Sojourn Solutions

# TOP 10 BEST PRACTICES FOR DOCUMENTING YOUR MARTECH STACK

# Go Where No One in Your Company has Gone Before

**Figuring out the best way to document your marketing tech stack can seem like an overwhelming challenge, particularly if you've just been given responsibility for this effort and are starting with a blank screen. We've seen 100s of marketing ops teams tackle this challenge and have distilled the things that we've seen work well into a top 10 list of best practices.**

**These best practices will help you determine:**

- **What technology to track**
- **How to track your technology**
- **The details you need to document**
- **How to optimize your stack**

# #1 You Define the Scope

## What is MarTech?

Deciding what should be tracked as part of the MarTech stack can be challenging. Do you include only products that marketing has bought? Should you include products that marketing uses that other departments have paid for? Does CRM belong in the MarTech stack, the SalesTech stack, or both?

There are no rules about what should be in a MarTech stack although there has been plenty of public commentary on the subject. Think about the "what and why" of what you are trying to accomplish, and use that as a guiding framework for what you should be tracking and how expansive the reach of your stack should be.

We approach our company marketing tech stack with a broad view of what belongs in the stack and have settled on the following scope: Any product or technology that supports the creation of the customer experience, or acquiring, engaging, and retaining customers. This broad definition allows us to:

- Reach beyond marketing and into sales and customer service
- Include tools that you wouldn't necessarily classify as a marketing product e.g. productivity and workflow tools
- Capture everything from a technology perspective for the CAC equation.

Bottom line: Find the framework and scope that works for your organization and don't worry about whether your stack is a true MarTech stack. If you say it is, it is!

# #2 Approach Your Stack Holistically

## Purchased Technology is Just the Tip of the Iceberg

Once you've defined the scope of your marketing tech stack you have to decide how deep to go within the stack. If your primary concern is the cost of the technology you are using, then tracking the technology you've purchased and that has been bought on your behalf by an agency may be sufficient.

If on the other hand, you are working towards an in-depth understanding of how well your technology is serving your marketing and sales needs, you'll need to go deeper and include freemium products and anything that you've developed internally.
We always recommend going as deep as possible. In today's environment with so many people changing jobs, it's critical to ensure that there is a complete and accessible record of all technology in place to facilitate personnel hand-offs as teams grow and change.

What's right for your stack?

- Freemium products
- Acquired products
- Products acquired and being used on your behalf by an agency
- Internally developed products

# #3 Think in Terms of Technology Lifecycle

By far, the most important technology to catalog is products that have been implemented and are currently being used. Once you have that in hand it's important to look at what might be added to the stack and what is being retired from your stack. Creating two additional stacks, one for products being evaluated and one for products that have been retired or rejected, will save time across the organization by eliminating the possibility of redundant evaluations and the risk of someone in the organization resurrecting a product that was been retired, regardless of the reason.

## The three stacks everyone should have

**Products being evaluated**

**Products in use**

**Products that have been Retired (Trash Stack)**

# #4 Engage Stakeholders

One of the biggest challenges in documenting a tech stack is getting team members to share information about the tools they use. Frequently, stakeholders are concerned that sharing information will lead to technology being taken away or budgets being cut. Being successful requires stakeholders to be supportive of the documentation project.

