

# HOW TO PICK A MARTECH SERVICE PARTNER

A guide to driving real value from your  
Salesforce Marketing Cloud investment

ACX IOM



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# MAKING YOUR MARTECH INVESTMENT SING

**Brands spend a lot on marketing technology (aka martech) so they can engage and delight their customers with relevant, personalized experiences. In fact, Gartner reports the average CMO allocates just over a quarter of marketing resources to martech – roughly equal to the proportion they spend on paid media.**

The focus of this investment tends to be on SaaS platforms and applications – from marketing clouds and customer data platforms (CDPs) to analytics software and identity resolution solutions. The part that frequently gets overlooked is selecting the right service partner to help embed and optimize these technologies.

Service partnerships are almost as much of an investment as the technologies themselves. When Acxiom commissioned research from international strategy and research agency MTM, we discovered 41% of martech budgets are dedicated to service partnerships. And over half (57%) of the senior business leaders that took part in the research expected their service partner budget to increase in the next 12 months.

Implementation support from SaaS technology vendors is fairly limited, and few brands have the necessary expertise in-house, so a martech service partner can make the difference between getting real value from your martech investment and wasting your money.

Without the right partner, technology rollouts tend to exceed timescales and budgets, and you're unlikely to get the use cases or value you expect. If you think of the technology as the commodity, a service partner is the value-add element – the part that really makes your martech investment sing.

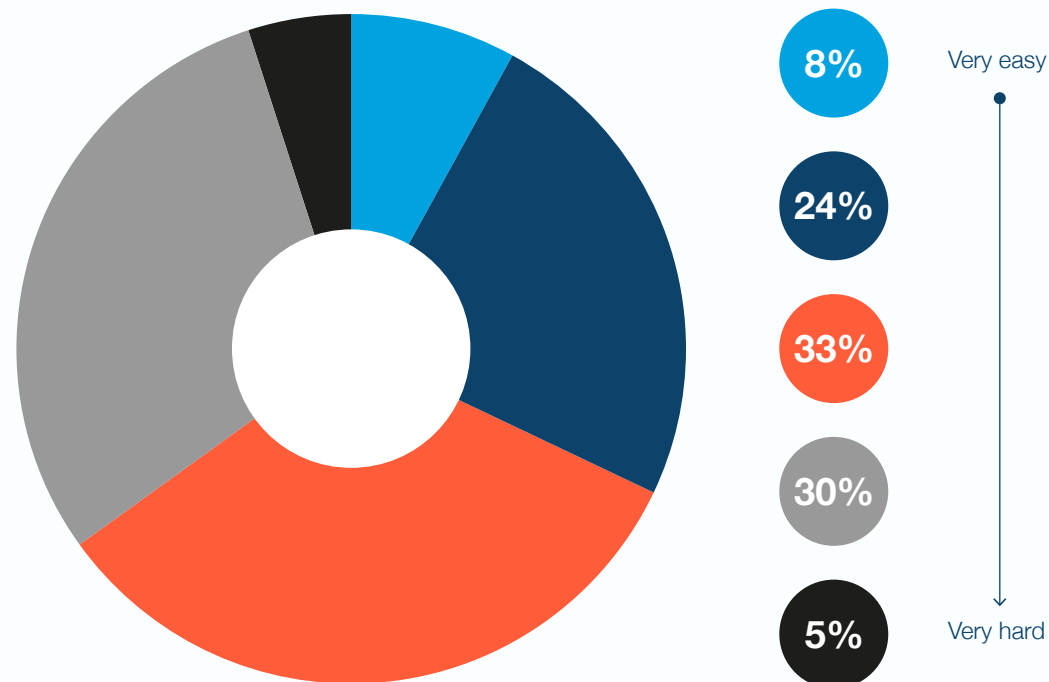
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## 62%

**of brands bring on a martech service partner to maximize the value of their martech investment**

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### How easy or hard was it to select the right martech partner(s)?



A service partner isn't just a technical expert but is also a strategic advisor. They're in the trenches with you and work closely with your teams across multiple departments to deliver the use cases you want on time and on budget. So it's worth making sure you select the right one.

But our research reveals selecting a martech service partner isn't easy. On a scale of one to five (with five being very hard), almost 70% of respondents rated choosing a service partner as level three or above.

This guide is designed to ease the selection process by helping you understand what to look for in a martech service partner, especially if you are implementing Salesforce Marketing Cloud.

