BENTLEY STRATEGY

FIELD GUIDE

The Capability Stack Field Guide

A field guide to the Marketing & Sales Capability Stack: six layers behind every customer interaction.

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WHAT IS IN HERE

Four sections, and an appendix

Each section stands on its own. Stop after any one of them and you have something you can use.

1. The six layers

What marketing technology actually does, in six categories.

2. A closer look at each layer

What lives in each layer, who owns it, and where AI fits.

3. Using the framework

Sort any vendor, find what is redundant, underused, or missing.

4. Where to go from here

The questions that reveal how a stack is doing, and a next step.

Appendix

The record and the CDP, composability, and the vocabulary.

THE PROBLEM

Marketing technology is a system. Few companies run it as one

- Fewer than one in three companies integrate all customer touchpoints
- Demonstrating ROI from marketing technology is among the weakest capabilities leaders report
- Connecting that technology to the company's other data systems rates lower still, and has not improved in two years
- Experts each know one area well, and disagree on solution approach
- Decisions get made one at a time, with no one accountable for the whole

Source: Bullets 1 to 3, The CMO Survey, 35th edition, 2026.

SECTION 1

The six layers

What marketing technology actually does, in six categories.

What marketing technology actually is

Strip away the vendor names and martech does six jobs.

Deliver (Engagement)	Carry it out in the channels the customer actually touches, including the sales call, and record what happened so the next decision is better informed.
Decide (Decisioning)	Choose what happens next for each customer or account, and coordinate the channels so they act as one.
Create (Content)	Produce and hold everything the company might show or offer, in a form that can be reused rather than rebuilt.
Understand (Insights)	Turn raw records into something usable: segments, scores, accounts in market, what actually drove results.
Recognize (Context)	Work out that the person on the website, the email list and the sales call are the same human, tied to the right account, and agree on what words like customer mean.
Remember (Data)	Store what the company knows about each customer and prospect: orders, contracts, visits, conversations, service history.

A USEFUL TEST

Marketing leaders' frustrations are often rooted in capability gaps

Each frustration points to a specific layer. Naming it is the first step to the answer.

Engagement	Why does the website not know what the customer just bought, or what the rep just promised? The channel is not reading from the foundation, or the outcome never gets written back.
Decisioning	Why did this customer get three different messages in one week? No central decision and no suppression. Each channel is running its own campaign calendar.
Content	Why does every campaign take six weeks to get out the door? Nothing is modular, so every asset is rebuilt from scratch and the offer is re-approved each time.
Insights	We spent millions on media. What did it actually do? Measurement was never wired to outcomes, so spend and result live in different systems.
Context	Why does our customer count change depending on who runs the report? No shared definition and no single record. Three systems, three answers, all defensible.
Data	We have plenty of data, so why can marketing not touch it without filing a ticket? The data exists. Access is the problem, not absence, and the wait is often days.

THE FRAMEWORK

The Marketing & Sales Capability Stack

Marketing and Sales Capabilities can be organized into six layers. Each layer draws on the ones below it.

Engagement	Customer Engagement Channels	Marketing automation, email, web, B2B commerce, advertising, sales CRM, field and inside sales, partner and distributor portals, service, testing and experimentation, AI assistants, permissions and approvals.
Decisioning	Decisioning & Orchestration	Next-best-action, offer arbitration, journey logic, contact policy and suppression, triggers by latency class, eligibility rules, AI agents, AI oversight and guardrails.
Content	Content & Offer Supply	Content planning and production, digital assets (DAM), web and app authoring (CMS), product content (PIM), offer and promotion library, AI content generation, organic and AI visibility, rights and brand approval.
Insights	Ready-to-Use Insight & Measurement	Segmentation, intent and account scoring, predictive scores and models, attribution and incrementality, reporting and BI, digital analytics, model governance.
Context	Shared Meaning & Identity	Identity resolution, account hierarchy and buying groups, Customer 360, shared definitions, consent and permitted use, policy authoring.
Data	Unified Data Foundation	Data platform, customer records, ERP and commercial data, third-party data, AI knowledge base, access control and data protection.

