



# Martech for 2026

by Scott Brinker and Frans Riemersma

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## Authors



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"Agentic AI, at its core, is about AI systems that can take semi-autonomous and autonomous actions to achieve goals. But to get there, you need a lot of foundational elements in place: clean data, integrated systems, clear governance policies, and organizational trust in AI decision-making." – **Jonathan Moran**



"You can experiment quickly, you can fail fast, you can succeed fast by the same token. But it's also requiring a massive amount of cross-functional collaboration and communication at a level we haven't seen before." – **Sara Faatz**



"AI is only going to be impactful if you give it the right data resources to leverage. And you need to make sure that those resources are connected in a way that's pragmatically accessible." – **Rebecca Corliss**



"We believe that with agents it's possible to make it 10X faster for marketers to launch campaigns and do their everyday work by automating the most mundane of tasks, like designing experiments, sizing opportunities, answering data questions, researching different angles, and giving marketers time back to focus on the most creative and the most strategic tasks." – **Tejas Manohar**



"The expectations for personalization are skyrocketing. Customers now expect every interaction to be contextually relevant and responsive to their immediate needs. AI makes this possible, but only if you have the infrastructure to process and act on data in real-time." – **Patrick Harrington**



"The most competitive marketers in the next five years are not going to be ones that can code, and they're also not disappearing, but it's going to be the ones who are these directors of AI, these strategic and empathetic directors of AI tools." – **Alexis Karsant**



"When it comes to AI, the biggest pitch you get oftentimes is it's going to drive operational efficiency. It's going to allow you to move faster, in a smarter way, and punt the mundane tasks from day to day. But you're not measured on efficiency in your day-to-day job — you're measured on business impact." – **Rafa Flores**

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# Introduction

"Hey, Claude. What's the title of a movie that sums up marketing and AI today?"

*I'd go with "**Everything Everywhere All at Once**" (2022).<sup>1</sup>*

*It perfectly captures how marketers are being told they need AI in every channel, every touchpoint, every workflow, every customer interaction, and every piece of content... all simultaneously. The multiverse metaphor works great too — there are infinite possible AI tools, strategies, and vendors, and marketers are expected to navigate them all while still hitting their quarterly targets.*

*The overwhelming chaos of that movie? That's basically every marketing team right now trying to figure out which AI tools actually matter versus which ones are just noise.<sup>2</sup>*

We suspect you can relate.

To paint a vivid picture of that overwhelming chaos, let's travel back in time a couple of months to one week in late September, early October...

## One Week of AI Martech Madness

Consider the stampede of announcements *just from OpenAI* from September 29 through October 6 relevant to marketing and martech:

- **Instant Checkout** (Sep 29): OpenAI launches Instant Checkout that lets users in the US shop and buy products from Etsy and Shopify merchants natively within ChatGPT. It's powered by their new open-source Agentic Commerce Protocol, jointly developed with Stripe. More merchants,

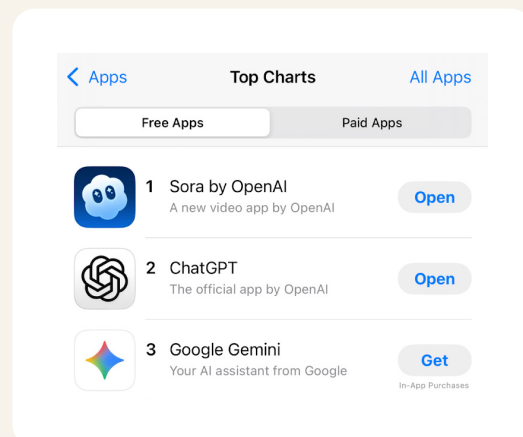
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<sup>1</sup> Other movie suggestions from Claude when we asked for more: *There Will Be Blood*, *The Matrix*, *Dumb and Dumber*, *No Country for Old Men*, and *Moneyball*. We'll leave those adaptations to your imagination.

<sup>2</sup> These 94 words were the only ones written by AI in this report. By choice, because we enjoy writing. And, yes, we like em dashes. We're taking them back from AI.

regions, purchase flows expected soon. One CMO privately frets that bypassing their owned ecommerce experience might relegate them to becoming just a glorified fulfillment service. (Two weeks later, Walmart announced that they would sell through ChatGPT this way too.)

- **Build-Your-Own-Martech** (Sep 29): OpenAI publishes a series of blog posts describing how they built their own internal go-to-market (GTM) agents and assistants: a sales copilot in Slack, an inbound sales assistant that replies in the prospect's language, a contract-to-data agent for finance, etc. The market worries what this means for the big martech SaaS companies, and many of them see double-digit drops in their stock price.
- **Sora 2 Generative Video** (Sep 30): OpenAI releases their latest generative video model Sora 2, keeping pace with Google's recent Veo 3 model. Producing great AI-generated video takes a big step forward.
- **Sora App & Social Network** (Sep 30): At the same time, OpenAI unveils a new Sora social network. With a quick capture of a user's voice and head movements, the app produces realistic "cameos" where the user can cast themselves into any 10-second video they can describe.<sup>3</sup> They can also add cameos of other users. (Sam Altman was cast in a fake scene shoplifting GPUs from Target — funny for a moment, but also frightening as a harbinger of what lies ahead.) Brands and copyrighted media get remixed in dubious and wondrous ways. Initially invite-only, the app rockets to the #1 spot on Apple's U.S. App Store within days.<sup>4</sup>
- **ChatGPT Apps** (Oct 6): OpenAI makes its play to become a new "AI OS" with ChatGPT Apps that turn the chat window into a zero-install app platform. Instead of sending users out to a site, marketers can put a working mini-product directly inside the conversation — pulling in first-party context (what the user just asked, past chat state) and pushing back interactive UI,

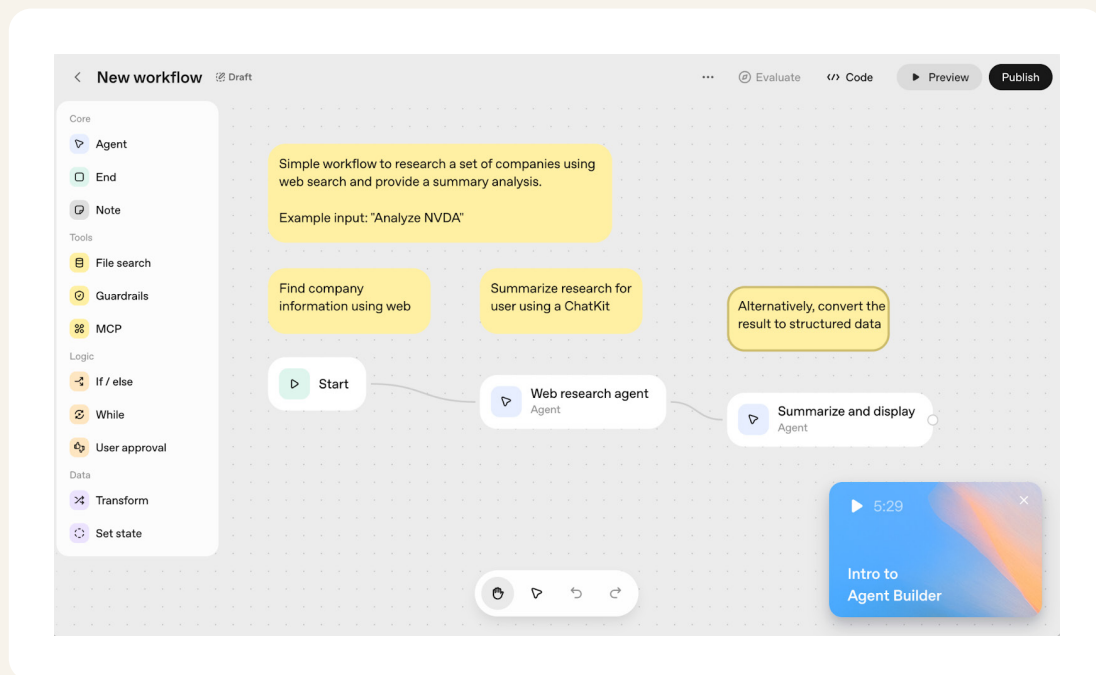


<sup>3</sup> Scott does a Sora cameo to express the vibe of vibe coding.

<sup>4</sup> We imagine a couple of OpenAI engineers deciding over beers on a Friday to vibe code a whole new social network in a weekend. We don't know that's true. But it's not entirely inconceivable either.

actions, and results in one flow. It's a new high-intent distribution channel and a new UX surface.

- **AgentKit and Agent Builder** (Oct 6): OpenAI ships AgentKit to make it easy for developers to build agentic workflows and embed chat-based agents in their own products. Their visual Agent Builder “provides a visual canvas for composing logic with drag-and-drop nodes, connecting tools, and configuring custom guardrails. It supports preview runs, inline eval configuration, and full versioning.” A wave of hyperbolic posts on LinkedIn claim that OpenAI just killed Zapier, n8n, and the like. (We disagree, but it certainly shakes things up.)



There were plenty of other announcements too. After inking a deal to deploy 10+ gigawatts of Nvidia systems the week before, OpenAI committed to an additional 6 gigawatts of GPUs from AMD on October 6. The following week, they made a deal with Broadcom for *another* 10 gigawatts of custom AI hardware.<sup>5</sup>

The scale of these compute deals and the hundreds of billions of dollars being committed leads people to fret that it's "AGI or bust!" — OpenAI better

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<sup>5</sup> A little trivia for you: in the film *Back to the Future*, Doc Brown states that the DeLorean time machine requires merely 1.21 gigawatts of power to activate the flux capacitor for time travel.

achieve artificial general intelligence<sup>6</sup> with oodles of benefits to the world (and investors), or risk throwing the whole economy into disarray.

And that's just news from *one* AI company in only *one week*.

Granted, OpenAI is an outlier company and that was an outlier week. And it remains to be seen how adoption of these new capabilities goes over time: what will catch, what will falter, what will iterate into something else. But still. If your head isn't spinning from the insane volume, velocity, and variety of this AI-fueled firehose of Big News<sup>7</sup>, someone should check your pulse and make sure you still fog a mirror.

## Love in the Time of AI Agents

Into this maelstrom, marketers and the martech vendors who love them have been thrown.

Marketers are under intense pressure to deliver present day results while simultaneously tasked to "figure out this whole AI thing" in both their internal and external go-to-market operations.

A [Forrester report](#) in July showed CMO tenure decreasing as market volatility is increasing. And if you only read what the techno-optimist marketing influencers on LinkedIn claim about running their entire department with vibe-coded agents

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*If you're a CMO and you're looking at 2026, I highly recommend that you sit your team in front of you and tell them that it's not about replacing them. It's about making sure that they have the right tools to succeed and embracing AI, as scary as it may sound to some folks. If done right, it can really change things for you.*

— Rafa Flores

[Read Interview](#)

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<sup>6</sup> There's debate about what exactly artificial general intelligence (AGI) is. We'll say it's an AI system that can understand, learn, and apply knowledge across any intellectual task at a level equal to or beyond human capability. Also the plot basis for *The Terminator* and *The Matrix*. Not that that's worrisome.

<sup>7</sup> A nod to the volume, velocity, and variety definition of Big Data.

("5 prompts to replace your whole marketing team!"), you might be feeling like George Washington in the musical *Hamilton*: outgunned, outmanned, outnumbered, outplanned.

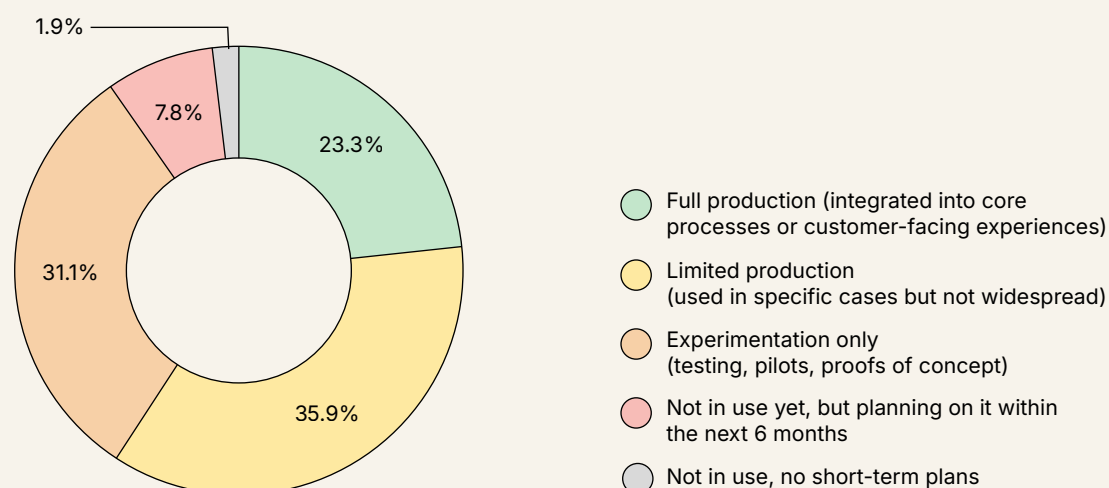
Well, rise up!<sup>8</sup>

Statistically, you're not far behind. Yet. The *diem* is still yours to *carpe*.

Because while it is a time of extraordinary change, almost everyone is still in the early innings of figuring this out. In our [State of Martech 2025](#) report earlier this year, 71.9% of marketers noted that they were only in the experimental/pilot phase of AI adoption or applying it in a few limited, specific workflows.

Even in our latest *AI & Data in Marketing Survey*, examining adoption of AI agents and agentic workflows six months later, only 23.3% of respondents had agents deployed in full production use cases. Most (67%) were using them only experimentally in pilots/proofs-of-concept or in limited production use cases. Another 9.7% hadn't deployed them at all.

## How are AI agents currently deployed in your marketing / sales organization?



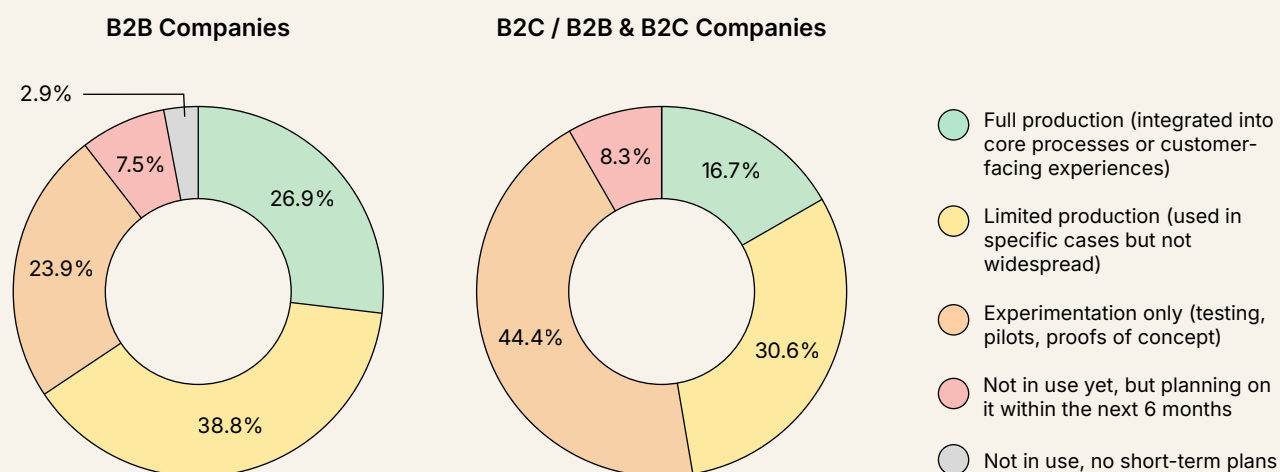
Source: *AI & Data in Marketing Survey*, 2025, chiefmartec & MartechTribe

<sup>8</sup> "Right Hand Man" from *Hamilton* by Lin-Manuel Miranda. [Available on Spotify](#).

B2B firms are a little further ahead than B2C companies in moving from experimentation to production. This makes sense given the challenges of scale — with both data and audience — that most B2C organizations face.

Keep in mind that our audience, whom we persuaded to take this survey (*thank you!*), skews more tech-savvy than average. We believe this survey shows where top-quartile marketing ops and martech leaders are at, and they're still in early stages. But they are marching forward.

## AI Agent Deployments: B2B vs B2C / B2B & B2C



Source: AI & Data in Marketing Survey, 2025, chiefmartec & MartechTribe

So what are these marketers using AI agents for?

We'll give you a full breakdown of internal and customer-facing agent adoption further in this report, but the top use case internally is content production (68.9%) and the top customer-facing one is customer service (54.4%).

### Internal-facing AI Agents

|                          |       |
|--------------------------|-------|
| Content production agent | 68.9% |
|--------------------------|-------|

### Customer-facing AI Agents

|                                                             |       |
|-------------------------------------------------------------|-------|
| Customer service chatbot agent, on website or in mobile app | 54.4% |
|-------------------------------------------------------------|-------|

Not surprising, right? These have become pretty mainstream applications of AI. But of the 16 other AI agent use cases we surveyed — audience discovery agents, AI SDRs, competitive analysis agents, customer journey builders, and more — most already had greater than 20% adoption. The tide is rising fast.

Of course, the biggest challenge in bringing agentic marketing to life lives at a layer below the AI. It's the data. Getting the right data, to the right AI agent, at the right time, is where the magic — and most of the real work — happens.

#### AI Implementation Challenges



And it's hard. 56.3% of our survey respondents said poor data quality — missing data, stale data, inconsistent data, etc. — was a significant difficulty for them.

The cool kids' name for wrangling the right-data-to-the-right-AI problem is *context engineering*.<sup>9</sup> What context does an AI agent need to make the right decision or take the right action? We love this framing, seeing the evolution of the martech stack from systems of record and system of engagement to *systems of knowledge* and *systems of context*.

Context also has a very human meaning. As the pace of business accelerates, are we able to make sure employees across our organization have the right context for the work they're doing? As customers engage with us via more AI-mediated channels and touchpoints, do we truly understand their context in the moment to serve them best?

AI is a commodity. Context is differentiation.

## SaaS is Dead! Long Live... Software in the Cloud?

Thank heavens the Internet's armchair analysts aren't your physician. You'd go to the doctor with a sprained ankle, and they'd declare you dead on arrival. (We swear, email has been declared dead more often than Michael Myers in the endless string of *Halloween* movies.)

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<sup>9</sup> Prompt engineering is, like, so 2024.

However, the death of SaaS, software-as-a-service, is greatly exaggerated.<sup>10</sup>

Don't get us wrong, incumbent martech platforms and products face serious threats in this time of AI disruption. But it's not because they're subscription software applications delivered through the cloud. ChatGPT, Claude, Gemini, Perplexity, et al., are all cloud-based software. They all charge seat-based subscription fees.

The threat is how AI is reshaping how work can be done inside a company and how customers will engage with brands and vendors. It's new capabilities. New channels. New behaviors. New competitors. New ecosystems. New economics.

It's a whirlwind of creative destruction, and existing martech vendors must adapt to survive.

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*The martech landscape is going to go through significant consolidation and transformation. We're seeing AI capabilities being built into virtually every tool, but there's a difference between AI as a feature and AI as a fundamental architectural shift.*

— Patrick Harrington

[Read Interview](#)

In our opinion, those who eagerly lean into new AI platforms and paradigms have the best chance to ride this next S-curve. Architecturally, almost all of today's AI use cases rely on existing systems to provide well-governed data, decisions, and delivery. That's a powerful foundation upon which SaaS companies can deliver tremendous value with AI today — and a perch from which they can pivot to what's next.

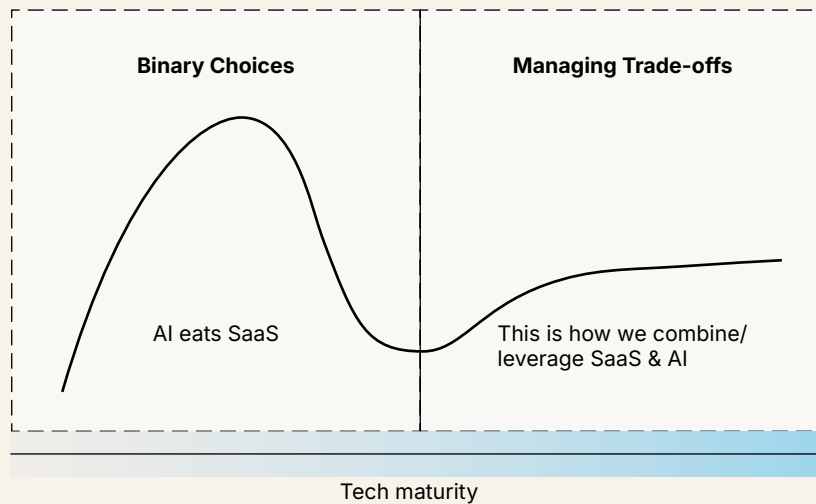
Chalk one up for martech vendors who've embraced composability. It's serving them well in this highly fluid environment, where adaptability is a major competitive advantage.

Of course, not all incumbents will make it. Evolution is brutal. New disruptors are rising. And over time, the fundamental structure of the stack will change more dramatically, displacing legacy solutions that fail to evolve. But for 2026, most companies will leverage both existing SaaS and new AI products in hybrid stack designs.

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<sup>10</sup> To quote Michael Palin's character in *Monty Python and the Holy Grail*, "I'm not dead. I don't want to go on the cart. I'm getting better. I feel fine. I think I'll go for a walk. I feel happy."

