

# Top MarTech Players

## ROMANOFF CONSULTANTS

May 2017

# Inga Romanoff

Chief Executive Officer  
Romanoff Consultants

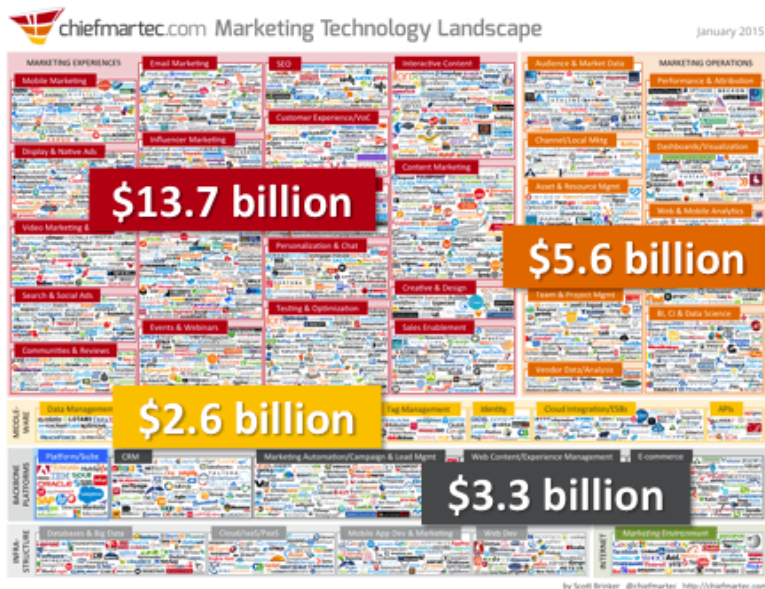
A thought leader, international speaker, and an award winning Marketing Automation expert with multiple certifications.





# Marketing Technology

The term “**MarTech**” especially applies to major initiatives, efforts and tools that harness technology to achieve marketing goals and objectives.



**\$25.2 billion**



**26 unicorns**

**\$2.41 ROI**  
(materialized)

**300,000+**  
**employees**

Investment data provided by

**VB | Profiles**

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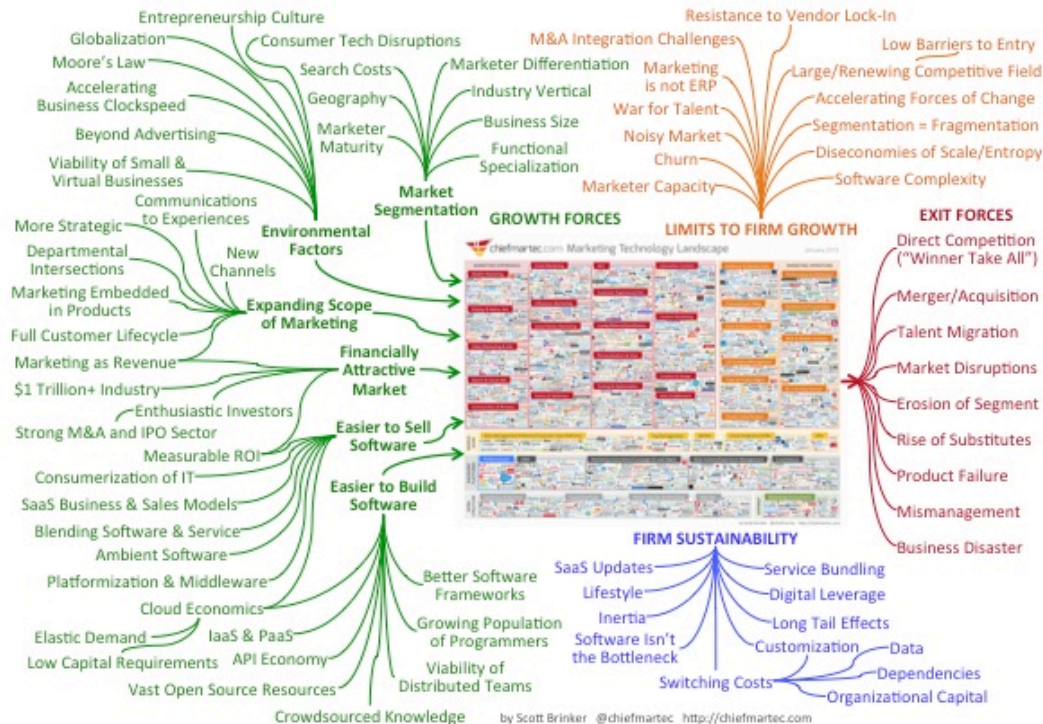
*Marketing has become a technology-powered discipline, and therefore marketing organizations must infuse technical capabilities into their DNA*