Governance Not a seventh layer. Policy is authored once, in Context, and enforced by a different control in every other layer.

Why use this framework

Three benefits, in order of weight.

A shared language	Marketing, sales, IT, data and finance describe the stack the same way, inside the business and in conversations with vendors and agencies.
One place for every tool	The framework organizes and classifies the entire stack. Each tool has one home, chosen by the job it does, in a structure all teams can use.
Reusable and extensible	The same framework becomes a reference architecture or a future-state design. It shows the gaps, makes clear the job each part of the stack does, and supports rationalizing what you own.

SECTION 2

A closer look at each layer

What lives in each layer, and who owns it.

Unified Data Foundation

- Engagement
- Decisioning
- Content
- Insights
- Context
- **Data**

Where it sits

The company's long-term memory. Customer insights and activations, including agentic AI, all depend on it.

- **Data platform:** the warehouse or lakehouse where records are consolidated.
- **Customer records:** who bought what, when and through which channel, plus service history.
- **ERP and commercial data:** orders, pricing, inventory and contracts.
- **Third-party data:** firmographics and market signals from outside the company.
- **AI knowledge base:** the documents and policies AI assistants draw on to answer accurately.
- **Access control and data protection:** who may read what, with masking, retention and lineage.

Shared Meaning & Identity

- Engagement
- Decisioning
- Content
- Insights
- **Context**
- Data

Where it sits

The company's shared vocabulary and its ability to recognize a customer. Without it, three systems report three customer counts, and all three are right.

- **Identity resolution:** matching emails, phones, devices and accounts to one person or company.
- **Account hierarchy and buying groups:** tying sites, subsidiaries and buying contacts to the right parent account.
- **Customer 360:** the one assembled record every downstream system trusts.
- **Shared definitions:** one agreed meaning for customer, active, churned, lead and revenue.
- **Consent and permitted use:** what each customer agreed to.
- **Policy authoring:** where the rules the other layers enforce are written.

Ready-to-Use Insight & Measurement

- Engagement
- Decisioning
- Content
- **Insights**
- Context
- Data

Where it sits

Understanding. Which accounts are likely to buy, which are likely to leave, and which investments moved the number.

- **Intent and account scoring:** evidence that an account is in market. It feeds account-based marketing (ABM).
- **Segmentation and audiences:** definitions built from foundation data, refreshed on a stated schedule.
- **Predictive scores and models:** propensity, churn risk, lifetime value, next-best-product. Produced here, published to the customer record.
- **Attribution and incrementality:** what drove the outcome, including holdout testing.
- **Reporting and analytics:** dashboards, BI, and what people do on the site and in the product.
- **Model governance:** inventory, validation and drift monitoring for anything in production.

Content & Offer Supply

- Engagement
- Decisioning
- **Content**
- Insights
- Context
- Data

Where it sits

Content and offers the company uses in marketing and sales communications. Everything it might show or offer, stored and connected so it can be reused.

- **Content planning and approvals:** what gets made, by whom, and who may publish it.
- **Digital assets (DAM):** the library of approved images, video and brand content.
- **Web and app authoring (CMS):** where pages and modular content are published.
- **Product content (PIM):** descriptions and specifications, governed once and used everywhere.
- **Offer and promotion library:** the catalog of offers, each with its eligibility and value.
- **AI content generation and visibility:** variants at scale, and content AI assistants can find and cite.

Decisioning & Orchestration

- Engagement
- **Decisioning**
- Content
- Insights
- Context
- Data

Where it sits

The company's judgment. One decision engine picks the best action for each customer or account, and the channels carry it out.

- **Next-best-action and offer arbitration:** rank the eligible options and choose the winner.
- **Journey logic:** multi-step sequences that respond to what a customer or account does.
- **Contact policy and suppression:** who may be contacted, how often, and who is excluded.
- **Triggers by latency class:** overnight by default, faster only where a named use case requires it.
- **Shared engine:** a single-channel journey can stay in the channel. Cross-channel rules, suppression and arbitration need one shared engine.
- **AI agents and oversight:** agents that plan and act under human direction, with guardrails and an audit trail.