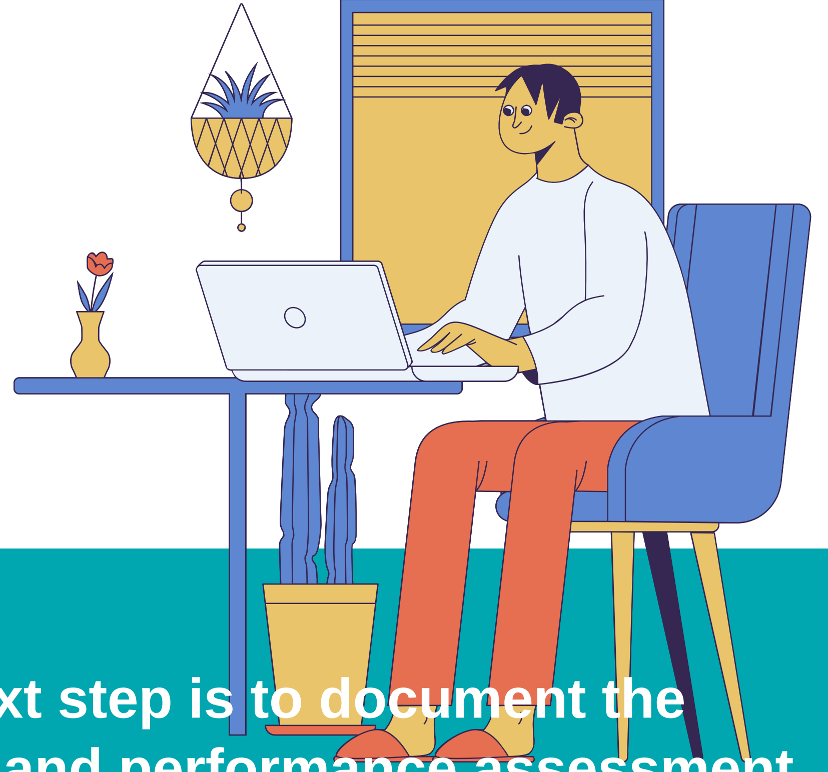
Some ideas that we've seen work for engaging stakeholders: Start by focusing on the products that each group is happy with and frame the project as one of sharing ideas and product recommendations. Address the budget issue head-on and make a commitment that if any product is eliminated from the stack as a result of your assessment and documentation exercise, you will return the budget back to the team/department to use for new programs and tools. Focus your asks on the benefits of sharing information.

## Reasons for Stakeholders to Get Onboard

**Creating a centralized record of all the marketing technology in use across the organization will:**

- **Make it easier to demonstrate the value of thetechnology being used and justify the acquisition of new technology**
- **Provide the information needed to improve the overall performance of the stack and to better meet sales and marketing objectives**
- **Make the team more effective in their jobs, reduce admin tasks and enable the focus to be on improving marketing results**
- **Enable us to share both good and bad experiences with products and to learn from one another**
- **Make it easy to collaborate on technology evaluations**
- **Simplify reporting and reduce the time to respond to requests for reports**
- **Ensure that we have a comprehensive record in case one or more key personnel leave the company a heading**

# #5 Start with the Most Critical Details



Once you've got a complete list of all the marketing technology that's being used in your organization, the next step is to document the critical attributes of each technology product that are important to technology implementation, management, and performance assessment. It's really easy to get carried away here; we've seen companies track as many as 50 different technology attributes for each product they use.

The best approach is to start with the minimal information needed and then over time layer on more and more detail.

In getting started, define the most critical information needed in the following categories:

- Administration
- Implementation
- Management
- Impact

Administration should cover information related to your purchase agreement or contract with a vendor. Implementation should document critical technology information associated with the product (e.g. technology version, integration details, customization details). Under management, anything related to the day to day operation of the product (e.g. user list, vendor contacts) should be documented. Impact is all about performance. This is where you should document the user stories the technology supports, how well the technology is utilized, as well as technology spend and ROI.