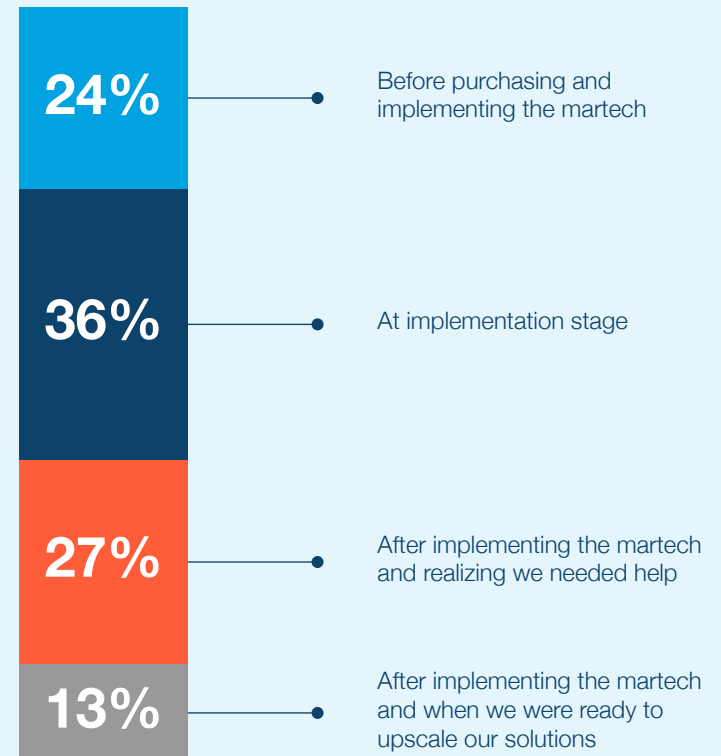
Ready to make a start?

# STARTING WITH THE WHEN

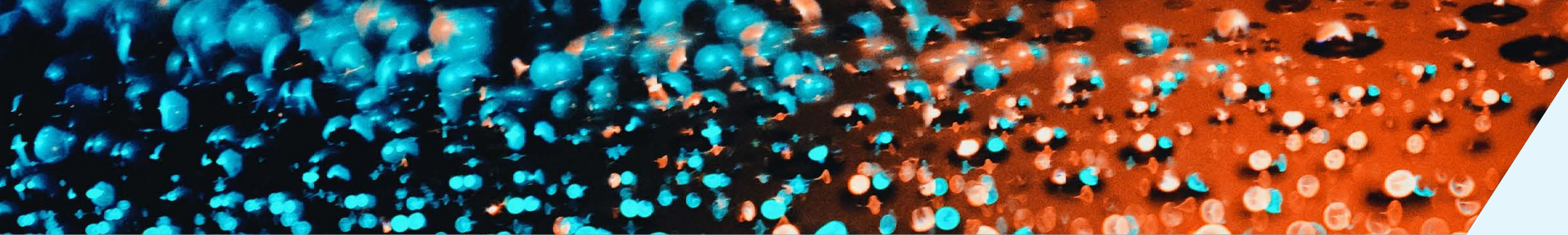
**Before we discuss *how* to pick a martech service provider, let's first take a look at *when* to make that choice.**

The majority of brands engage a service partner either at the implementation stage or shortly after. It's quite common for businesses to choose and buy a SaaS platform, and only then realize they need help to implement it. Some companies – especially smaller ones – will attempt the implementation first and then bring on a service partner when they realize they can't derive the necessary value.

**Which of the following best describes the stage at which your organization decided to bring on a service partner(s) for your martech?**







But there's a strong argument for bringing on a martech service partner much earlier in the process, either before you start to look at technology options, or to validate a choice you've already made before you commit budget to it.

At the selection stage a partner can take a consultative role, looking at the business outcomes you want to achieve, figuring out the use cases to support those outcomes, and recommending the best technology (or potentially a mix of technologies) to support those use cases.

A partner can help you work through a number of stages before committing to a platform. These include:

- Use case review
- Data evaluation
- Operational readiness assessment
- Technology evaluation

What's more, engaging a partner prior to implementation provides a much quicker route to value. With most technology vendors expecting upfront payment, and brands taking four-to-six months to choose a service partner, it makes sense to have that partner in place before you start paying for the technology they're going to implement.