Customer Engagement Channels

- **Engagement**
- Decisioning
- Content
- Insights
- Context
- Data

Where it sits

The hands and the voice. The most tools, the most change and the shortest shelf life.

- **Campaign delivery:** marketing automation, email, SMS, in-app and direct mail. No audience or journey logic lives in the channel.
- **Sales channels:** field sales, inside sales and the sales CRM.
- **Partner portals and B2B commerce:** the signed-in view for partners, plus search, reorder and contract pricing.
- **Website, app and advertising:** the company's own digital channels, and paid reach beyond them.
- **Service and AI assistants:** the contact center and AI agents that talk to customers on the company's behalf.
- **Testing, permissions and write-back:** running the test, approving who may send, and recording what happened.

SHARED OWNERSHIP

The stack is shared with sales, IT and finance

Getting the stack right means working across several functions, not only inside marketing.

Layer	Who usually owns it	Systems that feed yours
Engagement	Marketing and sales together, with IT for web and commerce.	Sales CRM, partner and distributor systems, B2B commerce, service and support.
Decisioning	Marketing, with sales and IT. Often the least settled.	CRM routing rules, CPQ, ad technology and clean rooms.
Content	Marketing, with product and sales enablement.	Product content, asset libraries, CPQ catalogs.
Insights	Marketing analytics, the data team and finance.	BI, finance systems, CRM pipeline and closed-won revenue.
Context	Often shared, sometimes no one. Data, marketing and sales operations.	CRM account records, master data, partner and distributor records.
Data	IT or a data team, with finance and operations.	ERP for orders, pricing and contracts, plus commerce and billing.

HOW IT FITS TOGETHER

One buying moment, traced through the stack

An example mid-market B2B account, from first signal to closed opportunity. The system type is shown at each step.

1	Insights	Intent tool	Intent data shows a buying group at a $500M business-services account researching a category the company sells into.
2	Engagement	Website	A contact at that account downloads a product spec sheet.
3	Context	Identity service	The download is tied to a known contact, and account hierarchy ties that contact to the right parent account and buying group.
4	Insights	CDP	The account's score updates. Several buying-group members are now active, and the new score is published to the customer record.
5	Decisioning	Decision engine	The engine weighs the eligible actions and chooses two: an immediate alert to the account's sales rep, plus a nurture sequence to the other buying-group contacts.
6	Content	Asset library	The rep's talking points and the nurture emails are pulled from the offer and asset libraries, already approved for this account's segment.
7	Engagement	CRM	The rep calls within the hour and logs the call. The nurture emails go out over the next five days.
8	Insights	Measurement	The opportunity is credited to the intent signal and the rep follow-up together. The outcome is written back to the customer record, and it feeds the scoring model.

WHERE AI FITS

AI is not a layer. It works in all six.

An agent inherits whatever sits underneath it. That is why the foundation decides the ceiling.

Layer	What AI does here	What it depends on
Engagement	Assistants that talk to customers. Automated creative selection in channel.	Permission to act, and a record of what it did.
Decisioning	Next-best-action models. Agents that plan and run tasks. Oversight, limits and an audit trail.	A stated policy, and somewhere to arbitrate.
Content	Generated copy, imagery and variants. Product content at scale. Being cited in AI answers.	Approved, governed material to work from.
Insights	Propensity, churn and lifetime-value scores. Anomaly detection. Continuous measurement.	Outcomes written back from the channels.
Context	Probabilistic identity matching. Assisted cataloging and definitions.	Agreed definitions, and consent that is enforced.
Data	The AI knowledge base that assistants draw on. Vector search and retrieval.	Accurate, current records in one governed place.

