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Drive Customer-Centric Business Growth With Omnichannel Marketing Automation Maturity

How Leading Companies Deliver Value — For Both The Business And Their Customers

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Executive Summary

The age of the customer has ushered in new opportunities for marketers to have relationships with customers that are more based on personalized, two-way engagement to create better experiences.[1] Empowered customers now expect, if not demand, such experiences that provide them with value in their moments of need, regardless of where and when they interact with a business. The COVID-19 pandemic has only intensified this expectation.

When it's done right, omnichannel marketing automation can deliver contextually relevant experiences, value, and utility via preferred customer touchpoints at the appropriate time in the customer lifecycle. These experiences can deliver measurable value for customers and achieve both brand and financial objectives. However, omnichannel marketing automation often proves to be a rocky road.

In September 2021, Agillic commissioned Forrester Consulting to evaluate the current state of omnichannel marketing automation and provide a benchmark in the form of an assessment on market maturity. To explore this topic, Forrester conducted an online survey in January and February of 2022 with 306 respondents in commercial leadership and marketing technology roles at European companies.

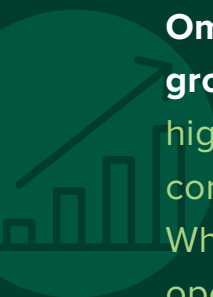We found that most companies set the right customer-centric priorities, but only a few provide truly great omnichannel experiences today. Challenges with people and technology hinder customer understanding and stifle omnichannel progress — especially for companies with lower maturity. Companies that effectively utilize and maximize their workforce and technology investments can advance their maturity.
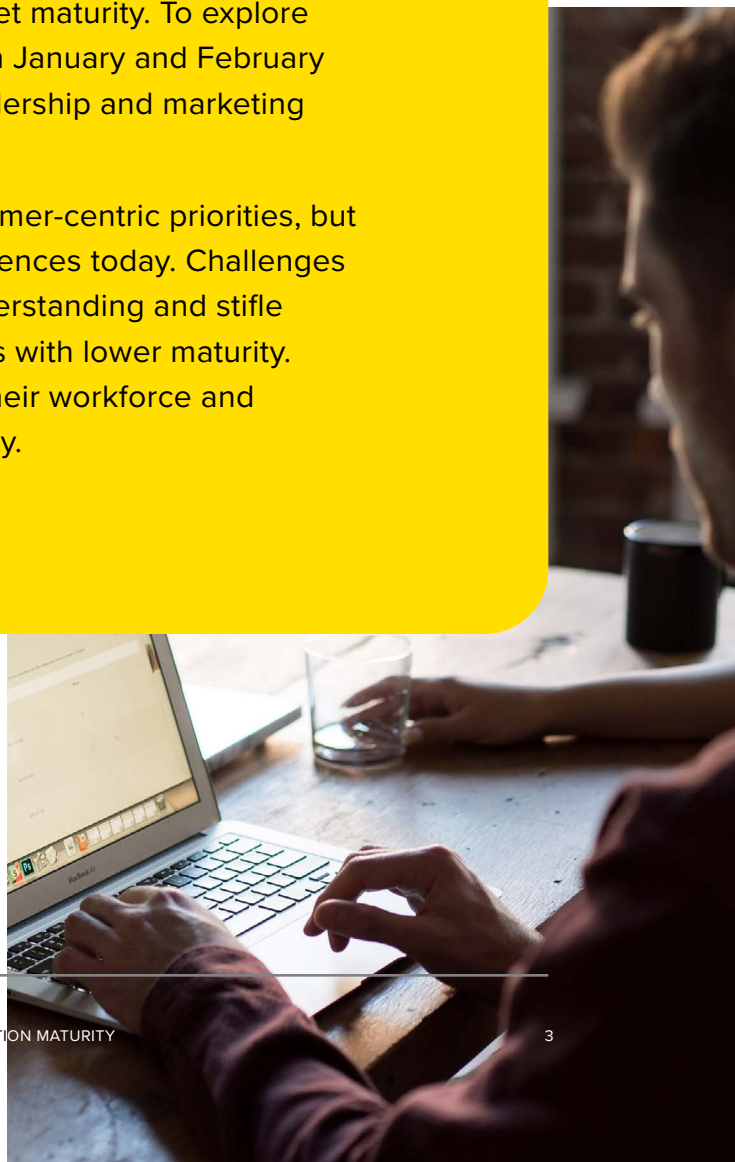
Key Findings

Companies set the right priorities, but few provide truly great omnichannel experiences. Companies have the best intentions: They prioritize customer experiences over other business initiatives, and they are confident in the omnichannel experiences they deliver. However, our omnichannel maturity assessment revealed that only 20% of respondents' organizations are Leaders.

Omnichannel marketing maturity drives exponential business growth. Leaders achieve materially greater benefits — they see higher revenue growth and conversion rates, indicating a direct correlation between omnichannel marketing and business impact. What truly differentiates them is their ability to establish effective operating models to drive omnichannel strategies. Leaders maximize the value of strategically aligned martech investments.

Technology and people challenges stifle omnichannel progress. The biggest challenge companies face is understanding customers' needs and preferences. This stems from people-related challenges that hinder the successful execution of omnichannel marketing and an inability to effectively leverage technology-related data and insights.

Omnichannel marketing automation brings benefits for both the business and the customer. Companies at all levels of maturity expect omnichannel marketing to help them establish a competitive advantage, achieve higher customer lifetime value and revenue, and increase efficiency. Better still, growth opportunities are anchored in positive customer benefits such as enhanced customer experiences and increased trust.

Mastering Omnichannel Marketing Automation Drives Business Growth

Companies strive to differentiate and add value for customers through personalized omnichannel marketing experiences. They understand the need to design and deliver seamless and personalized interactions with individual customers across digital and offline channels. But while customer expectations for value and relevance have evolved, many organizations struggle to change their approaches to personalization to meet — let alone exceed — those expectations.[2]

It's a daunting task to get omnichannel marketing right. In surveying 306 commercial leaders and martech decision-makers at European companies, we found that they face numerous competing business, marketing, and customer experience (CX) priorities. When presented with a list of 23 initiatives, most decision-makers rated all of them as critical or very important, yet stated that they find it very challenging to execute all of them. Encouragingly, organizations understand which initiatives will have the biggest impact, setting the right priorities to evolve their marketing approaches as they:

- **Focus on what customers desire and what the business requires.** Respondents honor the CX imperative at their companies and cite improving CX as their most important business priority over the next 12 months (82%) (see Figure 1). Using customer obsession to guide their strategies will help companies more effectively orchestrate personalized experiences that express their brand promise, establish market leadership, and maintain competitive differentiation.[3] Simultaneously, they understand that customer experiences must deliver measurable value for customers while achieving both brand and financial metrics; which is why improving revenue and profitability is also high on the priority list for 80% of decision-makers' companies.

- **Strengthen their evolution to omnichannel automation.** More than two-thirds of respondents say it's a high or critical priority to progress from a channel-by-channel approach to omnichannel marketing automation (69%) (see Figure 1). To support their progress, they plan to increase automated customer lifecycle marketing (67%) and improve

personalization capabilities (66%), especially by improving their use of data and analytics to fuel personalized communications (75%). Companies that prioritize omnichannel experiences do so to bolster CX, accelerate digital transformation efforts, and increase conversion rates. Those who don't prioritize those experiences acknowledge their need for core business readiness first and/or lack the necessary technology infrastructure, organizational alignment, and skills to support this transition.

Figure 1

Companies Recognize The Importance Of Aligning CX Initiatives With Business Objectives

● Critical priority
● High priority

"How much of a priority are the following business priorities to your organization over the next 12 months?"

