

From Reach to Relationship: Aligning Adtech & Martech Around the Customer

A Research Report by
Scott Brinker and Frans Riemersma

SPONSORED BY:



Authors



Scott Brinker, dubbed the “godfather of martech” by *Ad Age*, has been analyzing martech and its impact on marketing organizations for more than 17 years as the editor of the [chiefmartec](#) blog. Previously, he served as VP platform ecosystem at HubSpot, and before that he was co-founder and CTO of ion interactive, a pioneering no-code platform for creating interactive content. He authored the best-selling book *Hacking Marketing* and co-authored the recent best-seller *The New Automation Mindset*. He holds graduate degrees in computer science and management from Harvard and MIT. He jointly produces the [MartechMap](#) marketing technology landscape with Frans.

Frans Riemersma is a marketing technologist, researcher, and advisor. With over 30 years of consulting experience, he blends qualitative expertise with quantitative Martech data on stacks, vendors, and requirements, all consolidated in a proprietary Martech Data Warehouse. These insights power industry reports and tailored benchmarks for global enterprises through his company, [MartechTribe](#), which specializes in Martech research and benchmarking. Together with Scott Brinker, he produces the [MartechMap](#), the definitive overview of the marketing technology landscape. Frans is the author of *A Small Book on Customer Technology*, co-author of *Marketing Tech Monitor* and *Hello Firstname*, and a regular contributor to Martech.org and CMSwire. He frequently lectures at Business Universities, Business Schools, and Chartered Institutes.

Sponsors

This report is sponsored by [Zeta Global](#).

Content

The Company That Had to Be Introduced to Itself	1
Bridging the Real Divide: Mission and Economics	3
Move the Decision, Not the Data	5
Shared Systems Need Shared Stakes	7
The Reorg You Don't Have to Do	11
When Execution Gets Easier, Judgment Is the Job	13
You Can Buy Convergence. You Can't Buy Coherence.	14
Intelligence Built Around Your Goals	17

The Company That Had to Be Introduced to Itself

"Great to meet you! Really cool what you're doing. And I think we can help each other out."

It was a kick-off meeting for a large consumer brand with a new unified adtech-martech vendor. The brand's CMO had gathered leaders from the paid media team and the CRM team to align on how they could take advantage of a platform that now spanned both teams.

As introductions went around the table, it was the brand's *own paid media and CRM teams* who were getting to know each other for the first time.

Sure, they worked at the same company. In the same department. With the same reporting line two levels up. But they had never worked together, because nothing about how either team was measured, funded, or promoted had ever required it.

And that scenario is not unusual.

Of course, the customers of those brands know nothing of such organizational boundaries. Don't know, don't care. But when they are hit with an acquisition offer after already converting, are welcomed as a new customer in email while still being chased with abandoned-cart ads, or are subjected to independent frequency decisions across paid and owned channels, they roll their eyes, shake their heads, and maybe murmur WTF.¹

The company sees separate systems and teams. The customer sees one company behaving incoherently.

AS TOLD BY

carter's

The consumer doesn't concern themselves with any of these technology stacks. It's our job as product strategists to create the experience they are looking for.

Allen Lo

¹ What's This Foolishness? Why The Fragmentation? Who's Tracking Frequency?

