

# Keynote Presentation | [Scalable MarTech] Navigating The MarTech Landscape



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Underworks

# Navigating the MarTech Landscape

The logo for Underworks, featuring the word "under" stacked above "works" in white lowercase letters. A white arrow points upwards from the letter 'd' in "under".

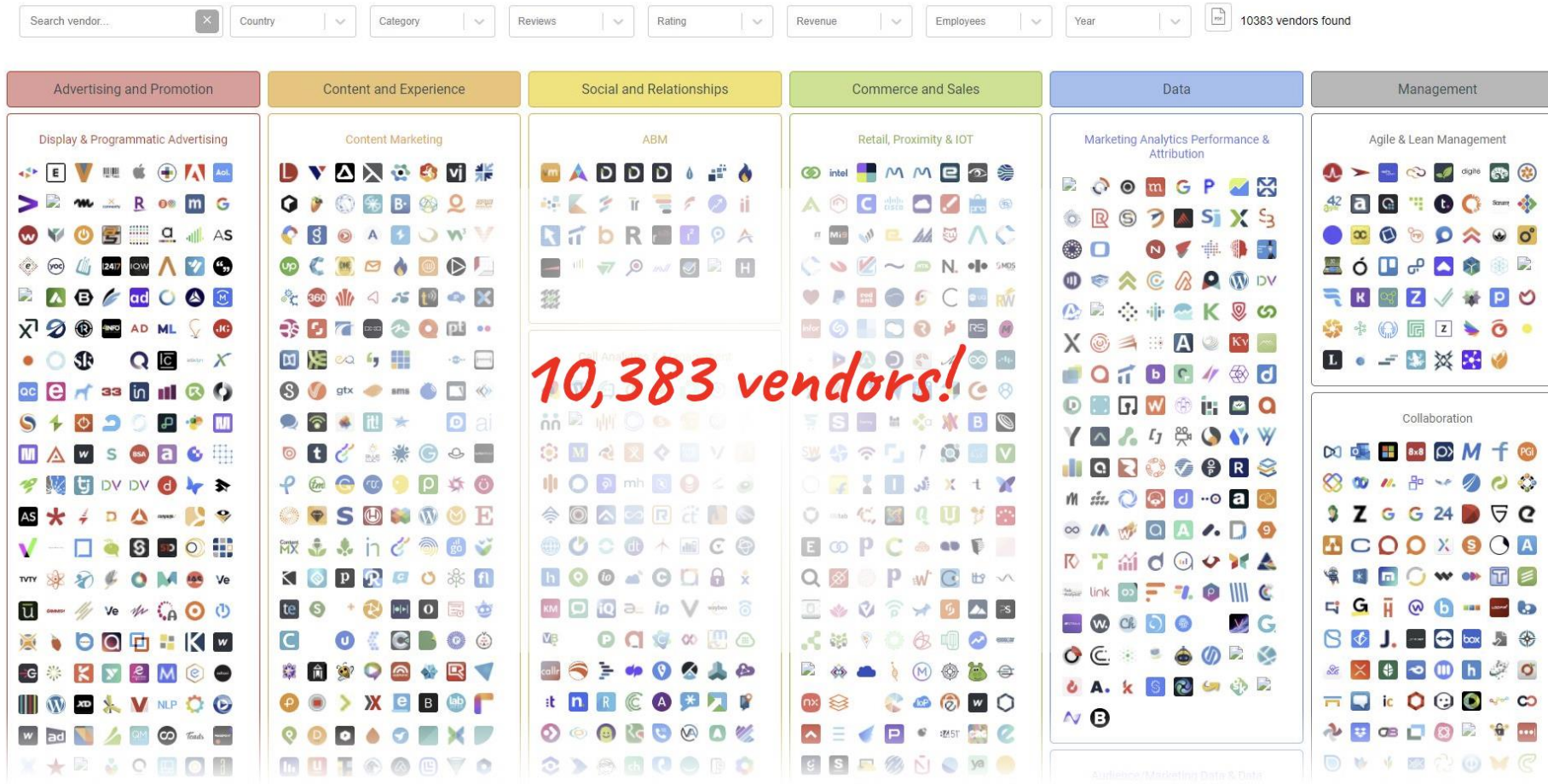
under  
works

The logo for Clickr Media, featuring the word "clickr" in a bold, orange, lowercase sans-serif font, with the word "MEDIA" in a smaller, orange, uppercase sans-serif font below it.

clickr  
MEDIA

# How many MarTech vendors are there in 2023?

# More than 10,000 MarTech vendors globally!



Martech for 2023: The (Really) Big Picture



# More than 1,500 vendors in Japan alone

2017

A grid of approximately 272 vendor cards, each with a logo and name, organized into columns and rows. The cards are color-coded by category.