(Showing top 5)
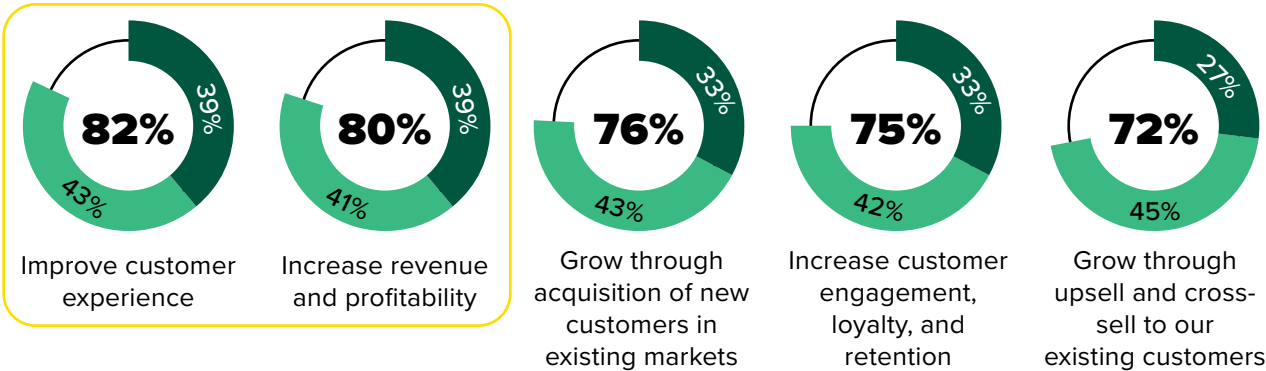
82%	80%	76%	75%	72%
39% / 43%	39% / 41%	33% / 43%	33% / 42%	27% / 45%
Improve customer experience	Increase revenue and profitability	Grow through acquisition of new customers in existing markets	Increase customer engagement, loyalty, and retention	Grow through upsell and cross-sell to our existing customers

"How much of a priority are the following marketing and customer experience (CX) priorities to your organization over the next 12 months?"

75%	69%	67%	66%
25% / 50%	28% / 41%	32% / 35%	29% / 37%
Improve our use of data and analytics to fuel personalized communications	Progress from a channel-by-channel approach to omnichannel marketing automation	Increase the amount of automated customer lifecycle marketing	Improve our personalization capabilities
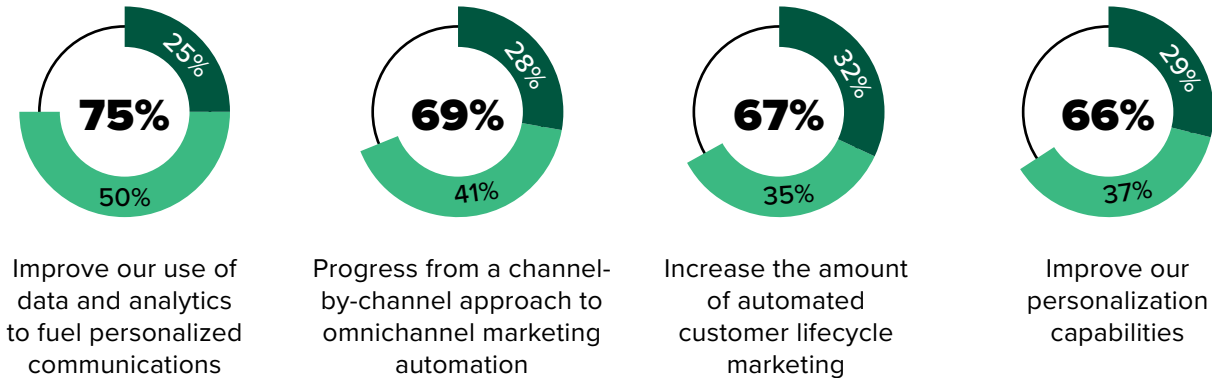
COMPANIES ARE OVERCONFIDENT IN THEIR DELIVERY OF OMNICHANNEL EXPERIENCES

Companies are confident when rating their own ability to deliver omnichannel experiences. When asked about the effectiveness of the experiences they provide across the customer journey, the majority of respondents rate themselves and their organizations highly in the phases where they help customers explore (73%), buy (69%), and engage (62%) with their brand — i.e., marketing's traditional strong areas. They report lower effectiveness (59% on average) in the phases where customers use products, advocate for the brand, or access customer service, which indicates that marketing is still not as involved across the full lifecycle and is more focused on acquisition.

However, it's hard to get omnichannel marketing automation right. In fact, our study found a significant gap between self-perceived proficiencies versus actual capabilities to deliver omnichannel experiences. Companies still have considerable work to do on:

- **Customer understanding and engagement.** Over half (57%) of decision-makers' organizations are average, fair, or even poor at understanding individual customers and engaging with them in a personalized way. Most of these firms rely on basic segmentation to deploy batch-and-blast campaigns. Only a few (9%) with excellent ratings focus on individual customer needs and preferences to ensure consistent engagement across all touchpoints.

- **Measurement.** Less than one quarter (23%) of decision-makers' organizations measure marketing ROI and business value based on customer-focused metrics. Forty percent use some form of attribution models, but the remaining 37% are average, fair, or even poor at measuring marketing's effectiveness, relying on old-school metrics such as opens or clicks.

- **Channel integration.** On average, only 16% are excellent at integrating channels and touchpoints seamlessly. Even core digital channels like email, mobile, and web need much more attention — only 19% fully

Mind the gap:
Companies are overconfident in their delivery of effective omnichannel experiences, but results show they still have considerable work to do.

integrate those popular touchpoints, which creates a lot of friction even in simple customer journeys. In addition, companies are missing opportunities to better integrate and align internet-of-things devices, contact centers, human-assisted channels, chatbots, and intelligent agents, which could help them better support the entire customer lifecycle.

Figure 2

The Omnichannel Marketing Maturity Assessment

Measurement

Technology

Data

The Omnichannel Marketing Maturity Model Assessed Six Categories

Strategy

People, culture, and skills

Process

The Assessment Revealed Three Levels Of Maturity
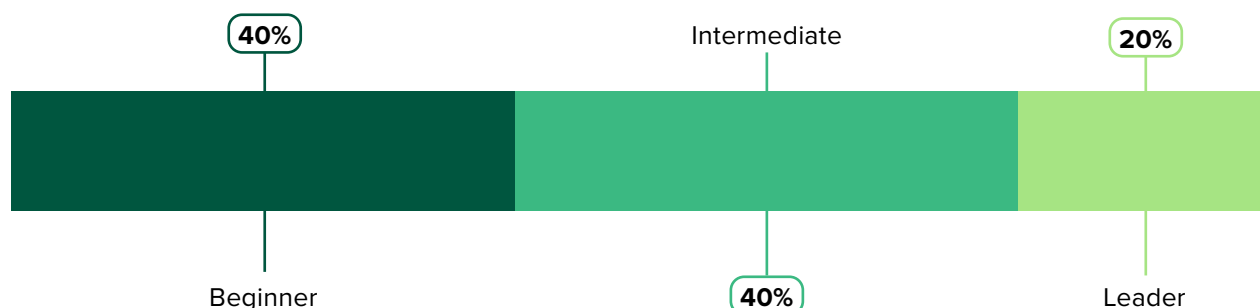
| **40%** | Intermediate | **20%** |

Beginner — **40%** — Leader

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

LEADING COMPANIES DEFINE A CLEAR STRATEGY AND DEPLOY THE RIGHT TECHNOLOGY TO BE SUCCESSFUL

To gauge omnichannel marketing maturity of decision-makers' organizations, we created a framework that examined their capabilities across six dimensions: 1) strategy; 2) people, culture, and skills; 3) process; 4) technology; 5) data; and 6) measurement. Using this framework, we uncovered three levels of maturity (see Figure 2):

- **Beginners.** Forty percent of surveyed decision-makers are Beginners — this lowest-ranking segment struggles with both strategy and technology and needs improvement in all areas. They place a much lower weighting on marketing and CX initiatives than other maturity segments, and they prioritize omnichannel marketing as a reaction to customer demand, rather than a strategic objective. Beginners are also far less likely to have seamlessly integrated channels and touchpoints into their omnichannel approach, e.g., only 6% have fully integrated email! They are least effective in providing seamless omnichannel experiences during all stages of the customer journey — except the buy stage. They focus on low-hanging conversion fruit rather than establishing a deeper relationship with their customers through more holistic CX initiatives.

- **Intermediates.** Forty percent of respondents are in the Intermediate segment. They see omnichannel as a key part of their digital transformation strategy, having already made some progress. Their sights lay on solidifying their omnichannel CX delivery. While they have made considerable investments, they still struggle to align their technology investments with marketing strategy. As they mature, they realize having the right tech is only an enabler; utilizing it effectively for CX orchestration is the real key to successful strategy execution. Continuous optimization enables companies to advance their maturity and take the next critical step to becoming a Leader (see Figure 3).

