AUDITING YOUR MARKETING TECHNOLOGY STACK

A GUIDE FOR TEAMS AND SMALL COMPANIES

A Foundation for Effective Marketing

Technology is critical to achieving marketing objectives with everything marketing does now enabled by technology. Conducting regular stack audits is essential to ensuring that you have the right technology in place and that your technology is being fully utilized and delivering a return on investment.

This e-book walks you through the stack auditing process step-by-step:

1. **Creating a stack architecture**
2. **Uncovering technology**
3. **Documenting critical information**
4. **Assessing technology performance**
5. **Creating a stack plan**
6. **Keeping everyone on the same page**

Stack Audits the Easy Way

You don't need a CabinetM account to leverage the information in this e-book but if you are using 25 products or less, a free CabinetM account will make the process much easier.

Each page of this book delivers actionable steps for completing a successful stack audit. At the end of each section we've provided action items to guide you on how to use CabinetM to perform each step of your stack audit.

Good luck and please reach out if you get stuck or need advice.

- -Anita

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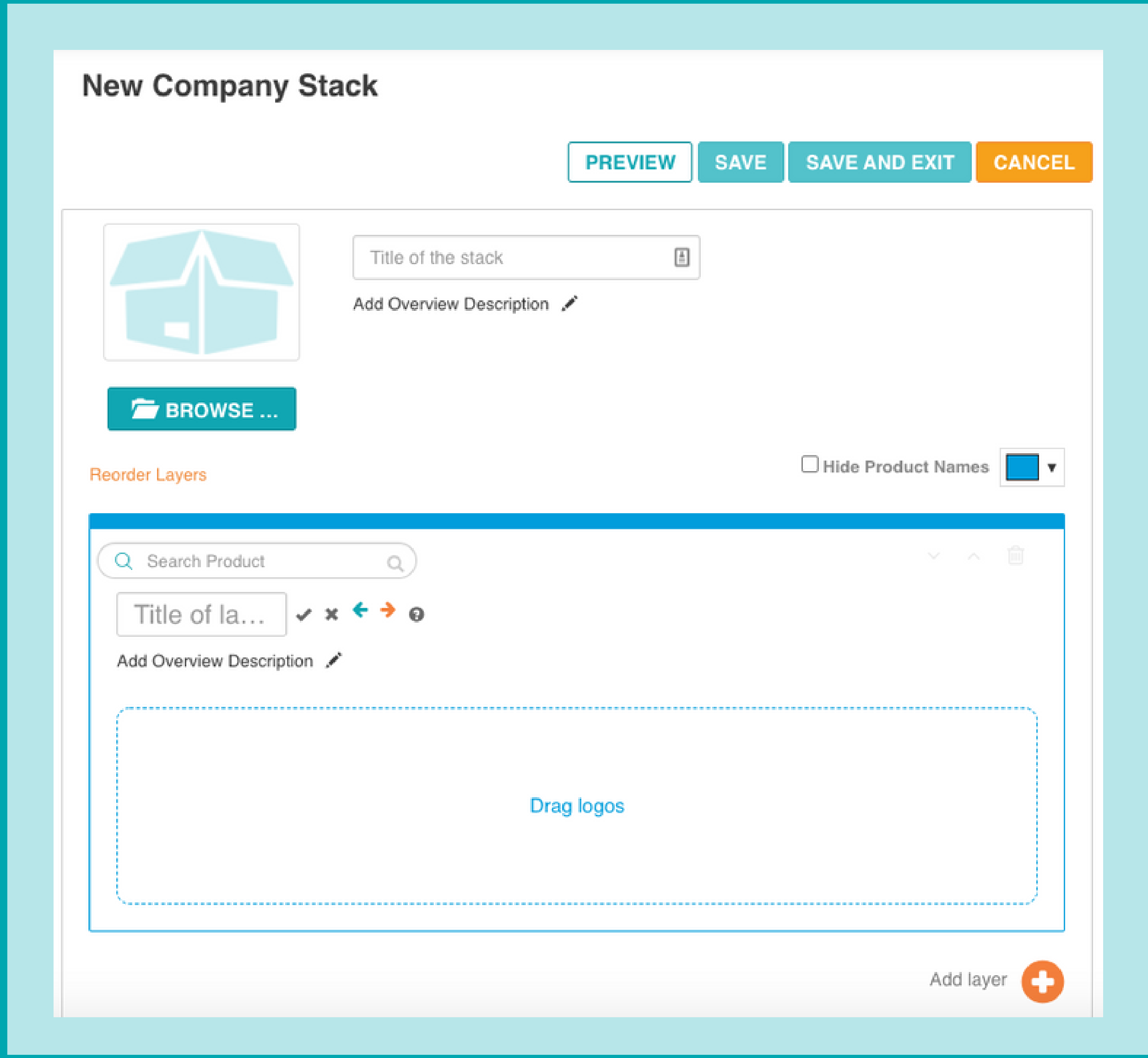
Create your Stack Architecture