While earlier may be better, it's never too late to engage a martech service partner, or even to switch partners if you're not getting the desired results. Two-fifths of the brands that took part in our research decided to bring on a service partner post implementation, either because they weren't getting the value they wanted from the technology or because they wanted to scale its use.

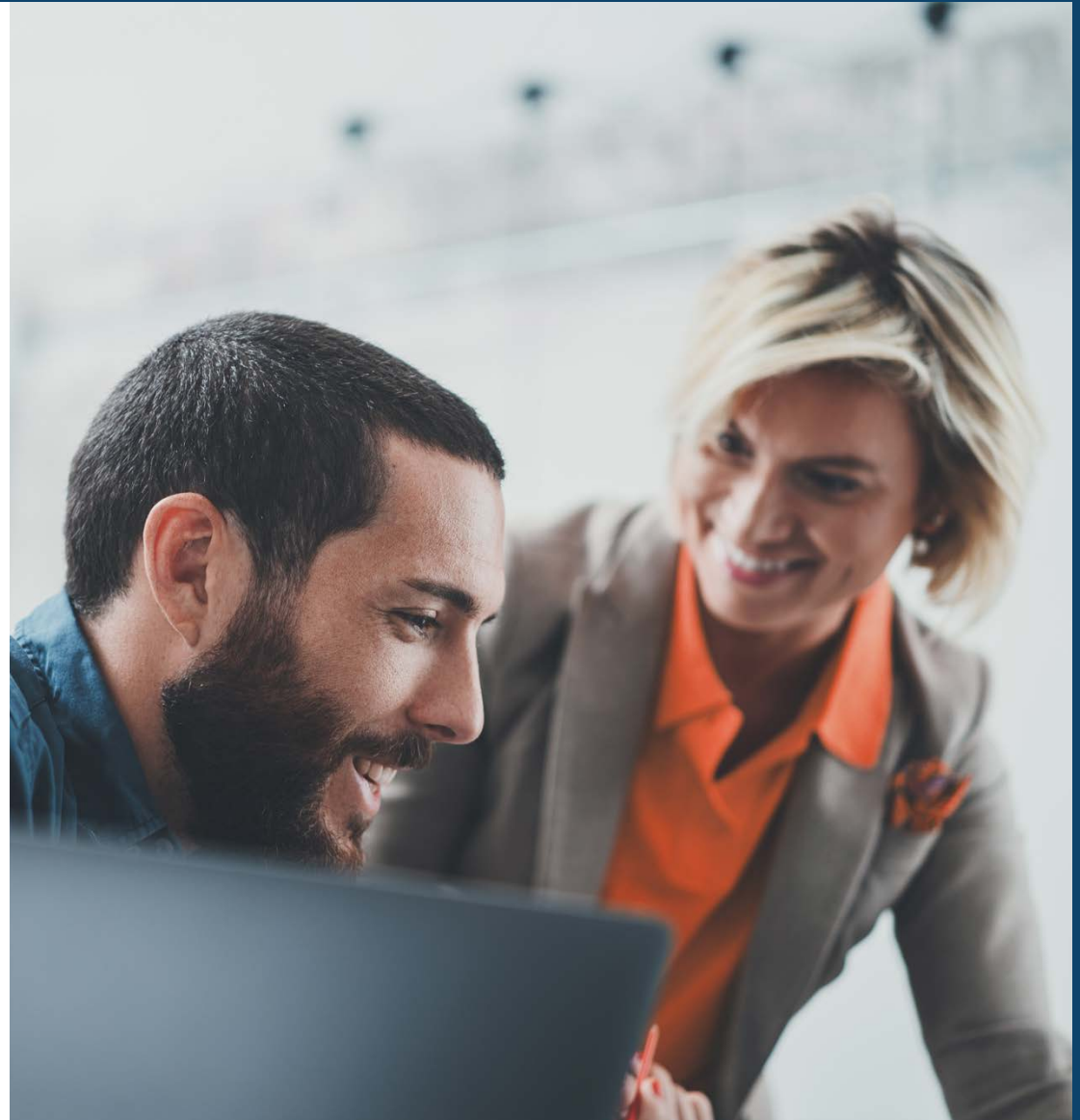
At the post-implementation stage a service partner can assess how the technology is performing and where improvements can be made. They can identify gaps in your tech stack and suggest potential solutions to drive additional value. And they can help you add new use cases as you scale the technology across the business.