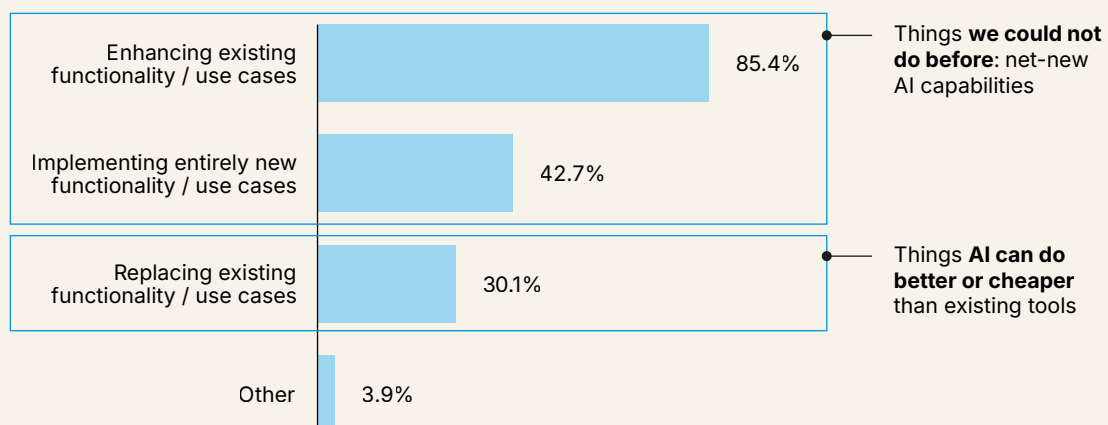
## Managing Your Hype Cycle



Source: MartechTribe

Our old friend, the Gartner Hype Cycle, continues to eloquently illustrate this journey. The peak of hype entertains all sorts of wild-and-crazy proclamations that bend towards binary extremes. The slope of enlightenment and plateau of productivity, however, reflect a greater understanding of the trade-offs.

## Are AI agents replacing or augmenting martech SaaS apps?



Source: *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

Indeed, our research found that the vast majority of real-world AI agent use cases (85.4%) are about enhancing existing martech functionality or implementing new functionality (42.7%).

Only 30.1% reported replacing existing martech capabilities with AI agents — and often while enhancing others. We expect there will be more substitutions in the year ahead. But mostly for very specific use cases, not wholesale replatforming.

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*I think it's really about pivoting from a risk and status-quo point of view to a growth mindset with these new AI capabilities. Yes, there will be dislodgement of entrenched channels and players, but there's also going to be considerable opportunity.*

— Patrick Harrington

[Read Interview](#)

## What's the Most You Ever Lost on a Coin Toss?<sup>11</sup>

One of the most interesting dynamics between martech SaaS-as-we've-known-it and new AI agents is the interplay between *deterministic* vs. *non-deterministic* capabilities.

The layperson's translation?

Deterministic workflows and experiences adhere to a fixed and formulaic structure and flow — the *if-this-then-that* logic of marketing automation systems for the past 15 years. Run the same deterministic process with the same input multiple times, and you will always get the same output. They're repeatable, predictable, explainable.

Non-deterministic workflows and experiences, well, aren't. They're probabilistic in nature. Run the same non-deterministic process with the same input multiple times, and you're likely to get different outputs. Maybe not dramatically different, but possibly so. Generative AI engines (and the agents that use them) are non-deterministic. You can try this for yourself by asking Claude or ChatGPT the

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<sup>11</sup> Claude put *No Country for Old Men* in our heads. *Martech for 2026* is a happier story, we promise.

exact same question multiple times. You will see variance each time.

This is not necessarily a bad thing! Non-deterministic processes can be very powerful because they do things that would have been difficult or impossible to program with deterministic logic. Interpreting or generating unstructured text and multimodal content are perfect examples. Non-deterministic processes can also be more resilient, able to adapt to unexpected changes in their environment, where deterministic processes are more likely to break with exception errors.

One isn't inherently better than the other. Each has strengths and weaknesses, depending on your use case. And, in fact, you don't need to choose just one. Many of the most innovative approaches we're seeing in practice are hybrid processes that incorporate limited non-deterministic AI steps within the guardrails of well-structured, deterministic workflows.

This gives you the best of both worlds — leveraging the stable foundations of your existing martech platforms while augmenting them with new AI-native capabilities. It's not a binary choice, but a balance of trade-offs.

Heads, you win. Tails, you also win.

This is our overarching theme for *Martech for 2026*. Big changes are happening, in the stack and in the market. AI agents are real, and they're rewiring the ways marketers market — and the ways buyers buy. But the hype still exceeds reality.

You should lean in and learn, as the world is shifting. But maintain healthy skepticism toward the AI equivalent of "wild-eyed pistol wavers who ain't afraid to die"<sup>12</sup> pushing for a radical rebuild of your entire stack. Experiment boldly, but scale wisely.

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*2025's challenge: AI was all about efficiency. And 2026's difference: AI is going to be a differentiator and used for sustained growth.*

— Alexis Karsant

[Read Interview](#)

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<sup>12</sup> *All She Wants to Do Is Dance* by Don Henley ([Spotify](#)). All we want to do is make customers happy.

Thank you to our sponsors GrowthLoop, Hightouch, Intuit Mailchimp, MetaRouter, Progress, SAS, and Treasure Data. Their support makes it possible for us to engage in this research and share it with you for free. The back half of this report includes deep-dive interviews with each of them — not to pitch their wares, but to share their thinking about where martech and AI are headed in 2026. We think you'll find their perspectives as thought-provoking as we did.

We also want to thank our friends at *Humans of Martech*, *MarTech.org*, *MarketingOps.com*, and *The Martech Weekly* for helping to rally participants for our research, as well as Angela Silva, our wonderful designer at *Dattura*.

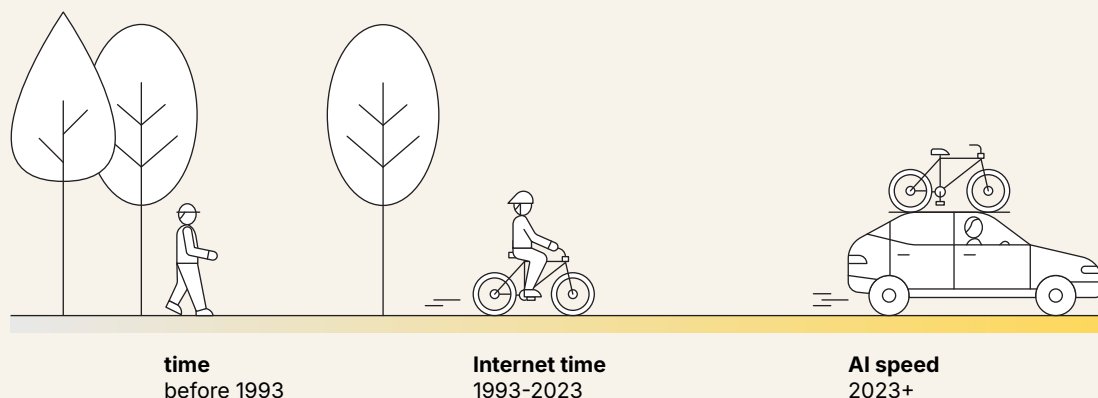
All right, let's dig in. With due respect to Claude, we're going to suggest a better movie title to sum up marketing and AI today: *The Incredibles*.



**Scott Brinker**  
chiefmartec



**Frans Riemersma**  
Martechtribe



# The Agentic Era of Marketing Has Begun

AI agents in martech are real.

90.3% of the participants in our *AI & Data in Marketing* study reported they're using AI agents somewhere in their martech stack, even if it's only for experimentation or in limited production use cases.

Granted, our participants skew more tech-savvy than the average marketing team. But they're running martech and marketing operations at some of the top B2C and B2B brands in the world. They take their responsibilities seriously. They're not starry-eyed or reckless. They're pragmatic and competing at the top of their game.

That cohort is almost certainly ahead of the curve in deploying AI agents in marketing. But they're paving the way — and setting the pace — that others will follow. Some of the ideas in this report may put you ahead of your peers, but not way out on a limb.

But first, let's get a semantic argument out of the way.

*What is an AI agent?*

There's endless debate among pundits about how much reasoning, decision-making, and action-taking autonomy something needs to qualify as a true AI agent. And there's fair criticism that some martech vendors are overreaching in calling their AI-ish features "agents."<sup>13</sup>

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*Things become agentic when you combine the ability of AI models to reason with tools and perform actions in the external world. For example, run SQL queries on your data warehouse, build predictive ML models, or analyze creative in Facebook ads.*

— Tejas Manohar

[Read Interview](#)

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<sup>13</sup> Remember when every other martech company started calling itself a CDP? That was so 2019.

We're not going to get too hung up on that. Directionally, these things are becoming more *agentic* along all of those dimensions. Scale, scope, and degree of autonomy today are less important to us than the net capability an agent delivers in production use cases — and the course it's on to further evolve over the next 12 months. Let's take in the forest rather than quibble about what's a tree or a shrub.<sup>14</sup>

The more important question is: what are these agents doing to marketing and martech?

### 3 Domains of AI Agents in Marketing

To us, the most interesting characteristics of AI agents in marketing's orbit aren't how big they are or how many tools they use. It's the people in their lives. *Who do they work for? Who do they interact with? Who do they benefit?*

We organize them into three domains:

- **Agents for Marketers:** AI agents that marketers control and use behind-the-scenes to conceptualize, produce, and analyze their work. Customers don't directly interact with these agents.
- **Agents for Customers:** AI agents that marketers control that *do* interact directly with prospects and customers. While these agents work for the marketer, the customer (or their own agents) can still choose if and how to engage with them.
- **Agents of Customers:** AI agents that prospects and customers use to intermediate or remix their buyer's journey outside the control of marketers.

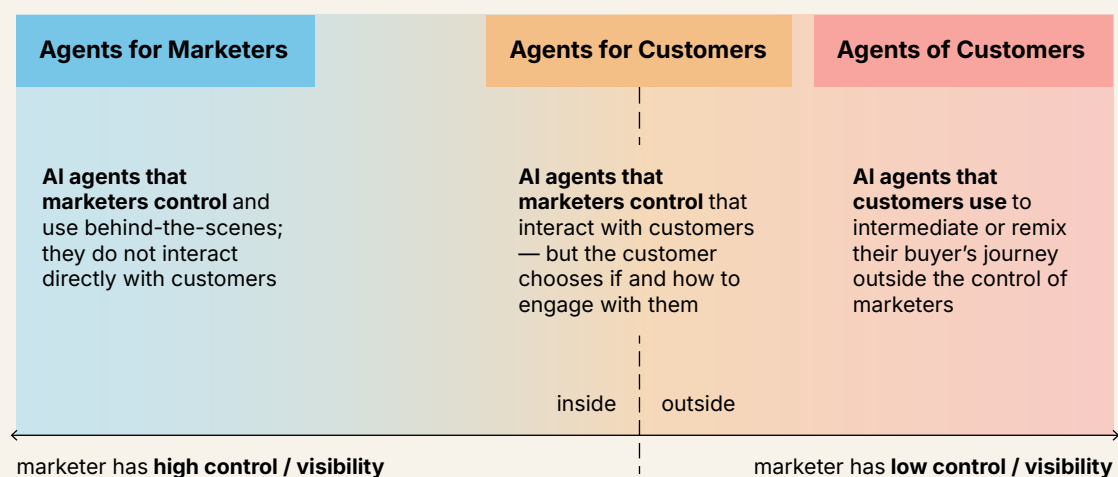
These different agents sit along a spectrum of how much visibility and control you as a marketer have. Internal *Agents for Marketers* are fully under your control. *Agents for Customers* are also mostly under your control — AI chatbots and shopper concierges on your website or AI SDRs over email.

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<sup>14</sup> With apologies to Eric Idle's character, Roger the Shrubber, in *Monty Python and the Holy Grail*. Yes, that's two *Holy Grail* references in one report. We know: "Stop that, stop that."

But the visibility of what's happening on the customer's side of the interaction is less clear, especially if they're engaging with you anonymously or using their own AI agents as intermediaries.

### 3 Domains of AI Agents in Marketing



Source: chiefmartec

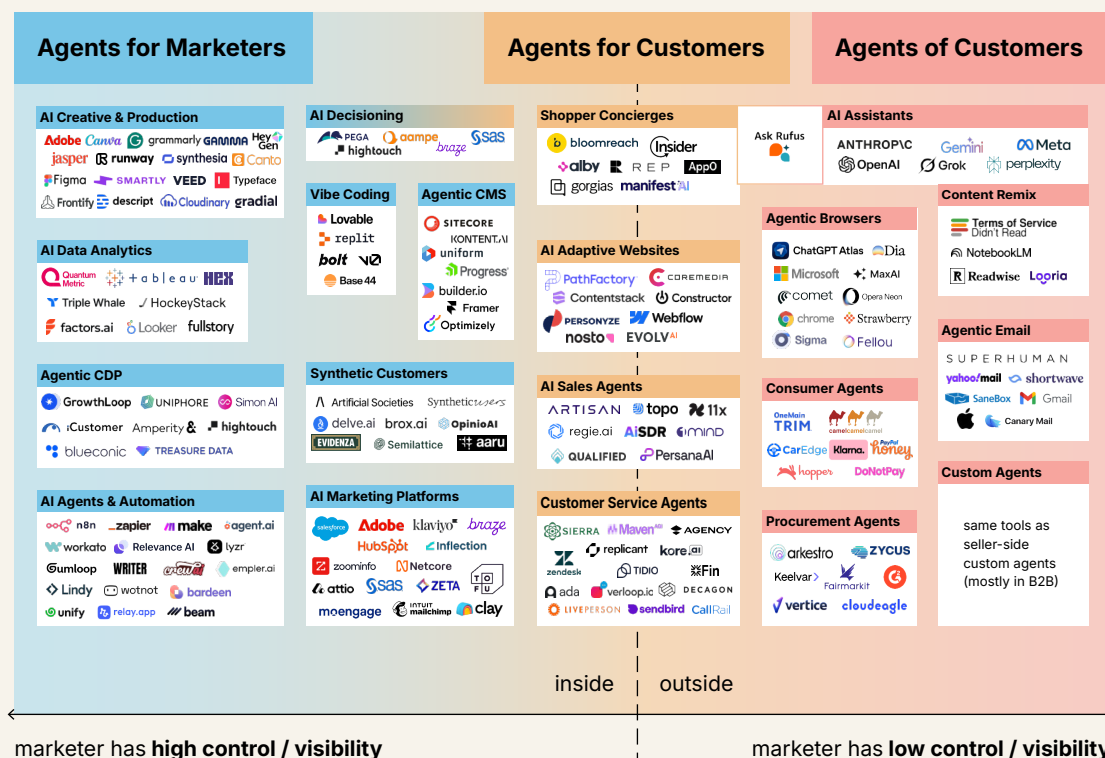
*Agents of Customers* are the most different. As a marketer, you have almost no control over these. The prospect or customer using these agents is in control.

In some cases, where one of these buyer-side agents wants to interact with your site or services, you may be able to detect it and decide how you want to react. Do you try to exclude them with "Are you human?" captchas or warmly welcome them with an experience optimized for AIs, such as an MCP or A2A server?<sup>15</sup>

But in many cases, you won't even know an agent was operating on the customer's behalf. The conversations they have about you with an AI assistant such as ChatGPT or Claude, the way they remix your content or web experience with something like NotebookLM or an agentic browser such as Atlas or Comet, or the filters their AI email client applies to your carefully crafted campaign messages all happen outside your view.

<sup>15</sup> MCP (Model Context Protocol) and A2A (Agent2Agent protocol) are new standards for how AI agents can talk with each other. We'll discuss them in the next chapter of this report.

### 3 Domains of AI Agents in Marketing - A Representative Sample



Source: chiefmartec, October 2025

Products shown are only a representative sample, not a comprehensive market map

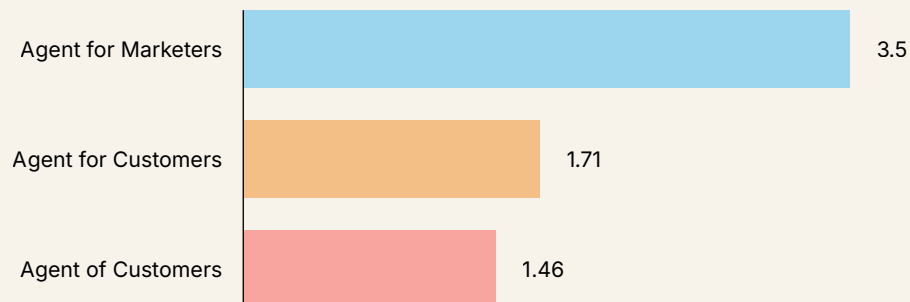
To make this less abstract, we've pulled together a representative sample of different agent products in each of these 3 domains in the market map above. (Let us emphasize the words "representative sample." This is by no means a comprehensive landscape. So vendors, if we didn't include you, please don't take it personally.)

Marketing teams often work with multiple agents. Participants in our survey have, on average, adopted 6.67 different types of agents — or, in the case of *Agents of Customers*, tools and tactics to serve and influence those buyer-side agents.

*Agents for Marketers* are the most popular, with an average of 3.5 agent types active in pilot or production use cases. Partly because they're the most plentiful — with a flood of new AI-native startups and existing martech vendors across the map racing to agentify their products. Partly because many of them plug into existing processes, increasing efficiency without requiring more structural changes. And partly because they're often the "safest," executing

work backstage, often with a human-in-the-loop to review their outputs and decisions. Customers don't directly interact with these agents.

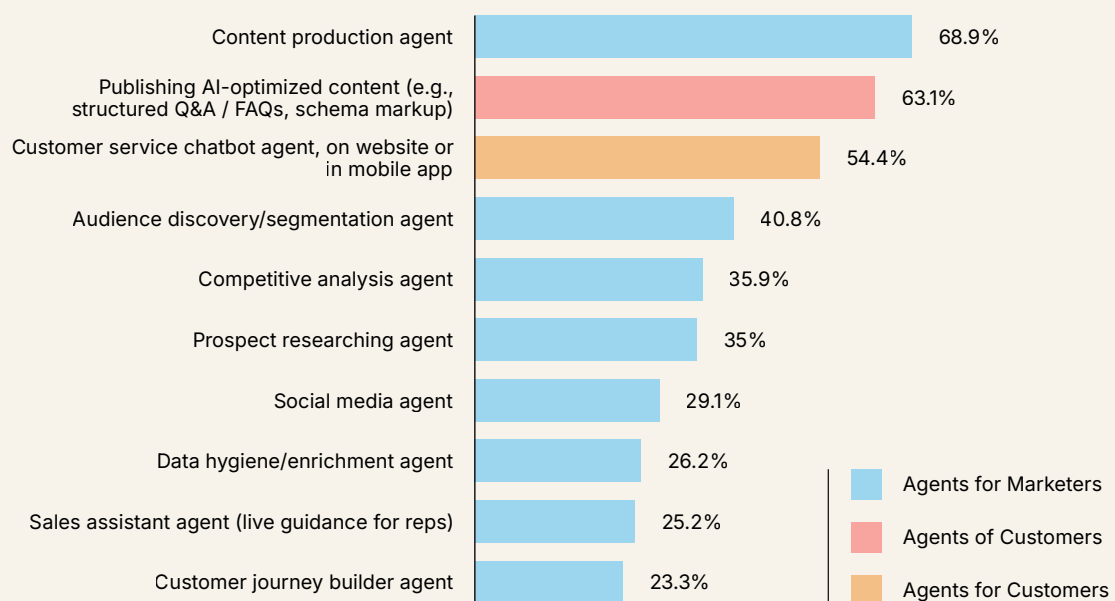
## Average Number of Agent Types in Use



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

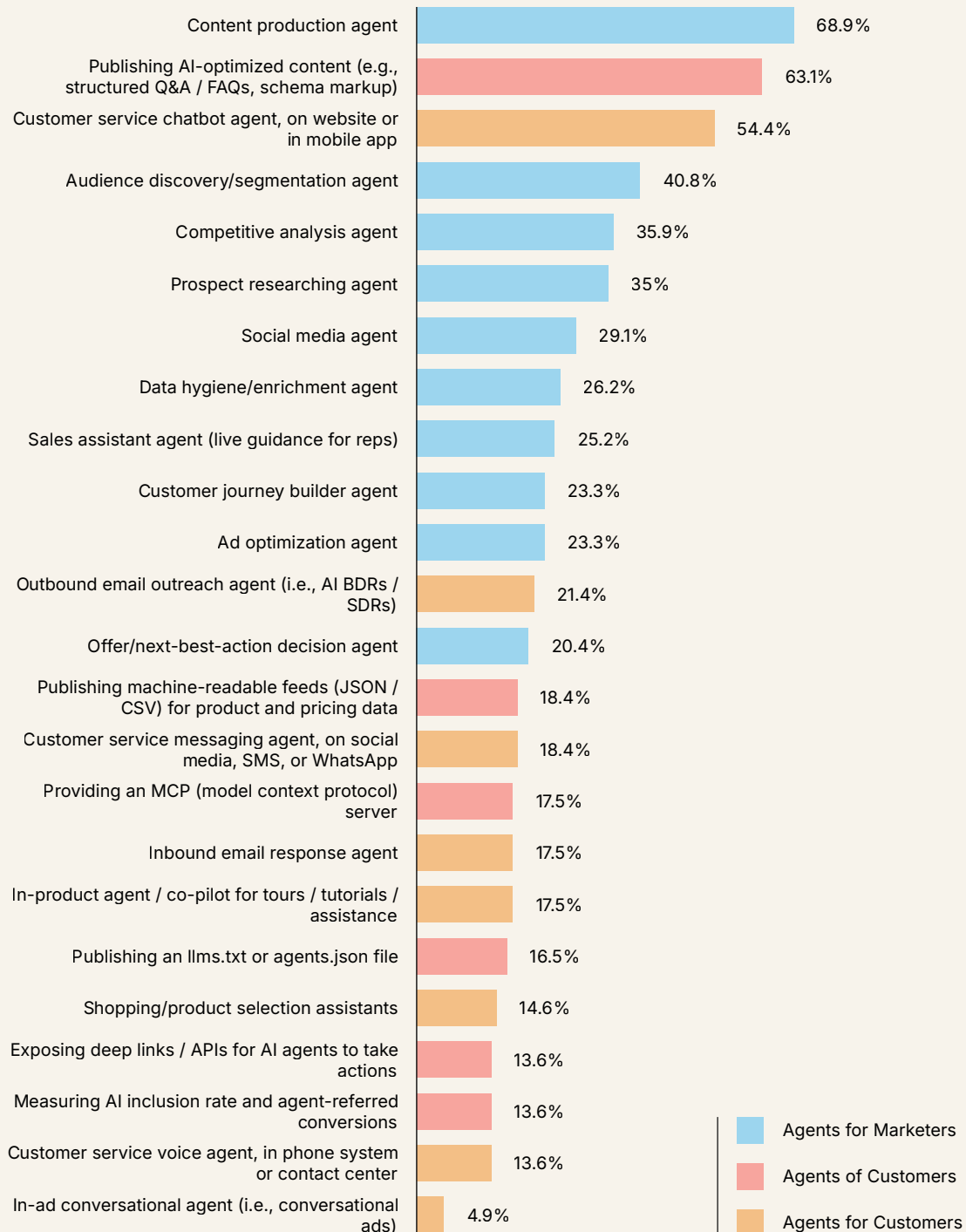
Across all agent types and use cases we studied, this is their ranked order of adoption:

## Top 10 Most Popular Agents



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

## Most Popular Agents - Extended List



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
 Respondents could select multiple options

Let's examine each of these agent domains more closely.