~ 272

2018

A grid of approximately 485 vendor cards, similar in format to the 2017 map but with a significantly larger number of entries.

~ 485

2019

A grid of approximately 931 vendor cards, showing a clear increase in the number of vendors compared to previous years.

~ 931

2020

A grid of approximately 1,234 vendor cards, with the text 'マーケティングテクノロジーカオスマップ JAPAN 2020' overlaid in the center.

~ 1,234

2021

A grid of approximately 1,317 vendor cards, with the text 'マーケティングテクノロジーカオスマップ JAPAN 2021' overlaid in the center.

~ 1,317

2022

A grid of 1,566 vendor cards, with a large '1,566!' in a grey oval at the bottom right. The map includes a navigation bar with 'Awareness', 'Engagement', and 'Retention' sections, and various icons representing different marketing functions.

1,566!

# Data is growing but customer data interactions are growing even faster

Along with the diversification of digital customer contact points between companies and customers, the utilization of customer data and the utilization of technology in marketing are progressing.

MuleSoft's Report found that **70% of customer interactions are now digital.**



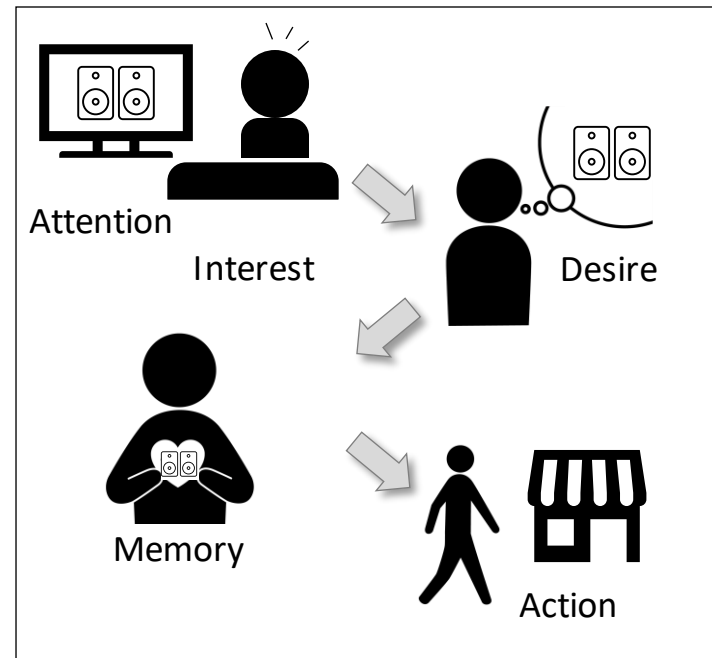
# Digital interaction is becoming increasingly important in the customer journey