## Case study: A timely turnaround

A large U.S. bank began a major digital transformation using Salesforce Marketing Cloud to provide customers with an always-on, journey-based experience. Eighteen months in, the bank realized its incumbent service partner didn't have the strategy, operational processes, or expertise the project required.

Acxiom, already a trusted partner of the bank, was asked to help reset the transformation. After an audit of the system to pinpoint overall design issues, Acxiom assisted in developing new designs within the platform and delivered deeper staff training.

While the journey is ongoing, the bank now has a clear path to achieving its original goals and an experienced team to help it realize this vision.



# FIVE THINGS TO CONSIDER

**Martech service partners come in all shapes and sizes, from large generalist consultancies to small agencies that specialize in certain technologies, and everything in between.**

Each brand has different needs depending on their industry, their use cases, the technology they want to implement, and their stage on the martech implementation journey.

However there are five key areas all brands should look at when choosing a service partner:

- 1 Platform-specific expertise
- 2 A deep understanding of data
- 3 Experience combined with agility
- 4 A smart and trusted advisor
- 5 An existing relationship



# 1

## Platform-specific expertise

**It might sound obvious but, assuming you've already decided to use Salesforce Marketing Cloud, your service partner should have demonstrable experience of working with that application, and specifically the modules you're using.**

This is probably the only time your company will implement this particular technology, and you may not have anyone internally that has done it before. So make sure your service partner has, so they can bring best practices from previous implementations.

Checking technical certifications or credentials in the relevant technology is a good place to start, and 85% of the brands we surveyed said these were very important in selecting a martech service partner. And tech providers will often recommend partners they've worked with in the past. The larger platforms may have multiple platinum, gold, and silver partners for you to choose from.

But remember you aren't obliged to go with a tech vendor's recommendation. If you're looking for impartial guidance it may even be beneficial to work with a partner whose revenue isn't dependent on the provider's referrals. That's assuming they can demonstrate the relevant platform-specific knowledge and experience of course.

If your service partner is part of the technology selection process they should ideally be platform agnostic, with experience that spans a variety of platforms so they understand the strengths and weaknesses of each, and the use cases to which they are best suited. And even if you're bringing them on at the implementation stage or later, it helps if they can play in any sandbox. This allows them to implement and optimize the technology and the data flowing through it in a way that makes sense within the broader ecosystem.

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### 48%

**of brands bring in a service partner to leverage the best practices of other organizations**

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## 2

# A deep understanding of data

**The martech ecosystem and all the platforms within it are fueled by data. That data reveals how people engage with a given brand, who they are, and what they care about.**

The quality and integrity of the data coming into the platform dictates the quality of the results coming out – for both the business and its customers. Working with a service partner who has the expertise to enable a data-first approach will greatly increase the value you can derive from your martech investment.

As well as ensuring the data flowing through your martech stack is of the highest quality, your service partner should be able to advise you on how data and technology come together.

This might mean helping you build an independent data and identity spine, so applications can be swapped out without having to start identity from scratch. Or it could mean helping you manage data governance to ensure the measures you put in place are appropriate for your sector, use cases, and degree of data sensitivity.

Deep data expertise should also be supported by a wider understanding of the industry in which you operate, and the use cases that will drive your business outcomes. Most brands want service partners to demonstrate previous experience in their industry, and will look at case studies, customer reviews, and industry ratings to validate this experience.

But cross-sector experience can also be important as industry lines begin to blur. For example, with the in-car experience becoming as important as the vehicle itself, and data increasingly used to inform insurance policies, media consumption choices, and point-of-interest recommendations, auto brands might want partners with experience in finance, entertainment, or travel.

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## 84%

**of brands say demonstrating previous experience in their industry is very important**

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### 3

## Experience combined with agility

**When brands choose a service partner they sometimes gravitate towards larger management consultancies. This might be because technology vendors often have close relationships with these consultancies, or because they are seen as a safe pair of hands, with the right reputation and security credentials, particularly within the regulated industries.**

Of course a large consultancy might well be the right choice for your brand. They will certainly have experience in both your industry and with the technology you are implementing, although their subject matter experts won't necessarily sit within your account team but will cycle in and out at different stages of the project. The downside of larger consultancies is that they may be constrained by specific tools or solutions, and often operate slowly, with many brands not realizing value from their martech investment for many months or even the first year.