# Agents for Marketers to Augment and Amplify

The vast majority of AI agents in martech today are *Agents for Marketers*.

Many of them have been added to existing major martech platforms, such as Adobe, Braze, HubSpot, Intuit Mailchimp, Moengage, SAS, Salesforce, Zeta, etc. to help marketers with data management and enrichment, content and campaign creation, and performance analysis. CDPs such as GrowthLoop, Hightouch, and Treasure Data employ agents to dynamically assemble audiences and adaptively optimize customer offers and experiences. CMS and DXP platforms such as Optimizely, Progress, Sitecore, and Webflow offer agents to make it easier to design, deploy, and optimize web experiences.

The martech category of iPaaS (integration-platform-as-a-service) and workflow automation products has largely morphed into AI agent building platforms. Gumloop, Make, n8n, Workato, and Zapier have all evolved in this direction, competing (as well as collaborating) with AI-native solutions such as agent.ai, Bardeen, CrewAI, Lindy, and Relevance AI.

Creative production tools have been some of the biggest AI innovators, across a wide range of capabilities and use cases: video creation platforms such as Descript, HeyGen, Runway, and Synthesia; leading DAMs such as Bynder, Canto, and Frontify; design platforms such as Adobe, Canva, and Figma; copywriting wizards such as Jasper and Superhuman (formerly Grammarly); platforms to manage the end-to-end creative pipeline such as Adobe, Cloudinary, Gradial, and Typeface; and more.

There are also entirely new categories of agentic AI products for marketers.

“Vibe Coding” is probably the most controversial (and amusingly labeled).<sup>16</sup> These are tools such as Bolt, Lovable, and Replit that enable non-engineers to build simple apps — emphasis on *simple*, which nonetheless can also be *useful* — by simply describing what they want in natural language. You can chat an app into existence.

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<sup>16</sup> Stick around for the next chapter, where we have great fun mocking the whole “vibe” movement — while more seriously explaining the very real benefits it brings to marketers.

Products that embody synthetic customers — sometimes called “digital twins” — have exploded as a new martech AI category. They use real customer data to create artificial mirrors of your audience. You can test new campaigns and run market research studies with these simulants. You can talk to any arbitrary segment of them to ask questions about their interests and behaviors, being as undiplomatic as you like (“why do you keep ignoring my emails?!”), with no risk of offending them.

While you might be skeptical of these synthetic customer products at first, they can be remarkably effective when fed good data. They’re not a replacement for engaging with real customers, of course. But they can help qualify and refine ideas before setting them loose in the wild. Examples of products in this category include Brox, Delve.ai, Evidenza, OpinioAI, Panoplai, and Synthetic Users.

AI decisioning agents are a different kind of agents that use reinforcement learning techniques to automatically optimize campaigns and customer journeys based on feedback loops from real customers. Aampe, Braze (via their OfferFit acquisition), GrowthLoop, Hightouch, and SAS are top vendors in this category.

Arguably, AI decisioning agents act as *Agents for Customers*, but they’re often acting one layer below the direct engagement channel, e.g., selecting an offer to include in an email, but relying on a different platform to actually deliver that email.

Here are the results from our survey of the kinds of *Agents for Marketers* that have been adopted, even in a pilot or experimental stage:

Key Highlights & Insights  
from Our Sponsor

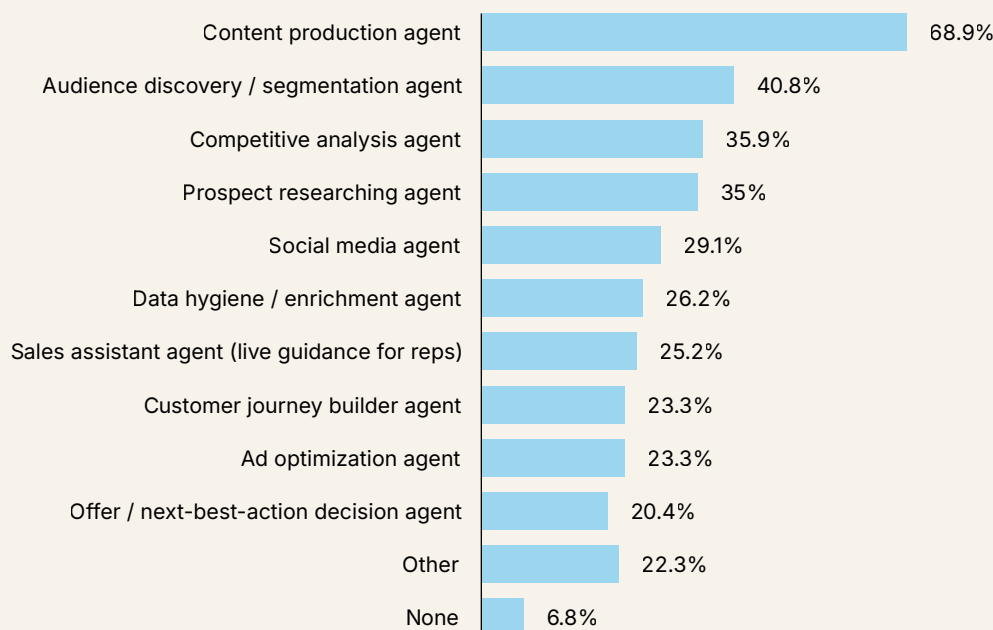


*When I think about true AI decisioning, we're not just presenting an offer based on rules like "if this person clicked here, show them this." We're looking at multiple variables — behavioral data, transactional data, contextual data — and using machine learning models to predict what offer or action will drive the best outcome for that specific customer at that specific moment.*

— Jonathan Moran

[Read Interview](#)

## What internal-facing AI agents have you used, even in a pilot or experimental stage?



Source: *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

93.2% of our respondents have at least one of these agents in use.

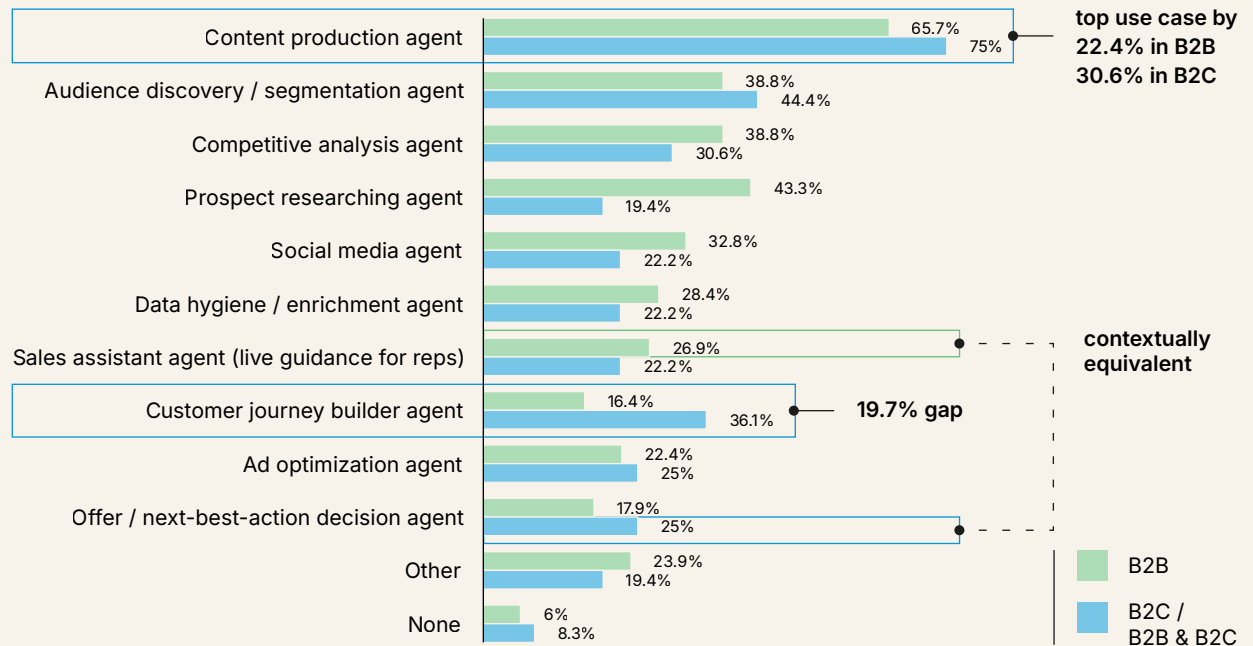
Not surprisingly, content production agents are the most popular by wide margin: 68.9% of our respondents are using them. Brainstorming, producing, and personalizing content was the first big wave of use cases for generative AI in marketing — and also one of the easiest to check with a human-in-the-loop for review and approval. Makes sense that these content use cases are the furthest along.

The second most popular use case (40.8%) is applying agents for audience discovery and segmentation, using AI to better mine and activate customer data. This is where we're seeing a lot of renewed innovation in the CDP (customer data platform) category.

Competitive analysis agents (35.9%) and prospect researching agents (35%) are the next most widely adopted. These often use web browsing tools to scrape content and data from external sites, automatically interpreting it and distilling triggerable signals that previously required a lot of manual work to find and act on.

We did see several notable differences in adoption of *Agents for Marketers* between B2B and B2C (or joint B2B & B2C) companies:

## Internal AI Agents Deployed: B2B vs. B2C / B2B & B2C



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
 Respondents could select multiple options

While content production agents are the most popular by far in both kinds of businesses, they're even more popular in B2C by about 10 percentage points: 75% in B2C vs. 65.7% in B2B. This makes sense given the typically larger scale of B2C marketing, which consumes a wide variety of content across advertising, social media, and web/ecommerce experiences.

The biggest difference in adoption was with customer journey agents, with a 19.7 percentage point gap between B2C (36.1%) and B2B (16.4%) adoption. We attribute this to the fact that B2C products and services tend to have shorter and simpler buyer journeys, whereas B2B can involve months-long discovery and evaluation stages with multiple different stakeholders in a buyer's group. The latter is harder for AI to map and manage end-to-end, especially given often sparser instrumentation and integration of behavioral data across these journeys. But we expect to see notable innovation here in 2026.

Finally, because B2B and B2C typically have different sales models — the former often employs sales rep heavy motions, while the latter often has more self-service purchasing channels, such as with ecommerce sites and retail stores — the kinds of agents they adopt differ accordingly. With a little hand-waving though, we consider sales assistant agents (live guidance for reps) in B2B and offer/next-best-action decision agents in B2C to serve similar functions, with nearly equivalent adoption: 26.9% and 25.0% respectively.

These use cases start to blend into external-facing *Agents for Customers*.

## Agents for Customers to Sell and Serve

*Agents for Customers* — deployed by marketers, but directly used by prospects and customers — currently have about half as many use cases adopted. The most common are customer service chatbot agents on websites or embedded in mobile apps, which 54.4% of our survey participants reported they're using.

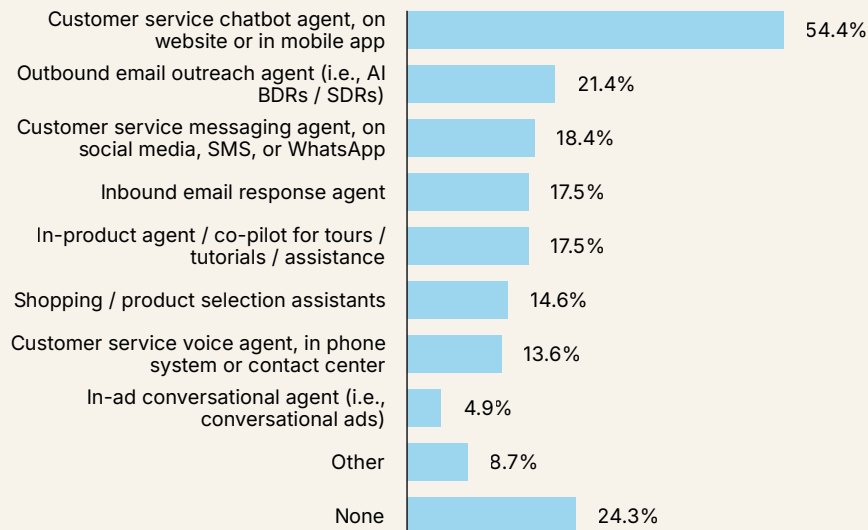
Admittedly, website chatbots had already proliferated before the big generative/agentive AI wave came crashing in. But, let's face it: the previous generation of these chatbots kinda sucked. But now, by incorporating LLMs that are very good conversationalists and connecting them with more data such as knowledge bases, support ticket histories, and richer customer profiles, this new generation of chatbots are actually getting quite good.

Stats vary considerably, but we're typically hearing that these customer service chatbots now achieve a 60% or greater resolution rates. That's pretty impressive. Done right, this is a case of delivering greater efficiency to the company while also delivering greater efficiency and delight to the customer.

Fin, Maven AGI, Sierra AI are a few of the leading independent providers of these customer service agents. HubSpot, Salesforce, Zendesk, and Klaviyo also offer very good agents of this kind natively in their platforms as well.

Outside of these customer service chatbots though, adoption of other *Agents for Customers* drops off significantly, with most having less than 20% adoption each. 24.3% of respondents said they have none deployed yet.

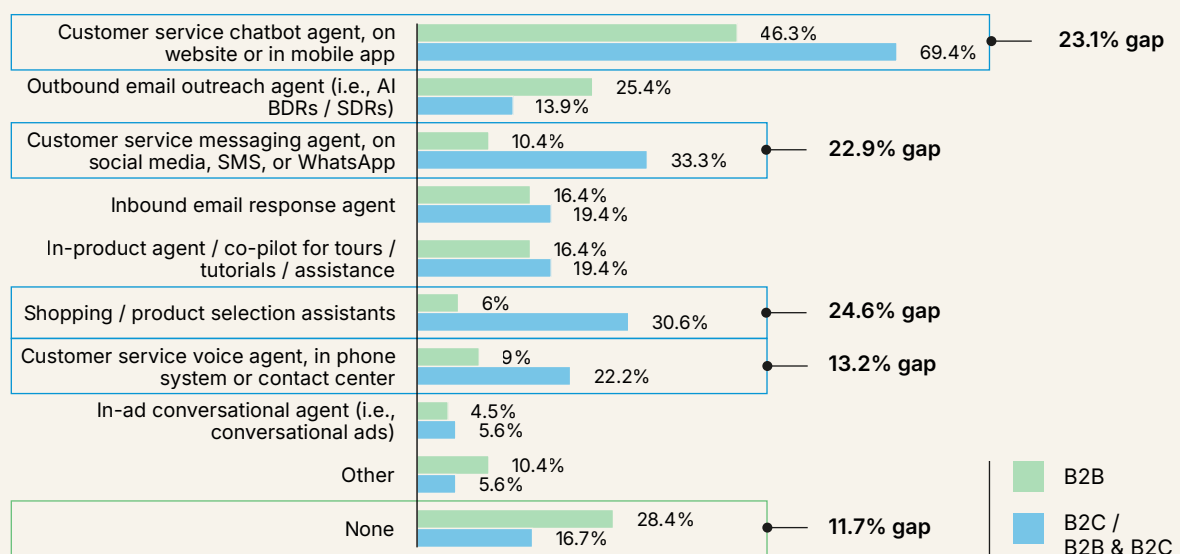
## What customer-facing AI agents have you used, even in a pilot or experimental stage?



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
 Respondents could select multiple options

The differences in B2B vs. B2C adoption are even more pronounced in this domain:

## Customer-Facing AI Agents Deployed: B2B vs. B2C / B2B & B2C



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
 Respondents could select multiple options

Those customer service chatbots are the top use case for both, but there's a 23.1 percentage point gap between 46.3% adoption in B2B and 69.4% adoption in B2C. Again, we chalk some of this up to generally simpler products and services — and simpler customer relationships — in B2C.

B2C companies are more likely to have at least one kind of customer-facing agent deployed: 83.3% compared with 71.6% in B2B. Customer service messaging agents, which engage on social media, SMS, or WhatsApps, have 33.3% adoption in B2C. Shopping/product selection agents — what we call shopper concierges, increasingly popular on ecommerce sites — have 30.6% adoption. 22.2% now use voice-based customer service agents in their phone system or contact center.<sup>17</sup>

In B2B, the second most popular customer-facing agent type are "AI SDRs" that automatically search out and engage prospects, typically through outbound emails (25.4%), although inbound email response agents are also used (16.4%).

From our personal experience being on the receiving end of these AI SDR agents, we can say two things:

1. They're incredibly impressive in the personalized messaging they can deliver. We downloaded a vendor report (a common demand-gen tactic) and within minutes had received an agent-produced email that had researched our business and incorporated its assessment of our likely challenges and opportunities. This was not kindergarten *Hello \$Firstname*<sup>18</sup> mail merge personalization. This was a beautifully written email that truly epitomized relevant 1:1 marketing. The only reason we knew it was agent-produced is because no human could have possibly researched us and crafted such a tailored message in just a few short minutes.
2. Certainly in B2B tech markets, most prospects already feel overwhelmed by the number of outbound emails and phone calls they receive. They increasingly ignore them — the equivalent of banner blindness in these so-called "owned" channels<sup>19</sup> — which has resulted in decreasing efficacy of these tactics. AI SDRs remove a lot of the cost and friction for sellers to increase the frequency and scale of these tactics. In the short term, this

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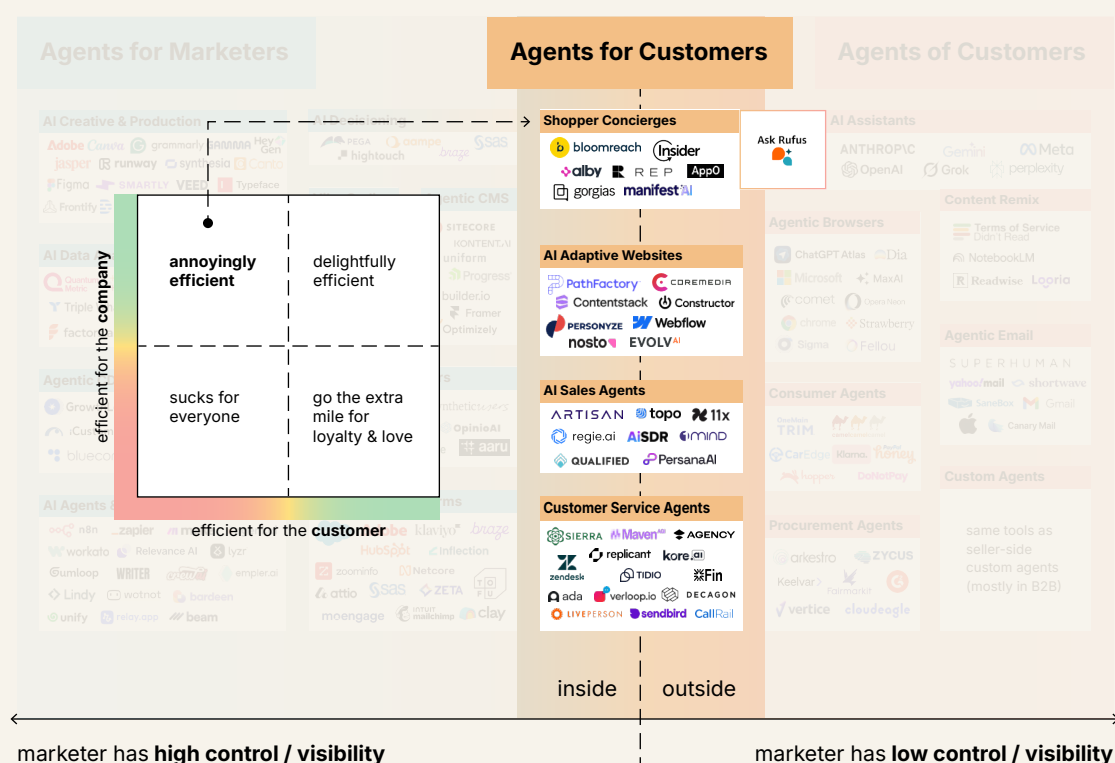
<sup>17</sup> There's a [fascinating video](#) of two AI agents talking to each other over the phone, recognizing that they're both AIs, and switching to a more efficient [Gibberlink](#) sound-based protocol. Wild.