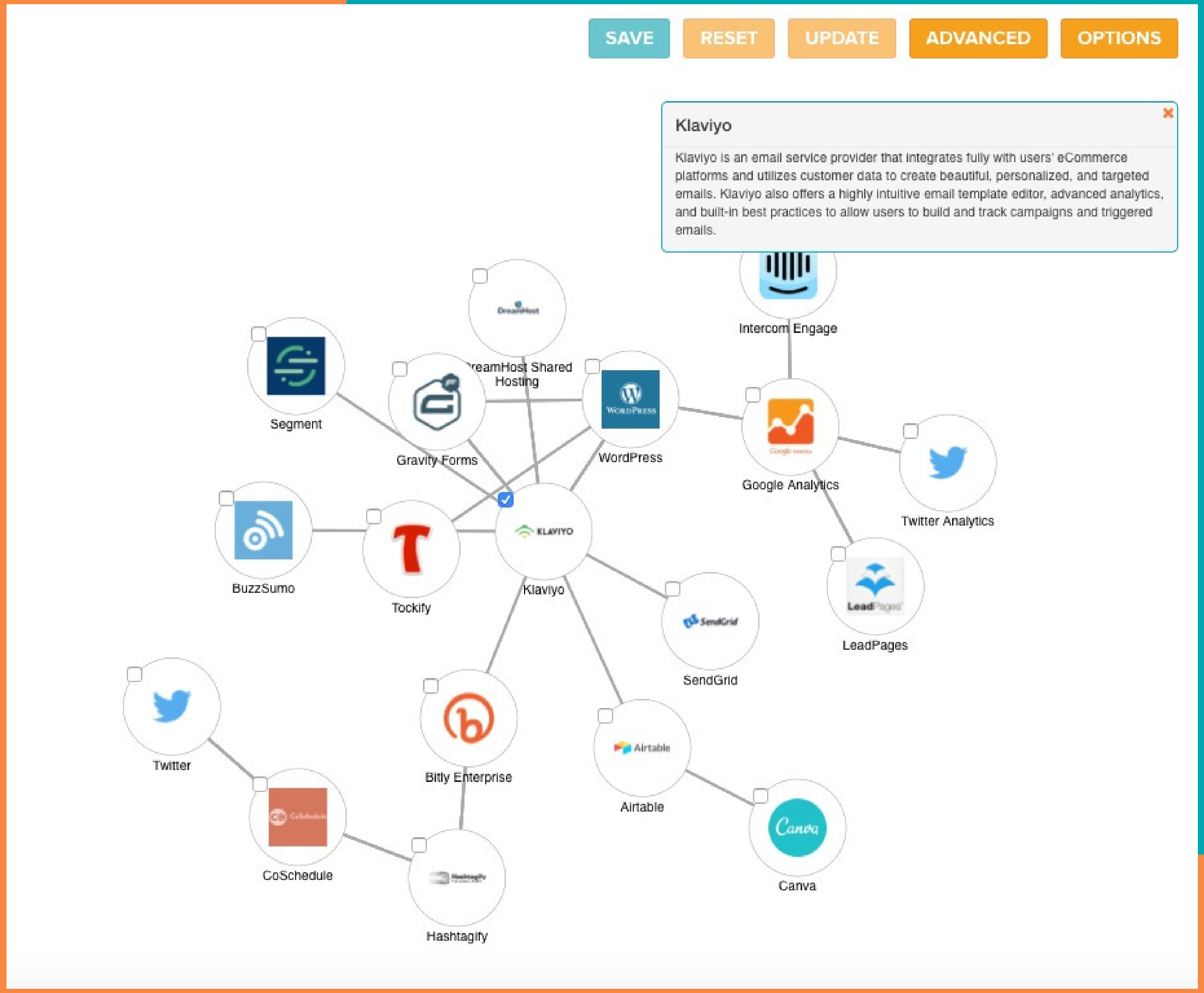
Start with your "must know" items and build from there.

# #6 Map Your Integrations

Though our stack visuals may show a tidy list of products or a neatly ordered set of product logos, the reality is that many of the products in our stacks are only valuable if they are connected to, and share data with, other products. Most stacks resemble a complex jigsaw puzzle rather than a discrete set of building blocks. With stacks, the whole is definitely greater than the standalone pieces.

In documenting your stacks, it's vitally important to document how products fit together and specifically:

- What data is passed from product to product?
- The direction that data is passed; is it one direction? Bi-directional?
- How products are connected: if custom code has been created you'll need to document the details and the responsible individuals for the code



# #7 Document Your Team's Skills

Skills are a critical contributor to stack success

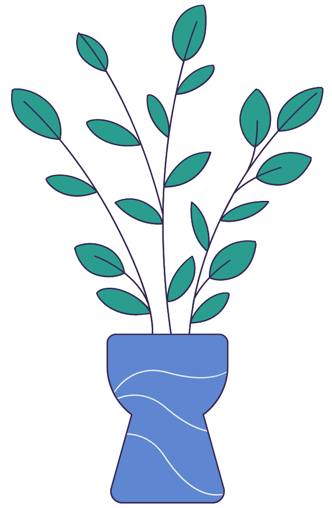
Most of us work diligently to track and manage the products we use but few of us spend any time focused on whether we have the in-house technical proficiency to properly utilize the products we've purchased or developed.
Gartner has noted that 29% of marketing leaders indicate that training and upskilling existing MarTech talent is a major impediment to their MarTech stack.