WATCH VIDEO

The first step in auditing your technology suite is to define the lens through which you want to look at your technology. By far the simplest way is by technology category, but some prefer to look at technology in the context of the customer journey, lifecycle, or the sales funnel. There's no right or wrong way to create a stack architecture; the goal is to create something that works for you.

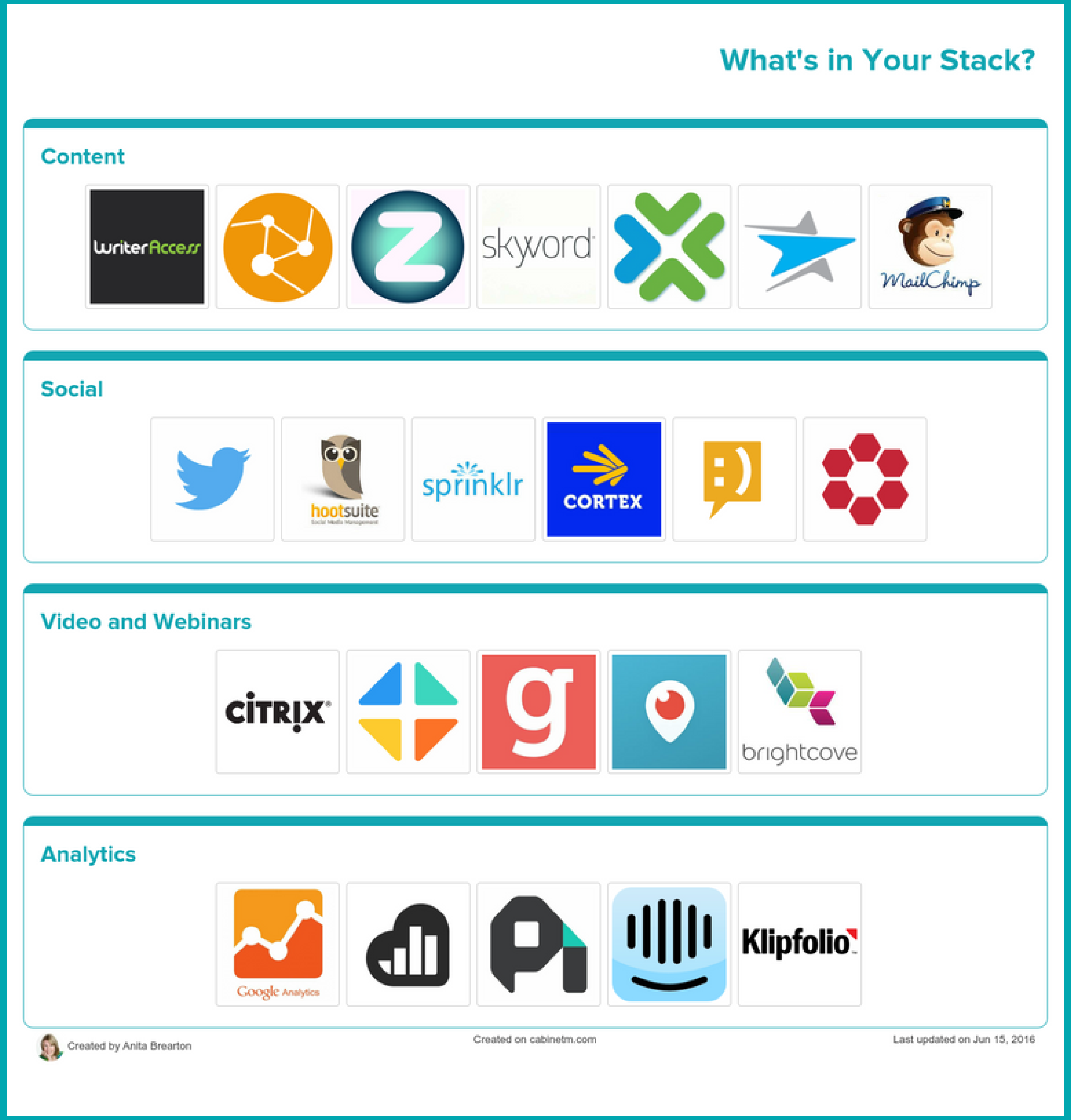
When you create an architecture, deciding what should be tracked as part of the MarTech stack can be challenging. Do you include just the products that marketing has purchased? Should you include products that marketing uses that other departments have paid for? Does CRM belong in the MarTech stack, the SalesTech stack, or both?