<sup>18</sup> *Hello \$Firstname: Profiting from Personalization* is a fantastic book by Rasmus Houliind and Frans Riemersma to learn a deeper understanding of how to successfully apply AI personalization.

may bump their success rate in absolute terms by increasing their volume but at the expense of pushing their *relative* success rate lower and lower as recipients tune them out more and more. In system dynamics, this is known as a negative feedback loop or a vicious cycle. We believe this will accelerate adoption of buyer-side *Agents of Customers* such as agentic email clients to intermediate these communications on their behalf.

Overall, this domain of *Agents for Customers* is one where we'd caution you about paying too much attention to your company's own efficiency ("Hey, we can send all these sales outreach emails for a fraction of the cost of having human SDRs do it!") and losing sight of the efficiency of the experience for your customers.

### 3 Domains of AI Agents in Marketing - *Agents for Customers*



**Source:** chiefmartec, October 2025

Products shown are only a representative sample, not a comprehensive market map

<sup>19</sup> While email is typically considered an “owned” channel — with a customer’s email, you can send them any message you want, any time you want, right? — it actually behaves more as an “earned” channel: its efficacy is almost entirely a function of how much trust and attention you’ve earned with recipients.

Four recommendations we'd make for keeping company and customer efficiency aligned here:

- 1. Always have a way to reach a real human.** AI and automation can be efficient for customers as much as it is for the company — when it addresses the customer's needs. But it's never going to be 100%. The edge cases are infinite. And while not all of them will be valuable opportunities lost, some of them will be. If a customer wants to reach a human, you probably want them to as well. The lower-right corner in the 2×2 of company vs. customer efficiency sums it up: go the extra mile for loyalty & love.
- 2. Run secret shopper exercises.** Have people who take the journey as prospects or new customers, carefully recording their experience. Doing this with your own employees is a decent place to start. But ideally you want someone external with fresh eyes and no bias for internal politics to run the gauntlet. This is a little more difficult in B2B, given the data enrichment industrial complex that hones in on one's identity, albeit with varying degrees of accuracy.
- 3. Regularly inspect every active customer-facing AI agent or automation.** Just as elevators and escalators require regular inspection, anything that moves your prospects and customers along in their journey should be periodically reviewed. Are the rules and data definitions being used still valid? Is the content and branding still relevant? What are the contexts in which it works — i.e., what could have happened before it, what might happen next? Timestamp and sign these inspections. Repeatable test harnesses and heuristics are good. But you also want the benefit of human judgment in that check-up.
- 4. In B2B, if you use a rep's name in communications, loop them in.** We know, the whole point of AI agents and automations in such scenarios is to reduce the manual work for reps. But they can use inbox rules to reduce the noise until there's a response from the recipient. Then it's probably worth at least peeking at it, even if they let the automation carry on. It also makes it easy for them to occasionally review what is being sent in their name. After all, it's the rep's reputation as well.

# Agents of Customers to Control Their Own Journey

As powerful as AI agents deployed by marketers increasingly are, it's *Agents of Customers* that are the real source of disruption for marketing in this new AI era.

The most obvious example is the shift of buyers using AI assistants such as ChatGPT, Claude, Gemini, and Perplexity to research and evaluate products and services. For 25 years, this swath of the digital buyer's journey has largely been driven by Google searches. Those searches led to near immediate clickthroughs to matched post-click experiences that immediately took ownership of the buyer's experience. We could track and analyze those paths and behaviors, using that data to activate personalized engagement and optimize our marketing campaigns.

## Agents of Customers: The Real AI Disruption

|                                               |                                                                         |                                             |
|-----------------------------------------------|-------------------------------------------------------------------------|---------------------------------------------|
| <b>50%</b><br>of consumers                    | <b>20-50%</b><br>of traffic at risk                                     | <b>\$750B</b><br>of consumer spend          |
| already use AI-powered search today           | from traditional search as it captures decisions earlier in the journey | will flow through AI-powered search by 2028 |
| Source: McKinsey AI Discovery Survey, n=1,927 | Source: McKinsey projection                                             | Source: McKinsey projection                 |

Over the past 25 years, an entire discipline of SEO (search engine optimization) blossomed around this channel and its interaction patterns.<sup>20</sup> Most marketers have embraced the art and science of SEO as a key pillar of their digital strategy.

Suddenly, that's all changing.

With buyers engaging in research and evaluation conversations mostly or entirely inside an AI assistant — and more rarely clicking through to a brand's

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<sup>20</sup> We may have taken SEO a little too far. In New York City, we recently ran across a restaurant actually named *Thai Food Near Me*. (smh)

website — marketers are losing much of the visibility and control they used to have over those top-of-funnel and mid-funnel parts of the customer's journey.

Recent stats from McKinsey report that 50% of consumers already use AI-powered search now, which has put 20-50% of the traffic previously received by brands via traditional search at risk. Especially with shopping transactions now coming to these AI assistants — such as ChatGPT's Instant Checkout — McKinsey estimates that \$750 billion of consumer spend will flow through AI-powered search by 2028.

#### Key Highlights & Insights from Our Sponsor

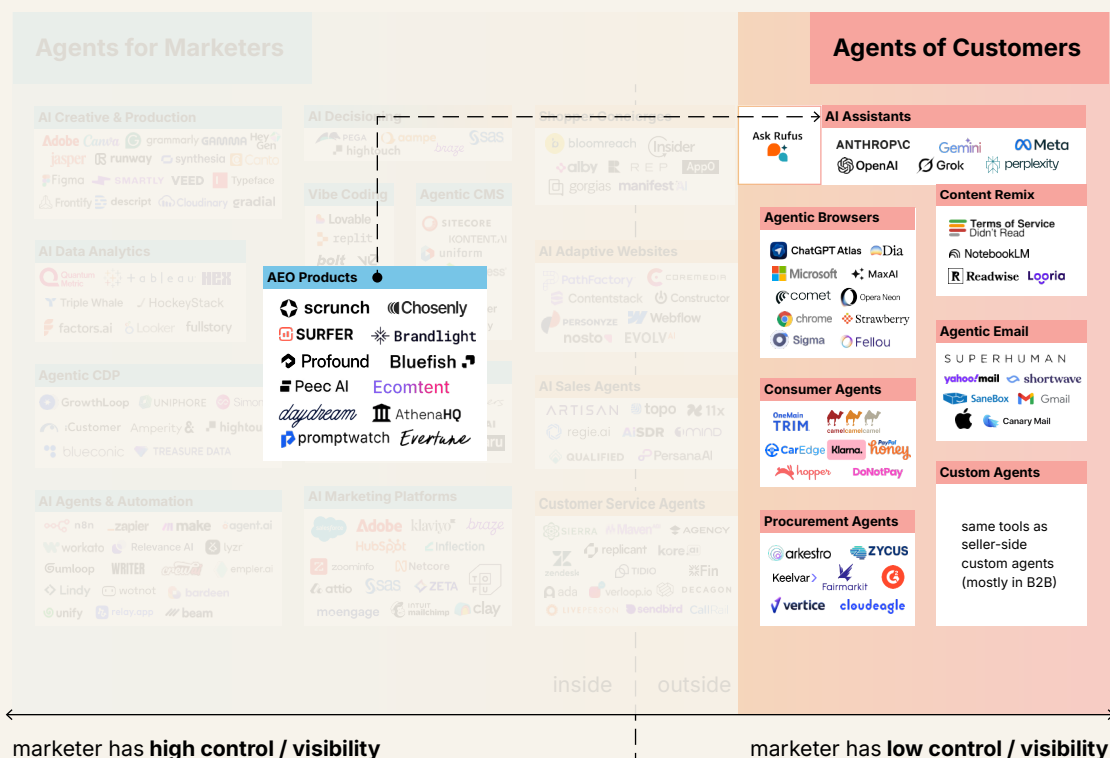


*Fewer people are going directly to a website. They're doing a lot of their research offsite. So your offsite brand all of a sudden becomes critical. It is crucial that you're showing up on Reddit and LinkedIn and YouTube, that you're being quoted in articles.*

— Sara Faatz

[Read Interview](#)

### 3 Domains of AI Agents in Marketing - Agents of Customers



Source: chiefmartec, October 2025

Products shown are only a representative sample, not a comprehensive market map

While marketers have less visibility into what happens inside a prospect's or customer's buying journey within the walls of their own AI assistant, we do recognize the opportunity to influence that experience. Just as SEO was about influencing how we showed up in Google search results, a new discipline of AEO (AI Engine Optimization or Answer Engine Optimization) — sometimes called GEO (Generative Engine Optimization) — is emerging, along with a bevy of new martech tools that specialize in supporting it.<sup>21</sup>

AirOps, Bluefish, Daydream, Evertune, Profound, and Scrunch are examples of some of the innovative new AEO products gaining adoption with marketers. The leading SEO tools from the pre-AI era, such as ahrefs and Semrush (now acquired by Adobe), are also rapidly augmenting their products for AEO.

But strategies and tactics for supporting *Agents of Customers* are still early. In our survey, the only effort that had significant adoption was publishing AI-optimized content, such as including schema markup in your pages and producing more structured FAQs that the public LLMs seem to love. 63.1% of our respondents say they're doing this today.

Ironically, only 13.6% said they were measuring AI inclusion rate and agent-referred conversion. While the techniques around AEO are inherently more challenged with visibility, most of the new martech products supporting AEO are developing clever ways to provide pretty good directional insights here.

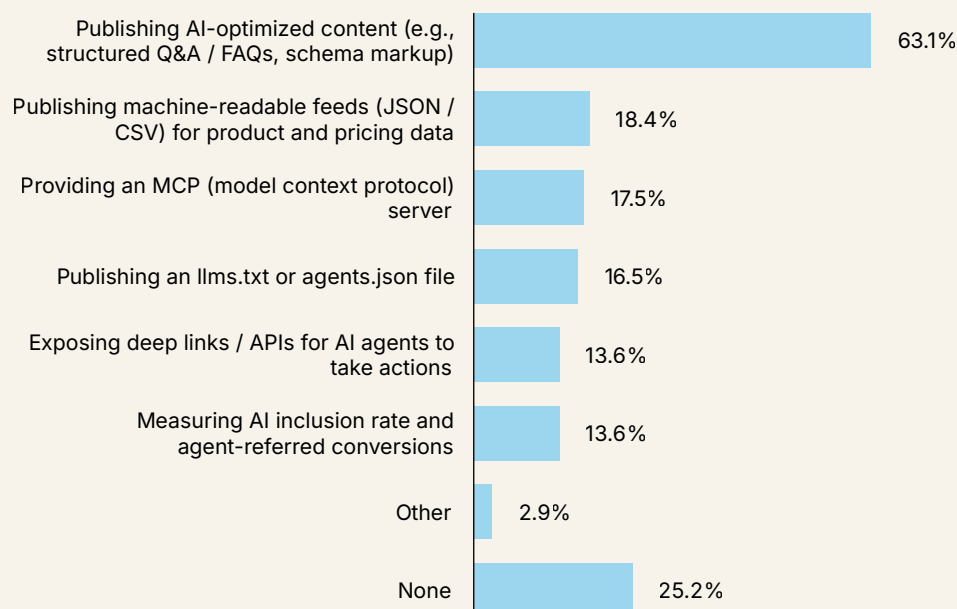
Other more nascent support for buyer-side agents include publishing machine-readable feeds for product and pricing data (18.4%), providing an MCP server for customer use (17.5%), publishing an `llms.txt` or `agents.json` file (16.5%), or explicitly exposing deep links and APIs for customer-driven AI agents (13.6%) to take actions autonomously on their behalf.

There were few differences in B2B vs. B2C adoption here, except for publishing AI-optimized content, which was embraced by 68.7% of our B2B respondents but only 52.8% in B2C. (Although B2C companies were nearly twice as likely to measure that impact, 19.4% in B2C vs. 10.4% in B2B — albeit both have relatively low penetration.)

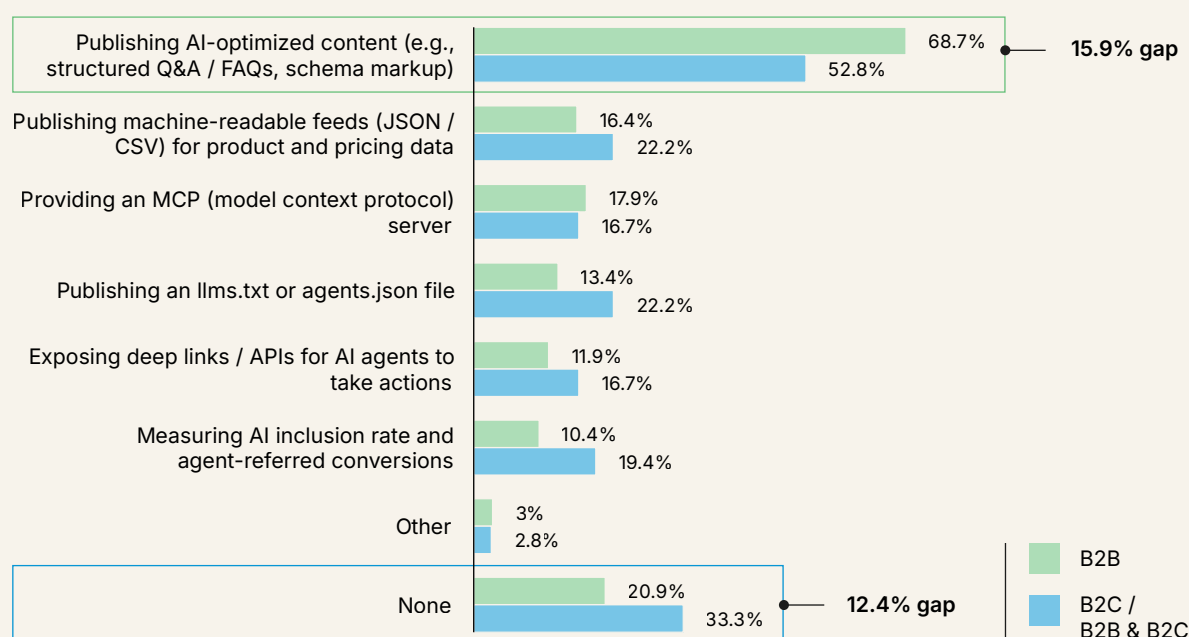
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<sup>21</sup> The intermingling of SEO and AEO/GEO as a martech product category is one of the reasons we saw 24% growth in that category from 2023 to 2025 in our [State of Martech 2025](#) report.

## What are you doing to support external AI agents that operate on behalf of buyers, including AEO (Answer/AI Engine Optimization)?



## Support for External AI Agents: B2B vs. B2C / B2B & B2C



**Source:** AI & Data in Marketing Survey, 2025, chiefmartec & MartechTribe  
 Respondents could select multiple options

Although AI assistants such as ChatGPT, Claude, Gemini, Grok, et al., are the major actors on the *Agents for Customers* scene, others are rising.

Agentic web browsers, such as Atlas by OpenAI and Comet by Perplexity, enable prospects and customers to reshape the experience they have on your website too. They can bypass your site's information architecture and your own on-page chatbots, to converse with your site the way they want — including pulling in knowledge from your competitors and the market at large.

To give this a spin, install an agentic browser and go visit the pricing page of a large martech provider. These pages are often difficult to parse as human. So try asking your in-browser agent to calculate a price for you for a specific scenario. Then ask it about what the real pricing is — the truth about deals and discounts — beyond the official list pricing on the page. Then ask it how that compares against competitive alternatives.

We assure you, if you're a B2B marketer and you do this with your sales director at your side, their jaw will drop to the floor. "This is how prospects can now engage with our website?!" they might exclaim with wide eyes. Yes, Dorothy, we're not Kansas anymore.<sup>22</sup>

The same is starting to happen with email too. The leading email clients from Apple, Google, and Yahoo are already experimenting with AI to reshape what a recipient sees in their inbox. Not just filtering and routing messages. But overwriting a marketer's crafted preview text — or even subject line — with their own AI-generated previews and summaries of emails.

AI-native clients such as SaneBox, Shortwave, and Superhuman Mail are further pushing the boundaries of how people interact with email. We expect more innovation here in 2026 as recipients seek to better manage seller-side AI driving more and better emails their way. (Even if the emails are more targeted and more personalized, the volume coming at people from tireless AI engines will motivate the use of buyer-side AI to better manage it on their terms.)

In B2B, you'll also want to keep an eye on buyer-side procurement agents, such as Fairmarkit and Keelvar, that become a different kind of constituent

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<sup>22</sup> Wizard of Oz references are still recognizable, right? Or at least references from the musical *Wicked*?

for your product, pricing, and availability information. In B2C, independent consumer AI agents such as CarEdge, Hopper, Klarna, and others may also inject themselves into the buyer's journey. (Note that some of the companies in this category have dubious reputations. We're not endorsing any of them. But we do believe this will be a category with more legitimate entrants in 2026.)

*Agents of Customers* are not part of your tech stack. But they will be interacting with it.

So let's talk next about how your stack is evolving to support these different kinds of agents.

# Building the Agentic Martech Stack

The narrative around AI martech is revolutionary.

The reality of AI in martech stacks today, however, is more evolutionary.

As we described back in May in our *State of Martech 2025* report, most of the major systems that marketers have been relying on to run marketing, sales, and customer experience — the alphabet soup of CDP, CDW, CRM, DAM, DXP, MAP, MDM, etc. — remain firmly in place. In fact, most of these platforms are crucial to successful AI implementations, as they provide the data foundations, the governing campaign and program structures, and the “last mile” delivery channels that AI needs to reliably work its magic.

And as it turns out, most AI agents currently deployed in marketing are actually ones baked into those existing systems. Almost all of the major marketing platforms have launched AI agents in their products this year, and they’ve been the easiest for teams to adopt within their current operations and workflows.

62.1% of our *AI & Data in Marketing* survey respondents said they’re using these built-in agents embedded in their existing martech platforms.

The next most popular mode of AI agent deployment is the use of no-code/low-code agent and agentic automation builders that sit at a level above those foundational martech systems. Many of these agent builders are evolved iPaaS (integration-platform-as-a-service) products, such as Gumloop, Make, n8n, Workato, and Zapier, that marketers already have in their stacks. This too makes it relatively easy for them to introduce agentic AI into their existing marketing processes.

49.5% of our respondents said they’ve deployed AI agents with these evolved iPaaS products.

Key Highlights & Insights  
from Our Sponsor



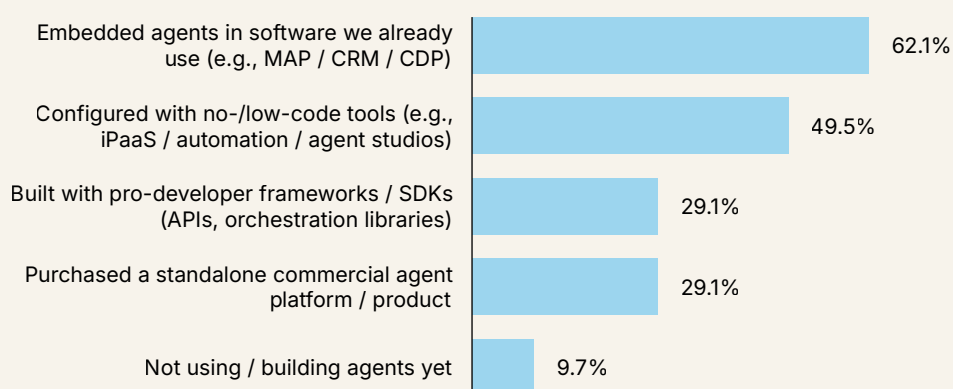
*When you distill what's going on in the world — the changing surfaces, the types of data being thrown off, the time scales that data is moving — there's an opportunity to close the loop and optimize in ways that weren't possible before.*

— Patrick Harrington

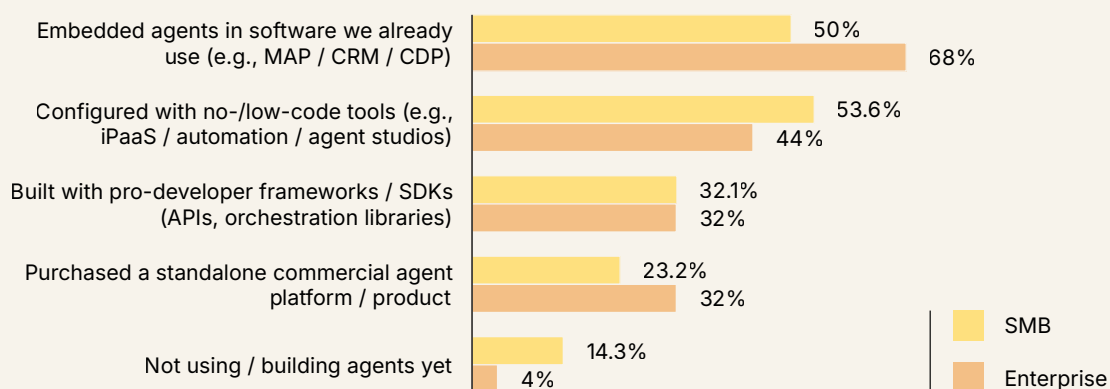
[Read Interview](#)

AI-native agent platforms, such as agent.ai, Bardeen, CrewAI, Lindy, and Relevance AI, are used by another 29.1%. And yet another 29.1% are building their own custom agents using pro-developer frameworks and SDKs, such as LangChain, LangGraph, and LlamaIndex. But these too tend to sit on top of the existing martech stack.