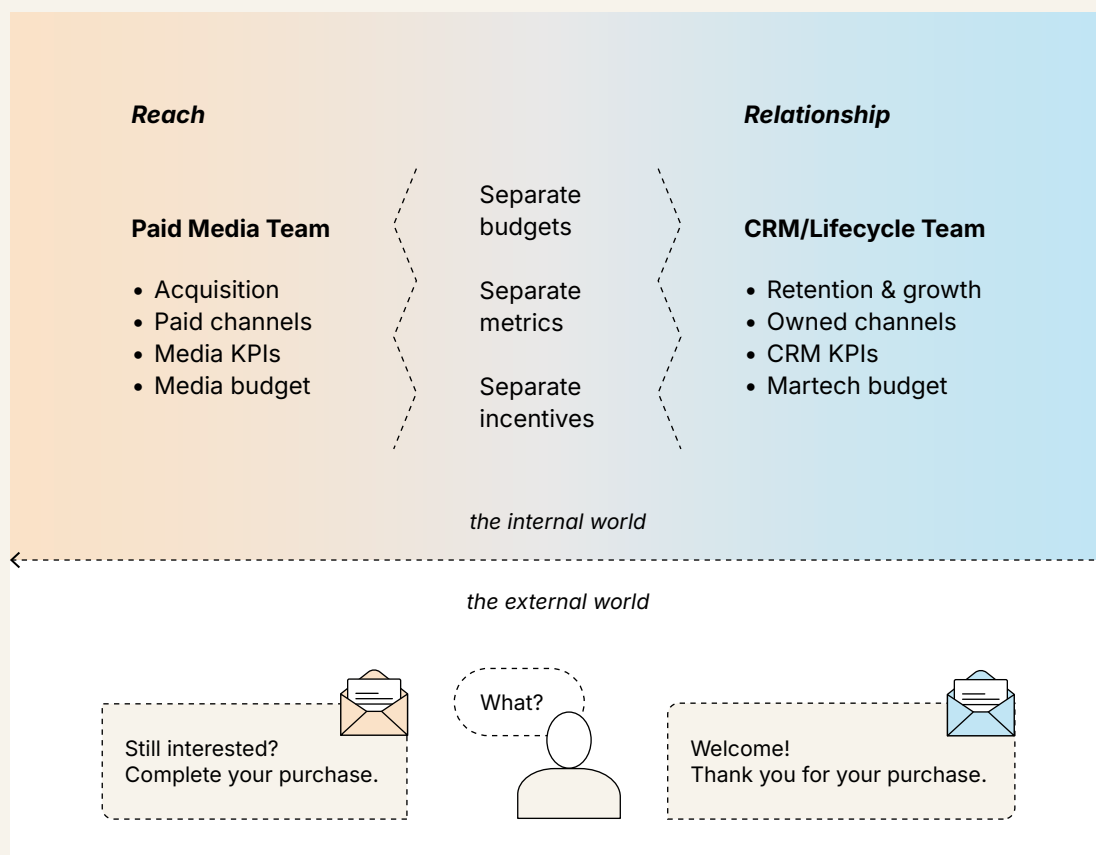


Figure 1. Adtech and Martech: internal structure, external experience.

The good news: adtech and martech — once largely separate worlds — are increasingly interconnected, converging through integrated identity resolution, data infrastructure, and AI decisioning to create a shared context layer for the business and its customers.

Yet while technical convergence enables coherence, it doesn't automatically generate it.

If your organization's budgets, metrics, incentives, skillsets, and strategies are still separated across a divide, consistently crafting coherence remains a Sisyphean task.

Luckily, solving this challenge doesn't require upending your entire org chart. It does, however, require organizational alignment around the strategy, measurement, and economics of the full customer lifecycle. You must bridge not just adtech and martech, but marketing, finance, and IT.

This report is based on original research by the authors, including in-depth interviews with enterprise marketers who have navigated adtech-martech convergence firsthand. Interview participants were drawn from Zeta Global's customer base. The conclusions are entirely our own.

Bridging the Real Divide: Mission and Economics

Despite the “tech” suffix on both adtech and martech, the tech hasn't been the real schism.

Yes, each side has had different technology. One was the realm of third-party data, the other was first-party. One used cookies; the other used CRM records. One optimized auctions; the other orchestrated journeys. One integrated with walled gardens; the other was *your* walled garden.

Adtech, as it was organized	Martech, as it was organized
Acquisition	Retention & growth
Anonymous / addressable audiences	Known customers
Paid channels	Owned channels
Cookies, IDs & external signals	CRM & first-party data
Media optimization	Journey optimization
Media teams & agencies	CRM, lifecycle & marketing ops teams
Growth investment, variable spend	Operating infrastructure, fixed spend
Reach	Relationship

Figure 2. Adtech and Martech: the anatomy of the split.

But these were never insurmountable hurdles. The reason few companies sought to integrate them is that they served two separate missions — or, more accurately, two missions that were managed separately.

Reach: Adtech was organized primarily around customer acquisition (and reacquisition), orchestrating both brand and performance advertising. It was treated as a growth investment, a variable expense that could be easily expanded or contracted. Because most of the technology involved charged by usage, it was treated as the fully-loaded cost of media spend.