There are no rules about what should be in a MarTech stack. Think about what you are trying to accomplish, and why, and use that as a guiding framework for what you should be tracking. We approach what belongs in our company marketing tech stack with a broad view and have settled on the following scope: any product or technology that supports the creation of the customer experience, or acquiring, engaging, and retaining customers.

ACTION:

- Click on Company Stacks in your CabinetM account and then on CREATE A COMPANY STACK.
- Add a stack title, stack description, and your logo (300px square works best).
- Select your corporate color to change the look of the stack.
- Add your stack layers and a description for each layer.
- Save your stack.

Find all your technology



Once you've defined the scope of your marketing tech stack you have to decide how deep to go within the stack. If your primary concern is the cost of the technology you are using, then tracking the technology you've purchased and that has been bought on your behalf by an agency may be sufficient. If on the other hand, you are working towards an in-depth understanding of how well your technology is serving your marketing and sales needs, you'll need to go deeper and include freemium products and anything that you've developed internally. We always recommend going as deep as possible. In today's environment with so many people changing jobs, it's critical to ensure that there is a complete and accessible record of all technology in place to facilitate personnel hand-offs as teams grow and change.

What's right for your stack?

- Freemium products
- Purchased products
- Products acquired and being used on your behalf by an agency
- Internally developed products

ACTION: Search for, and drop, all of your products into your stack. Ignore the annotation screen for now -- just click on "do not automatically show this page" at the bottom of the screen.

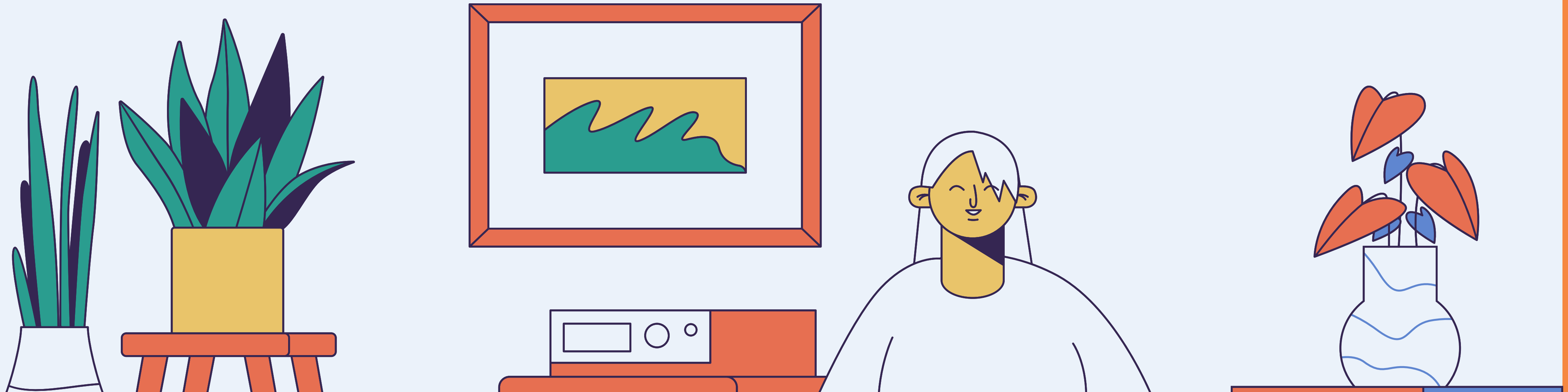
TIP: With a limitation of 25 products in your free account you may not have the ability to catalog all of the free products in use. A workaround for this is to use one icon for all free products and list each product in the annotations for that icon. The same goes for internally developed products and agency-managed products. Search for these icons by using the search function within your stack: Free Products, Internal Products, and Agency-Managed.