~ Scott Brinker, [chiefmartec.com](http://chiefmartec.com)

# MarTech Landscape

## System Dynamics of the Marketing Technology Landscape

January 2015

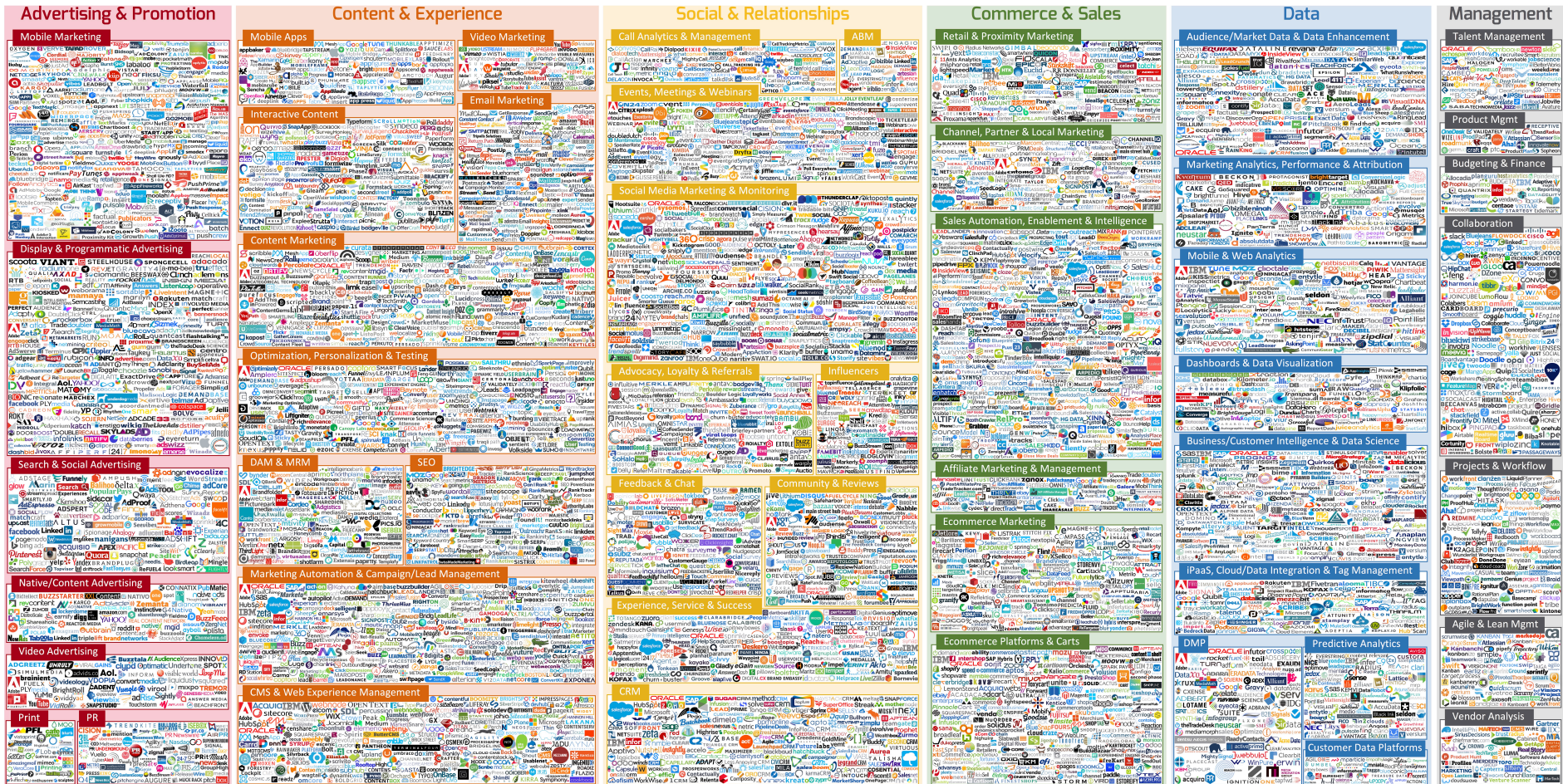


In 2016, the number of logos is closer to **3,500 (87% growth over the last year prior)**!