## Traditional Buyer Journey

### Environment



### AIDMA

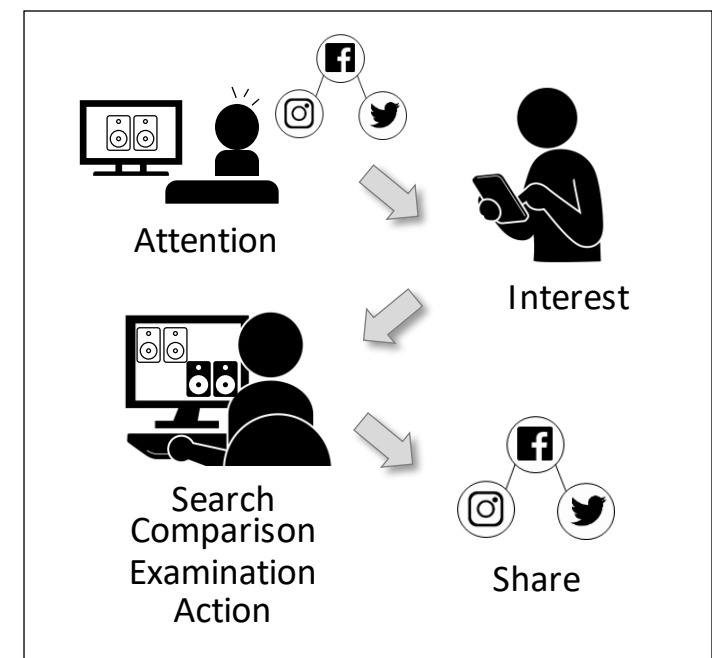


## Digital Customer Journey

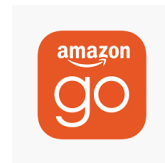
### Environment



### AISCEAS



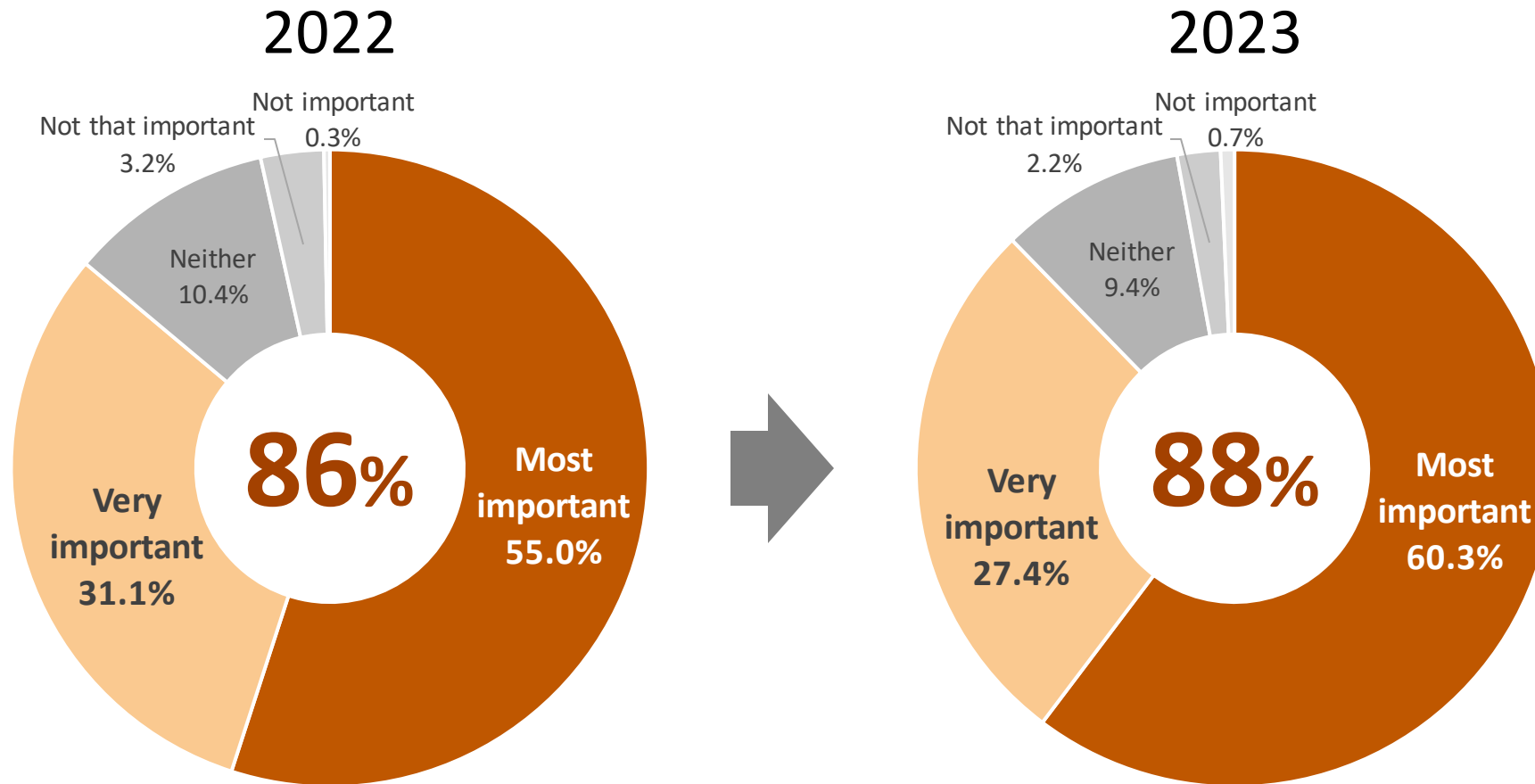
# Your customer is always ON in a digital world





According to our research, nearly 90% of enterprises said marketing data management is crucial for improving marketing results