- **Leaders.** Finally, a small group of respondent's companies (20%) achieve what it takes to be Leaders. They are the most advanced because they:

  - **Have the strongest strategies.** Leaders prioritize marketing and CX initiatives much more highly, and they focus their efforts universally — and consistently — across all areas of their approach, be it CX, operating models, or commercial priorities (see Figure 4). This proactive approach sets them apart from all other segments.

  - **Derive more value from their omnichannel marketing technology, as they:**

    - **Use it more effectively.** Leaders are far more advanced at seamlessly integrating channels and touchpoints into their

omnichannel approaches. This especially applies to popular digital channels such as email, web, and more even advanced channels such as IoT, networked devices, chatbots, and intelligent agents (see Figure 5).

- **Maximize their investments.** Leaders are much more satisfied (81% on average) with their current omnichannel marketing technology and derive more value from it. Leaders prioritize investments in functionality that enables them to plan and orchestrate campaigns based on customer identity, behavior, preferences, and consent.

- **Play the long-term martech game.** Out of all segments, Leaders have the highest focus (63%) on martech stack upgrades or replacements, constantly reviewing and optimizing their martech. They also have stronger martech roadmaps that focus on sophisticated features and capabilities.

- **Leaders provide significantly better omnichannel experiences.** Leaders are more effective at providing a seamless omnichannel experience across the whole customer journey, not just the conversion stage. For example, 81% of Leaders are extremely or very effective at engaging with their customers after a sale. And because they have seamlessly integrated channels, they empower their customers to choose their preferred touchpoints and deliver value in their moments of need, rather than dictating the journey.

Having the right tech, while orchestrating and utilizing it effectively, enables companies to advance their maturity and take the next critical step towards becoming a Leader.

Our analysis shows that omnichannel marketing maturity drives exponential growth and benefits. Those who have the most advanced omnichannel strategies achieve materially greater benefits than Beginners and Intermediates (see Figure 3). Leaders deliver higher revenue growth and conversion rates, indicating a direct correlation between omnichannel

marketing and business impact. All of the surveyed decision-makers' organizations experienced revenue growth in the last year, but leaders were: twice as likely to grow by 10% or more; 50% more likely to grow by 5% or more; and 25% more likely to grow by at least 1%. Leaders are also better able to handle challenges that impede Beginners and Intermediates, such as defining a strategic martech investment roadmap, measuring ROI, and aligning customer insights with omnichannel marketing automation.

Figure 3

Effective MarTech Orchestration Enables Companies To Advance Their Maturity Toward Being A Leader

The tipping point: Leaders use their omnichannel marketing technology more effectively, constantly reviewing it and optimizing it.

Leaders':		
	• Have the strongest strategies as they weight marketing and CX priorities higher and have clear martech roadmaps.	
	• Constantly review and optimize their tech and place a much stronger emphasis on features and capabilities.	
	• Are much more satisfied and derive more value from their omnichannel marketing technology platforms.	
	• Are better at providing seamless omnichannel experiences across the whole customer journey.	
	• Experience more business benefits such as higher revenue growth and higher customer lifetime value.	

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

Figure 4

"How much of a priority are the following marketing and CX priorities to your organization over the next 12 months?"

(Showing "Critical priority" and "High priority")

Legend: ● Beginner ● Intermediate ● Leader

Axes: Increase brand awareness · Establish the right operating model to make marketing more efficient · Improve the ROI/ effectiveness of marketing · Improve the experience of our customers across all touchpoints · Optimize conversion rates across the board · Improve our personalization capabilities · Increase the amount of automated customer lifecycle marketing · Improve our use of data and analytics to better understand customers · Upgrade or replace our martech stack

Scale rings: 40%, 60%, 80%

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

Figure 5

"To what extent are these channels or touchpoints integrated into your omnichannel marketing strategy?"

(Showing "Excellent" and "Good")

Legend:
- Beginner
- Intermediate
- Leader

Digital advertising (e.g., search, display, social media)
- Beginner: 49%
- Intermediate: 52%
- Leader: 85%

Personalized email marketing
- Beginner: 34%
- Intermediate: 52%
- Leader: 82%

Inbound mobile marketing (e.g., in-app personalization)
- Beginner: 52%
- Intermediate: 57%
- Leader: 76%

Web or e-commerce personalization
- Beginner: 43%
- Intermediate: 49%
- Leader: 74%

Contact center (e.g., outbound telemarketing or inbound service)
- Beginner: 41%
- Intermediate: 39%
- Leader: 68%

Internet of things (e.g., intelligent devices, appliances, cars, etc.)
- Beginner: 39%
- Intermediate: 46%
- Leader: 66%

Outbound mobile marketing (e.g., SMS, push messaging, etc.)
- Beginner: 61%
- Intermediate: 67%
- Leader: 65%

Chatbots and intelligent agents
- Beginner: 27%
- Intermediate: 34%
- Leader: 63%

Person-to-person (e.g., agent, advisor, teller, sales associate, etc.)
- Beginner: 42%
- Intermediate: 43%
- Leader: 55%

Digital personal assistants
- Beginner: 34%
- Intermediate: 42%
- Leader: 50%

Networked devices (e.g., ATM, POS, kiosk)
- Beginner: 20%
- Intermediate: 20%
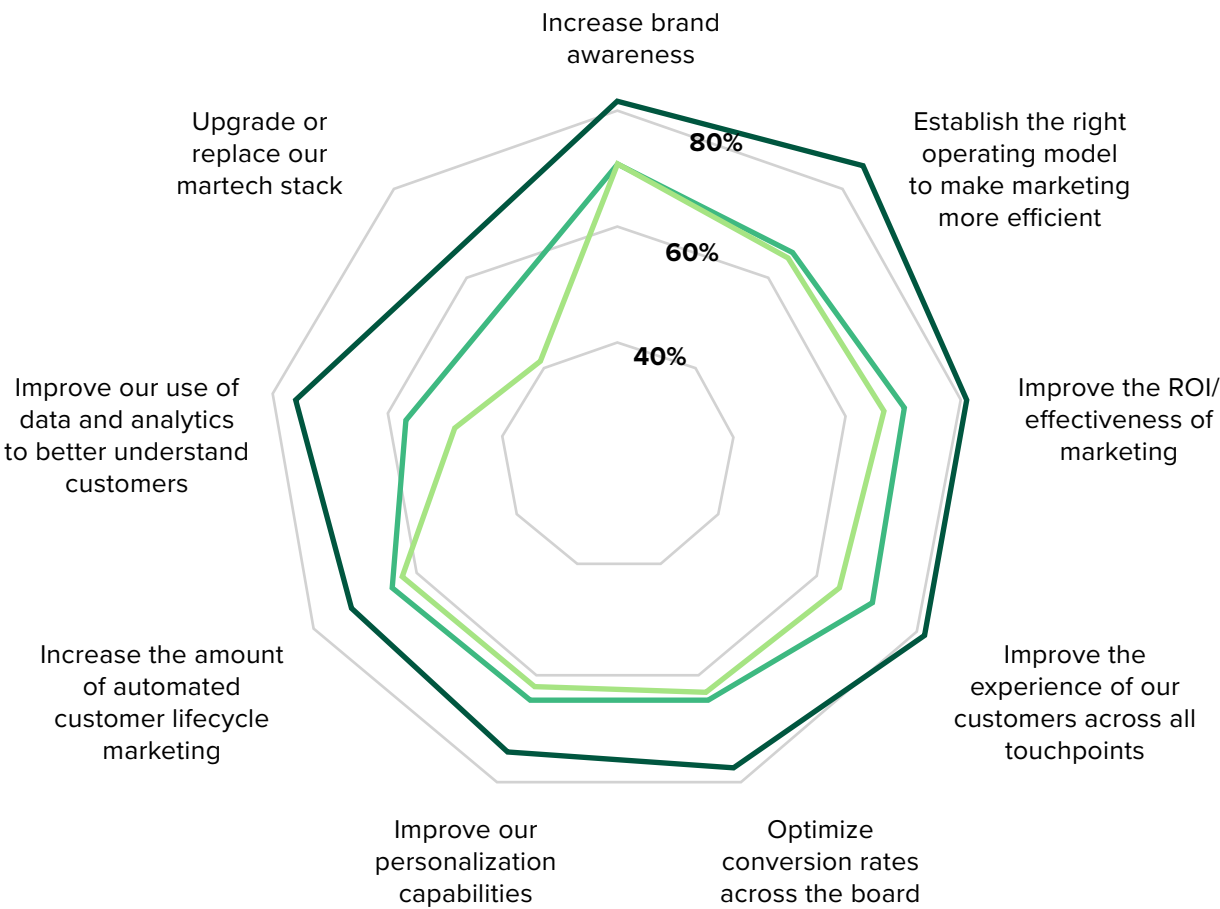- Leader: 47%