## How are you acquiring or developing AI agents for marketing use cases?



## AI Agent Acquisition and Development by Company Size



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

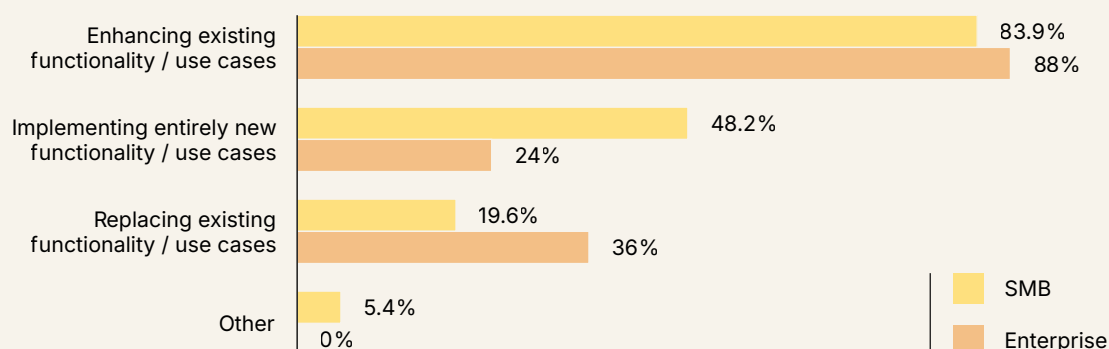
If we break out SMB vs. enterprise adoption — leaving out mid-market companies that straddle those two worlds for now — it's worth noting that enterprises are more likely to use AI agents embedded in their existing martech platforms (68%), while SMBs are more likely to configure agents and agentic workflows using those no-code/low-code evolved iPaaS tools (53.6%).

## Hybrid AI and SaaS Stacks

As we discussed in our introduction, the vast majority of real-world use cases with these agents are to enhance existing martech functionality (85.4%) or to implement net new functionality (42.7%). In contrast, only 30.1% are using AI agents to replace existing martech capabilities.

This differs a bit between SMBs and enterprises. While both are primarily enhancing existing martech use cases — 83.9% and 88.0%, respectively — enterprises are nearly twice as likely as SMBs to use AI agents to replace some current functionality in their stack, 36.0% vs 19.6%.

### AI Agent Relationship to Existing Stack by Company Size



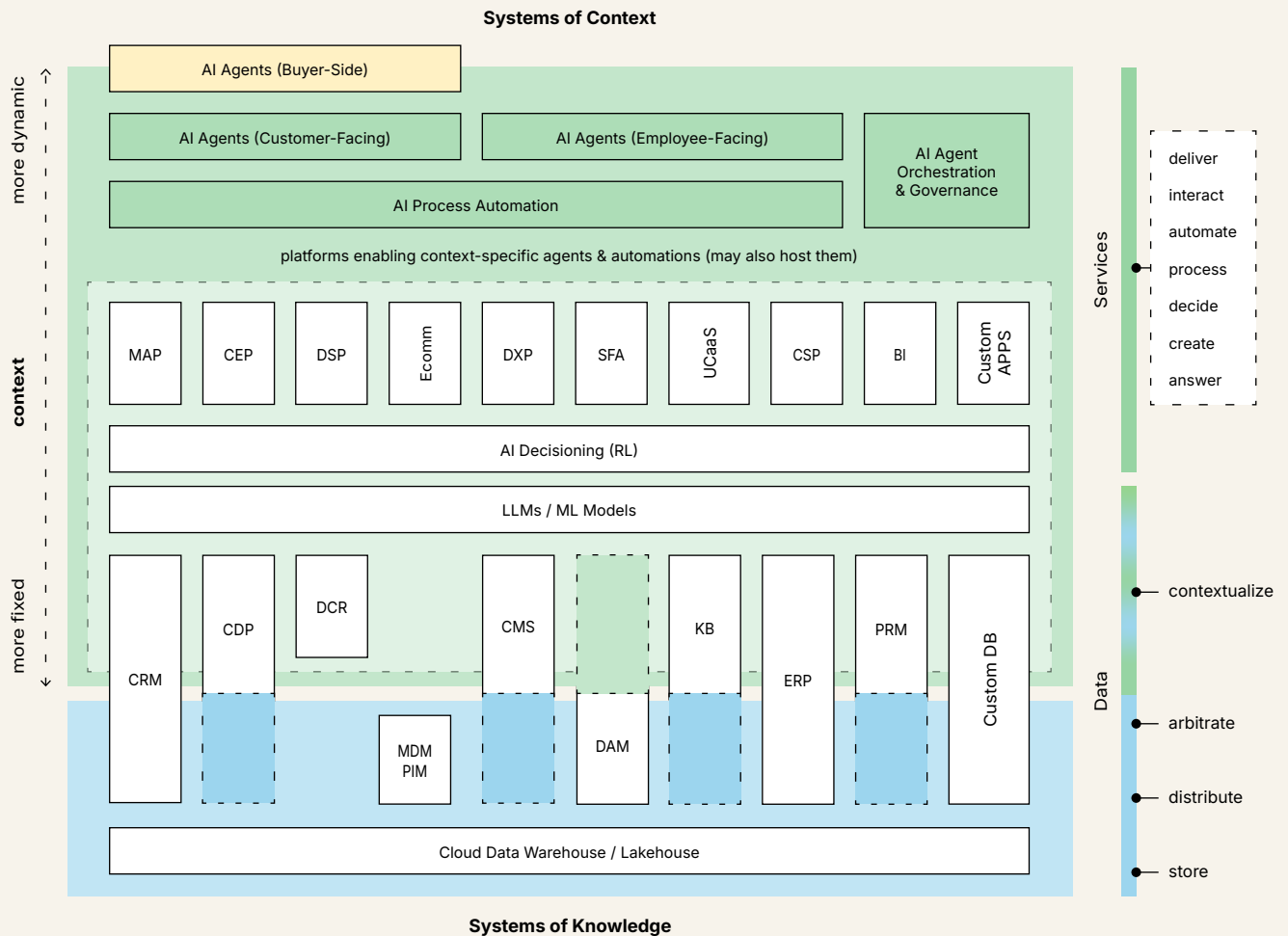
Source: *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

Conversely, SMBs are *twice as likely* as enterprises to implement entirely new use cases and functionality with AI agents, 48.2% to 24.0%. We're inclined to attribute this difference to the usual trope of SMBs being more agile and less risk-averse.<sup>23</sup> They're hungry to disrupt the larger incumbents in their space and willing to experiment with new tactics to get an edge.

But the overarching conclusion across all businesses is that new AI agents and existing SaaS platforms are not an *either/or* proposition. They're *both/and*.

This diagram from our [State of Martech 2025](#) report is still a fairly accurate representation of the layered relationship between old and new components in most hybrid SaaS-AI stacks:<sup>24</sup>

## Old Meets New: Martech Stack Integration



Source: chiefmartec

### Acronym Decoder Ring:

**AI**-Artificial Intelligence; **BI**-Business Intelligence; **CDP**-Customer Data Platform; **CEP**-Customer Engagement Platform; **CMS**-Content Management System; **CRM**-Customer Relationship Management; **CSP**-Customer Success Platform; **DAM**-Digital Asset Management; **DB**-Database; **DCR**-Data Clean Room; **ERP**-Enterprise Resource Planning; **KB**-Knowledge Base; **LLM**-Large Language Model (e.g. GPT-4); **MAP**-Marketing Automation Platform; **ML**-Machine Learning; **MDM**-Master Data Management; **PIM**-Product Information Management; **PRM**-Partner Relationship Management; **RL**-Reinforcement Learning; **SFA**-Sales Force Automation; **DSP**-Demand-Side Platform (advertising); **UCaaS**-Unified Communications as a Service; **DXP**-Digital Experience Platform; **XTC**-New Wave Band

<sup>23</sup> Some might say less compliance-constrained. But not us, on advice from our general counsel.

<sup>24</sup> Per *Shrek*, martech stacks have layers. Is yours an onion or ogre? Or hopefully more like a cake or parfait? Everybody likes parfait.

We referred to the bottom layer of this stack, where data is stored, distributed, and arbitrated, as “systems of knowledge” — a more flexible substrate than classic SQL-based systems of record, now incorporating unstructured, multimodal, and streaming behavioral data that generative AI engines are able to efficiently and productively use.

Everything operating above that data layer we grouped together as “systems of context” that are responsible for delivering services and experiences to both employees and customers *in their specific context*.

It’s a broader framing than traditional systems of engagement, as it applies to employee-facing and customer-facing applications. It includes behind-the-scenes decisioning and automation as well as touchpoints with a human user interface (UI). It may be delivered through a SaaS app, an AI agent, or infrastructure underpinning them.

Context is defined by:

- Who the user is (traditionally a human, but also agents)
- Their motivating job-to-be-done<sup>25</sup>
- Their expectations for what should happen
- Continuity for them with what came before

*Context engineering* is the popular term to describe the process to bring together the right data, content, functionality (tools and services), and instructions to deliver that context in AI-powered use cases. The ideal here is likely aspirational, but the closer we get, the better experiences they have and the better outcomes we achieve.

Note that context engineering isn’t about just blindly cramming more data and content into the AI’s context window. That quickly slides into diminishing

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*We know that mid-market businesses can use between 7 to 25 different tools to run their business. That is up to 25 different tools that have data in them. AI can ingest all that disparate data and instantly segment audiences and surface relevant insights. It could predict customer churn or identify cross-sell opportunities.*

— Alexis Karsant

[Read Interview](#)

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<sup>25</sup> Clay Christensen’s [jobs-to-be-done](#) theory and his models on [disruptive innovation](#) are two of the most valuable frameworks we’ve found in driving smart martech strategy.

effectiveness with greater compute costs and longer processing times. Too much noise can be just as bad as too little signal.

We're striving for the Goldilocks principle: delivering context that is just right.

## Context Engineering: Data Flowing in Your Stack

If context is now king,<sup>26</sup> data is the royal treasury. The king needs cash in the coffers, the ability to get at it whenever they want, celebrated projects to spend it on, and assurances that it won't be whisked away by bandits.

(Sorry, that metaphor overextended quickly.)

It's become cliché to say that *you don't have an AI strategy if you don't have a data strategy*. But it's a cliché because it's largely true.

To successfully leverage data (and content) in context engineering, four things must be true:

1. You must have the data (collected, bought, or traded).
2. The data must be "good enough" — reasonably clean and current.<sup>27</sup>
3. The data must be efficiently accessible — connected, secure, fast, inexpensive.
4. The data must be applied effectively in the destination use case.

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*AI is a powerful engine, but it runs on data. Garbage in, garbage out. Marketers really need a clean and curated database that's going to serve as that single source of truth for the customer journey. They really need to prioritize the collection and standardization of their zero-party and first-party data from their own channels.*

— Alexis Karsant

[Read Interview](#)

<sup>26</sup> The "content is king" kingdom has been annexed by the larger context kingdom. It was a welcome conquest, as context has made content even more valuable. More Mill than Machiavelli.

<sup>27</sup> AI can work with messy data formats, but factual accuracy is necessary to avoid hallucinations.

The first three are entirely a function of your data infrastructure and operations. If you don't get those right, that last stage — the cool AI use case — is going to fizzle.

In our *AI & Data in Marketing* survey, the most common internal data sources being connected to AI agents or agentic workflows are the most accessible and universally useful:

- Customer profiles from a CRM or CDP (61.2%)
- Brand/marketing assets from a DAM or CMS (also 61.2%)

Emails and brand voice/styles guides tied in second place with 48.5% adoption of AI integration each. Summarization, automated or semi-automated responses, and customer insight mining are the most common AI use cases with email. And a well-developed brand voice/style guide provides guardrails for many AI marketing processes to brainstorm, produce, and/or critique content that is consistent with your brand. Just as a human-in-the-loop can check an AI's work, these brand guides let AI agents provide a brand check on the work humans do.<sup>28</sup>

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 **hightouch**

*To make AI useful across the organization, you first need a semantic model — basically saying which tables in your data warehouse matter for marketing and what each field within those actually means.*

— Tejas Manohar

[Read Interview](#)

Knowledge bases are in third place, connected 47.6% of the time. The most common use cases for this data are AI customer service agents (e.g., Fin, Maven AGI, Sierra) and AI SDRs (e.g., Artisan, Regie.ai, Qualified).

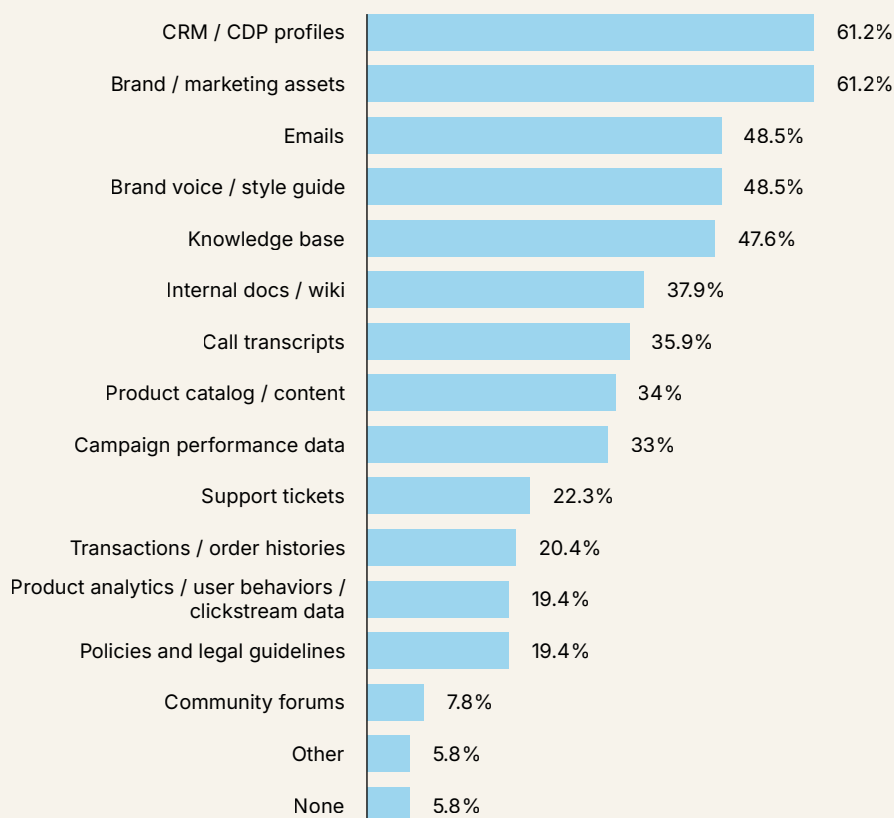
It's worth noting how many of the popular sources are *unstructured data* that were previously hard to apply in programmatic ways. In addition to the ones mentioned above — all except for structured CRM/CDP customer profiles — there's also internal docs/wiki (37.9%), call transcripts (35.9%), support tickets (22.3%), policies and legal guidelines (19.4%), and community forums (7.8%). A couple of the write-in responses in the "other" category also included

<sup>28</sup> "People sometimes make mistakes." "Yes, they do." — *WarGames* (1983)

contractual data and customer reviews.

Structured data is still in the game too: product catalogs (34%), campaign performance data (33%), transactions/order histories (20.4%), and product analytics/user behaviors/clickstream data (19.4%).

## What internal data sources are you integrating into AI agents or agentic workflows?



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

It's the creative combination of these data sources that opens up so many exciting, new possibilities.<sup>29</sup>

<sup>29</sup> We're thinking of an analogy with ice cream [mix-ins](#), which opened up delicious new frontiers in desserts, such as Dairy Queen Blizzards. Granted, we think about such things even when we're not hunting for a combinatorial innovation analogy. In fact... wait here, we'll be right back.

In addition to internal data sources, marketing teams are increasingly mixing in external sources as well, such as third-party customer/prospect profile enrichment data (50.5%), prospect and customer websites (49.5%), and social media posts and interactions (43.7%). While most of these sources are primarily relevant in B2B scenarios, we do see some in B2C, including the increasing use of external intent signals (35.9%).

### Which external data sources are you integrating into AI agents or agentic workflows?



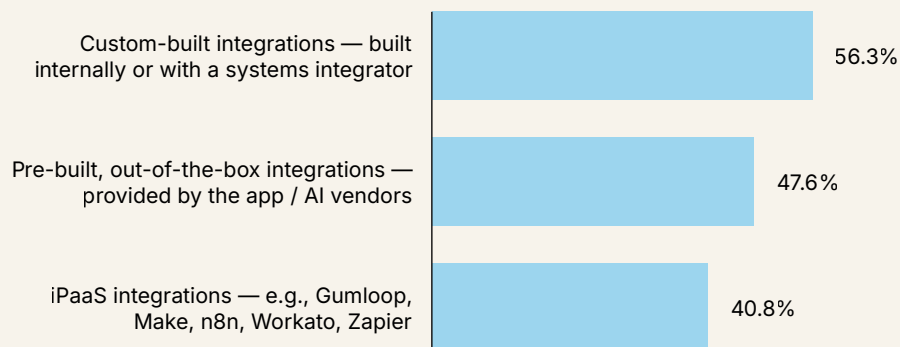
**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

It's interesting that external ecosystem data, such as partner/distribution channel data (14.6%) and marketplace/review sites like Amazon, G2, and Trustpilot (13.6%) are relatively underused at this time. We see that as a promising opportunity for marketers in 2026.

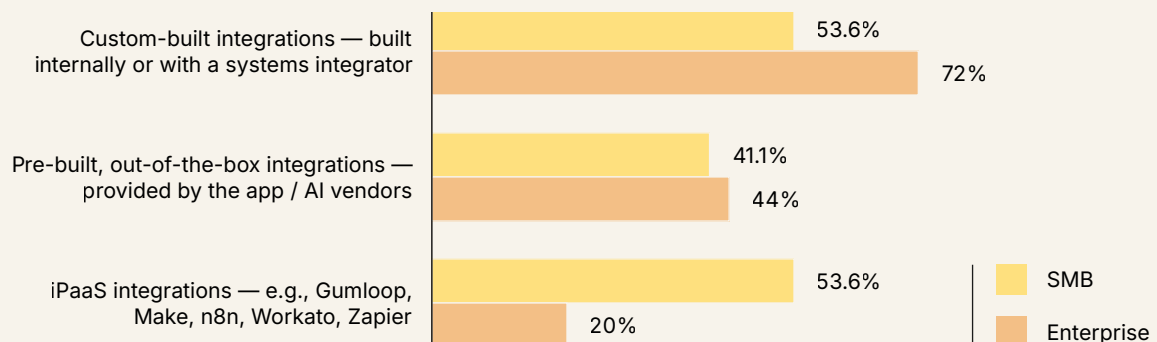
## Context Engineering: Integration Methods and Challenges

How are these contextual data sources being integrated into AI agents and agentic workflows? For many companies it's a mix of custom-built integrations (56.3%) — built internally or with a systems integrator; pre-built, out-of-the-box integrations (47.6%) provided by the app or AI vendor; and iPaaS integrations (40.8%), such as with Gumloop, Make, n8n, Workato, or Zapier.

How are AI agents, tools, or agentic workflows integrated with your tech stack today?



### AI Agent Integration Method by Company Size



Source: *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

Enterprises are more likely to take the route of custom-built integrations (72%) than SMBs (53.6%). This makes sense since many of them have more technical resources on staff. On the other hand, SMBs are significantly more likely to use iPaaS integrations (also 53.6%) compared to enterprises (20%).

One of the new AI-native approaches to integration is using Model Context Protocol (MCP) connectors. Introduced just a year ago by Anthropic, MCP has quickly gained momentum as a standard after being embraced by AWS, Google, Microsoft, OpenAI, and hundreds of other SaaS companies. While it launched as a very simple protocol — easy to implement, but also initially lacking key performance and security features — it has continued to evolve rapidly for enterprise use.

There is not one official directory of all MCP servers, but for a good representative sample, check out about 600 official third-party and community-maintained MCP servers listed on [the protocol's GitHub page](#). Other MCP registries include the [Pulse MCP Server Directory](#) with 6,492 servers and [MCP.so](#) with 16,967 (!) servers listed.<sup>30</sup>

About half of our survey respondents (48.5%) said they already use MCP connectors in AI assistants such as ChatGPT, Claude, Gemini, and Microsoft Copilot. This is a great place to start experimenting with MCP, as it's fully human-in-the-loop to evaluate its performance and reliability.

Another 27.2% are now incorporating MCP server calls into their AI agents and automations, often through iPaaS-ish systems such as n8n, Workato, and Zapier. 23.3% are using MCP servers or clients inside their core marketing platforms such as HubSpot and Salesforce.