The top 5 largest categories, by number of solutions included, are:

- Sales Automation, Enablement & Intelligence (220)
- Social Media Marketing & Monitoring (186)
- Display & Programmatic Advertising (180)
- Marketing Automation & Campaign/Lead Management (161)
- Content Marketing (160)





# MarTech Buzz Words

artificial intelligence

marketing automation

agile marketing

hyper-personalization

Chief Growth Officer

digital ship

lead nurturing

account-based marketing

Chief Marketing Technologist

omnichannel

marketing software

big data

Adtech + MarTech

lead scoring

CRM

e-commerce

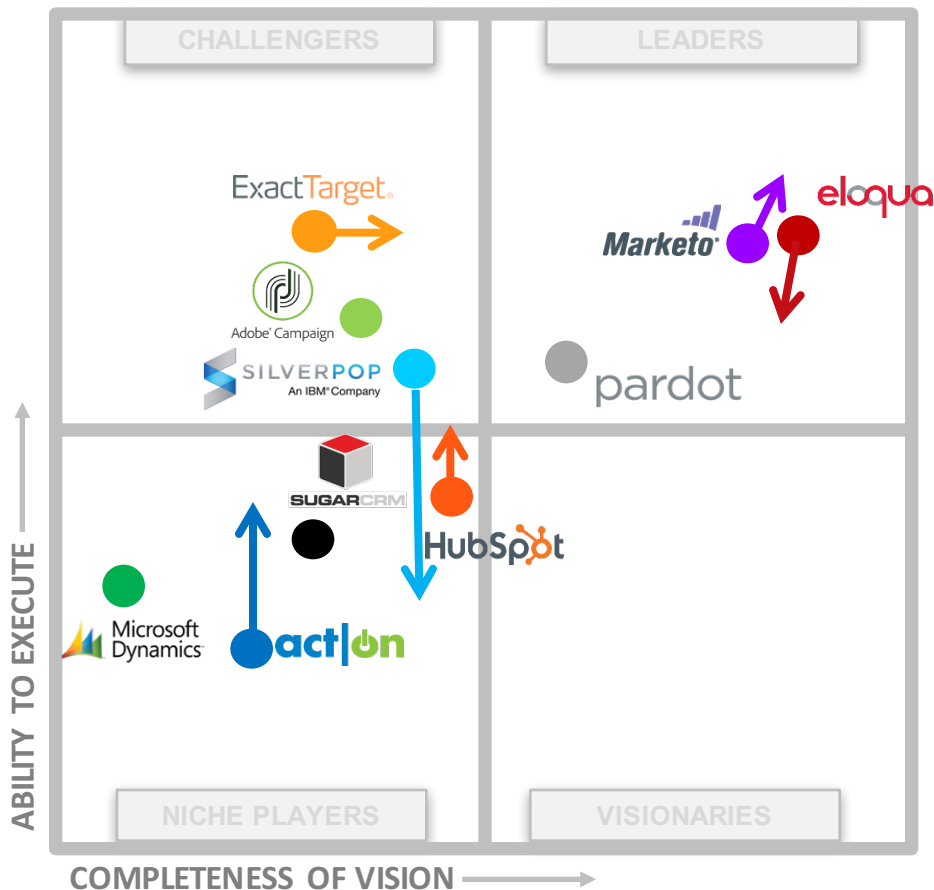


# The Only Constant is the Change



Gartner Magic Quadrant

<https://www.marketo.com/analyst-and-other-reports/gartner-magic-quadrant-for-digital-marketing-hubs/>