Print and direct mail
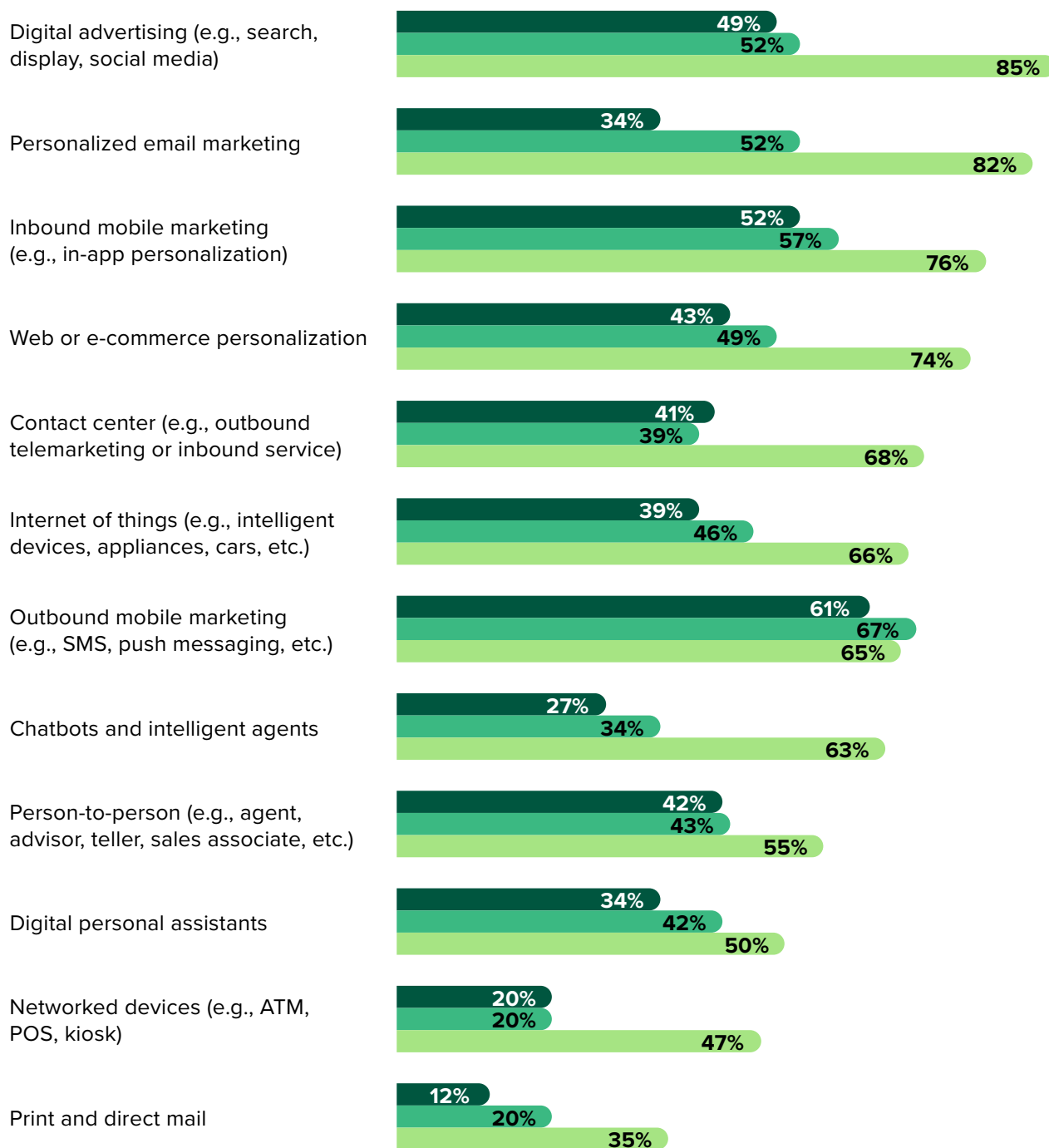- Beginner: 12%
- Intermediate: 20%
- Leader: 35%

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

People And Technology Issues Hinder Omnichannel Marketing Evolution

Virtually all respondents (95%) experience challenges when it comes to omnichannel marketing automation. While there is no single roadblock to creating omnichannel experiences, several themes surfaced from the top challenges that respondents reported.

The biggest challenge with omnichannel marketing automation is understanding customers' needs and preferences (39%), which is hardly due to a lack of data (see Figure 6). This challenge stems from an inability to effectively extract and activate insights from both people and technology perspectives. When it comes to their people, respondents told us they face challenges with:
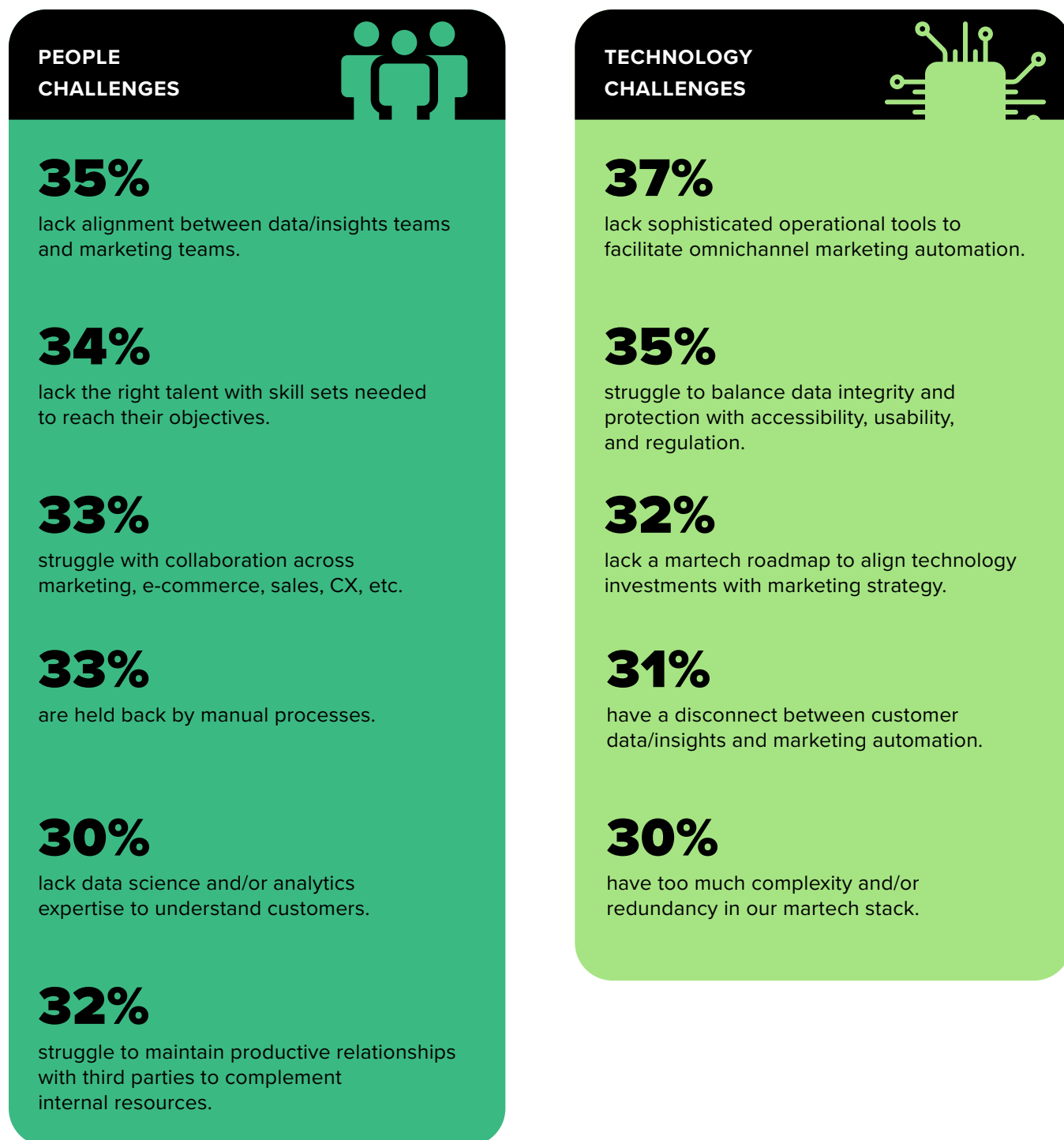
- **Lack of collaboration and alignment.** Limited collaboration across marketing, e-commerce, CX, and other internal teams (33%) shows that companies still take a siloed approach to omnichannel marketing automation. This is exacerbated by a lack of alignment between marketing and data/insights teams (35%), which makes it impossible to have a holistic customer understanding.