If you don't have a clear picture of your technical competency it will be difficult to determine whether a product is not performing due to problems with the product or because the product isn't being properly utilized. Furthermore, without a clear view of your team's skills, you risk having only one internal resource who can drive your critical platforms.

In the same way that you document the details of the products in your stack, you should be documenting the skills of the team members that are using those products.

Reasons to track skills alongside technology:

- To ensure that you have the competency to take full advantage pf the technology you’ve deployed
- To identify areas of risk and exposure
- To map an effective training and hiring program



# #8 Document Product Utilization

Marketing leaders report utilizing only 58% of their MarTech stack's potential according to Gartner. There's a natural tendency when implementing new technology to start by using a subset of a product's functionality in order to simplify product activation. This makes a lot of sense. Unfortunately, teams frequently move on to purchasing the next product without implementing the remaining features of the product they've just activated.

As this process takes hold, companies inevitably end up purchasing systems with redundant functionality which leads to "stack bloat" -- too much spend and time wasted learning to use multiple products when just one would suffice.

**To ensure that you take advantage of all the features each product delivers:**

- **Document the key features of each product**
- **Track the features of the product you are using**
- **Document the user stories or requirements each feature set supports**
- **Highlight features that may be useful in the future**

# #9 Always Look Ahead

## Create Your Own Crystal Ball

If you are in marketing operations, you're most likely aware of the famous Scott Brinker MarTech landscape graphic. Scott in collaboration with Frans Riemersma of MartechTribe released the latest version of the landscape, searchable via MarTech Map on May 4, 2023, which now shows more than 11,000 products in the MarTech industry. Some of the key drivers for the amount of innovation in marketing technology are the fragmentation of our target audiences, the emergence of new marketing channels, changing consumer behavior, and the maturation of new technologies that make it possible to reach and engage with prospects in new and different ways.

As the person or team responsible for marketing technology, there is an expectation that you will be on top of all the innovation that's happening in the industry. At the pace that our market is moving, this can be a challenge.

The best approach to this challenge is to create a fourth stack to capture products that may be of interest in the future. Unlike your other stacks, documenting this one is simple - all you need to capture is the product name, URL, a feature summary, and your thoughts on where this might be useful.