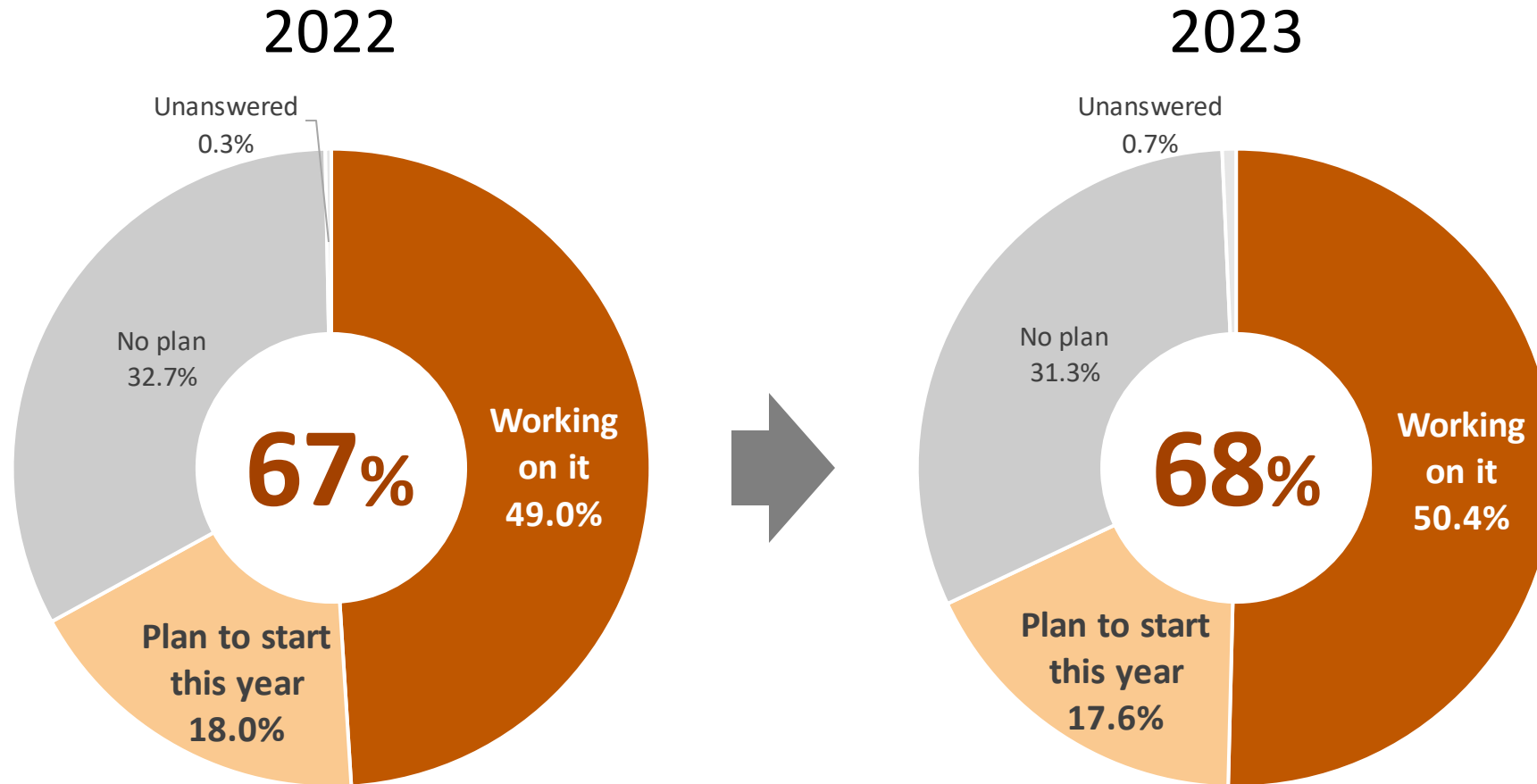
**Q: How important is marketing data management for improving your marketing results?**



\*Marketing data management is the process of collecting, organizing, analyzing, and applying data to your business strategies.

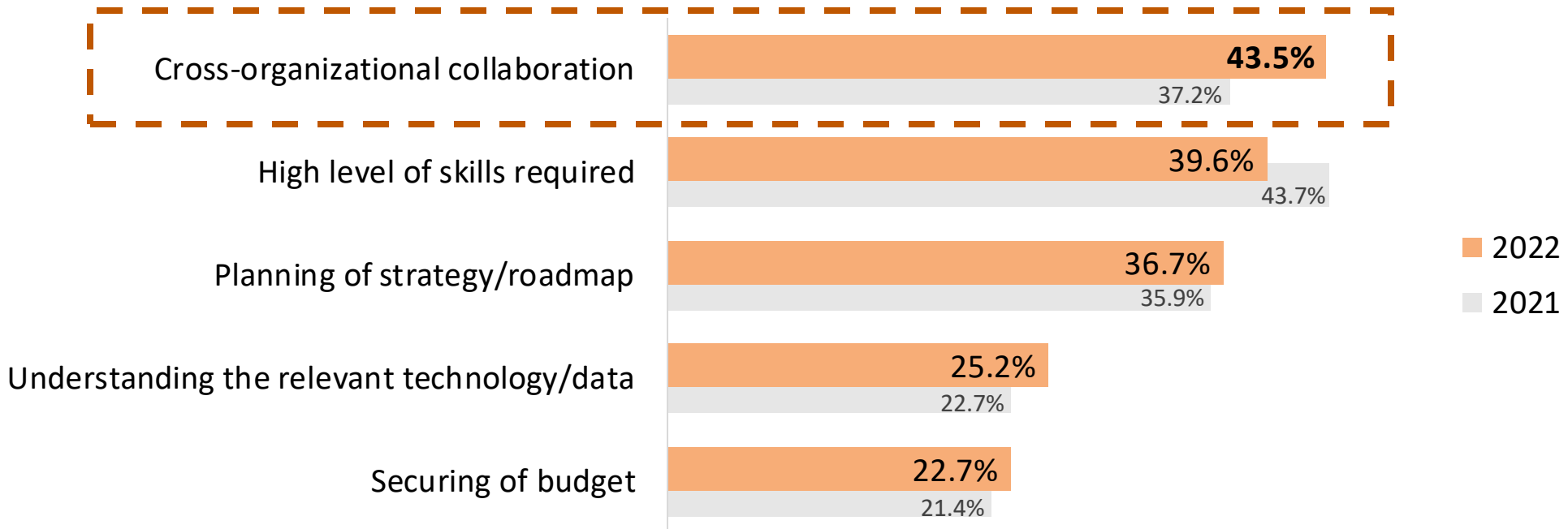
# Nearly 70% of enterprises also said they had plans to work on their marketing data management