Engage Stakeholders

One of the biggest challenges in documenting a tech stack is getting team members to share information about the tools they use. Frequently, stakeholders are concerned that sharing information will lead to technology being taken away or budgets being cut. Being successful requires stakeholders to be supportive of the audit project.

Some ideas that we've seen work for engaging stakeholders:

- Start by focusing on the products that each group is happy with and frame the project as one of sharing ideas and product recommendations.
- Address the budget issue head-on and make a commitment that if any product is eliminated from the stack as a result of your assessment and documentation exercise, you will return the budget back to the team/department to use for new programs and tools.
- Focus your asks on the benefits of sharing information.



Reasons for Stakeholders to Get Onboard

Creating a centralized record of all the marketing technology in use across the organization will:

- **Make it easier to demonstrate the value of the technology being used and justify the acquisition of new technology**
- **Provide the information needed to improve the overall performance of the stack and to better meet sales and marketing objectives**
- **Make the team more effective in their jobs, reduce admin tasks and enable the focus to be on improving marketing results**
- **Enable everyone to share both good and bad experiences with products and to learn from one another**
- **Make it easy to collaborate on technology evaluations**
- **Simplify reporting and reduce the time to respond to requests for reports**
- **Ensure you have a comprehensive record in case one or more key personnel leave the company**

Add the Details

Now that you have captured all the technology that is being used in your organization, you can start adding details about how the technology is being used, how much it costs, and how satisfied the users are with the technology.

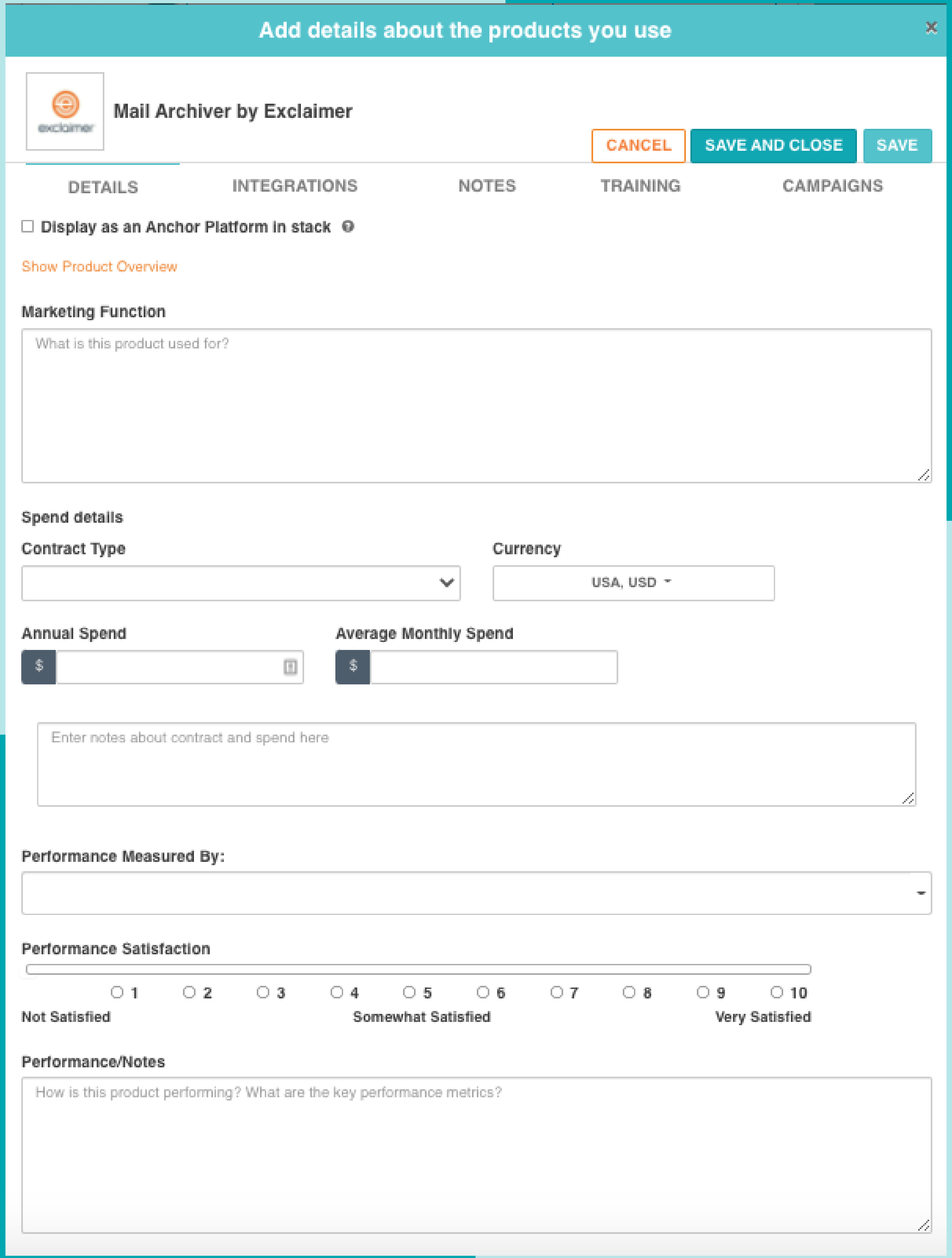
The more details you can document, the easier it will be to make decisions about using the technology going forward.