Smaller service partners, on the other hand, can be far more agile. They may not have the track record of their larger counterparts, but they can get technologies up and running quickly, even if only for a handful of initial use cases, so brands can start working towards their ROI targets. They tend to have more flexibility in the tools they use to get the most out of your martech stack, and you're likely to have a more consistent account team for the duration of the partnership.

Experience and expertise will always be at the top of the wishlist when choosing a service partner, but balancing this with agility will help you to derive quicker value from your investments. There are mid-sized organizations (and Acxiom is a great example) who can combine a strong reputation and security credentials with the agility your brand is seeking to ensure you get nimble work done by a company you trust.

### **What type of organization has your company considered for martech partners?**

(Whether for implementation, optimization and/or managed ongoing services)

**66%**

Large leading management consultancies

**63%**

Companies who only specialize in our technology

**60%**

Multi-agency marketing/data groups (including specific providers within a group)

**34%**

Smaller consultancies focused only on martech

## 4

# A smart and trusted advisor

**True partnership is the key to profitable martech implementation or optimization. The right service partner shouldn't be just another vendor you need to manage. They should be a good fit with your company and a trusted advisor – someone you can be sure is always acting in the best interests of your brand.**

The right partner will really get to know your business and will suggest customized solutions to solve your specific problems. They will be open and honest about any challenges that lie ahead, and find solutions to help you navigate through them. They will consider what you want to achieve in the future and solve today's problems with an eye towards tomorrow, rather than just focusing on getting the immediate job done.

Our survey respondents defined these essential outcomes for a successful martech partnership:

- The partner helps the brand determine their current marketing and data sophistication as well as future ambitions
- The brand is empowered with the appropriate skills to use once a partnership is over
- The brand feels more confident in their marketing decisions as a result of the partnership
- The partner helps the brand to ensure data and decisions are not siloed within an organization

The education piece is particularly important. A successful martech implementation requires investment in change management, communications, and training across the organization. Running a quick train-the-trainer course and leaving attendees to pass the knowledge on simply won't cut it.

The right partner will work with all stakeholders and teams involved with the technology – from marketing ops to analytics and IT – to make sure the solution is fully embedded and understood before they hand over the controls. They will empower teams with the skills they need to get maximum performance out of the technology once the partnership is over.

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**> 80%**

**of brands say finding a partner that is a good fit with company culture is very important**

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## 5

### An existing relationship

**Somewhat surprisingly, when we asked brands what criteria were important in selecting a martech service partner, ‘having an existing relationship’ came near the bottom of the list. (Although 66% did still say it was very important.) This result indicates brands are prioritizing choosing the right partner over just working with someone they already know, which does make perfect sense.**

But imagine if you could have the best of both worlds. A partner you trust and who already knows your business, and who also has the capabilities you’re currently looking for. Given brands work with an average of three-to-four service partners at any one time, there’s a fair chance an existing partner will have the skills and experience you need to implement Salesforce Marketing Cloud, even if you’re not yet aware of them.

And there can be significant benefits in expanding an existing relationship. The most common quality brands look for in a partner is the ability to ‘demonstrate an understanding of the company’s problems and solutions.’ Well, nobody understands a company’s problems better than its existing partners – sometimes not even the company itself.

When you bring on a new partner that has no history with your data and processes, there is an inevitable learning phase when errors can easily be made. Over a quarter of brands report challenges with martech providers that include early mistakes in configuration, having to repeat steps or processes, and taking too long to implement the technology.

All of these issues can be mitigated (to some extent) by working with existing partners that already understand your customers, your processes, how data flows through your organization, and how your various systems interconnect. And, once again, working with an existing partner that knows your business and is close to your data often provides a quicker route to value than onboarding a new team.

Of course different service partners all have different areas of expertise, and it’s possible none of your current partners have the right skills. But it’s always worth asking the question.

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## 64%

**of brands look for a service partner that understands their problems and the solutions**

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# SPOTLIGHT ON ... SALESFORCE



**With a more than 20% share of the CRM Market and 150,000 customers across the globe, Salesforce is one of the world's leading cloud-based software providers.**

Salesforce Marketing Cloud is an extension of that powerhouse, helping brands offer personalized customer experiences and drive business outcomes across all channels in every phase of the customer lifecycle.

Impressively, almost 70% of the brands that responded to our survey had invested in a martech solution from Salesforce. But most brands don't have the internal resources and experience to drive maximum value from their investment.