Q: Are you currently working on marketing data management or have a solid plan to start?



# Rolling out a marketing data management strategy often requires cross-organizational collaboration

**Q: Which are the areas you find the most difficulty in when planning data management?**

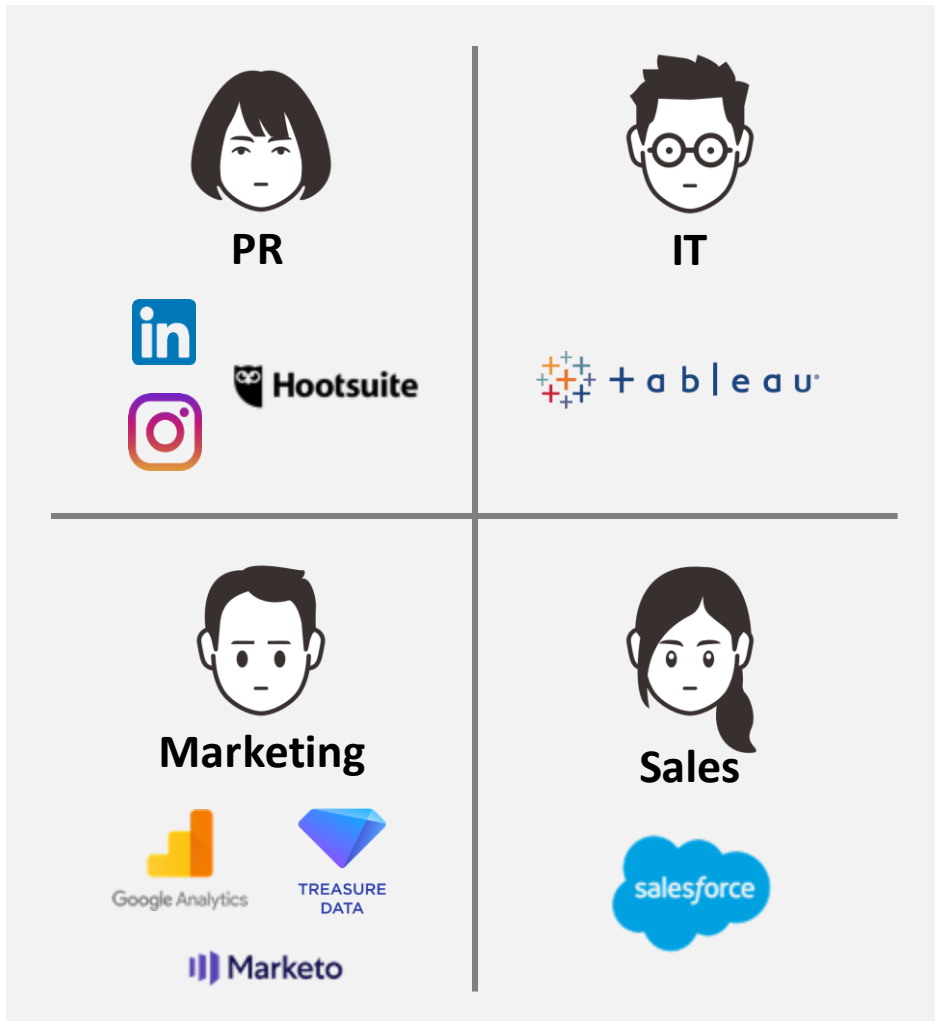


There is still a low level of awareness and understanding of the importance of these initiatives among management and on-site personnel.