- **Marketo:** Easy to use, known for innovation and thought leadership. Very good brand reputation. Streamlined client onboarding (professional services, launch pack consulting product.)
- **(Oracle) Eloqua:** Enterprise-focused. Known for breadth/depth of product and ability to scale, but is difficult to use and implement. Have not expanded share in rapidly growing market.
- **(Salesforce) Pardot:** Designed for small-to-midsized B2B marketers. Basic functionality, little support and a product roadmap lacking vision.
- **(Salesforce) ExactTarget / Marketing Cloud:** Optimized to midsize-to-large B2C enterprise
- **Act-on:** Growing very rapidly and specializing in SMB segment
- **Silverpop:** Difficult interface, struggles with branding due to recent changes to messaging.
- **Hubspot:** Content marketing guru. Product and organization centric to SMB customers. Claims to give a built-in CRM for free.

# Marketing Automation

## WHAT IS MARKETING AUTOMATION?





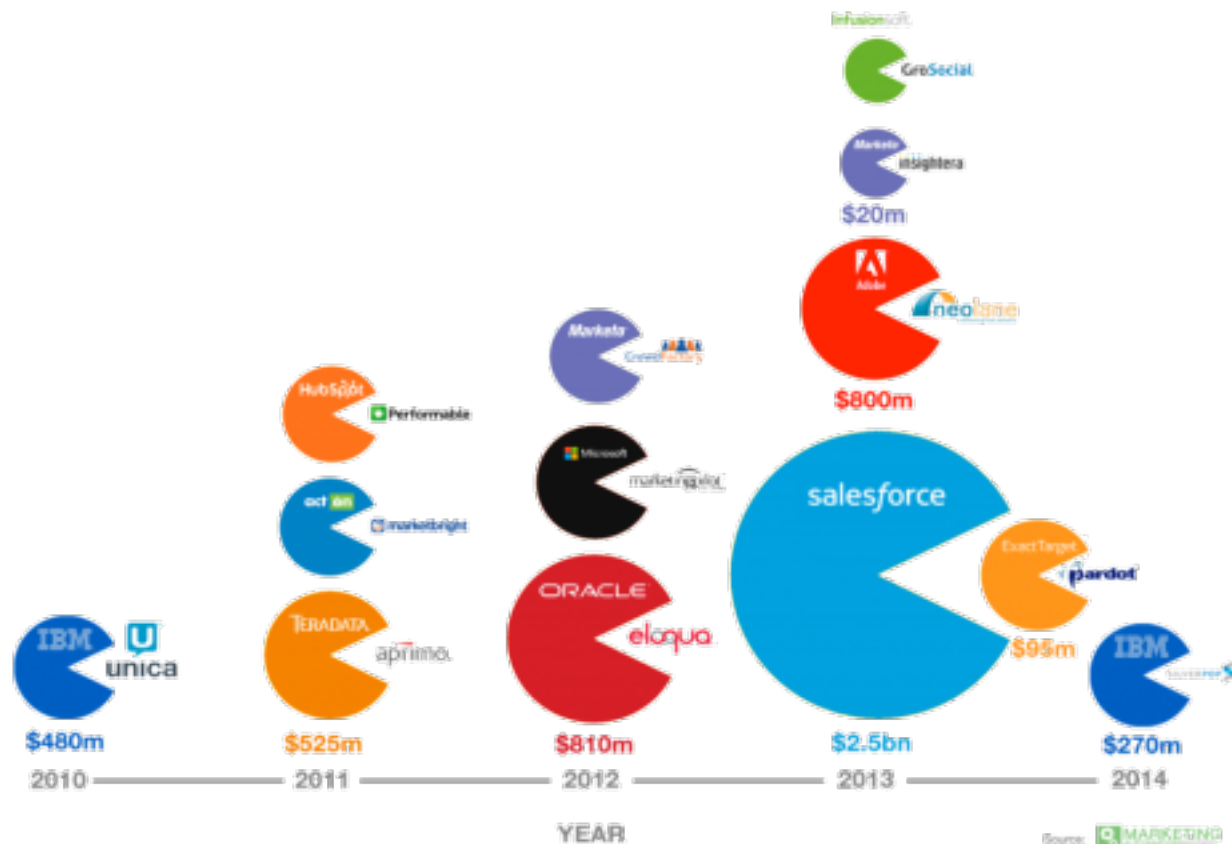
# Early MA Vendors



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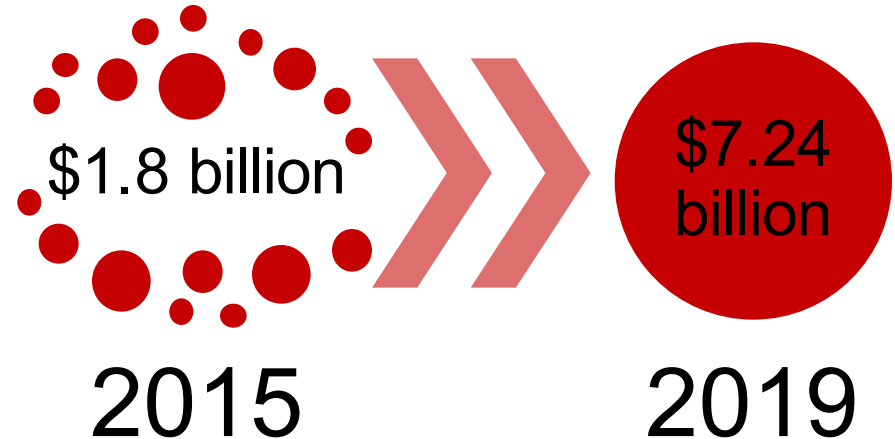