- The dependency runs downward. Accuracy comes from Data and Context. Usefulness comes from Insights and Content. Safety comes from the oversight in Decisioning. An assistant that cannot read accurate product data will invent an answer, and it will sound exactly as confident either way.
- Composability is what lets you plug an agent in. An agent can only use a component it can find, connect to, and write back to. That is three of the six traits, and it is why composability became an AI question rather than an architecture preference.

SECTION 3

Using the framework

Sort any vendor, find what is redundant, underused, or missing.

Place any vendor in about a minute

Sort by the job a product does, not the category it is sold under. Two examples sit in more than one layer, which is normal.

Engagement	Salesforce Sales Cloud, Intercom. The rep, the system of record for accounts, contacts and deals, and AI agents that talk to customers.
Decisioning	Pega Customer Decision Hub, Salesforce Agentforce. Ranks eligible actions, arbitrates which offer wins, and directs AI agents under guardrails.
Content	Adobe Experience Manager, Salsify. Pages and modular content; governed product content.
Insights	6sense, Google Analytics, Amazon SageMaker. Account intent and scoring, predictive models, and what people do on the site.
Context	Dun and Bradstreet, OneTrust. Company identity and corporate linkage; consent and permitted use.
Data	Snowflake, Databricks. The platform where records are consolidated.

Two that sit in more than one layer: A CDP such as Adobe Real-Time CDP or Salesforce Data 360 does work in Data (the copy), Insights (audiences and scores) and Engagement (the sync to channels). A marketing automation platform such as Marketo Engage does work in Decisioning (journey logic and contact policy) and Engagement (sending).

What to do with the overlap: Name the jobs separately and ask the vendor which ones it is doing for you. A product that claims every layer is selling a suite, not a capability.

Common vendor and product names in this space: Salesforce Sales Cloud, Microsoft Dynamics 365 Sales, Intercom, Pega Customer Decision Hub, Adobe Journey Optimizer, Adobe Experience Manager, Salsify, 6sense, Google Analytics, Dun & Bradstreet, OneTrust, Snowflake, Databricks, Adobe Real-Time CDP, Marketo Engage. Examples of the category, not endorsements.

Two pitches, one job

Two vendors from different categories can sound almost the same. The six jobs help you know what each one actually does.

Vendor A, a campaign automation platform

The pitch: "We unify your customer data and deliver personalized, real-time journeys across every channel."

Layers: Decisioning and Engagement.

The job: it runs journey logic and sends the message.

What it does not do: resolve identity across your systems, hold the customer record, or build the models behind its scores.

Vendor B, a customer data platform

The pitch: "We unify your customer data and activate personalized, real-time experiences across every channel."

Layers: Data, Insights and Engagement.

The job: it keeps a scoped copy of the record, builds audiences, and syncs them to the channels.

What it does not do: decide which offer wins, enforce contact policy across channels, or send the message.

The question for any meeting: Which of the six jobs are you doing for me, and which do you partner for?

SPOTTING OVERLAP

How stacks end up with redundant capabilities

This is normal. It is what happens when tools are bought one problem at a time and are not rationalized.

Where it doubles up	Where the overlap sits	The question that resolves it
Three systems that can send an email: the automation platform, the CRM and the CDP.	Engagement, with the rules in Decisioning.	Which system holds the contact policy, and do the others follow it?
Several places a journey can be built: the automation platform, the CRM, the CDP and the ad platform.	Decisioning.	Where do cross-channel journeys live, and which may stay in a single channel?
Two content libraries: the asset library and the templates inside a channel tool.	Content.	Which library is the source, and do the others reference it?
Two systems that score accounts: the intent tool and the CRM.	Insights.	Which score is published to the record, and who owns the model?
Two systems that each claim to be the customer record: the CRM and the CDP or suite.	Context and Data.	Which one holds identity, definitions and consent, and which can be rebuilt from it?

SPOTTING UNDERUSE

What you already own and are not using

The cheapest capability to add is the one already paid for. These sit switched off in stacks every week.

Scoring in the marketing automation platform

Built in, rarely turned on, or turned on once and never tuned. Sales stops trusting the number and goes back to a gut call.

Destinations in the CDP

Configured during onboarding, then unused. Audiences get rebuilt by hand in each channel instead.