Relationship: Martech, in contrast, was organized primarily around known customers — engaging them, retaining them, merchandising to them — as well as capabilities to increase the efficiency and productivity of internal marketing teams. It was commonly treated as operating infrastructure, a fixed expense that was less elastic and harder to quantify its direct ROI.

Two different missions. With two different teams. With two different tech stacks. But also with two different classifications on the P&L. Two different conversations with finance on accounting, budgeting, measurement, and success metrics.

In effect, the P&L reinforced the org chart, and the org chart reinforced the tech stack.

That dichotomy persisted for years because these two branches only came together at the most senior level of the marketing organization — often the CMO. There was little structural incentive for the teams below to cross the divide, as they were more often competing for resources. And most CMOs had more pressing issues to tackle, especially under the pressure of typically very short tenures.

But two shifts have changed the equation.

Signal loss: In many ad channels, signal loss has made targeting harder and the anonymous-audience model weaker. Identity resolution has improved significantly, but much of the richest durable, consented, person-level context lives separately in CRM, commerce, customer engagement, and loyalty systems.

Cloud data platforms: company-wide data infrastructure, such as Databricks and Snowflake, and marketing-specific customer data platforms (CDPs), unify data across the full customer journey. When combined with powerful new AI models have enabled greater decisioning intelligence across every touchpoint.

Programmatic media buying was a proto-agentic precursor to this, making millions of real-time allocation decisions against an economic objective. Today's AI agents can bring that kind of continuous, machine-speed optimization to every marketing surface, far outpacing the legacy build-launch-measure-repeat cycle that could take weeks to adapt. But to unlock the full potential of this optimization engine — on both first-party and third-party surfaces — common context must be shared across the divide.

The breakthrough isn't that adtech and martech finally became the same thing. It's that they stopped needing to. Once context and decisions can cross the boundary, specialization stops being a barrier to coherence and starts becoming an advantage. Two missions with connected intelligence improves the economics for both.

Which raises a different architectural question: Where should the decision live?

Move the Decision, Not the Data

So where should the decision live? Increasingly, wherever the best combination of data, intelligence, and execution can act on it.

The breakthrough is interoperability. Audience definitions, identity keys, event schemas, consent state, suppression logic — the objects adtech and martech need to exchange — can increasingly pass between systems as configuration rather than a bespoke integration project.

But interoperability is only the intermediate state. The destination is a shared system of intelligence: common context, signals, and economics informing what should happen next across the customer lifecycle. That intelligence may live within a unified platform, span multiple interoperable systems, or combine

the two. What matters is that decisions draw on the fullest relevant context and get executed by the machinery best suited to act on them.

Because those execution engines remain genuinely different. An auction engine bidding in milliseconds against inventory quality, frequency, pacing, and price is not the same machine as a lifecycle orchestrator managing consent, deliverability, and branching logic across a six-week sequence. Both disciplines have become more specialized, not less — and that depth is precisely what makes each engine good at what it does.

The two worlds didn't converge by making every engine the same. They converged by giving specialized engines the same intelligence to act on in the service of a common goal: better customer experience and better business results.

Still, every handoff carries some combination of fidelity loss, latency, and cost:

- **Identity resolution.** A signal in one environment does not automatically resolve to the same person in another. Cookie-level inventory often cannot be reliably connected to a durable person-level identity, depending on where the media runs and what infrastructure you control.
- **Fidelity.** Every additional hop is a point where entropy can creep in: for the audience size to shrink from desynced match rates, for fields to drop out, for definitions to drift, or for permissions to break. And those losses compound.
- **Latency.** Every handoff adds execution time, and it adds up. Shared-data and zero-copy architectures are the antidote, eliminating unnecessary movement — right up until a decision is needed, in milliseconds. As an added benefit, they reduce the risks of conflict and misalignment by letting everything reference the same, up-to-date data source.

Those costs point to a simple design rule: Move the decision to the data whenever you can, rather than moving the data to wherever the decision has historically been made. Your highest-value and most time-sensitive decisions should cross the fewest boundaries.

Historically, nobody made that placement very consciously. Media decisions lived in media systems because the media team owned them. CRM decisions

lived in CRM systems because the CRM team owned them. The architecture followed the org chart — Conway's Law, with a media budget.