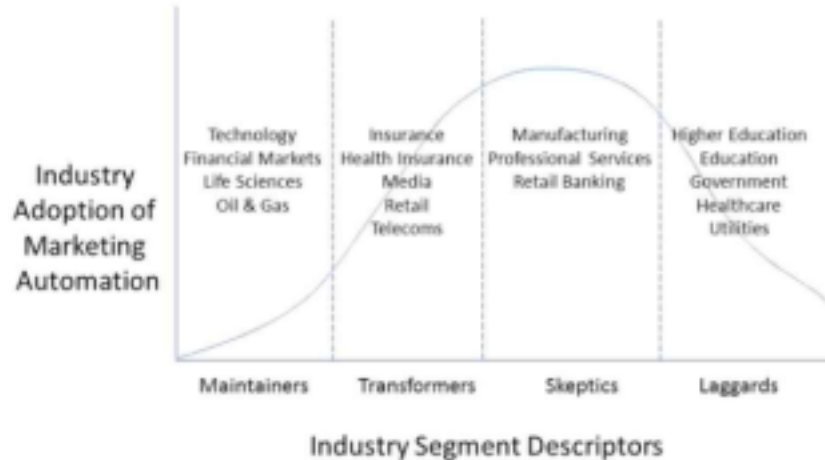


# Major Acquisitions



# Marketing Automation

- According to SiriusDecisions research, there are nearly 11 times more B2B organizations using marketing automation now than in 2011
- Current penetration rate: 49% of overall businesses from 3-5% in 2014





"The Scream" by Edvard Munc  
is one of the most famous paintings in art history because it captures universal suffering

# Chief Growth Officer



## CMO became Chief Growth Officer

33% of CEOs think that it is CMO role that is charged with delivering revenue growth opportunities; however, CMOs have limited view of the progress and performance results. What are current challenges and bottlenecks, what is not working, where do revenue opportunity priorities lie (e.g. low hanging fruit)?



## Personalized, targeted marketing campaigns

What is current maturity of our marketing programs and campaigns? How are we performing and where are opportunities to drive growth. How we should be prioritizing initiatives and marketing resources. What works for us, what does not?