Journeys running as one-step sends

A tool bought for multi-step, responsive journeys used as a better send button. Nothing branches on what the customer did.

Testing tools used once a quarter

Licensed for continuous experimentation, used for the occasional headline test. The winner is never fed back.

Product content maintained in several places

A governed source exists, and the website, the portal and the sales deck still each keep their own copy.

Enrichment already in the contract

Firmographic or intent data paid for and flowing into a field nobody reads. The signal is there, and no workflow acts on it.

Source: The CMO Survey, 35th edition, 2026.

SPOTTING GAPS

What is typically missing

Stacks grow around the problem of the day. These six rarely make the list, and each changes what the rest of the stack can do.

Third-party enrichment and intent (Context and Insights)

Firmographics, technographics, contact completeness and in-market signals. The clearest line from the stack to pipeline, and the most common thing missing outright.

A connected decision layer (Decisioning)

The customer data platform and the marketing automation platform wired so one place decides and the channels carry it out. Without it, each channel runs its own calendar and nothing arbitrates.

Write-back from channels and from sales (Engagement)

What happened in the channel, the sales call included, returns to the record. Every model and every next decision starts from real outcomes rather than from the last refresh.

Account hierarchy and buying groups (Context)

Contacts tied to the right parent account and buying group. It decides whether value can be attributed to a customer at all, and whether marketing and sales are working the same account.

Predictive scoring someone trusts (Insights)

Propensity, churn risk and lifetime value, validated and owned. Many stacks have none, and many of the rest have a score nobody acts on.

An AI knowledge base (Data)

Governed documents, policies and product content that an assistant draws on. It is the difference between an assistant that is accurate and one that is confident.

SECTION 4

Where to go from here

Seven questions, and how to take the next step.

IN SUMMARY

Seven questions that reveal how any stack is really doing

Being able to answer these questions is a strong indicator of marketing technology maturity.

Engagement

Does what happens in each channel, including the sales call, get written back, so the next decision is better informed?

Decisioning

When two campaigns want the same customer, what decides, and who is watching what the AI does?

Content

When we launch something new, how much is built from scratch, and can we tell the same story on the site, in the portal and in an AI answer from one source?

Insights

Can a marketer build an audience and see what last quarter's spend produced without filing a ticket?

Context

If three teams count our customers, do they get the same number, and can we say what a customer agreed to?

Data

Where does the company's customer and commercial data live, ERP included, and who owns it?

Ownership

Who owns the plan for the whole stack, and who arbitrates when sales, IT, finance and marketing leaders disagree?

NEXT STEP

Two ways to keep going

Start with a 30-minute conversation to discuss:

- Where your stack sits today, layer by layer, and which layer is holding the others back.
- Where your stack can be added to with low effort, to improve customer and business outcomes.
- What to ask the vendor you are meeting next month.
- What a desired customer use case requires that you do not have yet.
- Who should own the stack, and who arbitrates when cross-functional leaders disagree.

Without the bias of a vendor or agency trying to sell you the next project. **bentleystrategy.com**

Or go deeper on your own: the Decisions Guide names the decisions a stack forces and the criteria for judging each one.

SECTION 5

Appendix

The record, the CDP and the decision engine; composability; and the vocabulary.

Customer 360, CDP and decision engine: three different jobs

One record, one copy, one place that decides. The company owns the record. The CDP and the decision engine are usually bought.

CDP, the channel sync

Engagement. The CDP's connections to channels. Audiences and instructions go out, and events come back.

Decision engine, the place that decides

Decisioning. Journeys, contact policy, suppression and arbitration. The one place that decides what happens next.

CDP, the audiences

Insights. Segment definitions and memberships, built without engineering and ready to use.

Customer 360, the record

Context and Data. Identity, definitions and consent sit in Context. The curated data sits in Data. The company owns it. Scores built in Insights are published to it.

CDP, the copy

Data. A scoped, fast copy of the record for activation. It can be rebuilt from the record.