But now that's a choice.

Which brings us to the part technology can't solve for you.

Better identity, fewer hops, lower latency, smarter decisioning — all matter. But they buy capability, not coherence. A company can have the cleanest identity spine and smartest decisioning layer in its industry yet still behave incoherently.

AS TOLD BY



Successful transformation starts with technology, but its true value is realized when it empowers people to work differently and achieve more.

Parthiv Sheth

Because the costs that remain aren't paid in match rates or milliseconds. They're paid in budgets, scorecards, incentives, and organizational turf.

Shared Systems Need Shared Stakes

Technical convergence can look threatening from inside the org chart.

Senior leaders in large companies tend to operate in three currencies: headcount, budget, and influence. A shared audience layer, shared measurement, and shared decisioning can appear to put all three at risk. If my team no longer owns the audience, and my results are measured alongside somebody else's contribution, what exactly do I still own?

That fear is rational, not petty. But the observed outcome in our interviews was often the reverse. When paid and owned channels share context and measurement, waste becomes easier to see and performance easier to prove. Several interviewees described greater budget and influence following demonstrated efficiency, not less.

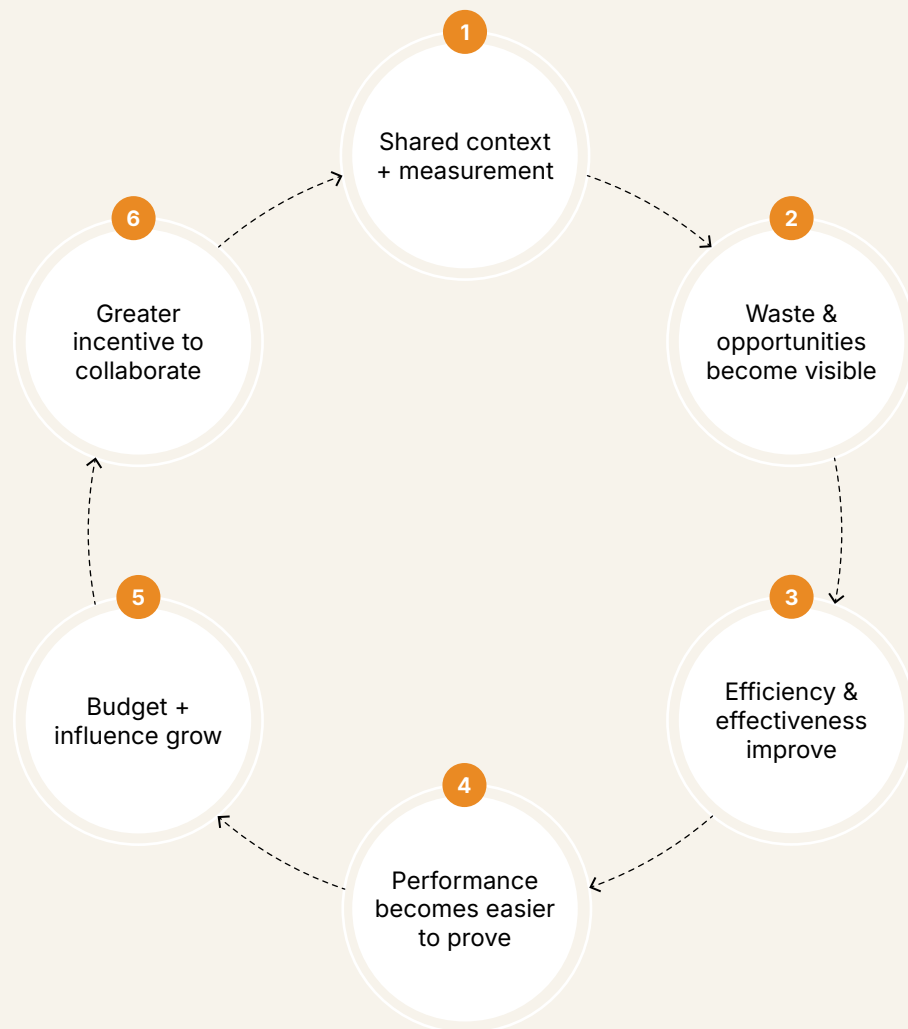


Figure 3. The flywheel that follows shared context and measurement.