ACTION: Use the icon on the logos in your stack to access stack annotations. From there:

1. Add information about product function, contract type, spending, and performance.
2. Click across the top of the annotation screen to document integration detail, training information, notes, and images related to campaigns and add any additional notes relevant to the product.

TIPS

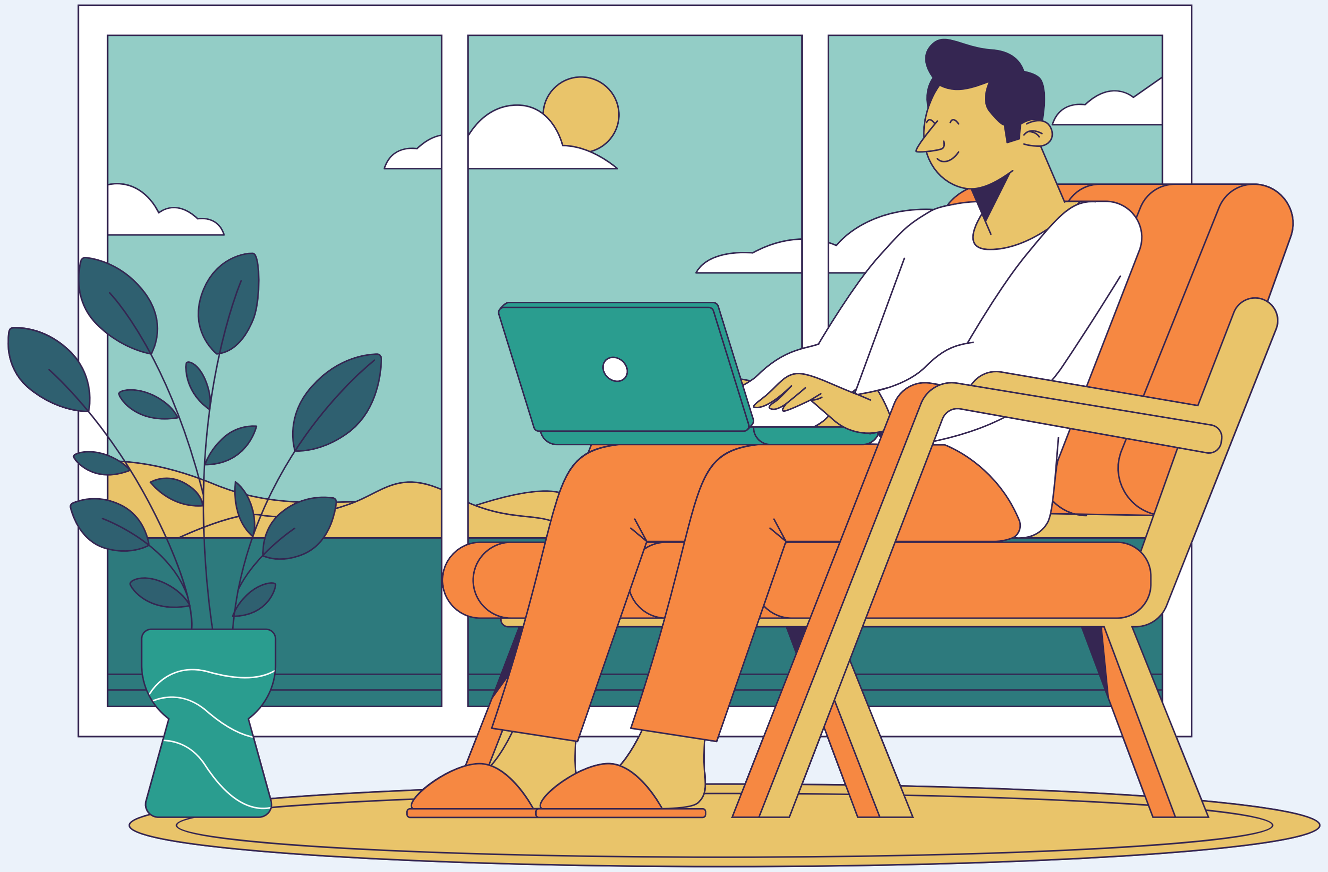
- Don't forget to SAVE your work
- You don't have to add every piece of information at once, start with one or two key pieces and build from there.