Enterprise data platform

Data. Where everything lands. The record is a governed area inside it. The platform is not the record.

Common vendor and product names in this space: CDPs such as Adobe Real-Time CDP, Twilio Segment, Treasure Data and Hightouch. Enterprise data platforms such as Snowflake, Databricks, Google BigQuery and Microsoft Fabric. Marketing automation platforms and decision engines such as Adobe Journey Optimizer, Salesforce Marketing Cloud, Braze and Pega Customer Decision Hub. CDPs do work in three layers. The copy is Data, the audiences are Insights, the channel connections are Engagement. Marketing automation platforms do work in two layers. The journey logic is Decisioning. The sending is Engagement. Examples of the category, not endorsements.

What each one holds, does and never does

The "never does" row is the one that settles most arguments.

	Decision engine	CDP	Customer 360
Layer home	Decisioning.	Data, Insights and Engagement.	Context and Data.
Holds	Journeys, triggers, decision rules, contact policy, caps and holdouts.	The activation copy, segment definitions and memberships.	Identity, definitions, consent, history, and the scores that Insights publishes to it.
Does	Evaluates each customer against journeys and rules. Sends an instruction to a channel.	Reads the record in place where possible. Builds audiences, syncs to channels and writes back.	Resolves identity. Applies one definition per term. Publishes data products and scores.
Never does	Hold the record, the offer library or enterprise identity. Deliver the message.	Become the record. Hold an identity rule, definition or history that exists nowhere else.	Send a message, run a journey or hold channel logic. It is not a marketing tool.
Owned by	A vendor. Rules, journeys and history can be exported and reloaded elsewhere.	A vendor, configured and scoped by the company. Rebuildable from the record.	The company, run as a product with a roadmap.

Common vendor and product names in this space: the same categories as the previous slide. A CDP that also offers journeys is doing two jobs, and the journey half belongs to the decision engine. Examples of the category, not endorsements.

From the record to the channel and back

Instructions flow one way. What was learned flows back the other way.

1	Data	Systems of record create the data. CRM, ERP, service, web, app and third parties land it in the data platform.
2	Context	Customer 360 resolves identity and applies definitions and consent. Models built in Insights publish their scores here.
3	Data and Insights	The CDP keeps a scoped copy current and builds audiences on it. It syncs both out and writes back.
4	Decisioning	The decision engine applies journeys and the contact policy. It decides what each customer gets next, where, and how often.
5	Engagement	Channels assemble from referenced content, deliver and report. They hold no audience or journey logic.

Coming back: Channels publish sends, opens, clicks and visits. The engine publishes decisions and outcomes. The record and the models learn what happened.

The rebuild test: Switch off the CDP. The record should have lost nothing, because the copy can be rebuilt from the record. If something is lost, the CDP has become the record.

Common vendor and product names in this space: the same categories as the first slide of this section. Examples of the category, not endorsements.

Composable = modular architecture

A composable architecture is built from modular components that can each be selected, connected, replaced or upgraded on their own, without rebuilding the rest.

Six traits of a composable architecture.

Discoverable

People, systems and AI agents can find it, understand it and reuse it.

Connected

Standard feeds in and out, and one customer key.

Zero copy

It reads the company's record in place instead of keeping its own copy.

Write-back

It returns what it learned to the record. A tool that keeps its own copy still has to write back, so these are two separate tests, not one.

Replaceable

A published interface, so a swap is a connector change, not a migration.

Product managed

A named owner, a service level and a release cadence.

The test

If you replaced the campaign tool next year, how much of the rest would have to move with it?

The tradeoff

More composability costs integration effort and needs product ownership. Apply it layer by layer. It is not a purity test.

Technology terms you will hear in the next vendor meeting

The platforms and systems behind the names.

Marketing automation platform (MAP): Software for scheduled and triggered campaigns, lead nurturing and scoring. Marketo Engage, Oracle Eloqua, HubSpot, Salesforce Account Engagement (Pardot is now Account Engagement).

