in some areas	Analytics guides decisions and system evolution

Reflection questions

After completing the table, consider the following:

- Where do we see the largest gaps between where we are and where we want to be?

- Which dimension creates friction in the others?

- Are we trying to improve everything at once, or is there a clear place to start?

- What would meaningful progress look like in the next 6–12 months?

Interpreting the results

Organizations rarely move forward by addressing every dimension at the same time. Progress typically comes from sequencing:

- Clarifying ownership often unlocks better design

- Improving operational fit often reveals ecosystem issues

- Strengthening analytics often exposes where the stack needs to evolve

The most effective next step is usually the one that reduces friction elsewhere.

A final note

MarTech maturity isn't about having the most tools or the most advanced capabilities. It's about how well the system supports real work, real decisions, and real outcomes.

This assessment is meant to help you see your system more clearly and decide what to do next.

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