- **Scarcity of talent and skills.** More than a third (34%) of respondents acknowledge that they struggle to reach their objectives due to a lack of the right talent and skill sets. Thirty percent indicate they lack data science and/or analytical expertise to understand their customers. Without the appropriate competencies, firms will struggle to achieve their objectives even with increasing technology investments.

- **Inefficiency.** One-third (33%) of respondents indicate that they are held back by time-consuming manual processes that pull employees away from developing other skills. In addition, 32% struggle to maintain productive relationships with third parties that complement internal resources. It's crucial that companies develop their automation efforts and partner ecosystems to free up time for their teams to better utilize their creative and analytical skills.

While people challenges hinder the successful execution of personalized omnichannel marketing automation, companies face additional difficulties with their technology (see Figure 6). They primarily face challenges with:

Figure 6

Number One Challenge:
39% Of Respondents Struggle To Understand Customer Needs And Preferences

PEOPLE CHALLENGES

35%
lack alignment between data/insights teams and marketing teams.

34%
lack the right talent with skill sets needed to reach their objectives.

33%
struggle with collaboration across marketing, e-commerce, sales, CX, etc.

33%
are held back by manual processes.

30%
lack data science and/or analytics expertise to understand customers.

32%
struggle to maintain productive relationships with third parties to complement internal resources.

TECHNOLOGY CHALLENGES

37%
lack sophisticated operational tools to facilitate omnichannel marketing automation.

35%
struggle to balance data integrity and protection with accessibility, usability, and regulation.

32%
lack a martech roadmap to align technology investments with marketing strategy.

31%
have a disconnect between customer data/insights and marketing automation.

30%
have too much complexity and/or redundancy in our martech stack.

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

- **Lack of sophisticated tools.** The biggest tech challenge is the absence of sophisticated operational tools to facilitate omnichannel marketing automation. This comes as no surprise given that one-third of respondents fail to align martech investments with marketing strategy. Companies need to socialize the vision and value of omnichannel marketing early on in order to align strategy and technology investments.[4]

- **Data.** Over a third of respondents (35%) struggle to balance data integrity and protection with accessibility, usability, and regulation. Respondents also report a disconnect between customer insights and marketing automation, which further demonstrates misalignment between the respective teams.

- **Imbalanced martech ecosystems.** Respondents say their companies invest in a significant number of martech capabilities, but they are not always guided by one strategic approach. Nearly one-third (30%) report complexity and redundancy in their martech ecosystems. Successful omnichannel marketing requires a comprehensive approach to rationalize a variety of tools and capabilities. A well-defined martech roadmap — a hallmark of Leaders — can help.

- **Dissatisfaction with current vendors.** On average, 43% of Beginners and Intermediates are not satisfied with their marketing automation vendors. Technology itself is the highest driver of dissatisfaction, with over half of respondents noting their discontent with the integration, robustness of features, omnichannel capabilities, innovation roadmap, and user experience (UX) of vendor solutions.

Companies would also like to forge more strategic partnerships with their vendors versus having to deal with just another tech supplier. By contrast, only 19% of Leaders are not satisfied with their marketing automation vendors. Leaders experience fewer challenges with getting the most from their data, technology, and measurement tools. Also, Leaders rely on their vendors to deliver integration expertise, implementation services,

SURVEYED RESPONDENTS WHO ARE NOT SATISFIED WITH SERVICES FROM THEIR MARKETING AUTOMATION PLATFORM VENDOR	
Beginners and Intermediates	**43%**
Leaders	**19%**

and technology support, and they expect them to foster robust partner ecosystems.

In addition to people and technology challenges, companies struggle to assess external risks such as customer perception and privacy legislation. Respondents worry about their omnichannel personalization becoming invasive (32%), and they have a hard time complying with privacy and security regulations (32%). Despite their best intentions to be customer-focused, they may inadvertently create creepy or even harmful experiences that erode customer trust and loyalty. Companies need to reevaluate the fundamental assumptions on which their marketing programs are built and steer their teams back on track to win, serve, and retain customers — and regain their faith.[5] Leaders turn to vendors that understand these business requirements and provide the requisite thought leadership and innovation to help stay ahead of customer expectations.
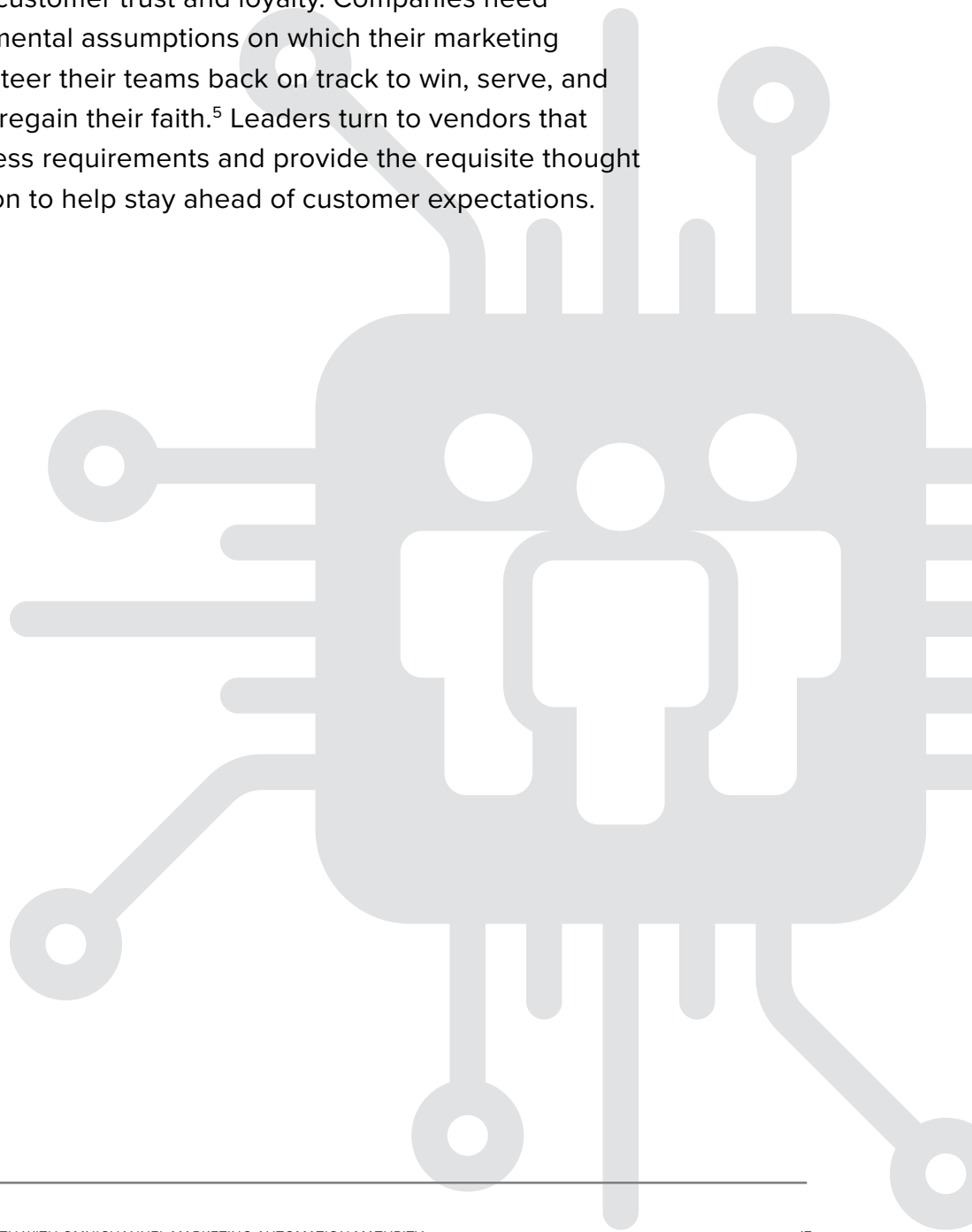
The Move To Omnichannel Delivers Value For Customers And Organizations Alike