CRM: Customer relationship management. The system of record for accounts, contacts, leads and deals. Salesforce is the archetype.

CDP: Customer data platform. Assembles a unified profile and builds audiences for activation across channels.

Composable CDP: A CDP that runs on the company's own data platform. The data stays in place and a thin activation tool sends audiences to channels.

CMS and DXP: Content management system (the website), and digital experience platform, a CMS bundled with personalization, commerce and analytics.

DAM and PIM: Digital asset management (approved images and video), and product information management (specifications and documents).

Data platform: The central store for company data, a warehouse or lakehouse. Vendors sometimes call it a data cloud.

ERP: Enterprise resource planning. The system of record for orders, pricing, inventory and contracts.

Customer 360: One consolidated record per customer, combining every touchpoint. Often built in house on the data platform.

Identity resolution: Matching the many IDs a person leaves behind, such as email, device and account, to a single individual or company.

Semantic layer: A shared layer that defines business terms once, such as active customer or revenue, so every tool computes them the same way.

Clean room: A secure environment where two parties match and analyze their data together without sharing the raw records.

Business and operating terms you will hear in the next vendor meeting

The methods, measures and ideas behind the names.

ABM: Account-based marketing. Treating a named account and its buying group as the market, instead of a list of individual leads.

Buying group: The set of people at an account who influence a purchase.

Intent data: Signals that an account is researching a category, drawn from first-party or third-party activity.

Next-best-action: A decision method that ranks every possible offer or message for a customer and picks the best one.

Contact policy: The rules for who may be contacted, how often and through which channel. Written once and applied across channels.

Activation and destinations: Activation sends audiences or data out of a platform. Destinations are the channels and tools that receive them.

Attribution and MMM: Two ways to measure what drove results. Touchpoint-level attribution and top-down marketing mix modeling.

Holdout: A group deliberately left out of a campaign, so the difference in results can be measured.

Zero copy: Letting systems read data where it already sits, instead of copying it. Zero copy is about reading.

Write-back: Sending what happened in a channel, the sales call included, back to the customer record so the next decision is better informed. Write-back is about returning results.

Agentic AI: AI systems that plan and carry out multi-step tasks, such as building an audience or launching a test, rather than only answering questions.

GEO and AEO: Generative engine optimization and answer engine optimization. Making content easy for AI assistants and answer engines to find and cite.

The Marketing & Sales Capability Stack

Six layers, bottom to top. Write your own tools in the right-hand column, then mark the layer you would fix first. Every capability has exactly one home, chosen by the job it does.

ENGAGEMENT

Customer Engagement Channels

Email · Web · Commerce · App · Advertising
Service · Sales and CRM · Partner portals · Testing · AI assistants

Does what happens in each channel, the sales call included, get written back?

YOUR TOOLS

DECISIONING

Decisioning & Orchestration

Next-best-action · Offer arbitration · Journey orchestration
Contact policy and suppression · Triggers by latency class · AI agents and oversight

When two campaigns want the same customer, what decides?

YOUR TOOLS

CONTENT

Content & Offer Supply

Content planning · Digital assets (DAM) · Web and app authoring (CMS)
Product content (PIM) · Offer and promotion library · AI content generation

When you launch something new, how much is built from scratch?

YOUR TOOLS

INSIGHTS

Ready-to-Use Insight & Measurement

Segmentation · Predictive scores and models · Intent · Attribution and incrementality
Reporting and BI · Digital analytics · Model governance

Can a marketer build an audience and see what last quarter's spend produced?

YOUR TOOLS

CONTEXT

Shared Meaning & Identity

Identity resolution · Customer 360 · Account hierarchy and buying groups
Shared definitions · Consent and permitted use · Policy authoring

If three teams counted your customers, would they get the same number?

YOUR TOOLS

DATA

Unified Data Foundation

Data platform · Customer records · Commercial data and ERP
Third-party data · AI knowledge base · Access control and data protection

Where does your customer and commercial data live, and who owns each source?

YOUR TOOLS

Governance Policy is set once, in Context, and enforced by a different control in every layer