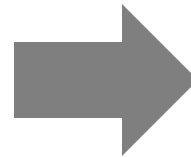
This often results in a **Silo Mentality**, which is where each department is focused on its own work and does not properly communicate with the rest of the organization.

# The Silo Mentality has to be overcome to achieve successful marketing orchestration

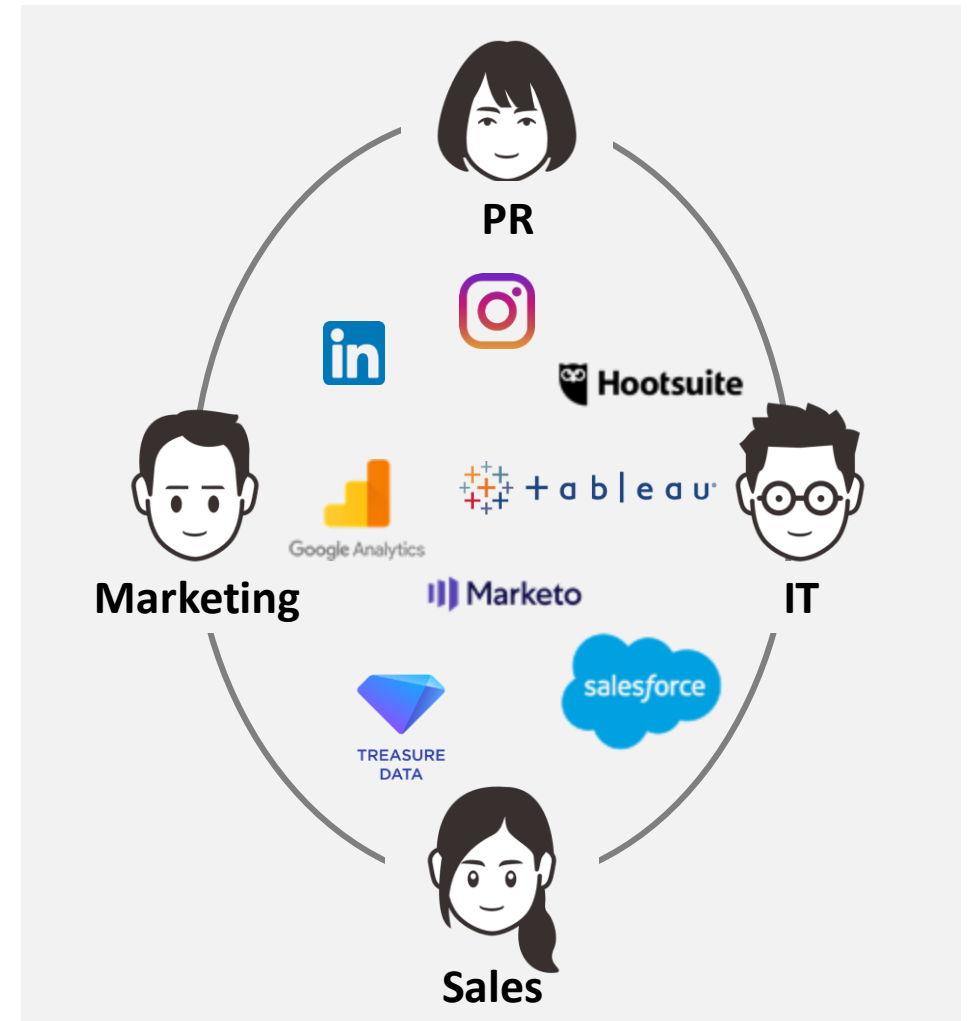
## Silo Mentality



Breaking down silos for integrated operations



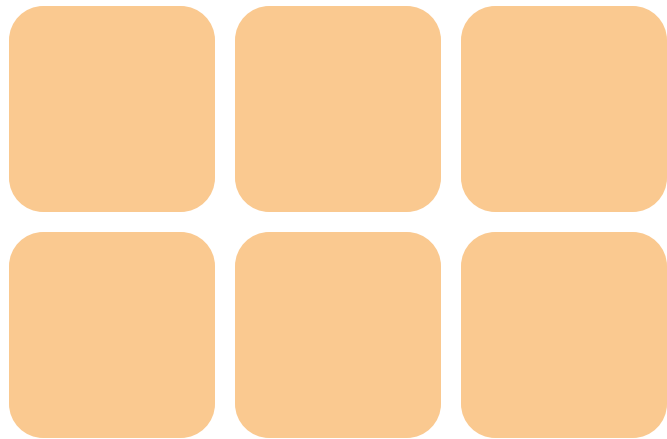
## Marketing Orchestration



From the systems perspective, there is also a need to decide how to build your MarTech stack

### Suite Solution (All-in-one)

A one-stop provider or platform offering everything you need for your marketing activities.