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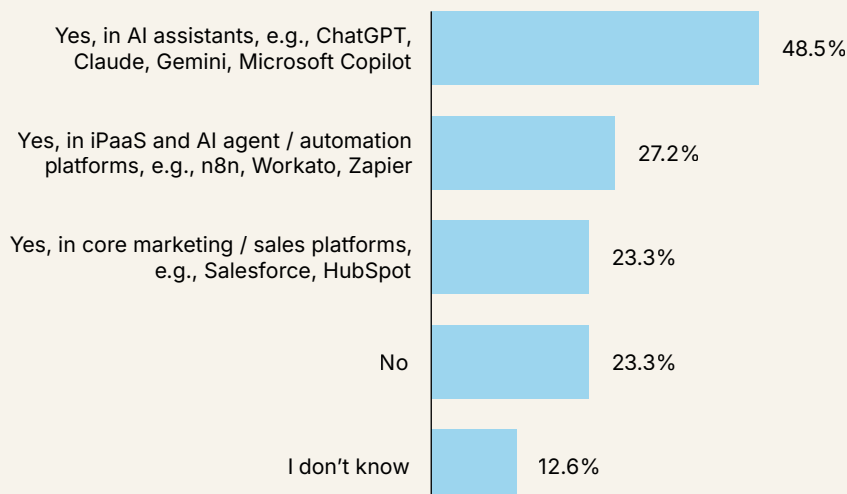
*I couldn't be happier that we have MCP and that it has come to the forefront. I think it's one of the things that's needed in an industry where so many people are creating so quickly and they're building agents and AI-embedded experiences and search and RAG implementations.*

— Sara Faatz

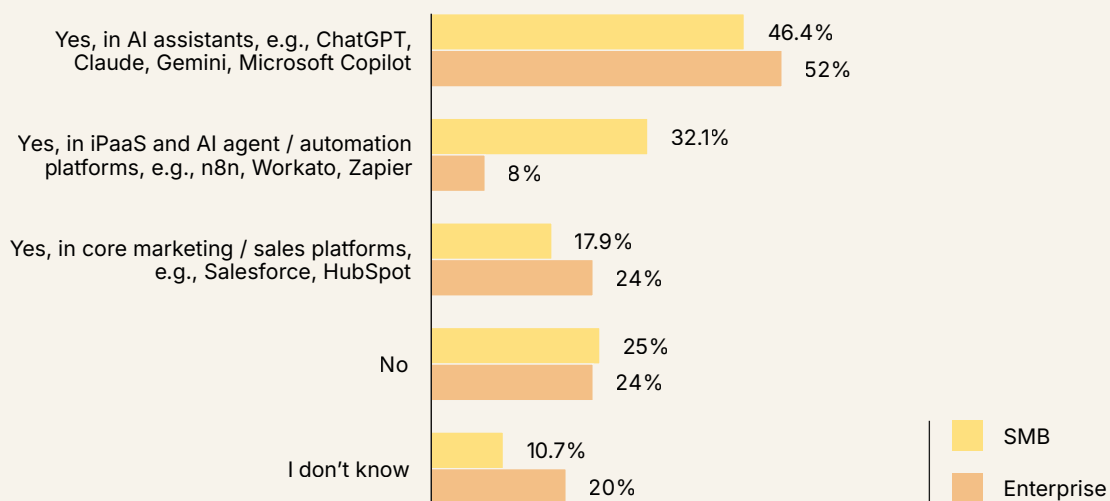
[Read Interview](#)

<sup>30</sup> Counts as of 12:45pm EST on Saturday, November 8, 2025. (They change quickly.)

## Are you using any MCP (Model Context Protocol) connectors?



## MCP (Model Context Protocol) Connector Adoption by Company Size



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

There were differences in MCP use between enterprises and SMBs. Enterprises were a little more likely to use MCP connectors in AI assistants (52% vs. 46.4% for SMBs). But the bigger gap was in their use in iPaaS and AI agents/automations, with only 8% of enterprises using MCP in those systems vs. 32.1% SMBs — 4X greater use!

With the increasing adoption of cloud data warehouses/lakehouses as a universal data layer inside tech stacks, we were curious how many companies have started integrating data from that layer directly into AI agents. For now, only 37.9%. (Enterprises were slightly more likely, 44%.) However, with Databricks, Google BigQuery, and Snowflake all focused on more native agentic AI capabilities in their platforms, we believe adoption here will grow significantly in 2026.

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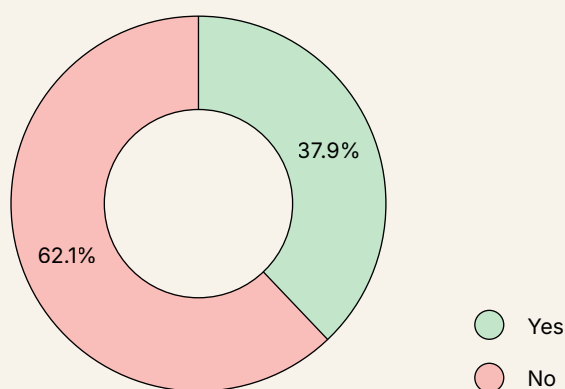
 **GrowthLoop**

*Deploying and leveraging data centralization with an enterprise data cloud means accepting that a data resource that lives outside of the tools you love will be better for the marketing team and the business. That's a big moment of acceptance that folks need to think about. It's a composability mindset.*

— Rebecca Corliss

[Read Interview](#)

## Are you integrating data directly from a cloud data warehouse/lakehouse to AI agents?

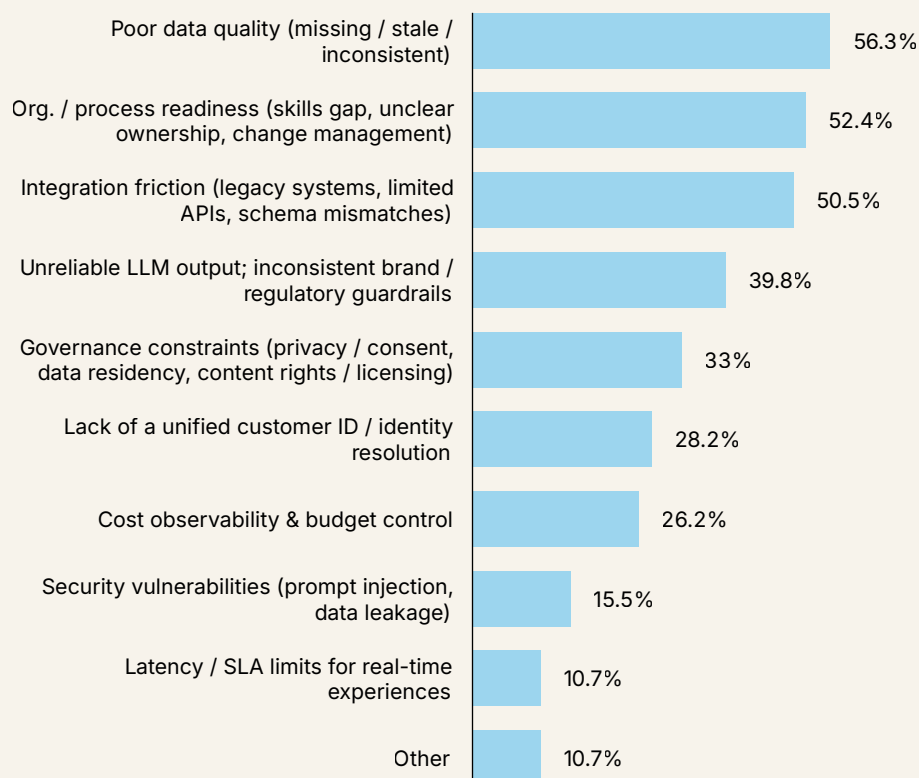


Source: AI & Data in Marketing Survey, 2025, chiefmartec & MartechTribe

But context engineering isn't without its challenges.

Not surprisingly, the biggest issue teams are running into with integrated AI systems is poor data quality (56.3%). Remember that "you don't have an AI strategy if you don't have a data strategy" cliché from a few pages back? It's baaaaaack. AI is the epitome of garbage in, garbage out.

## What challenges or difficulties are you having with these integrated AI systems?



Source: *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe

Respondents could select multiple options

The next most common challenge isn't technical. It's org/process readiness (52.4%), including skills gaps, unclear ownership, and subpar (or non-existent) change management.

The third most common challenge is our old "friend" of broader integration friction across one's tech stack (50.5%), wrestling with legacy systems, limited APIs, schema mismatches, and so on. Integration has sadly been a top 3 martech pain point ever since martech was born.<sup>31</sup>

While there's hope that AI itself will help fix many of these integration issues at some point — *finally, a worthy cause for AGI superintelligence: good martech*

<sup>31</sup> We think of that scene from Mel Brooks' *History of the World, Part I*, where the birth of the first artist was shortly followed by the arrival of the first art critic.

*integrations!* — we first need to overcome the next most common problem: unreliable LLM output. 39.8% of our respondents said they have difficulties wrangling this, with inconsistent brand and regulatory guardrails.

The new challenge to keep an eye on is cost observability and budget control (26.2%). As more of the commercial martech stack incorporates consumption-based pricing, marketing operations owners increasingly have to develop more complex forecasting and cost tracking mechanisms.

#### Key Highlights & Insights from Our Sponsor

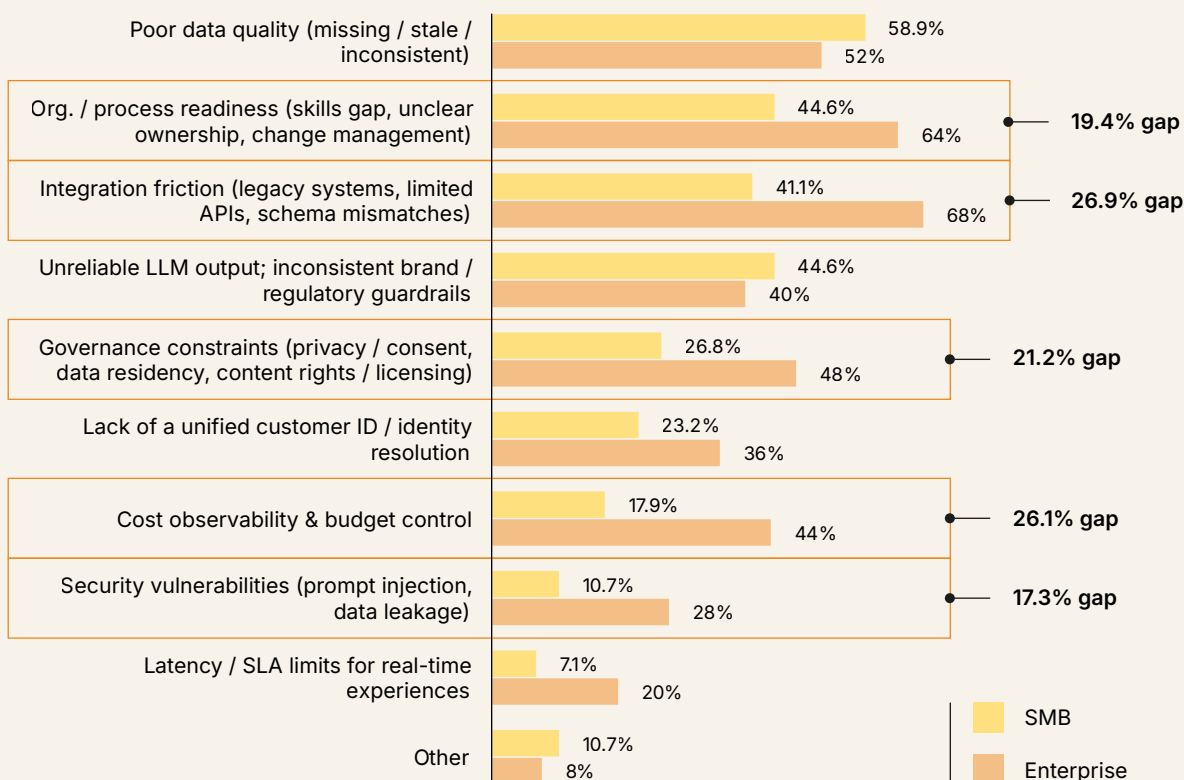


*AI is only as good as the memory — the data that you feed to it. What I mean by that is CDPs are really becoming that trusted and secure intelligence layer that can power your different models at high scale.*

— Rafa Flores

[Read Interview](#)

## AI Implementation Challenges by Company Size



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

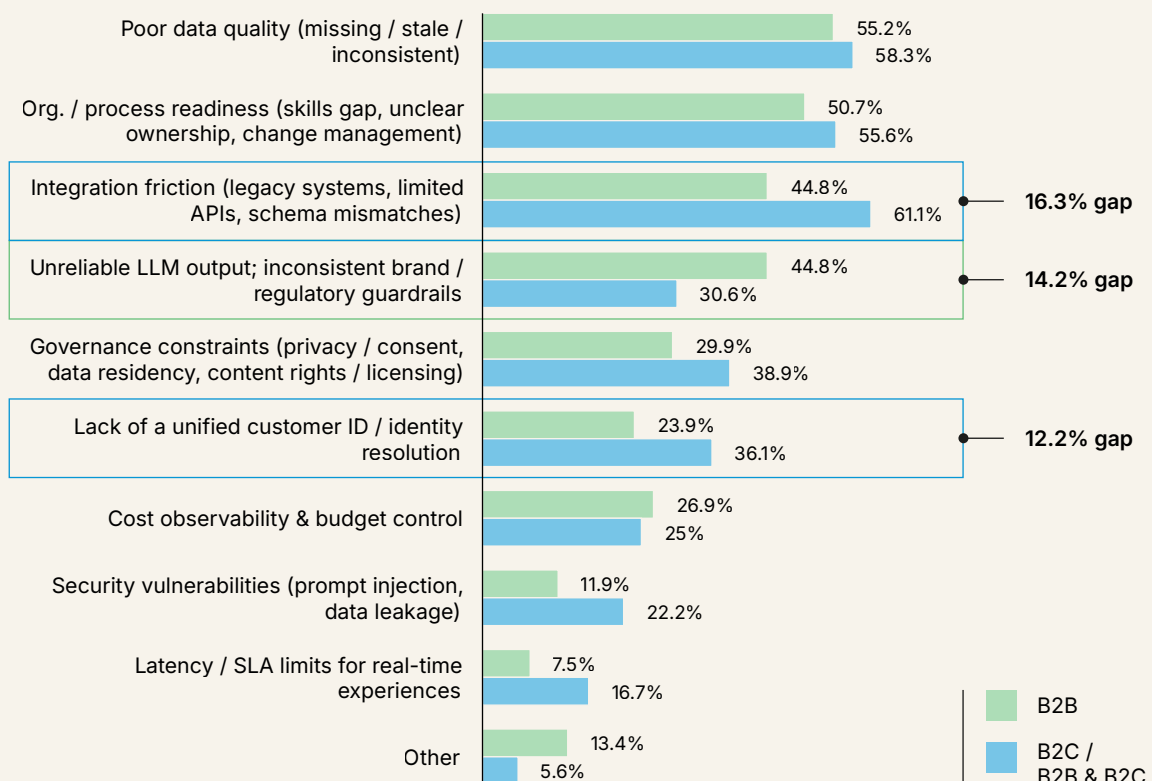
There are a few interesting differences between enterprises and SMBs here.

In a finding that *Captain Obvious* would surely be proud of, our data revealed that enterprises generally have more challenges than SMBs.

Integration friction is the #1 challenge for enterprises (68%), while it's #4 for SMBs (41.1%). Probably not surprising, given that enterprises have more complex stacks and often opt for more custom-built integrations.<sup>32</sup> Cost observability is also reported as a challenge more frequently for enterprises (44%) than SMBs (17.9%). Each of those issues had a 26+ point gap.

In the other direction, poor data quality and unreliable LLM output were slightly more frequent challenges for SMBs than enterprises. 58.9% vs. 52% for data quality and 44.6% vs. 40% for unreliable output.

## AI Implementation Challenges: B2B vs. B2C / B2B & B2C



**Source:** *AI & Data in Marketing Survey, 2025*, chiefmartec & MartechTribe  
Respondents could select multiple options

<sup>32</sup> A former platform ecosystem executive at a leading SMB martech company also worked hard on this.

We also saw a couple of notable gaps between B2B vs. B2C challenges.

Integration friction was notably more frequent in B2C (61.1%) than B2B (44.8%), often due to their larger data sets across channels with less direct control.<sup>33</sup> In the other direction, unreliable LLM output was a more common problem for B2B companies (44.8%) than B2C ones (30.6%). B2B marketing, especially account-based marketing, often leverages deeper data and content resources over longer and more complex buyer's journeys, where generative AI can be helpful — e.g., hyper-personalized nurturing and sales enablement — but only if it's reliable.

## A Spectrum of AI Agentic-ness

Adoption of AI agents and agentic workflows are not an all-or-nothing proposition. They sit along a spectrum of how much *agentic-ness* they have — which for simplification purposes we will roughly equate with the amount of autonomy they are given.

On one end of the spectrum, we have traditional rules-based automations. These are the classic *if-this-then-that* workflows and sequences that have proliferated across marketing automation and customer engagement platforms over the past 10-15 years.

On the far other end, we have the tantalizing vision of an AI “orchestrator agent” that takes a high-level goal — e.g., design, produce, and execute a complete end-to-end campaign, dynamically adjusting ad strategies and post-click experiences for different audience segments, to optimize for average order value (AOV) of net-new customers. That master agent then orchestrates a network of more specialized AI agents to fulfill that mission, learning and reasoning as it goes along to achieve that goal.

For the most part, we still have a ways to go to reach that super-agentic end of the spectrum.

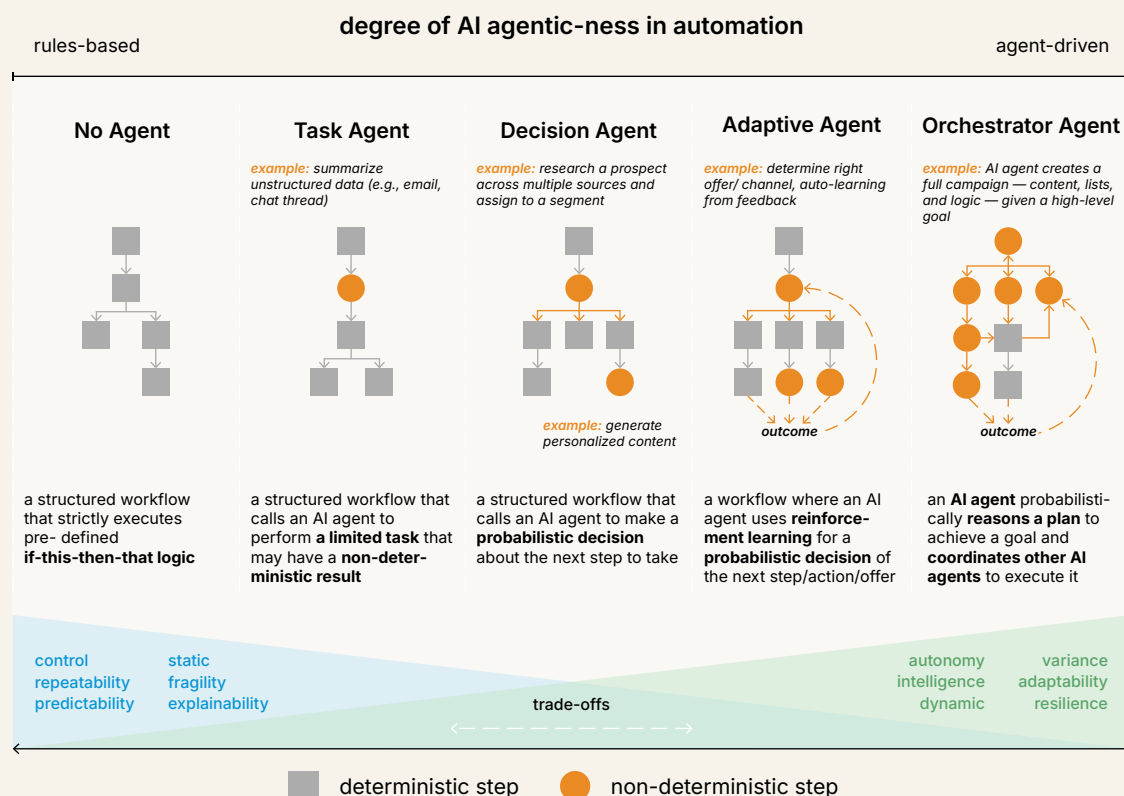
However, in between those two poles, there is a wide continuum of blended possibilities. A common first step along this agentic-ness scale is to incorporate

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<sup>33</sup> Also, see previous footnote.

a narrowly-scoped generative AI “task agent” within a more traditionally structured automation. For instance, a workflow that is triggered when an inbound customer fills out a form or emails a request might call an AI agent to summarize the customer’s history and profile before forwarding that on to an appropriate sales or customer service person. There is almost always a human-in-the-loop here before something generative is presented to the customer.

## Degrees of AI Autonomy in Workflow Automation



Source: chiefmartec

A further shift along the agentic-ness scale might have an AI “decision agent” make a judgment about which next step in a branching workflow to take, based on its own reasoning about that prospect or customer. For instance, a B2B prospecting agent might deep research a potential customer and based on the analysis of their website and other external content automatically determine which segment and lead nurturing program to assign them to, and whether or not to forward them on to a specific sales rep.

This more agentic workflow might also use generative AI to create an email, landing page, or other marketing/sales asset that is tailored for that specific prospect or customer. There are now multiple AI agents executing steps in this process — but still within the constrained scaffolding of an overall structured workflow. There may or may not be a human-in-the-loop to approve the content generated for that prospect or customer.

The next milestone along the agentic-ness scale are “adaptive agents” that learn from interactions with customers how to self-optimize campaigns, offers, and experiences. Aampe, Braze (which acquired OfferFit), Hightouch, and SAS have examples of AI decisioning products that use reinforcement learning AI agents to achieve this self-adaptability, usually without a human-in-the-loop.

Beyond that, on the far right, AI agents take more autonomous control over defining the flow. It’s no longer a fixed workflow, as the path taken could vary significantly from one execution to the next.

It’s worth pointing out that *this is not a maturity model*. The automations on the left side of this spectrum are not necessarily “lesser” than those on the right. They have different strengths and weaknesses. This is actually a continuum between more *deterministic* automations and more *probabilistic* ones.