That creates a flywheel. But the people being asked to move first shouldn't be expected to discover the upside on faith. The leadership job is to make the trade legible before asking anyone to make it.

And marketing can't do this from inside marketing alone. Marketers have spent years learning to speak finance; increasingly, they also need to engage technology leadership directly. The practitioners doing this well arrive with the problem, not the specification — "Here's what I'm trying to learn or accomplish; you're the experts" — turning a place in the IT queue into a shared objective.

The same principle applies outside the company.

Much of media execution still sits behind an agency. For many brands, the DSP is operated externally. Agencies may be reluctant to touch first-party data because of privacy or contractual constraints. And deep expertise in media execution does not automatically translate into deep fluency in CRM, lifecycle orchestration, and customer data.

The answer is not simply to bring everything in-house. Several interviewees described companies that tried exactly that and later pushed significant media execution back to agencies because they could not operate it as efficiently.

A more durable division is to separate *control of the intelligence* from *operation of the channel*.

The brand should control the customer context, identity rules, audience definitions, measurement framework, and decisioning logic that govern how customers are treated. An agency can still operate the external media machinery, as one of many channels the brand is orchestrating.

What matters is that the signals flow both ways. Conversion, engagement, consent, and suppression signals should inform media decisions. Exposure, frequency, cost, and response signals should flow back into the shared intelligence informing the rest of the customer journey. That is a much more consequential form of convergence than simply sharing an audience file.

Then there's the money. The financial machinery still encodes the old divide in three important ways.

- **First, there's no budget line for convergence.** There's a media budget and a martech budget, both sized around the old split. Connecting them imposes a cost before it produces a benefit, with no obvious owner waiting to fund it.
- **Second, procurement calendars freeze yesterday's architecture in place.** Major marketing platforms have historically turned over on multi-year cycles, with incumbents protected as much by switching cost as by product superiority. Those calendars haven't disappeared, but interoperability changes what happens when the window opens: replacing or connecting one layer no longer has to mean rebuilding everything around it.

- **Third, scorecards reinforce the split every quarter.** If acquisition is rewarded for volume or low acquisition cost while retention is graded separately on engagement or churn, both teams can hit their numbers while making the overall customer economics worse.

A shared economic lens changes the conversation. Not simply *How many customers did we acquire?* but *What quality of customers did we acquire, what value did marketing create across the lifecycle, and where should the next dollar go?* The principle is to measure the value marketing creates across the journey, not just at the organizational boundary where one team hands the customer to another.

If you need somewhere practical to start, one of the most underrated convergence use cases is *suppression*: Stop paying to advertise to someone who already converted, stop retargeting someone deep inside an active nurture or service journey, stop promoting items that are out of stock, stop one part of the company from spending money to contradict another. It requires exactly the shared context convergence is supposed to create, and the savings are immediate enough that a CFO doesn't need a heroic attribution model to see them.

That pattern came up repeatedly in our research: Money leads and strategy follows. Companies connect paid and owned systems to eliminate an obvious financial inefficiency, then discover what else the connection makes possible.

Start with a problem whose economics are obvious. Prove the value. Let the connection expose the next opportunity.

Shared context. Shared intelligence. Shared measurement. Shared stakes. Not necessarily shared reporting lines.

The Reorg You Don't Have to Do

If adtech and martech are converging, surely the media team and CRM team should converge too?

Every person we interviewed for this report — platform executives selling converged systems and enterprise marketers operating them — gave us essentially the same answer: no. Not “not yet.” Just flat-out no. Nobody had seen a company blow up the two organizations and merge them. Nobody thought that was the goal, and nobody thought that was a good idea.

The specialties are too real. Auction dynamics, frequency management, inventory quality, pacing, and media economics are a discipline. So are lifecycle design, deliverability, consent management, and journey orchestration. Merge the teams and you risk creating generalists competent at both and expert at neither, precisely when both crafts are getting more sophisticated.

Specialist depth is earned slowly and destroyed quickly.

The durable distinction isn't really adtech vs. martech. Those technology categories are already intertwined. Nor is it cleanly prospects vs. customers. Paid media supports retention, reactivation, and cross-sell, and owned channels nurture prospects long before they buy.

