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Implementing a Martech Software Solution

The four phases to successfully implementing a stronger client–supplier relationship.

Today's marketers require effective and efficient marketing technology software to navigate the rapid pace of change in the digital landscape.

Thousands of software solutions exist today to aid practitioners in process automation, data management and retention, and insight generation, and other key areas, but simply acquiring a software solution isn't enough. Marketers should consider and structure a communication action plan with their martech providers to ensure a tool is implemented and utilized effectively against the marketing organization's needs. A successful rollout is essential to the software's ability to help marketers build their brands and drive growth — and that starts by getting everyone on the same page when it comes to how the martech software works and what it can do for the organization.

Marketers' initial approach to implementing martech software can make or break its future as a viable tool in their marketing stack. Its implementation is best conducted in four phases — kickoff, discovery, gathering requirements, and getting sign-off — to align internally and with the martech provider on the goals of the initiative.

Here are the four phases to successfully implementing a new martech software solution:

01 Kickoff

The kickoff phase establishes a foundation for the project. Marketers will need to identify stakeholders, especially those with a vested interest, and understand their roles as key participants from marketing, procurement, and finance, among other teams. These individuals will be affected by the introduction of new solutions and must understand the scale of that change. It's important to note that martech suppliers often interact with other external providers such as marketing agencies or data providers, so the focus should not solely be on internal stakeholders.

Once the stakeholders have been identified, the next step in the kickoff phase is to define the specific problem that the technology solution needs to solve; create a problem statement (i.e., a statement that defines the problem the martech software will help to solve) with buy-in from all parties; establish a budget; and define the project endpoint.

02   Discovery

The discovery phase provides marketers the opportunity to ensure all parties are aligned on how to solve the problem defined in the problem statement. Brainstorming sessions can be powerful tools for generating ideas and distilling perspectives from diverse groups. Marketers should draw on previous experiences of what has worked well and what hasn't, as this can drive discussions and place requirements in clearer context.

Discussions should be mindful of the needs-versus-wants concept to prevent the project from getting sidetracked. Specifically, participants in the process should carefully review "stretch objectives" — goals designed to align with the big picture but are not always realistic to achieve within current constraints — to see how achievable they are. Finally, the marketers will need to identify and list potential solution providers. A rule of thumb is to include three potential suppliers that are well known in the industry.

Often, martech solutions are bought to automate manual processes that the marketing team is seeking to replace. These manual processes may use or generate documents, such as Excel files, PDFs, and email. Collecting as wide a set of sample documents as possible for the potential supplier to review will give the supplier a better impression of the marketing organization's current setup and determine a solution that comes as close to their requirements as possible. The best-case scenario is if these documents have real-life data in them or, failing that, dummy data the supplier can analyze.

It is worth marketers keeping in mind that discovery is often iterative. New issues may arise as previous are solved. Understanding that this is perfectly natural reduces stress levels, ensuring stakeholders are not surprised or alarmed as new facts come to light during the course of the project.

03   Gathering Requirements

In this phase, marketers need to prioritize solution requirements using a methodology that is familiar to the business, ranking solution objectives from highest to lowest. As part of this process, the marketing team should create use-case examples of the technology solution to provide prospective suppliers with deeper insights into what specific problems they must solve. The prospective suppliers should then provide a demonstration of their solution, which may trigger ideas to be included in the requirements, along with innovative approaches not yet considered. Marketers should seek continuous feedback from the stakeholders during this phase, allowing for the requirements to be reviewed and refined.

Many martech solutions collect useful data from the operational processes they automate. By understanding the business questions that need to be answered before defining the operational content and hierarchies, the technology solution will provide actionable insights that improve the marketer's business.

04 Reviewing and Signoff

During this final phase, marketers should document the final requirements and have them signed-off, as well as finalizing budget and timing. Procurement or purchasing should create a request for proposal (RFP) or a request for quotes for the selected suppliers to respond to. The preferred supplier (or suppliers) should then enter into negotiations regarding requirements, terms, and costs.

The Signs of Success

The supplier's perspective is as important as the marketers' in the successful implementation of a martech solution. In the initial stages, challenges may arise when dealing with complex RFPs in which the supplier has not had the ability to conduct any form of discovery sessions. For example, text in the RFP can be interpreted differently, leading to friction. If possible, the marketing team should provide the supplier with direct access to key client stakeholders, as face-to-face communication can help clear up misunderstandings and ensure both parties are on the same page.

The chosen supplier then partners with the client throughout the implementation process to ensure success. Marketers will benefit from developing relevant training content and help guides for each segment and by ensuring the delivery of this content is tailored to each audience. A key learning at project initiation is to set up weekly meetings to capture any issues or risks so that they can be mitigated.

There are several signs of a successful martech software implementation:

- The marketer is actually using the tool.
- Collaboration is taking place between internal and external organizations, facilitated through the tool.
- The consumer experience has been improved through by providing data and metrics to key decision-makers.
- The organization feels confident in treating the platform as a single source of truth for fueling the operation and direction of its marketing organization.

After a successful implementation, there will always be room for enhancement and improvement. By following this four-phase model for implementation as well as a focusing on the foundational principles of cooperation and communication, marketers can ensure a successful client–vendor relationship before, during, and after a martech software implementation.

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