Document Product Utilization

Marketing leaders report utilizing only 58% of their MarTech stack's potential according to Gartner. There's a natural tendency when implementing new technology to start by using a subset of a product's functionality in order to simplify product activation. This makes a lot of sense. Unfortunately, teams frequently move on to purchasing the next product without implementing the remaining features of the product they've just activated.

As this process takes hold, companies inevitably end up purchasing systems with redundant functionality which leads to "stack bloat" -- too much spend and time wasted learning to use multiple products when just one would suffice.



To ensure that you take advantage of all the features each product delivers:

- **Document the key features of each product**
- **Track the features of the product you are using**
- **Document the user stories or requirements each feature set supports**
- **Highlight features that may be useful in the future**

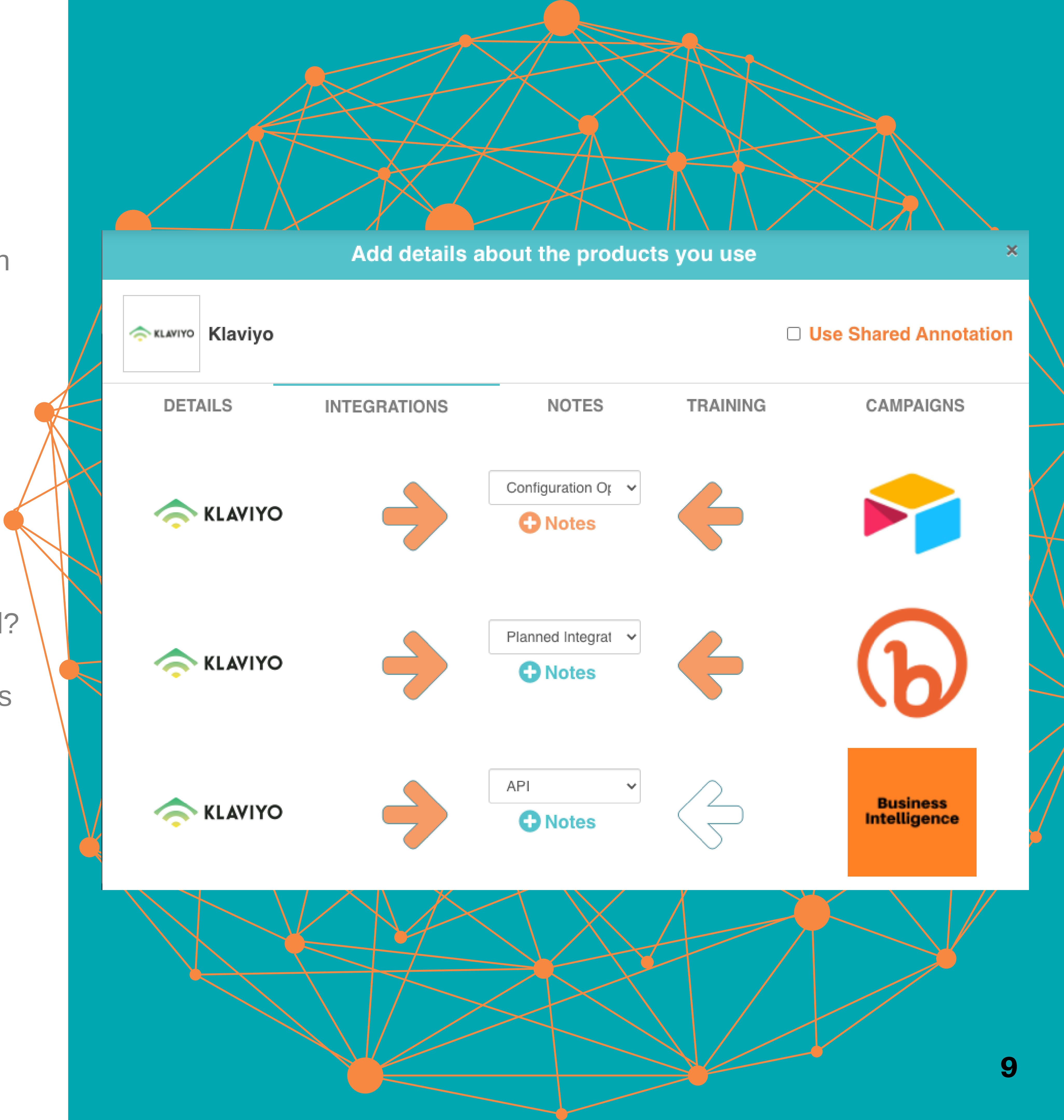
Map Your Integrations

Though our stack visuals may show a tidy list of products or a neatly ordered set of product logos, the reality is that many of the products in our stacks are only valuable if they are connected to, and share data with, other products. Most stacks resemble a complex jigsaw puzzle rather than a discrete set of building blocks. With stacks, the whole is definitely greater than the standalone parts.

When documenting your stacks, it's vitally important to capture how products fit together and specifically:

- What data is passed from product to product
- The direction that data is passed; is it one direction? bi-directional?
- How products are connected. If custom code has been created you'll need to document the details and the responsible individuals for the code

ACTION: Use the Integration tab in Stack Annotations to document integration details



More Details

Over time it will be important to capture additional information to create a complete picture of each technology component in your stack. Some examples:

- Key vendor contacts and notes related to discussions
- Market reports relevant to the technology
- Competitive information
- Links to training information
- Information related to campaigns that have leveraged the technology
- Notes on which departments are using the technology and which department is paying for the technology.

ACTION: Use the NOTES, TRAINING, and CAMPAIGNS tabs in Stack Annotations to add additional information for each product.