All surveyed respondents agreed: Omnichannel marketing automation helps achieve a balanced blend of valuable benefits for customers as well as growth opportunities for their organizations (see Figure 7). They see omnichannel marketing automation as a route to:

- **A competitive advantage.** The majority of respondents expect their omnichannel marketing automation strategy to help them establish a significant (27%) or even a market-leading (43%) competitive advantage. Companies of all maturity levels understand this potential.

- **Improved CX, enhanced trust, and stronger relationships with customers.** Companies see growth opportunities anchored in positive customer benefits as they deem omnichannel marketing automation as a route to: better support their customers (44%); form trusted relationships with them (42%); and enhance their loyalty (42%) and satisfaction (37%) through more personalized experiences (39%). Leaders stand to benefit even more: They expect to achieve significantly better customer support (56%) than their Beginner and Intermediate counterparts (41%).

- **Increased business growth.** A strong omnichannel marketing automation approach will help companies capitalize on growth opportunities in the post-pandemic era. Leaders are more likely to grow their revenue and prioritize omnichannel marketing because it drives significantly higher conversion rates (56%), but more importantly, it helps them provide better customer support (56%). These metrics in turn drive longer-term business benefits like higher customer lifetime value (36%) and increased efficiency (33%) that bolster revenue and profitability.

70%

of companies expect their omnichannel marketing automation strategy will help them establish either a significant or market-leading competitive advantage.

Figure 7

"Thinking of your organization relative to similar companies in your sector, to what degree do you expect your omnichannel marketing automation strategy to help you establish a competitive advantage?"

70%

of respondents expect their omnichannel marketing automation strategy will help them establish a competitive advantage.

- ● Market-leading competitive advantage
- ● Significant competitive advantage
- ● Some competitive advantage
- ● Very little competitive advantage
- ● No competitive advantage at all
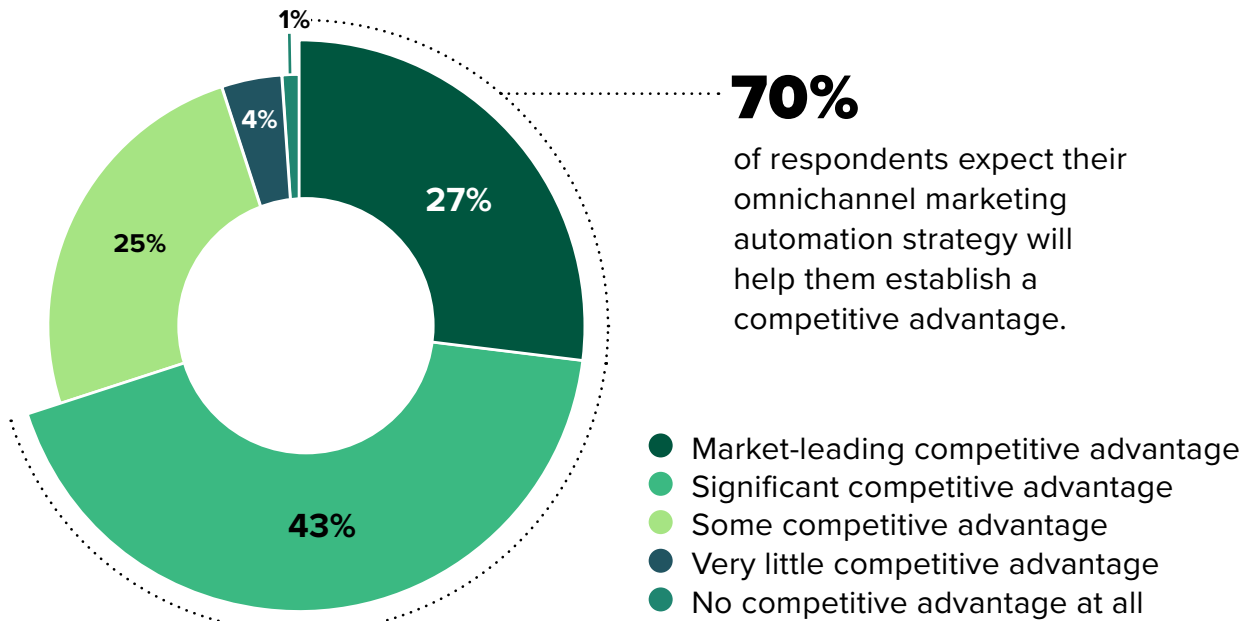
"What benefits, if any, do you expect as a result of your omnichannel marketing automation efforts?"

(Showing top 5 results)

Improved customer support
44%

Trusted customer relationships
42%

Improved customer loyalty/retention
42%

More personalized experiences
39%

Improved customer satisfaction
37%

The top 5 benefits are all **advantages for the customer**.

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022
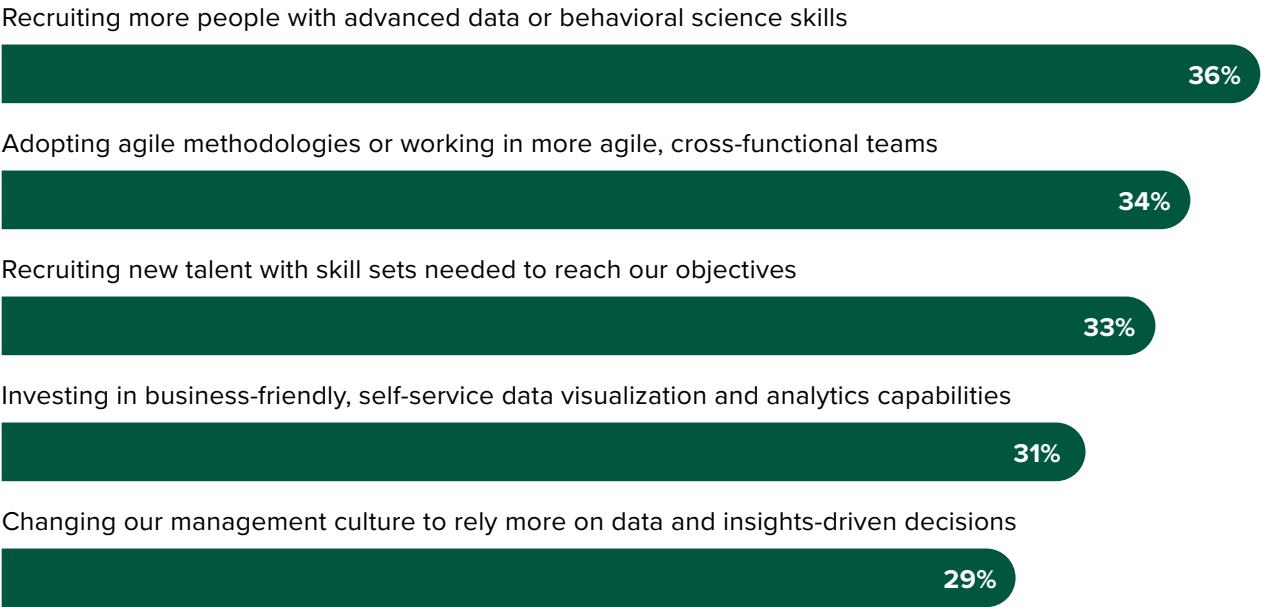
INVESTMENTS FOCUS ON PEOPLE AND TECH ALIKE

Efforts to advance omnichannel marketing automation maturity include numerous initiatives instead of centering on any one mitigation strategy. What unites all segments is the understanding that tools alone won't do the trick. It is only through a strong interplay of the right technology and aptly skilled people that organizations can advance on their path to mastering omnichannel marketing. However, Beginners and Intermediates are more likely to focus on advanced analytics and AI tools, whereas Leaders emphasize innovation of digital products and services that leverage underlying technology. When it comes to their future vision and roadmap, companies are focusing their investments in areas they struggle with the most (see Figure 8):

- **People.** To bridge the skills gap, respondents note how their organizations are planning to recruit more talent with advanced data or behavioral science know-how (36%) and other competencies needed to reach their objectives (32%). In addition, adopting agile methodologies and working in cross-functional teams (34%) will help overcome collaboration and alignment issues. Increased adoption of more business-friendly, self-service data visualization and analytics capabilities (31%) will go hand-in-hand with companies' efforts to change the management culture to rely more on data and insights-driven decisions (29%).