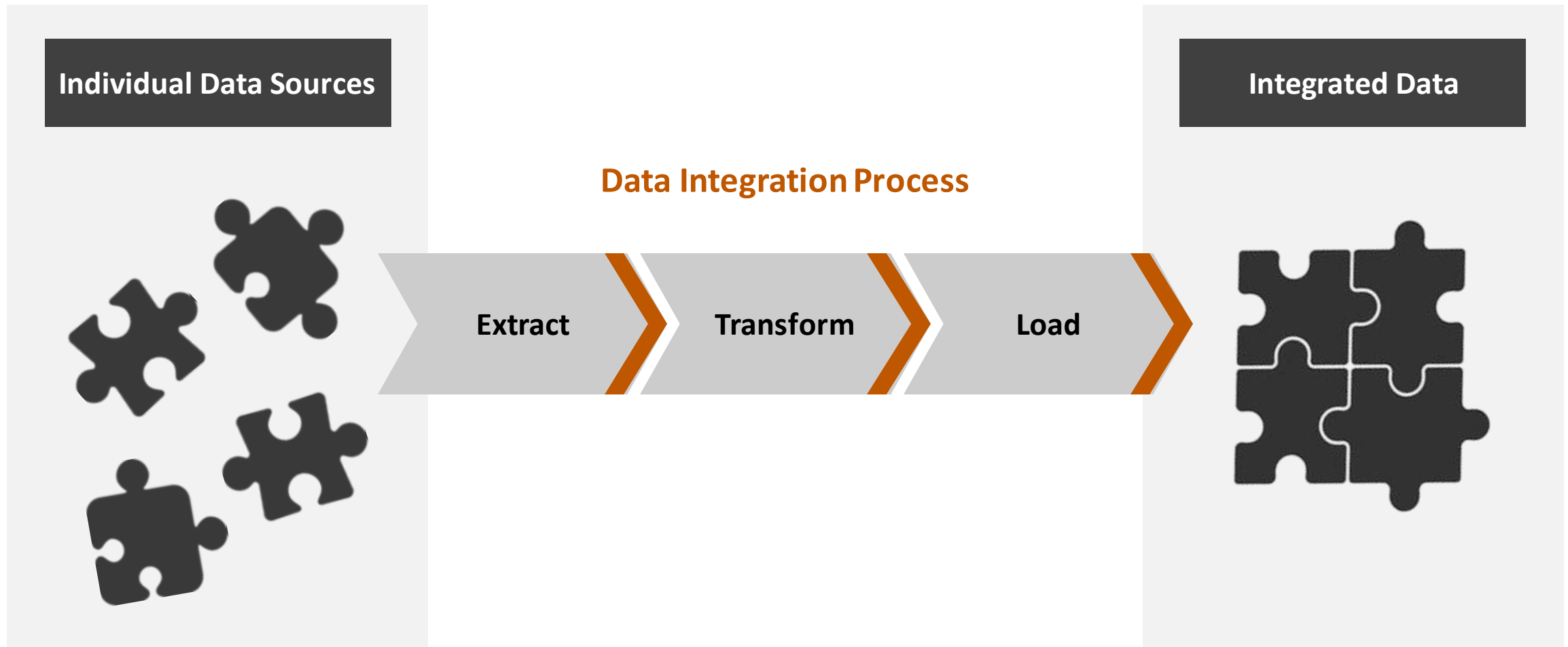
### Best-of-Breed (Stack)

Individual tools that fit each of your marketing needs best, combined into a complete and customized system.