What persists is a difference in craft: operating in an external market you compete in vs. operating a relationship you already have. A media buyer running a win-back campaign is still practicing media-market execution. A lifecycle marketer nurturing a prospect is still practicing relationship execution. The audiences overlap, but the expertise doesn't.

So if you don't merge the teams, what do you converge?

Converge the economics. Shared incentives are better than shared managers. Start by agreeing on the economic outcome both sides are trying to improve. Customer lifetime value is a strong candidate because it forces acquisition to care about the quality and downstream value of the customers it brings in, while making retention accountable for what it

does with them. Depending on the business, contribution margin, payback period, or expected incremental value may be more useful. The exact metric matters less than the principle: both sides should win when the customer becomes more valuable, not when one team merely hits its local number.

Converge the context. Both disciplines should work from the same available picture of the customer: a common identity spine, shared audience definitions, shared consent and suppression logic, and the same relevant behavioral signals. Not a mythical perfect 360-degree view of every person. Just enough shared truth that one side doesn't act on a version of the customer the other side knows is wrong.

Converge the measurement. Shared measurement does not mean forcing everything through one attribution model. It means a common evidence framework capable of reconciling attribution, incrementality, media-mix analysis, lifecycle performance, forecasting, and customer economics. You need to be able to answer what media did, what lifecycle programs did, what they did together, and where the next dollar is most likely to create incremental value.

Then keep the execution specialized. The durable model is not one blended discipline. It's specialist media-market execution and specialist customer-relationship execution, connected by shared audience, identity, intelligence, and measurement capabilities.

That connective tissue might live in a dedicated team, a federated function, or a cross-functional operating layer. The org chart matters less than the authority. When the media team and lifecycle team define the same audience differently, somebody has to decide which definition wins.

Converge what they know, how they measure, and what they're trying to achieve. Don't converge away the expertise that makes each side effective.

AS TOLD BY

carter's

Gone are the days when functions operate in silos. The lines are blurring between consumer data, martech, and adtech.

Allen Lo

From	Toward
Optimize channels	Optimize customer value
Separate acquisition and retention economics	Shared customer economics
Channel-specific goals	Shared economic outcomes
Volume acquired	Downstream value acquired
Retention rate	Value created through retention
Separate measurement	Combined incremental impact
Allocate budget by channel	Allocate by incremental value
Optimize within the team	Optimize across the journey
Technology as advantage	Organizational coherence as advantage

Figure 4. Adtech and Martech: from channel metrics to customer economics.

When Execution Gets Easier, Judgment Is the Job

As shared context and decisioning span paid and owned channels, more execution becomes automatable. But as activation gets easier, judgment gets more valuable.

The job of the human-in-the-loop becomes deciding which objectives matter, which signals deserve trust, which constraints to impose, and when not to optimize at all. What should disappear is the reflex that every disappointing result is a creative problem — that “let’s refresh the creative” somehow counts as a diagnosis.

People whose work was primarily hands-on-keys in buying and orchestration platforms are moving toward audience strategy, insight, planning, and decision design. Everyone becomes a bit of a data scientist — emphasis firmly on a bit. Not Python and statistical rigor, but numeracy, comfort interrogating a number, and the ability to explain where it came from and why anyone should believe it.

That last part matters even more with AI. Trust in an AI recommendation should not come from the confidence with which it delivers an answer. It comes from being able to inspect the signals, assumptions, and evidence behind it.

Because answers aren't scarce anymore.

AI can generate hypotheses, segments, recommendations, tests, and actions faster than an organization can reasonably pursue them. It can also help you make a bad decision much faster. What becomes scarce is contextual clarity: understanding the business, the customer, and the objective well enough to recognize which answer is worth acting on.

That requires strategic discipline. When testing and activation were expensive, cost imposed some prioritization automatically. As those costs fall, the temptation is to try everything simply because you can. But strategy has always been partly about deciding what *not* to do. AI makes that discipline more important.

The same applies to relevance. Better signals without a better message only make you a more efficient pest. Knowing exactly whom to reach, when to reach them, and what they might want does not absolve you from having something worthwhile to say.

You Can Buy Convergence. You Can't Buy Coherence.

Nobody was confused.