- **Technology.** To advance on their path toward mastering omnichannel marketing automation, respondents recognize their tech shortfalls and are planning to invest accordingly: 69% of respondents note that their organizations will increase their martech investments over the next 12 months; a quarter plans for significant investment increases of 11% or more (see Figure 8). Beginners and Intermediates recognize the opportunity and invest even more aggressively than Leaders, who already have more mature martech ecosystems and are able to focus on utilization and optimization of existing tools.
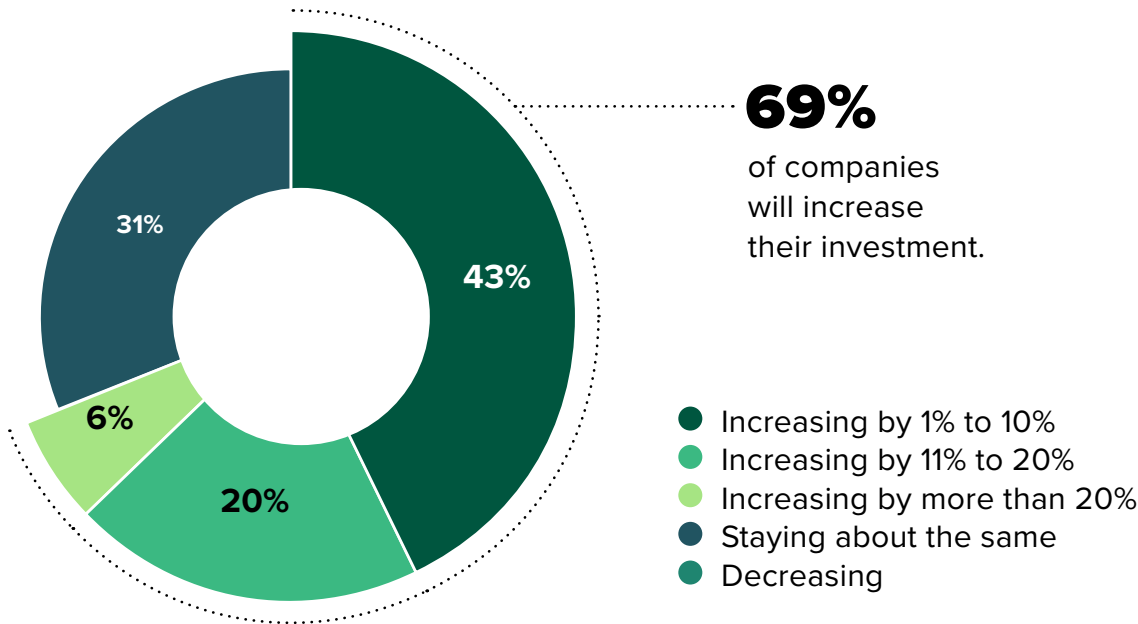
Figure 8

"To address and overcome challenges when it comes to omnichannel marketing automation, which of the following steps is your organization taking as part of its future vision and roadmap?"

(Showing top 5 results)

Recruiting more people with advanced data or behavioral science skills

36%

Adopting agile methodologies or working in more agile, cross-functional teams

34%

Recruiting new talent with skill sets needed to reach our objectives

33%

Investing in business-friendly, self-service data visualization and analytics capabilities

31%

Changing our management culture to rely more on data and insights-driven decisions

29%

"How do you expect your investment in omnichannel marketing automation technology to change over the next 12 months?"

43%

31%

6%

20%

69% of companies will increase their investment.

- Increasing by 1% to 10%
- Increasing by 11% to 20%
- Increasing by more than 20%
- Staying about the same
- Decreasing

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

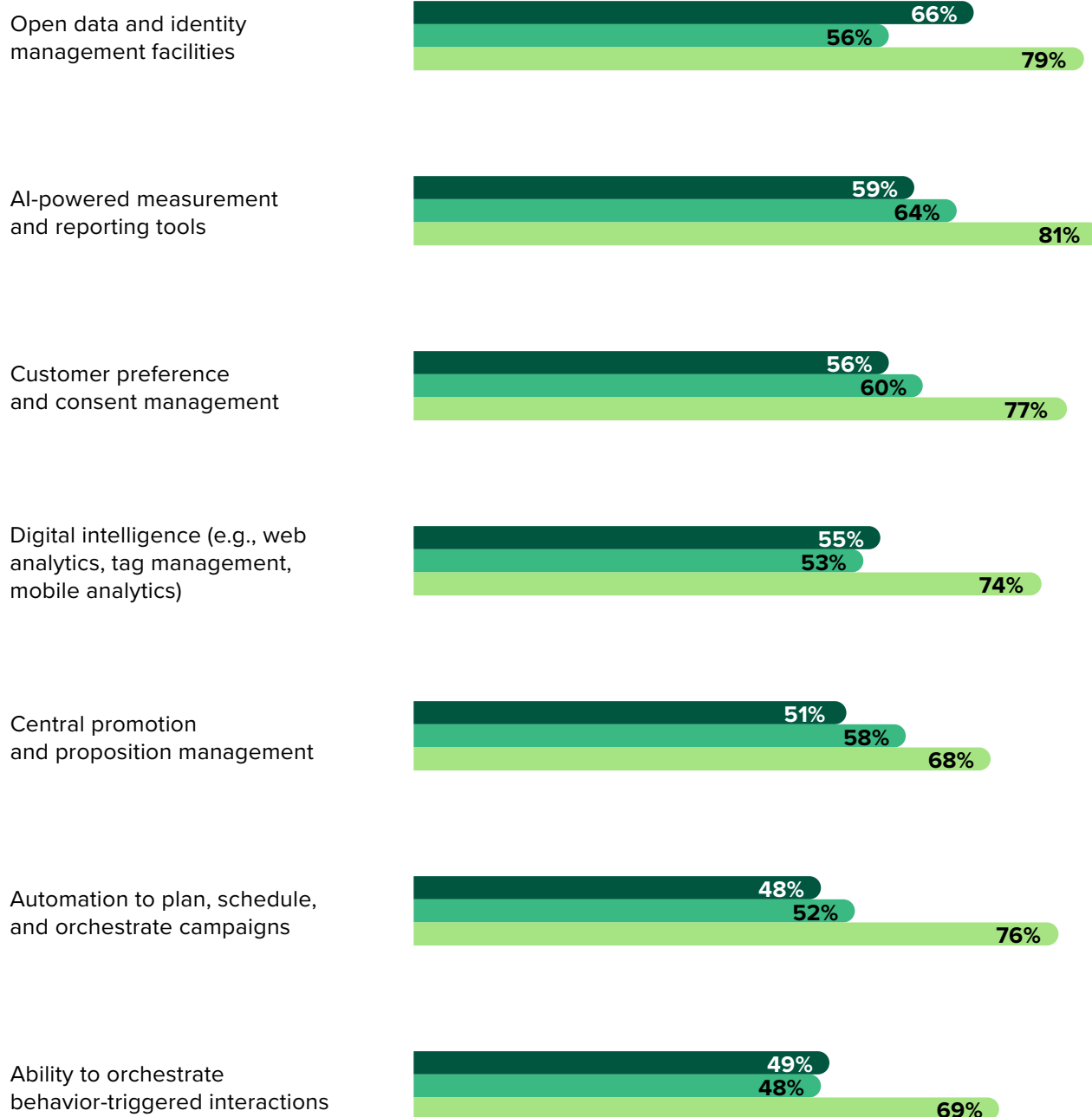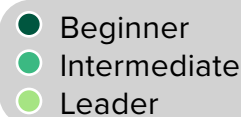## FINDING THE RIGHT TECH PARTNER IS KEY

Tech investments need to be well-directed. If a company is going to rely on a vendor for years, it's critical to make an informed decision to future-proof for success. When it comes to their investments in omnichannel marketing technology, we learned that:

- **Leaders want sophisticated capabilities, while others chase commodity features.** Leaders value the features and capabilities in omnichannel martech that help them: plan and budget (87%); manage customer data (84%); govern privacy and security (84%); collaborate (81%); and apply AI to customer analytics and measurement (81%). On average, Leaders place a much stronger emphasis on the more sophisticated tools such as AI-powered measurement and reporting, open data and identity management, central promotion and proposition management, and the ability to orchestrate behavior-triggered interactions (see Figure 9). Beginners and Intermediates on the other hand are more prone to chase shiny objects and commodity features that drive incremental benefits.