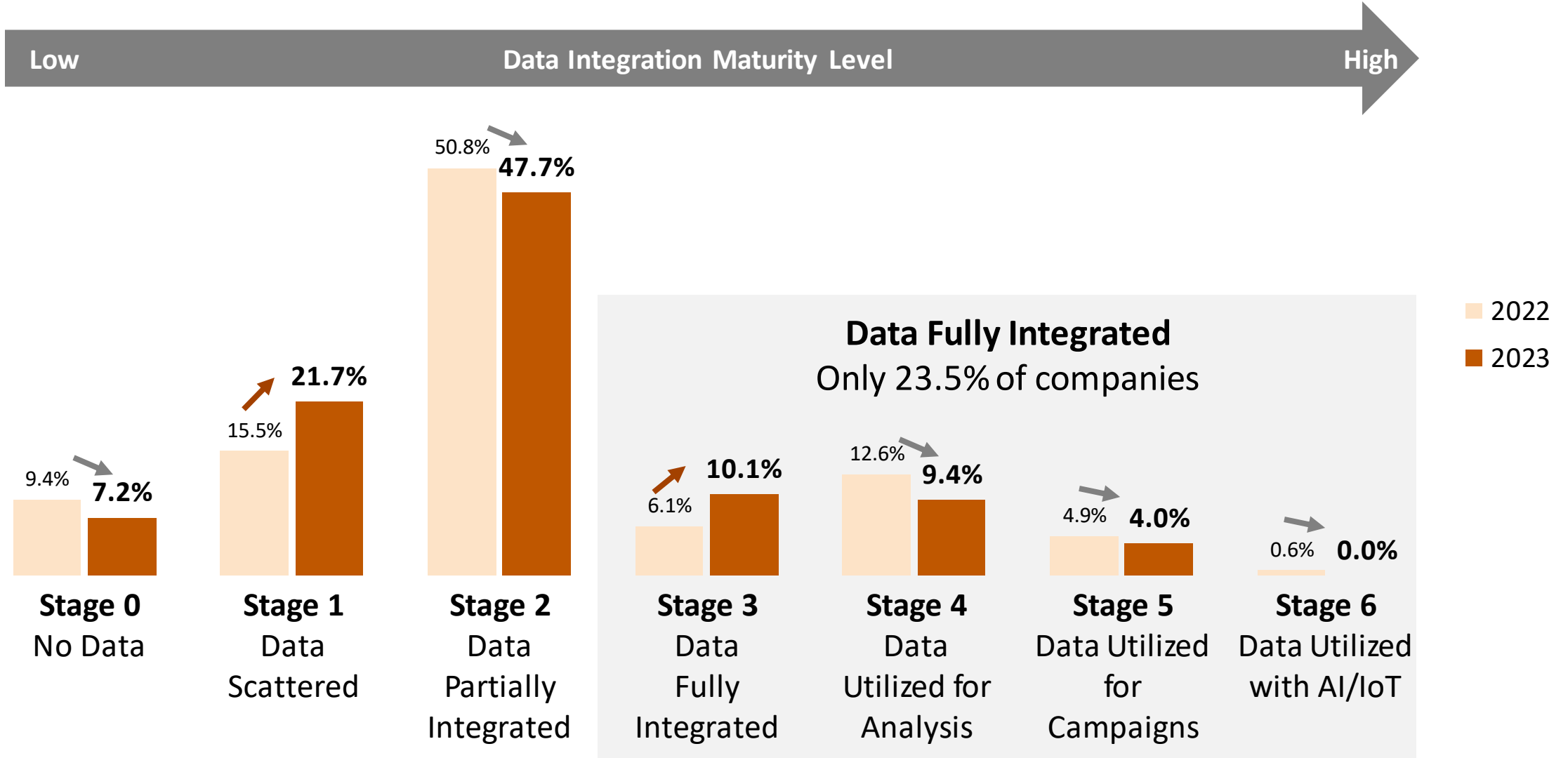
**Can an All-in-One Suite Solution satisfy your needs?**

With the Best-of-Breed approach, companies have to fit individual data sources together to fully reap its benefits



However, over 75% of enterprises have yet to fully integrate their data

Q: Which stage best represents your company's data integration status?



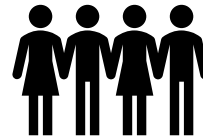
# Getting the most out of your MarTech stack

There are three main points to consider for a successful data management strategy:



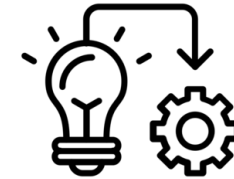
## 1. Evaluating vendors

Put time in buying process evaluating vendors on their openness and integrations



## 2. Investing in people

Invest in people to learn how to use new technologies



## 3. Strategy based process

Invest in building a clear process based on a strategy for how to run the project and how to harness data value



# True Marketing Orchestration Starts With Marketing Experts

It is necessary to build an integrated marketing foundation in consideration of customer needs, business requirements, and operational processes, but this is an area where specialized knowledge is required, and we specialize in digital marketing consulting and execution support.



**Audit**



**Strategy**



**Implementation**



**Enablement**



**Activation**



**Governance**



# A Future Beyond Your Imagination

We help our clients provide their customers a seamless and personalized journey by combining **Deep industry knowledge**, **Digital technologies** and **a Human-centered design approach**.

By putting **Experience First and Technology Second**, our mission is to take part in creating “A Future Beyond Your Imagination”.

The logo for 'underworks' is displayed in a dark blue, sans-serif font. The word 'under' is positioned above 'works'. A vertical line runs through the center of the 'u' in 'under', extending upwards to form an arrowhead pointing towards the top of the frame. The logo is set against a large, semi-transparent white circle that is partially overlaid on a background image of a city skyline.

under  
works

**Founded in 2006**

**CEO: Manabu Tajima**

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