Purely rules-based automations are the most deterministic. Run one of those workflows 100 times with the exact same inputs, and you will get the exact same decisions and outputs. There is no open-ended probability involved. Such determinism has real advantages. Deterministic workflows are repeatable, predictable, and explainable. They are paragons of consistency and control.

But such deterministic workflows have disadvantages too. They tend to get more complex, as you must explicitly define the logic of every step of how they operate. They’re also static; they don’t update themselves. A human is responsible for maintaining them. As a result, they tend to be fragile — unexpected changes in their environment can cause them to break or throw errors.

More probabilistic, agent-driven automations invert these pros and cons. With the advantage of greater intelligence and autonomy, they can adapt to a wider variety of situations. You don’t have to detail how to handle each specific case; the AI agent can reason its way through them. This adaptability can make these automations simpler to define and more resilient to changes in the environment.

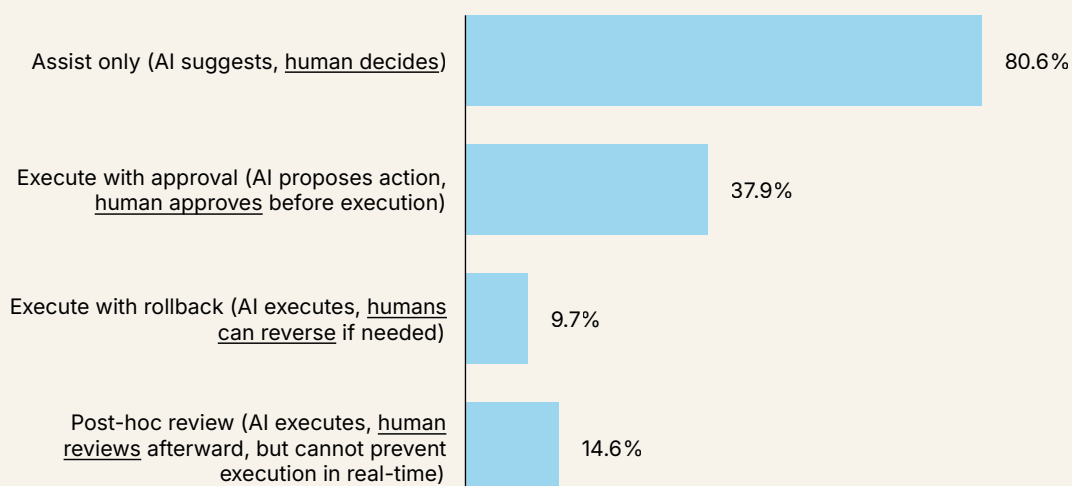
The price of this greater agentic power is the introduction of more probabilistic behaviors into your automations — also called *non-deterministic* behaviors because, well, they're not deterministic. Run an agentic workflow 100 times with the exact same inputs... *and you may get 100 different variations* in its work, decisions, and outputs.<sup>34</sup> Now, most of those variations may be small and non-material. But some could differ significantly.

Is one approach better than the other? It depends on your use case. Probabilistic AI agents can do amazing things that rules-based workflows simply can't. Deterministic automations, on the other hand, can assure consistency in your experiences and operations.

Blending along the continuum between the two can let you harness the best of each.

In asking about agent autonomy in our *AI & Data in Marketing* survey, most marketers reported that they are still mostly on the left side of this spectrum, primarily using AI agents as assistants (80.6%) with a human-in-the-loop who then decides what action to take.

## What is the level of autonomy your AI agents currently operate at?



**Source:** *AI & Data in Marketing Survey*, 2025, chiefmartec & MartechTribe  
Respondents could select multiple options

<sup>34</sup> New definition of insanity: doing the same thing over and over again with an LLM and expecting the *same* results.

Another 37.9% let AI agents take action, but only with the approval of a human-in-the-loop. These are likely “task agent” examples embedded within otherwise deterministic workflows.

A very small percentage (9.7%) have implemented “execute with rollback” AI agent use cases. Although that may be a useful governance model for certain backstage AI capabilities, it’s rarely practical when the process involves an automated engagement with a prospect or customer. Once your audience has received or experienced something, it’s hard to walk that back with a simple switch.<sup>35</sup>

A more common approach to autonomous AI agent activity is post-hoc review (14.6%), where humans check the agent’s decisions and actions after the fact. This can’t necessarily put the toothpaste back in the tube if a prospect or customer received incorrect information or had a bad experience. But regular monitoring allows you to quickly fix and improve agentic processes and, if necessary, follow-up with anyone who was negatively impacted.

We’re not at a set-it-and-forget-it stage of AI evolution yet. But we expect most marketing teams will expand along this spectrum with a greater mix of deterministic rules-based automations and probabilistic agents over the year ahead.

## Vibe Coding and the Hypertail

While the “long tail” of commercial martech products remains incredibly robust — we identified over 15,000 products in our *State of Martech 2025* report earlier this year — we’ve been more interested in the rise of the “hypertail” of custom martech.

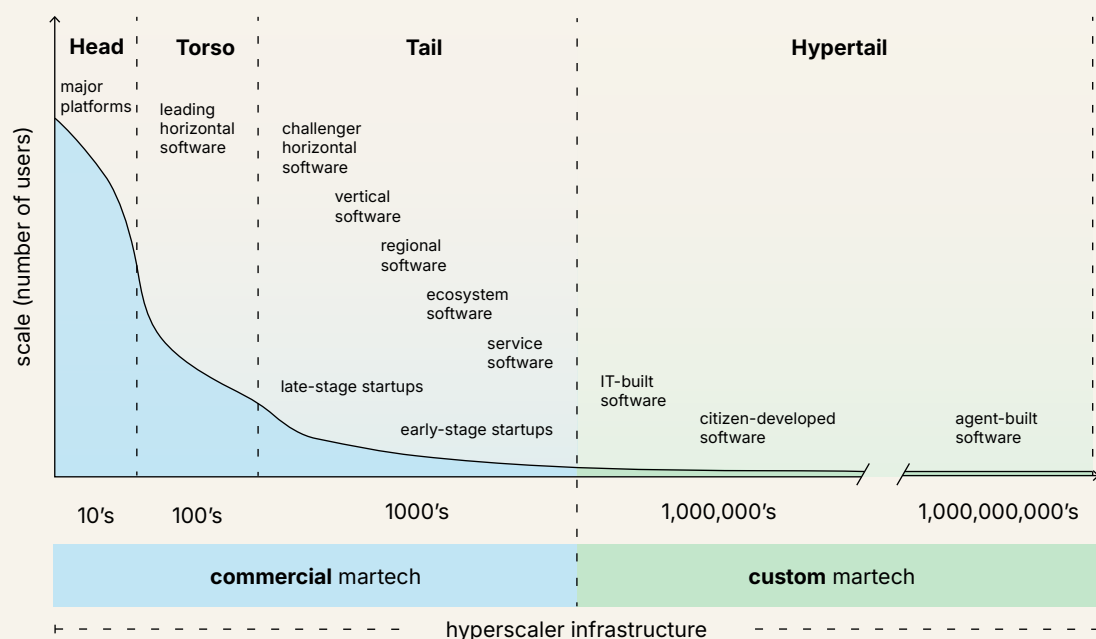
As software becomes easier to create, and as major martech platforms become more open and composable, the balance of build vs. buy is shifting. It is increasingly practical for companies to develop custom-built apps, agents, and automations as part of their martech stack. This gives them much greater freedom to tailor their go-to-market operations and customer experiences.

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<sup>35</sup> That sinking sensation in your stomach when you realize you messed up an email you just sent, at the very moment the “Undo” option goes away.

Such custom software is usually less about substituting commercial martech products, but instead building on top of — or around — those platforms. (This is exactly what we've seen with the relationship of AI agents to current martech stacks: 85.4% enhancing existing functionality, 42.7% implementing entirely new functionality, and only 30.1% replacing existing functionality.)

## The Martech Long Tail and Hypertail



Source: chiefmartec

We see approximately three categories of custom martech development:

1. Software coded by professional engineers (IT, systems integrators, etc.).<sup>36</sup>
2. Software built with no-code/low-code tools by ops professionals or power users — sometimes known as “citizen developers.”
3. Software written by AI agents on-the-fly to execute a particular task — often without a human even knowing that a software program was written and executed on their behalf. We described this fascinating category as “instant software” in the *State of Martech 2025*.

<sup>36</sup> Rock star AI programmers get their tokens for nothing and their inference for free. (With apologies to Mark Knopfler.)

That second category got a big boost this year with “vibe coding,” a term coined by Andrej Karpathy to describe the experience of a building an app through largely natural language interactions with an AI agent:

*There's a new kind of coding I call “vibe coding”, where you fully give in to the vibes, embrace exponentials, and forget that the code even exists. ... I'm building a project or webapp, but it's not really coding — I just see stuff, say stuff, run stuff, and copy paste stuff, and it mostly works.*

AI app-building tools such as Bolt, Lovable, Replit, and v0 by Vercel exploded in popularity in 2025 as millions of non-technical or semi-technical builders tried their hand at vibe coding.

Before we continue a more serious discussion of vibe coding, can we just poke a little fun at this vibe language? What a bizarre mash-up of 1960's counterculture and 2020's techno-optimism!

And since vibe coding became such a hot topic, we — *of course* — started to see “vibe” put in front of everything. Vibe marketing. Vibe selling. Vibe finance. (Okay, we made that last one up.) The vibe language is new. But the underlying ideas? Not so much. So we amused ourselves by putting together a quick translator:

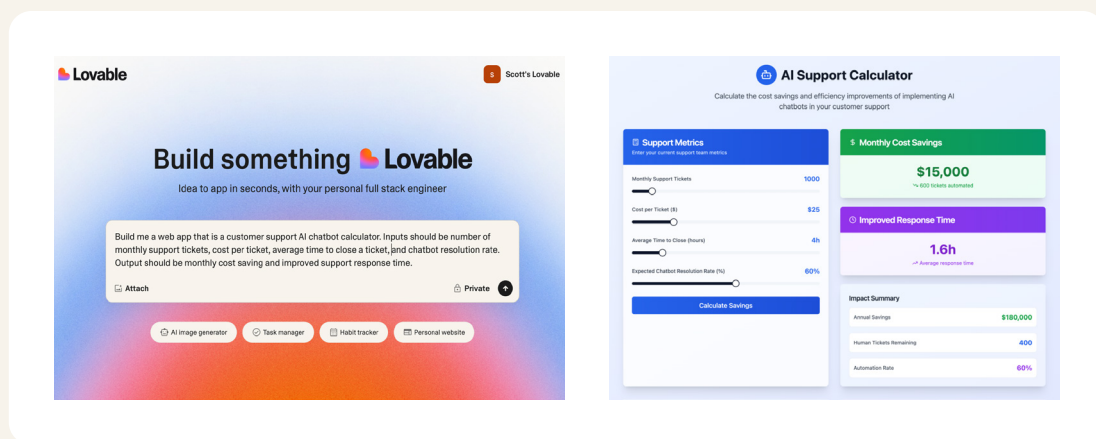
## The Summer of Vibes

| Vibe Era               |       | Pre-Vibe Era        |
|------------------------|-------|---------------------|
| Vibe coding            | ----- | No-code / Low-code  |
| Vibe marketing         | ----- | Growth hacking      |
| Vibe selling           | ----- | Hustle culture      |
| Vibe finance           | ----- | Creative accounting |
| Vibe <u>(anything)</u> | ----- | Shadow IT           |

Okay, now that we got that out of our system...

These vibe coding tools are actually pretty impressive. For instance, testing out Lovable, we were able to build a product calculator for a website in just a couple of minutes — all by simply describing what we wanted in English. While this is a simple project, it's one that previously would have taken days, at non-trivial cost, to get built by a professional developer.

## A Lovable Example



Source: chiefmartec

However, your mileage can vary significantly based on how technically savvy you are and how complex of an app you're attempting to build.

Jason Lemkin of SaaStr wrote a series of posts on LinkedIn this past summer as he spent a couple of weeks vibe coding apps for his business. He started out thrilled by the potential of what a non-technical user could build, but soon realized that there were lots of ways that one could get over their skis.

One of his concluding posts ranked the kinds of apps he now thought a non-technical user could reasonably build, from safe-and-easy "green light" apps to where-angels-fear-to-tread "red light" apps that they should most definitely *not* try to build.

We converted this into a continuum, from 1 (non-engineers can vibe here) to 10 (non-engineers should not vibe here), which we named the *Lemkin Scale of Vibe Coding*.

## Lemkin Scale of Vibe Coding



**Source:** chiefmartec, August 2025,  
Based on a LinkedIn post by Jason Lemkin

On the low end of the scale, green light apps include basic web apps (such as the product calculator example we built), prototypes for validation (demos, proofs-of-concept), and internal only apps such as dashboards, tracking tools, and internal workflow automations. They're relatively simple, limited in scope, and generally not working with sensitive data such as PII (personally identifiable information).

Cautionary yellow light apps (3-5 on our scale) are still fairly simple in their functionality, but they work with data that requires care and compliance. A quintessential example would be a custom landing page app that collects contact information from a prospect. Such apps need to respect GDPR requirements and make sure that the data is safely handled to its rightful destination without leaking for unauthorized uses or pooling somewhere that isn't properly secured. With review by a qualified developer or data professional, these can be safely deployed.

Moving from simple apps to more complex ones falls into the orange light warning zone (6-8 on our scale). It's hard for a non-engineer to completely understand all the inner workings of a more complex app. It may appear to

work fine with anecdotal uses, but there's no systematic testing to assure its correctness and reliability over time. Making changes in one part of the app might break something elsewhere in the app without it necessarily being obvious. Maintenance can be a nightmare — even more so if the original vibe coder leaves the organization. This is especially risky if the app is dealing with sensitive data or confidential information, where an inadvertent “bug” could result in a serious breach or regulatory violation.

Apps in this orange light zone should probably only be vibe coded by trained and experienced developers who can shape the app's architecture, establish good guardrails, and evaluate its performance and reliability. Using vibe coding platforms such as Bolt, Lovable, and Replit may still enable these pros to significantly accelerate their development. But they bring wisdom and discipline to the process that a non-engineer would typically lack.

Red light apps (9-10 on the scale)... simply should not be built on vibe coding platforms. The archetypal example would be trying to build your own version of Salesforce. The complexity is too great. These kinds of large-scale applications and platforms should most likely be bought from the commercial martech landscape. In the few cases where there's a legit business case for custom-built software at this scale, it should only be built by expert engineers using pro tools and frameworks.

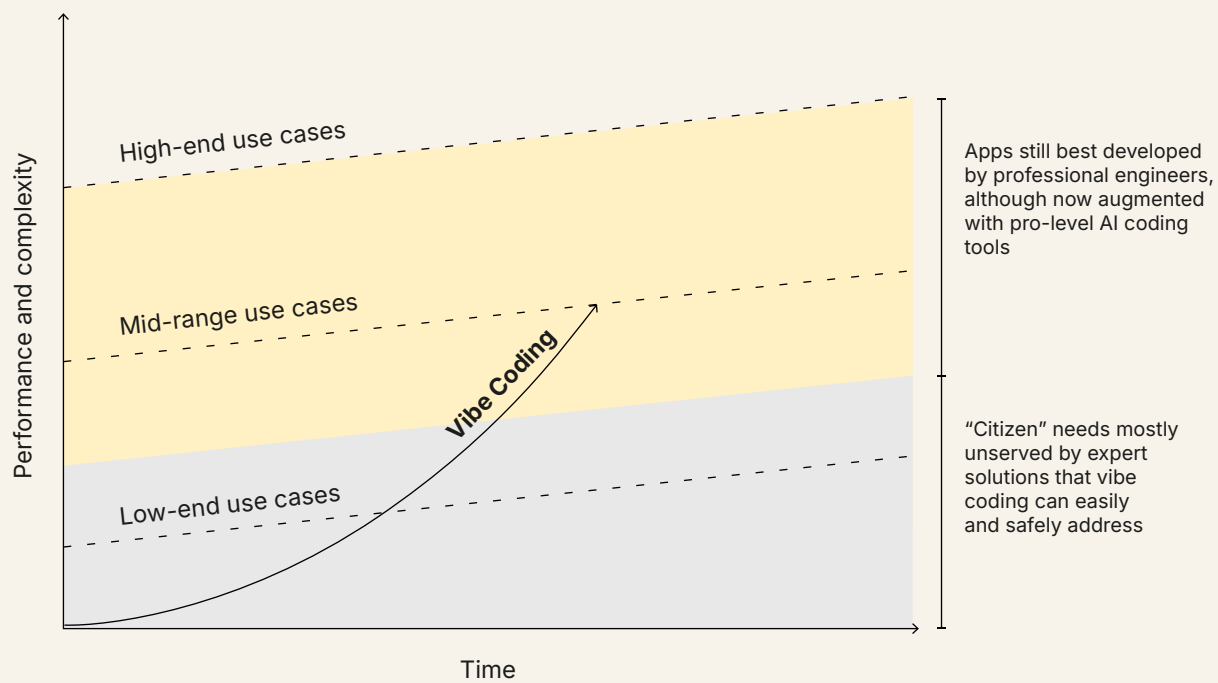
That said, over time, we expect the scale to steadily shift left, as AI matures and becomes more powerful.

(Pro-level software engineers are also using AI development agents and assistants, such as Claude Code, ChatGPT Codex, Cursor, GitHub Copilot, Amazon CodeWhisperer, etc., to dramatically accelerate and expand their productivity. This kind of augmented development experience is also sometimes referred to as “vibe coding.” But we put it in a higher echelon. It's more serious code, less amateur vibe. A more pro name for this is “agentic coding.”)

Given these pragmatic constraints, is vibe coding by non-engineers worth it?

We believe the answer is an enthusiastic “yes!”

## No-Code & Generative AI — Classic Disruptive Innovation



Source: chiefmartec

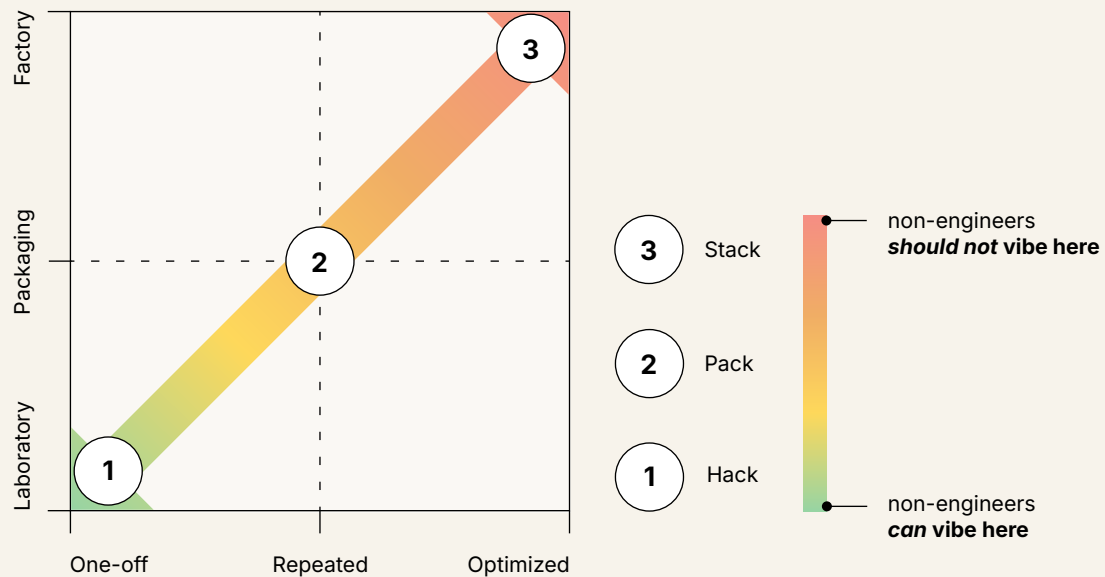
This is almost a textbook-perfect example of Clay Christensen's disruptive innovation dynamic at play. Vibe coding platforms make it possible for non-engineers to build simple apps, agents, and automations to address a ton of "low-end use cases" — ideas they have or pain points they experience — that previously couldn't have justified the time, cost, and expertise of professional software engineers.

These low-end use cases have been unserved or underserved. Vibe coding platforms now make it feasible to implement them, opening up a whole swath of front-line possibilities and a massive vector for new innovation.

Vibe coding with non-engineers is not a replacement for professional software development or major commercial martech applications. It is a complement to them.

It's one of the many reasons why we expect the custom martech hypertail to continue to grow in many organizations in 2026.