- **Leaders are looking to maximize the value of their investments.** Leaders are looking for vendors with offerings that extend beyond standard or commodity omnichannel capabilities. They expect vendors to excel at technical support (53%) and value technology that is easy and fun to use (43%). Beginners and Intermediates value these features, too, but they place more value on rapid product iteration and standard features and functionality.

- **Integration is multifaceted.** Integration is important for all three groups. When considering further investments in omnichannel marketing automation technology, companies value integrations with advertising technology, enterprise resource planning (ERP), customer relationship management (CRM), and e-commerce that can help them focus on CX across the whole customer lifecycle.

Figure 9

"Thinking of the ideal technology solution to support your omnichannel marketing automation, how important are the following features and capabilities?"

(Showing very important and critical responses)

- ● Beginner
- ● Intermediate
- ● Leader

Open data and identity management facilities
- Beginner: 66%
- Intermediate: 56%
- Leader: 79%

AI-powered measurement and reporting tools
- Beginner: 59%
- Intermediate: 64%
- Leader: 81%

Customer preference and consent management
- Beginner: 56%
- Intermediate: 60%
- Leader: 77%

Digital intelligence (e.g., web analytics, tag management, mobile analytics)
- Beginner: 55%
- Intermediate: 53%
- Leader: 74%

Central promotion and proposition management
- Beginner: 51%
- Intermediate: 58%
- Leader: 68%

Automation to plan, schedule, and orchestrate campaigns
- Beginner: 48%
- Intermediate: 52%
- Leader: 76%

Ability to orchestrate behavior-triggered interactions
- Beginner: 49%
- Intermediate: 48%
- Leader: 69%

Base: 306 commercial leadership and martech senior decision-makers in Europe
Source: A commissioned study conducted by Forrester Consulting on behalf of Agillic, February 2022

Key Recommendations

When it comes to omnichannel marketing maturity, Leaders differentiate themselves by defining bold customer-centric strategies that determine requisite investments in people and technology. They look for partners that support organizational development above and beyond their innovative martech capabilities. Leaders maximize each and every investment to advance their omnichannel marketing maturity. This ensures that they deliver valuable customer experiences that drive business objectives.

Forrester's in-depth survey of 306 commercial leadership and martech decision-makers at European companies about their omnichannel marketing automation strategies and technology yielded several important recommendations:

Define a martech strategy to guide investments.

Martech spending has reached new heights, but productivity is in decline for those that cannot maximize their investments. Overzealous upgrades and impulse purchases of trendy point solutions actually slow innovation that is based on human ingenuity. Creativity and strategy can recalibrate the tech mess, lifting brands out of this rut. The path to growth relies on effectively utilizing technologies that deliver uniqueness to customers. Those that don't take this path will be lost in a sea of tech-fueled commoditization.

Invest in people as well as technology.

Leading companies ensure their people have the right skill sets to fully utilize advanced martech. It is critical to balance organizational development with tech investments, especially when it comes to analytical skill sets, that fuel customer understanding, and agile cross-functional methodologies, that deliver more consistent customer experiences. Look for martech partners that provide training, support, and people skills which are aligned with your business objectives, and ignore point solution providers that specialize in self-service automation tools.

Double down on customer understanding.

Orchestrating personalized omnichannel marketing that's aligned with customer needs and preferences relies on a steady supply of accurate and timely customer data. Unifying and transforming customer data takes time, so as your strategy evolves, you must derive actionable insights that inform real-time omnichannel experiences. You must also establish trust based on identity resolution and privacy policies that govern the use of implicit and explicit customer preferences. Leading organizations treat customer data management as more than just a database — it's a lifeline for better customer understanding and experiences.

Design experiences that personify your brand promise.

A finely tuned omnichannel marketing environment can amplify and operationalize your customer experience strategy. Don't think of omnichannel marketing as merely "automation," but rather, view it as a critical investment that empowers you to champion the customer and earn brand devotion. It is quite literally the control center that enables marketing to deliver mutual value exchanges with customers. Leading companies plan and align marketing campaigns with brand strategy to deliver customer outcomes and drive profitable growth.

Optimize value with customer-centric measurement.

Today's marketers need to do more than simply report results; they must apply real-time insights to continuously optimize marketing's value to both customers and the business. Leading companies leverage their marketing automation tools to identify patterns, elevate opportunities, detect issues and anomalies, model potential scenarios, and facilitate closed-loop, corrective actions. Such capabilities empower companies to measure successful customer outcomes and their contribution to customer lifetime value and long-term business growth, versus short-term "vanity metrics" that capture impressions, opens, clicks, and conversions.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 306 commercial leadership and martech senior decision-makers at organizations in Europe to evaluate the current state of personalized omnichannel marketing automation. Survey participants included decision-makers in commerce, branding and advertising, customer insights, digital, executive team, strategy, IT, customer experience, CRM, business development, and marketing. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in January 2022 and was completed in February 2022.

Appendix B: Demographics

COUNTRY	
United Kingdom	**13%**
Germany	**12%**
Austria	**11%**
Switzerland	**11%**
Denmark	**11%**
Norway	**11%**
Sweden	**10%**
Czech Republic	**10%**
Poland	**10%**

DEPARTMENT	
Marketing	**22%**
Business development	**11%**
CRM	**10%**
Customer experience	**10%**
IT	**8%**
Customer insights	**7%**
Digital	**7%**
Strategy	**7%**
Executive team	**7%**
Branding and advertising	**7%**
Commerce	**3%**

INDUSTRY	
Retail	**17%**
Financial services and/or insurance	**15%**
Technology and/or technology services	**11%**
Energy and utility	**9%**
Media and/or publishing	**9%**
Subscription services	**9%**
Travel, hospitality, and leisure	**8%**
Consumer electronics	**7%**
Entertainment and gaming	**7%**
Direct-to-consumer goods	**5%**
Charity and/or NGO	**4%**

TITLE/ROLE	
Manager	**53%**
Director	**22%**
Vice president	**14%**
C-level executive	**11%**

SIZE	
$50M to $99M	9%
$100M to $199M	20%
$200M to $299M	23%
$300M to $399M	18%
$400M to $499M	13%
$500M to $1B	17%

INDIVIDUAL CONTACTS STORED IN CUSTOMER DATABASE	
Fewer than 50,000	1%
50,000 to 99,999	8%
100,000 to 499,000	17%
500,000 to 999,999	29%
1,000,000 to 2,499,999	26%
2,500,000 to 4,999,999	8%
5,000,000 to 9,999,999	7%
10,000,000 to 19,999,999	3%
20,000,000 to 49,999,999	1%

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Align Strategy And Technology To Deliver Next-Gen Personalization," Forrester Research, Inc., September 2, 2020.
"The Future Of Enterprise Marketing Technology," Forrester Research, Inc., November 25, 2020.

Appendix D: Endnotes

[1] Source: "Marketers Versus Customers: Opposing Forces Erupt," Forrester Research, Inc., January 20, 2021.
[2] Source: "Align Strategy And Technology To Deliver Next-Gen Personalization," Forrester Research, Inc., September 2, 2020.
[3] Source: Ibid.
[4] Source: Ibid.
[5] Source: "Marketers Versus Customers: Opposing Forces Erupt," Forrester Research, Inc., January 20, 2021.

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