The media team and the CRM team always knew they were reaching the same people. Ask either one and they'd tell you the customer experiences a single

company. The problem was never recognizing the need for coherence. It was paying for it.

Coordinating across the divide meant reconciling identity models, measurement regimes, incentives, data, and vendors — real costs incurred up front against benefits that were obvious in theory and difficult to prove in practice.

What changed wasn't the idea. What changed was the price.

Identity resolution, shared data infrastructure, interoperability, and AI decisioning have steadily reduced the cost of coordinating across paid and owned channels. Convergence didn't suddenly become a good idea. It became an economically practical one.

The technical cost of coordination has fallen much faster than the organizational cost. Budgets, scorecards, incentives, and ownership are still structured for a world in which coordination was expensive. Much of the opportunity in this report lives in that gap.

Because as technical convergence becomes broadly available, it also becomes less distinctive. AI increases the value of shared context and decisioning. But competitors can acquire those functional capabilities from many of the same vendors.

Everyone can buy the convergence. But not everyone can deliver coherence.

One is technical. The other is human.

It's up to you to express the differentiators technology cannot manufacture. What your brand actually stands for. Why people should trust you. What you have worthwhile to say once you know exactly who's listening.

For marketers, that's a return to the soul of the job.

Converge the economics. Converge the context. Converge the measurement. But keep the expertise specialized.

And let the customer experience one company.

	Converge	Keep specialized
Economics	The outcomes both sides are graded on — CLV, contribution margin, incremental value	Channel-specific operating budgets and cost structures
Context	Identity spine, audience definitions, consent, suppression, relevant signals	Local execution environments and data-processing requirements
Measurement	A common evidence framework spanning attribution, incrementality, lifecycle performance, and forecasting	The specialist metrics each craft optimizes day to day
Execution	Shared decisioning logic and signals	Media-market execution and customer-relationship execution

Figure 5. What technology can converge; what only expertise can deliver.

Intelligence Built **Around Your Goals**

Zeta is building for a future where marketing works as one connected system of intelligence — bringing together what a business knows about its customers, what it wants to achieve, and the ability to determine and execute what should happen next.

That matters because the real value of adtech and martech convergence isn't simply connecting technologies. As *From Reach to Relationship* makes clear, the opportunity is to give specialized teams and execution engines shared intelligence while preserving the expertise that makes each effective.

Zeta's system of intelligence will bring together the intelligence of your business and your customers around a shared goal. It will connect proprietary data and identity, real-time consumer and business context, AI-powered decisioning, and activation across paid and owned marketing — creating a system that can **know, decide, act, and learn alongside the marketer.**

The result is a more connected way to build stronger customer relationships at every stage. Zeta recognizes when a prospect becomes a customer and adjusts acquisition activity accordingly. It identifies opportunities to deepen or retain a relationship, coordinate paid and owned experiences, and determines

where the next marketing dollar can create greater incremental value.

And every action makes the system smarter. Each customer interaction and campaign result adds new data that helps Zeta make the next decision smarter, so every action improves the one that follows.

For marketing leaders, the value is not simply having more connected technology. It is having a system that works across the customer journey — recognizing what each

person needs next, coordinating the right paid and owned experiences, and learning which actions create more value for both the customer and the business. That means less wasted acquisition spend, more relevant engagement after conversion, and a clearer path to stronger loyalty, lifetime value, and profitable growth.

That's the opportunity Zeta is building for: not simply connecting adtech and martech but connecting the intelligence across them around what matters most to the business.

Turn intelligence into stronger customer relationships and profitable growth.

[Learn more at Zeta Global.](#)

About Zeta Global

Zeta Global is the intelligent AI infrastructure company helping enterprises transform proprietary data into enterprise intelligence. The Zeta Data Cloud and Athena by Zeta™ connect proprietary enterprise knowledge with advanced AI to enable better decisions, more effective customer engagement, and stronger business outcomes. With one of the industry's largest proprietary data assets, Zeta helps organizations accelerate AI transformation and build durable competitive advantage. Founded in 2007 by David A. Steinberg and John Sculley, Zeta is headquartered in New York City with offices worldwide. Learn more at www.zetaglobal.com.

Stay connected



www.chiefmartec.com



www.martechtribe.com



www.martechmap.com