## A consistent customer-centered experience across channels

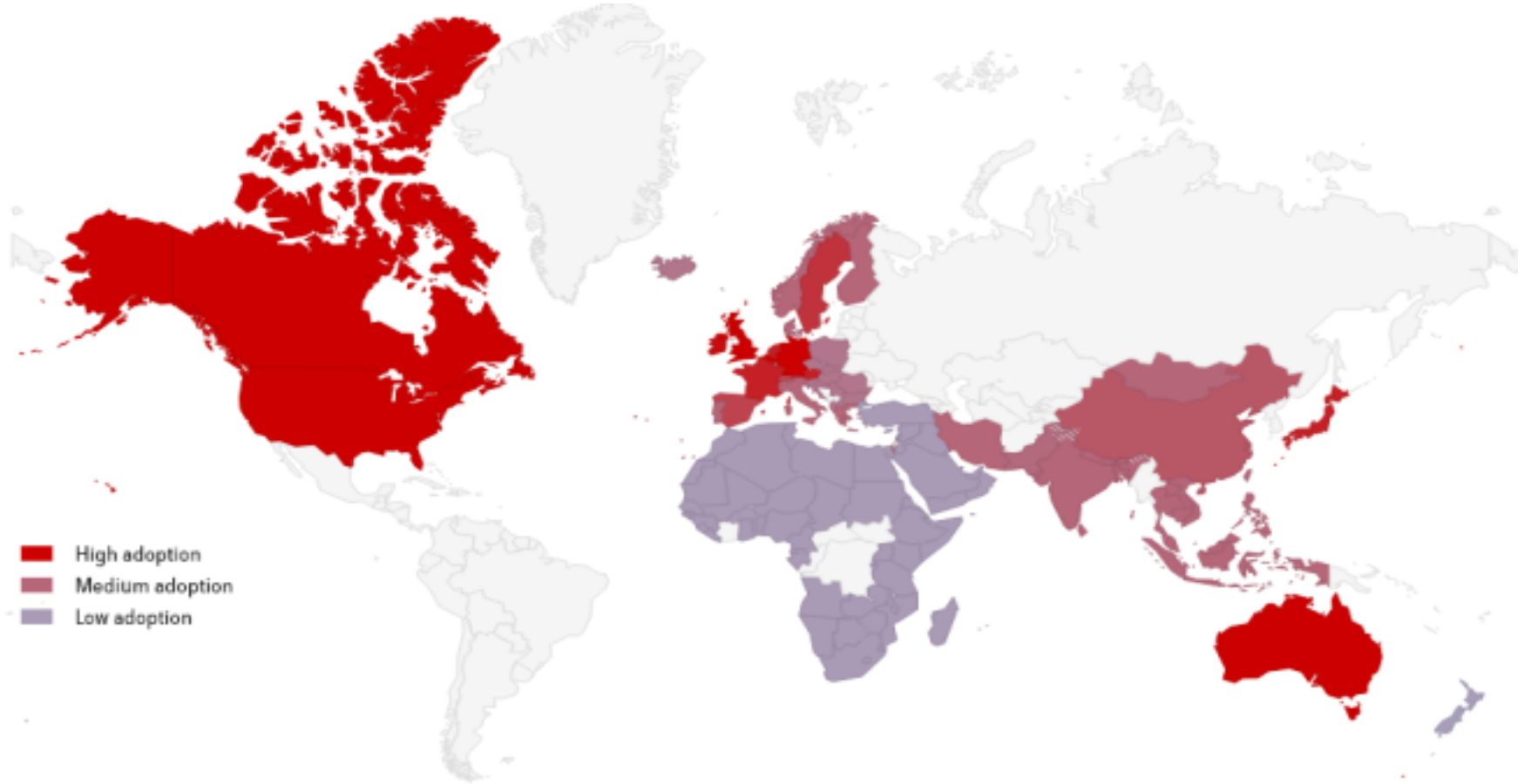
There are many forces at work making this near-impossible. Marketers are using different technologies across channels, so executing even on seemingly simple campaigns becomes labor-intensive. Additionally, the demand for Demand Gen and Marketing Ops talent continues to outstrip supply, meaning turnover is high. CMOs want to deliver a consistent experience for their customers, but the reality on the ground is very different.