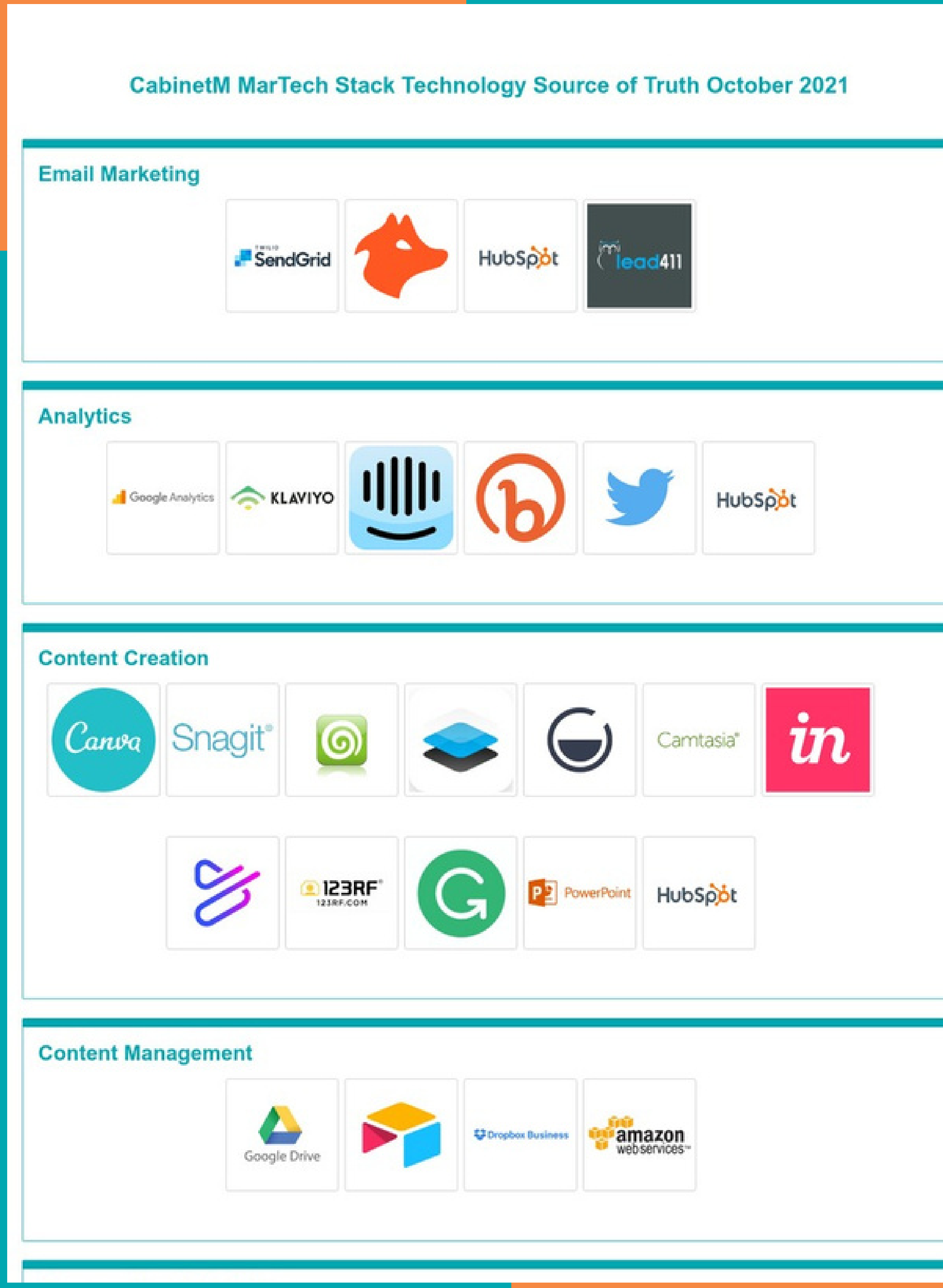
# #10 Refine Constantly and Share

There's a lot of job security in documenting your tech stack:-) The job is never done. Configurations change, users change, product utilization changes, contracts come up for removal, products move in and out of the stack; there's a myriad of details that need to be added and updated on a regular basis.

The most successful marketing operations teams make stack management part of their daily routine rather than something that's done monthly or quarterly. Ensuring that your stack is up to date makes it much easier to respond to requests for information and reports.

One of the best productivity tips we've seen over the last year is "if a job is going to take two minutes or less do it immediately." This is a good tip to action in updating your stack -- add that contract auto-renewal date now, don't wait until you have 10 more items to address.

Once you've created your initial stack documentation, make it visible across the organization. The most successful marketing operations teams we've met publish their stack as the "technology source of truth," uploading it to Confluence or SharePoint, or whatever they are using internally to share information. This provides a reference for everyone to check before requesting new technology and helps the organization understand what's being used and managed. Don't wait until you reach your perceived "perfect state;" this is a situation where "good enough" is what's important.



# Next Steps

Let's talk about what we can do for you. Start by completing our Stack Inventory questionnaire.

Feel free to reach out to Dan at Sojourn Solutions with any questions about documenting and optimizing your martech stack.

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**Our growth has mirrored the exponential growth of marketing operations capabilities globally as well as the influence of marketing leadership. Now more than ever, we are positioned to help you prove marketing's impact to revenue – from our proven approach, to our team, to our partners.**

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