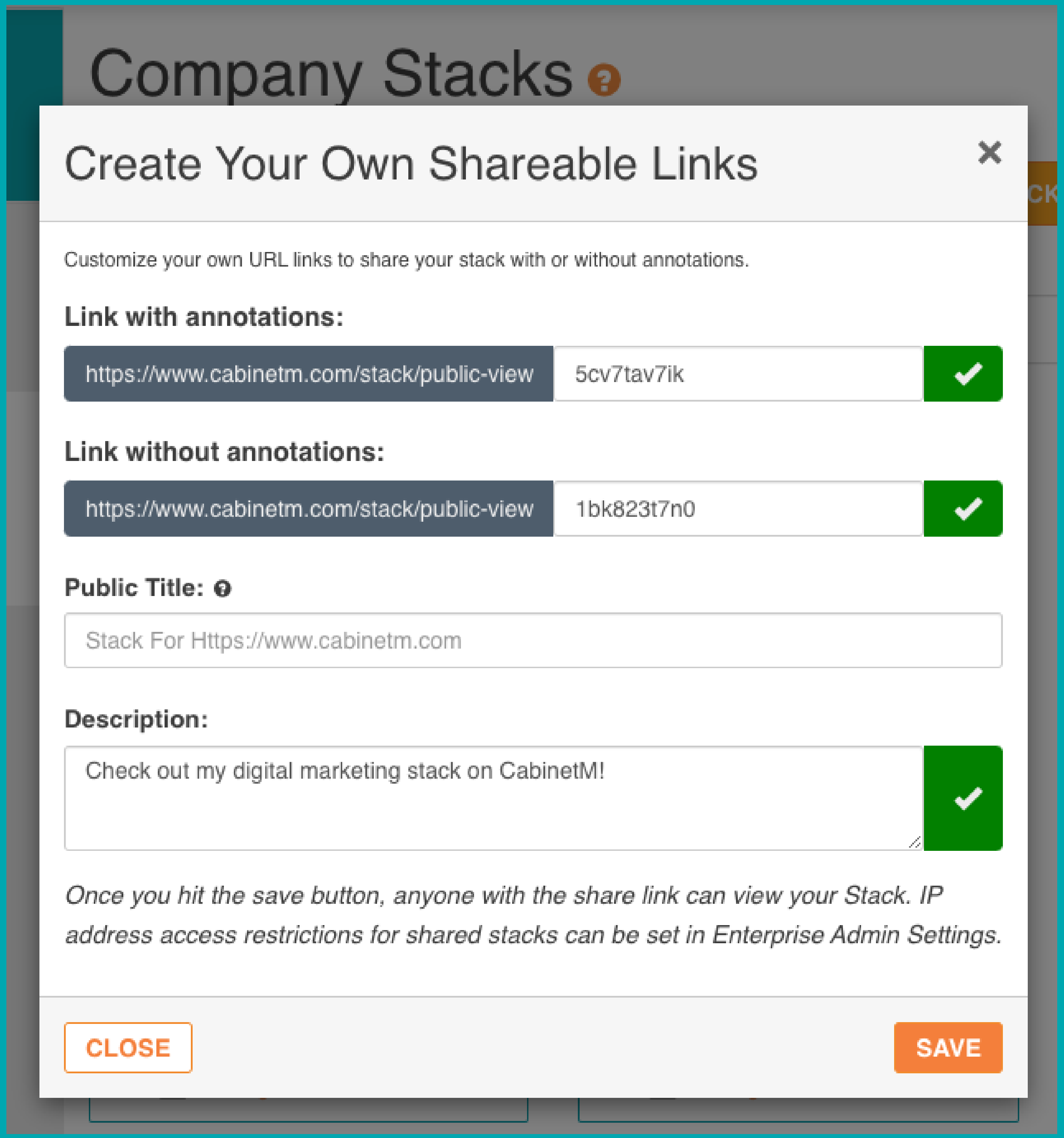
TIP: Notes are particularly useful for capturing information about new product features that you may want to consider using in the future, or future roadmap details based on conversations with the vendor.

Communicate

Once you've completed your initial stack audit, make the results visible across the organization. The most successful marketing operations teams we've met publish their stack as the "technology source of truth," uploading it to Confluence or SharePoint, or whatever they are using internally to share information.

This provides a reference for everyone to check before requesting new technology and helps the organization understand what's being used and managed. Don't wait until you reach your perceived "perfect state;" this is a situation where "good enough" is what's important.

ACTION: Create a Custom URL for your Stack in CabinetM to share with colleagues or embed within your project management tool.



Continue to Refine

There's a lot of job security in documenting your tech stack 🙂

The job is never done. Configurations change, users change, product utilization changes, contracts come up for removal, and products move in and out of the stack. There's a myriad of details that need to be added and updated on a regular basis.

The most successful marketing operations teams make ongoing stack auditing and management part of their daily routine rather than something that's done monthly or quarterly. Ensuring that your stack is up to date makes it much easier to respond to requests for information and reports.

One of the best productivity tips we've seen over the last year is "if a job is going to take two minutes or less do it immediately." This is a good tip to action in updating your stack -- add that contract auto-renewal date now, and don't wait until you have 10 more items to address.

Ready to Get Started Auditing Your Stack?

- Identify your collaborators
- Sharpen your pencils or sign-up for a FREE CabinetM account and start the work!
- If you need help or advice don't hesitate to reach out. You can email support@cabinetm.com and we'll get the right person to answer your questions or you can schedule a call using our "no pitch" Calendly link which will ensure you get help and not a sales pitch!