Acxiom combines 50+ years of data and marketing expertise with a team of certified Salesforce experts to help clients with the implementation, operation, and optimization of a collection of Salesforce Marketing Cloud offerings. These include:

- Genie \ CDP
- Engagement (formerly ExactTarget)
- Personalization (formerly Interaction Studio)
- Intelligence (formerly Datorama)
- Account Engagement (formerly Pardot)

In fact, as part of the IPG family of agencies, Acxiom can support the entire stack of Salesforce solutions, including creative.

IPG has well over 1,000 Salesforce practitioners and certifications, and Acxiom brings the insights necessary to fuel better marketing, and the capability to ethically manage and maintain identity across time, channels, and your enterprise.

We support growth and allow you to remain agile in an ever changing marketplace by providing the right solutions and designs inside Salesforce, in the context of the entirety of your enterprise data management. This effectively lowers the data costs tied to scalability.

[Read more](#) about the partnership between Acxiom and Salesforce.



## In their own words

When we asked our survey respondents to describe the best thing about working with a partner to implement, optimize, or manage Salesforce marketing technology, they said:

“Seamless integration with our infrastructure without any disruption to our operations.”

“The amount of capital we saved and ended up earning.”

“It saved us a lot of time and added essential expertise.”

“It made the entire decision making process much easier and more efficient.”

“Being able to receive customized support.”

“Time was saved in getting use cases and the spec defined.”

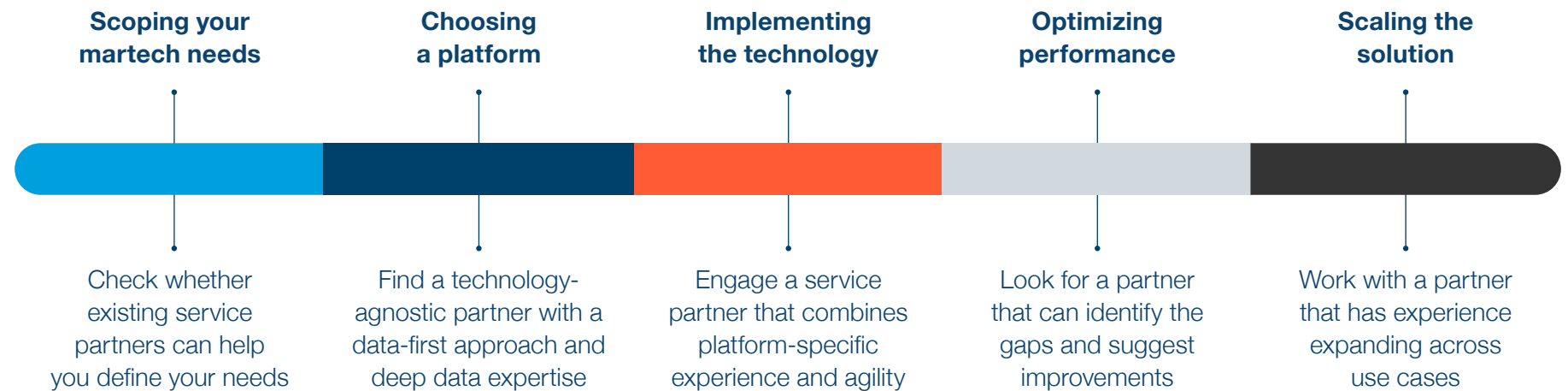
“There can be an excellent exchange of current trends and ideas.”

“We had more confidence in our longer term goals.”

“Learning so much to the point where you truly know you made the right decision.”

# NEXT STEPS TO VALUABLE PARTNERSHIP

**The next step to take in choosing a martech service partner depends where you are on the implementation journey.**



# ABOUT ACXIOM

Acxiom provides data-driven services and solutions that enable the world's best marketers to better understand their customers to create better experiences and business growth. A leader in customer data management, identity, and the ethical use of data for more than 50 years, Acxiom now helps thousands of clients and partners around the globe work together to create millions of better customer experiences every day.

Acxiom also offers a full suite of strategy consulting, predictive and marketing analytics, and marketing measurement offerings to support all facets of the data-driven prospect and customer journey. We help brands evolve their data strategy, understand marketing impact, better know their prospects and customers and predict behaviors.

Visit [acxiom.com](https://acxiom.com) or email [info@acxiom.com](mailto:info@acxiom.com) to get started.



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