# Adoption of MA is faster in high-revenue companies

The higher the revenue of a company, the more likely they are to use marketing automation

Segment	Annual Revenue	# of Marketing Automation Clients	Market Share	Estimated # of companies in market	Market Penetration
Large	\$500+ million	3,000	57%	5,000	60%
Mid-size	\$20-\$500 million	9,000	22%	90,000	10%
Small	\$5-20 million	12,000	16%	220,000	5%
Micro	<\$5 million	3,000	5%	1,000,000	3%

# Adoption Around the World



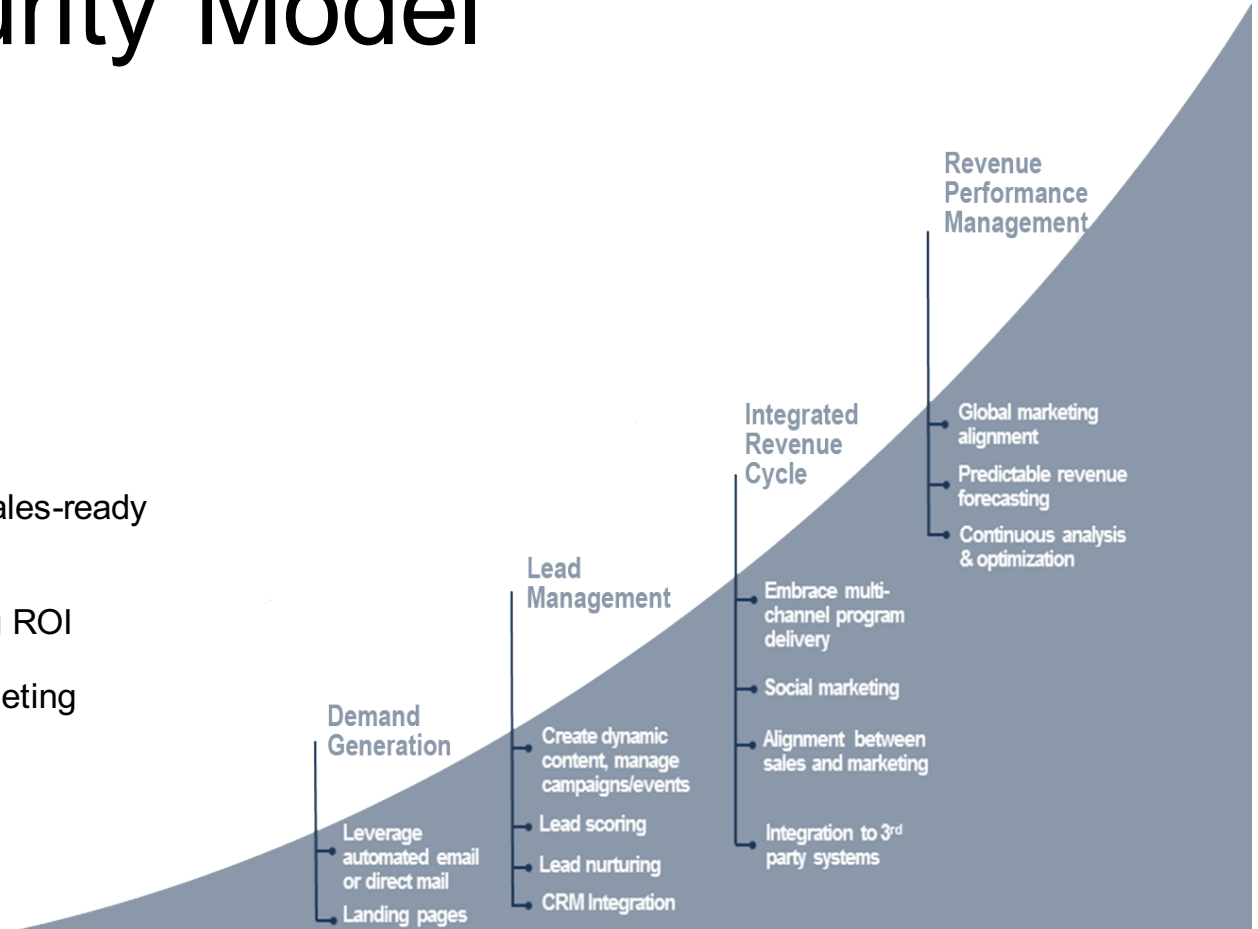


# Maturity Model

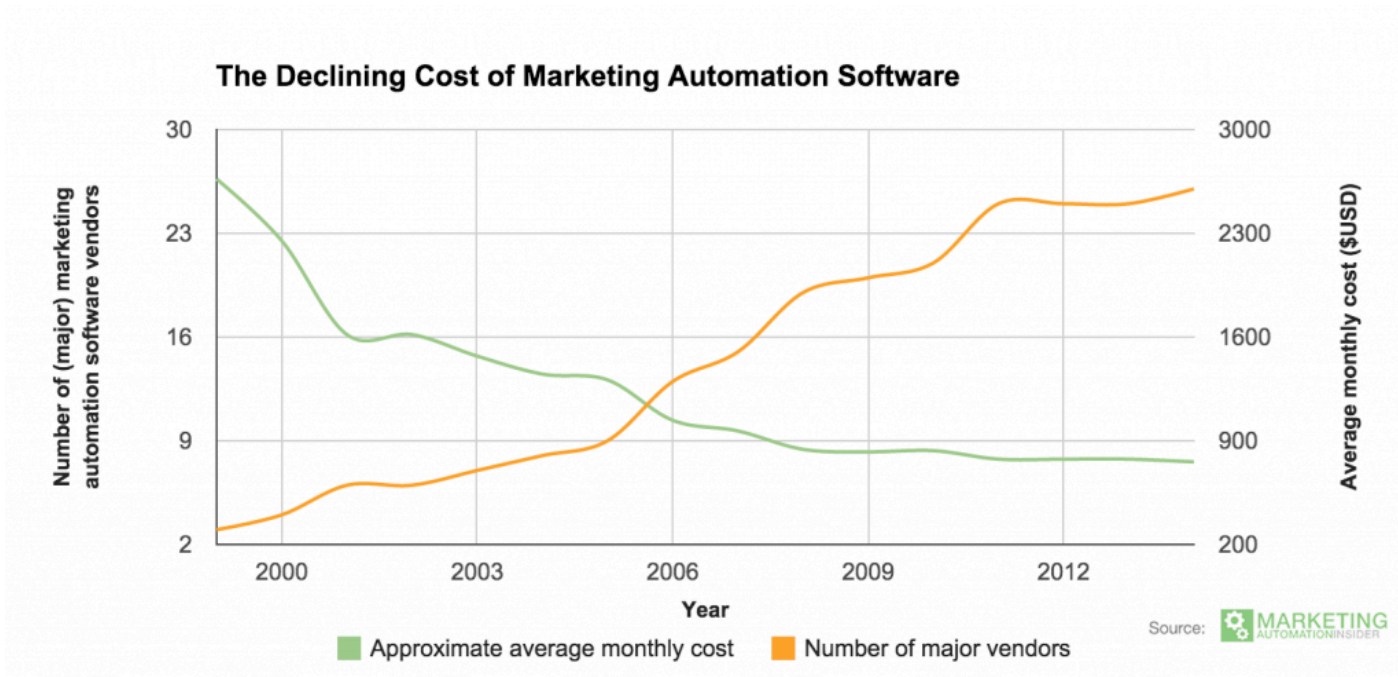
## Areas of focus

Marketing automation is used to:

- Grow revenue faster
- Generate more high quality sales-ready leads
- Measure and prove marketing ROI
- Save time and money in marketing



# Trend: Declining Costs



# Trend: B2B and B2C Converging



# Flip Your Funnel





OTHER AGENCIES PROVIDE SOLUTIONS...  
WE GIVE YOU R E S U L T S .

Best Practices Consulting

Data Quality Services

Advanced Nurturing

Complex Integrations

Expert Marketo Training

Implementations

# Who We Are

Romanoff Consultants is unique in that we focus on client results. Whether it's a more efficient marketing technology stack or a more agile and knowledgeable team, our goal is your business success. With strategy, business process, and technical consulting, we're here to be part of your extended team.

We are laser-focused on creating value for our clients, it's all about what you want to achieve.

- Results aligned to your priorities
- Improved campaign KPI metrics
- Better audience engagement
- Demonstrated Return on Marketing
- Investment
- Internal learning and improved team efficiency



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@ingaroma



[www.linkedin.com/in/ingaromanoff](https://www.linkedin.com/in/ingaromanoff)



Inga (212) 390-0082