## Productizing Customer Experiences



| Hack                | Pack                      | Stack                    |
|---------------------|---------------------------|--------------------------|
| Problem-Market Fit  | Product-Market Fit        | Platform-Market Fit      |
| Find traction       | Proven traction           | Scale traction           |
| Experimentation     | Cleaning up               | Exploitation             |
| Prototype           | MVP                       | Production               |
| Stand alone version | Refactored version        | Zero-maintenance version |
| Non-engineers       | Technical operators / ops | Architects / Engineers   |
| Days / weeks        | Months                    | Years                    |
| Ad hoc debugging    | Functional tests          | Automated tests          |

Source: MartechTribe

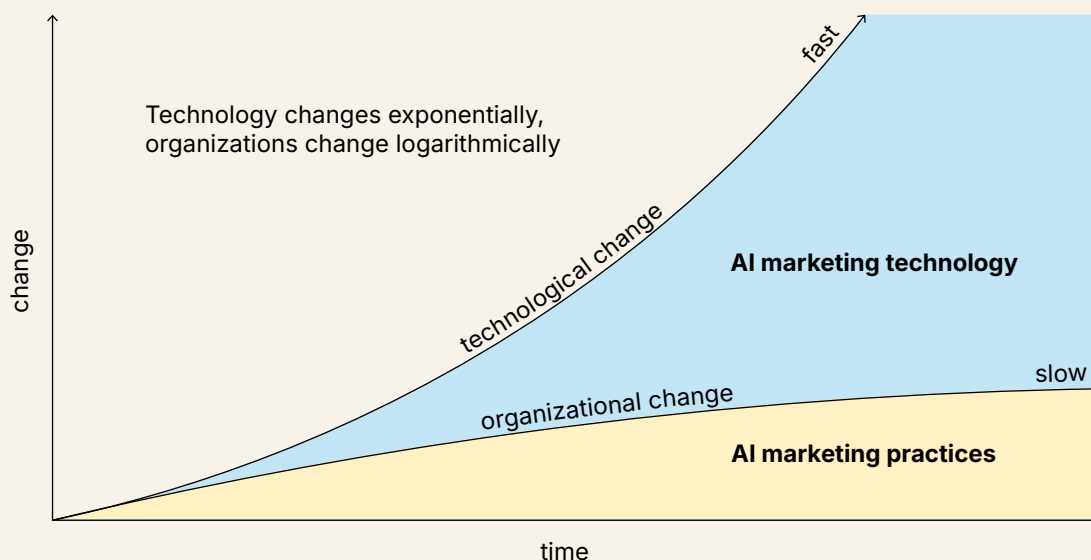
# The Change Agent: Driving Innovation & Value

The most important agent in marketing's AI transformation? The change agent.

You.

We are undeniably in a period where AI is advancing faster than organizations are able to keep pace. If you feel behind that curve, well, you almost certainly are. Because nearly everyone is.<sup>37</sup> But winning in this environment doesn't require you to change as quickly as the broad frontier of all these exponentially evolving technologies, an essentially impossible feat. Pragmatically, you simply need to adapt faster — and smarter — than your competitors.

## Martec's Law



Source: chiefmartec

<sup>37</sup> We'll concede possible exceptions to the companies driving AI's curve, such as Anthropic, Google, NVIDIA, OpenAI, etc. But from conversations we've had with some of their own go-to-market teams, we know many of them also feel they're frenetically chasing a frontier that's flying faster and further ahead.

If you feel the urge to smack us for using the word “simply” in that last sentence, we take it back. Change is hard. It’s hard as an individual. But it’s even harder as an organization made up of many individuals entangled in a competing mess of priors and politics, ideas and incentives, talents and trade-offs.

But adaptability is the dimension on which we’re competing.

Organizations that can adapt better and faster in this environment are likely to prevail. Those who can’t are likely to fail. We know, we’re basically cribbing Darwin here. But it’s true.

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*What we’re seeing is that the technology is moving faster than the policies and frameworks. Organizations are scrambling to create AI governance structures, but it takes time to get buy-in across departments, establish clear policies, train people, and implement the necessary controls.*

— Jonathan Moran

[Read Interview](#)

For you personally, this is an opportunity to lead. Push beyond your comfort zone to embrace new possibilities. But the hallmark of a true leader is bringing others along with you. Coach your team. Share with your peers. Build bridges across departments. Be a beacon of encouragement and support at a time when many around you are wrestling with uncertainty and self-doubt.

“We’re in this together.” Because a united force moves faster.

One of the best things with AI — especially with vibe coding — is that you can often “show” not just “tell” by quickly prototyping ideas and simulating outcomes with ever more realistic synthetic audiences and digital twins. Make bold and daring ideas more accessible by bringing them to life, even in a sandbox or laboratory.

Be an instrument of change.<sup>38</sup>

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<sup>38</sup> Just don’t be an organ, if you get our drift.

# Use AI to Do More with Less More

“Do more with less” is a common refrain in management mandates around AI.

It's not a bad initial goal in the early stages of AI adoption. It's relatively easy for AI to increase efficiency in digital processes. In marketing, AI can significantly accelerate many production and analysis tasks. In less time, with less overhead, you can push more through your marketing pipeline. That's a win.

But it's not much of a competitive advantage.

Because these sorts of efficiency gains are quickly being commoditized. Every business will be able to harness these benefits from AI, as they're already being baked into the core platforms of the martech stack.

To create real competitive advantage with AI, you must move beyond the scarcity mindset that has constrained marketing strategy and operations and instead experiment with new possibilities of abundance. Instead of a 50% increase in the number of audience segments or campaigns you run, can you imagine ways to expand them by 10X, an order of magnitude?

These segments and campaigns would almost certainly look and behave very differently. The process by which they're conceived and produced would be different. The overarching strategy that binds them together could be very different, orchestrating something that would have been impractical if not impossible before.

It might actually cost you more to run marketing that way.

Key Highlights & Insights  
from Our Sponsor



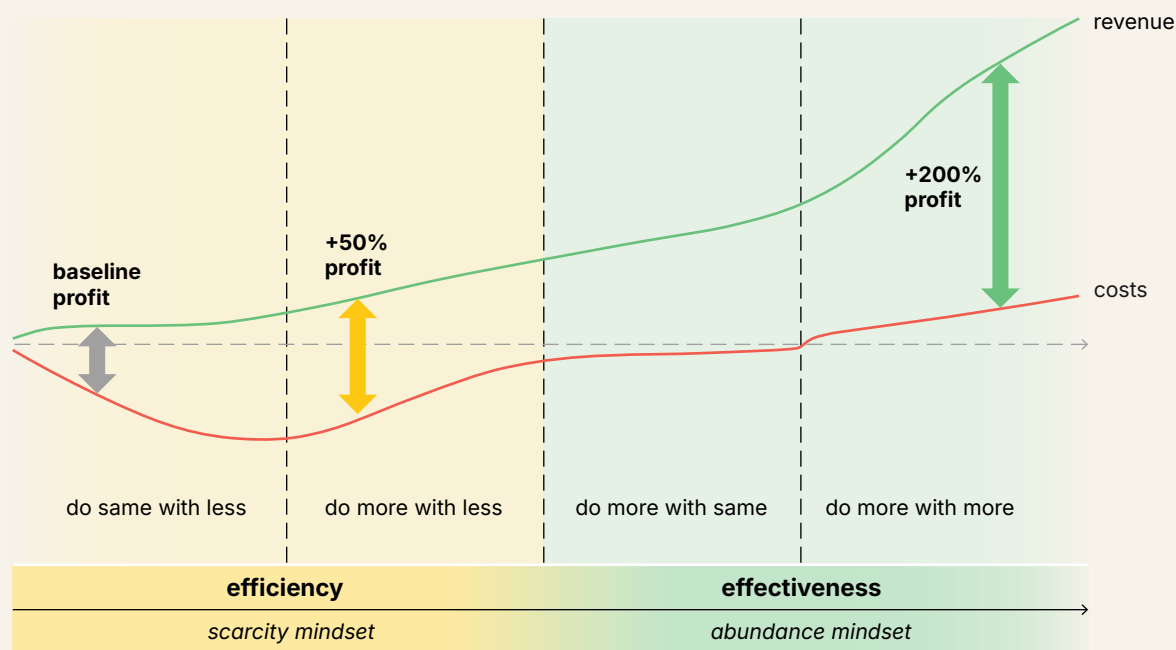
*The hard part about failing fast in the era of AI is that “fast” is 10X the speed it was before. So it's hyper-critical that you have those lines of communication open and that you have stakeholders from each one of the functions of the organization understanding what those experiments are.*

— Sara Faatz

[Read Interview](#)

But cost is only half the equation. It's the space between revenue and costs — profit — where businesses thrive.

## The Efficiency-Effectiveness Spectrum



Source: chiefmartec & MartechTribe

Marketing has long fought being branded as simply a cost center. Instead, it aspires to show how its investments can reliably drive revenue.

If you can unlock new growth possibilities with AI, can you justify greater investment?

Can you actually do *more* with more — and achieve a much larger increase in profit than with a constrained more-with-less approach? (Let us emphasize that

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from Our Sponsor



TREASURE  
DATA

*I think the biggest mistake that companies are making with gen AI when they're deploying is they're thinking about efficiency. They're not thinking about top-line growth.*

— Rafa Flores

[Read Interview](#)

the “more” in “do more” here isn’t necessarily just more volume. It can also be more quality, more innovation, more customer delight, more improvements in your operations, and other creative paths to profit.)

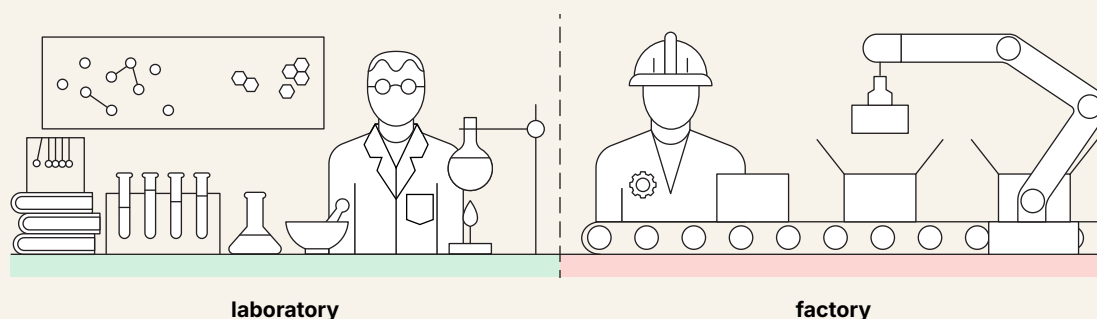
We believe you can.

Doing more with less can feel like a grind. Doing more with more can feel like real growth.

A shift from simply optimizing marketing with AI to *reimagining marketing with AI* is how breakthrough innovation — and more durable competitive advantage — can drive such growth.

But this requires work in the Laboratory, beyond the Factory floor.

## The Factory vs. The Laboratory



Source: chiefmartec & MartechTribe

In boardrooms everywhere, there’s pressure to simplify, streamline, and consolidate technology. On paper, that sounds efficient. In reality, it creates a hidden cost: you end up protecting today’s revenue at the expense of tomorrow’s.

AI or not, your stack will always need to serve two purposes. The first is the *Laboratory*<sup>39</sup>, where experimentation and agility fuel future growth. The

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<sup>39</sup> Laboratory playlist to include [\*Dr. Heckyll and Mr. Jive\*](#) (Men at Work) and [\*She Blinded Me with Science\*](#) (Thomas Dolby).

second is the *Factory*<sup>40</sup>, where reliability, scale, and cost control safeguard current revenue.

The mistake is treating these as mutually exclusive — or worse, trying to collapse them into one architecture, one budget, one suite, or one success metric. That's when you lose balance.

In the Laboratory, the focus is on testing unproven ideas, exploring new customer journeys, and learning fast. Metrics revolve around future-fit and innovation potential. But in the Factory, the mandate is efficiency and predictability. Its job is to deliver proven journeys at scale, protecting operational performance and margins.

Both are essential. One drives the next quarter; the other ensures there's a next decade.

Yet most organizations — often guided by cost-driven IT logic — overinvest in the Factory and starve the Laboratory. The result? Fewer experiments, slower adaptation, and a steady erosion of brand relevance.

Your technology stack isn't a monolith. It's two systems working in parallel, each with different rhythms, risks, and returns. The companies that recognize and fund both — a Laboratory for innovation and a Factory for scale — are poised to drive the most innovation with AI.

When you accept that your technology stack has two jobs, something powerful happens: you stop forcing it to be one thing, and you start designing it for balance.

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**GrowthLoop**

*We encourage pilots because we believe getting your hands on the technology as fast as possible is the best way to know what it's capable of in a real use case for your business. With AI, there's a lot of skepticism. Is it real? So with a pilot, it's all about show, don't tell.*

— Rebecca Corliss

[Read Interview](#)

<sup>39</sup> Factory playlist to include [9 to 5](#) (Dolly Parton) and [Manic Monday](#) (The Bangles).

## Two Martech Stack Roles

|                              | Laboratory                            | Factory                                           |
|------------------------------|---------------------------------------|---------------------------------------------------|
| <i>Purpose</i>               | Experimentation                       | Exploitation                                      |
| <i>Competence</i>            | Agility, Flexibility, & Serendipity   | Scalability, Predictability, and High-Performance |
| <i>Customer journeys</i>     | New (unproven) journeys               | Existing (proven) journeys                        |
| <i>Market-fit</i>            | Problem-market fit                    | Product-market fit                                |
| <i>Good for revenue type</i> | Future revenue                        | Current revenue                                   |
| <i>Financial focus</i>       | Revenue-driven                        | Cost-driven                                       |
| <i>Balance sheet</i>         | No line item for "Missed opportunity" | A line item as License fee, TCO, etc.             |

Source: MartechTribe

The Laboratory and the Factory are not competing systems. They are two sides of the same growth engine — one generating future revenue, the other protecting current revenue. The challenge for leadership is to give both the autonomy, metrics, and budgets they deserve.

1. *The Laboratory* has a mandate for exploration. It's where new customer journeys are tested, fresh data models are prototyped, and AI applications are piloted. Success is measured in learning velocity — how quickly teams can move from idea to insight, from hypothesis to market signal.
2. *The Factory*, by contrast, exists to scale what works. Its strength lies in predictability, performance, and cost control. Once a journey is proven, the Factory industrializes it — delivering consistency, compliance, and reliability at scale.

The contrast between the two is especially clear with their different views on failure. In the Laboratory, failing forward is the engine of innovation. In the Factory, failure is not an option.

The danger arises when organizations blur the lines. Apply Factory thinking to the Laboratory, and you strangle innovation under the weight of KPIs and governance. Apply Laboratory logic to the Factory, and you risk chaos, inefficiency, and brand inconsistency.

Marketing operations teams are well-suited to design the hands-offs from the Laboratory to the Factory, deciding when a use case is ready to graduate and ensuring that the necessary data, people, and processes transition smoothly.

This dual-stack discipline turns marketing technology from a cost center into a growth platform. It aligns marketing, IT, and finance around a shared understanding: innovation without scale is chaos; scale without innovation is decline.

The companies that master both don't just adopt AI — they harness it in an architecture for sustained value creation.

## Value Engineering: A Higher Role for Marketing Ops

For years, marketing ops has been the quiet engine behind marketing transformation — tuning systems, managing data, and keeping campaigns running. But now, AI is rewriting that role. It doesn't just make us faster. It changes how and where value is created.

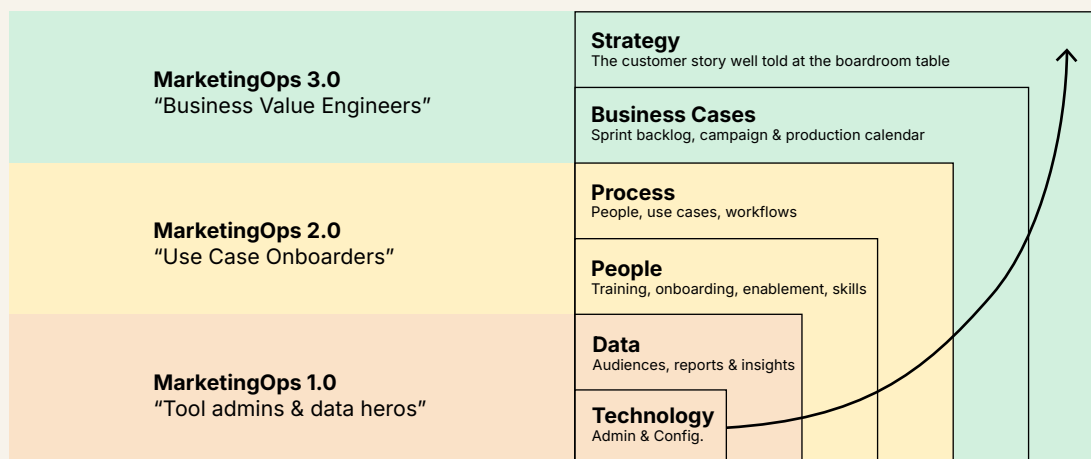
SaaS supported humans in executing tasks. AI executes the tasks for humans. That shift opens an entirely new frontier. If machines handle execution, what do we do with the time and capacity gained?

Right now, most AI efforts focus on efficiency: trimming costs, shortening production cycles, and automating manual work. It's an important start, but it barely scratches the surface.

*Efficiency saves money. Effectiveness makes money.*

The answer defines the future of marketing ops. The role is increasingly less about plumbing and ops-level performance. It's about turning AI's efficiency into commercial effectiveness — and claiming a new mandate as *business value engineers*.

## The Future Is Value Engineering



Source: MartechTribe

As companies use AI to improve customer impact, more than just internal productivity, they enter the innovative space where technology meets business. That's the real sweet spot for marketing ops.

Marketing ops professionals already bridge the gaps between tech, data, and people. They understand the systems, the workflows, and the business goals that connect them. AI doesn't replace that role. It expands it.

This is the next evolution of the marketing ops mandate: transforming AI's efficiency gains into commercial outcomes, and moving the function from stack engineering to value engineering.

The function evolves from efficiency managers to value creators.

AI has already proven it can automate execution. The opportunity lies in how marketing ops can moderate it — curating outputs, setting goals, and aligning every AI initiative to

### Key Highlights & Insights from Our Sponsor



**GrowthLoop**

*We're seeing an evolution of marketing ops into a strategic player that not only owns the systems, but also now thinks about that data investment. They think about how AI orchestration can power the whole organization. They think about AI and data and their martech tools for outcomes, not just activities.*

— Rebecca Corliss

[Read Interview](#)

measurable business impact. In this new role, success is not defined by the number of workflows launched, but by the outcomes they drive for customers and the company.

The modern marketing ops professional will blend three disciplines:

1. *Strategic thinking* to build business cases and tell the story of value in the boardroom.
2. *Technical orchestration* to integrate AI and ensure that systems serve the strategy.
3. *Human enablement* to train teams and align processes around customer and company outcomes.

Together, these skills transform marketing ops into the operating system of commercial growth — the connective tissue that translates technology's potential into tangible business value.

Marketing's future belongs to these business value engineers.

They don't just run the stack. They realize strategy.



# Mind the Gap: Why AI Success Starts with Data



Interview with *Rebecca Corliss*  
VP Marketing, GrowthLoop

**Welcome back, Rebecca Corliss! For those who may not know you, could you give an introduction to yourself and GrowthLoop?**

I lead our fantastic marketing group at GrowthLoop, which means I get to market our marketing technology to marketers. There's not much better than that.

GrowthLoop is an agentic composable CDP that drives compound growth by uniting your data cloud and AI into one Compound Marketing Engine. It's all about giving marketers access to the great wealth of data in the data cloud for audience building, campaign activation, and overall just increasing the speed of campaign creation, which we believe is a key component to improving your iteration speed, which drives compounding growth.

**You mentioned the AI martech readiness gap in one of our earlier chats. What exactly is this gap and how wide is it?**

It's a big gap. And marketing leaders are on different levels of the journey. What this gap really is, is a data readiness gap.

It's a learning curve in terms of accepting and understanding that to really employ a fantastic AI strategy and operations, you need to invest in your data first. That often involves thinking about the architecture and how your data

will be housed, where it will live, and how it will be organized to make AI as impactful as possible.

Some folks didn't necessarily know what was required there. Some are on the mission of figuring it out. And some have actually deployed some really incredible things to make their AI possible.

### **What is driving the urgency? Is it the board? Is it competition? Maybe something more human, FOMO?**

Well, FOMO definitely exists in marketing. I think every marketer can speak to that.

And there's a lot of pressure in adopting AI because the board is putting pressure on, and they're putting pressure on because they know your competition. It's wise to think your competition is leveraging AI to get ahead.

We know that marketing budgets are often constrained right now, and yet we still need to achieve more and grow faster. And so there's a lot of optimism that AI is going to be key in helping us overcome that. But we need to address this gap to make sure we're leveraging AI to give us the promise that we hope for.

### **What's the biggest misconception marketers have about what it takes to actually make AI work?**

Sometimes the optimism around AI can foster a false hope of thinking AI is just plug-and-play.

It'd be great if all AI were plug-and-play. Like ChatGPT, you just spin it up and start talking to it. But technology, especially technology that's going to leverage your wealth of data requires investing in your foundations first.

AI is only going to be impactful if you give it the right data resources to leverage. And you need to make sure that those resources are connected in a way that's pragmatically accessible.

**Indeed, it's often said that there's no AI strategy without a data strategy.  
What does a real data strategy look like?**

We're so enthusiastic about that quote that the GrowthLoop team has t-shirts with it on the back.

I think it's a good moment to double-click on the concept of composability. Composability is key because that is the architectural decision where you have a source of truth that powers your AI strategy and your AI application.

Imagine a world, it's not too far away, where every enterprise is using AI for every use case we can think of. Now the tools are all universally accepted. It's a matter of your data and the differentiator of your data, and how you've invested in your data that's actually going to make your AI more impactful. And so, that's why focusing on that data strategy first, or at least in parallel, is key to making sure you have the differentiation and the impact you're looking for.

**What does data centralization actually look like for a marketing team?**

It's going to be a learning curve for marketers because you might have made a whole career out of your ability to use a particular tool. And I have a lot of empathy for that.

But deploying and leveraging data centralization with an enterprise data cloud means accepting that a data resource that lives outside of the tools you love will be better for the marketing team and the business. That's a big moment of acceptance that folks need to think about. It's a composability mindset.

Let's use audience creation as an example. As I create audiences, am I creating audiences from whatever limited data is in one specific tool? Or from my full data cloud source of truth? That is data centralization.

It's a great opportunity for marketing ops. We talk about the marketing intelligence layer to think about investing and how it can have this great wealth of knowledge. It's a single source of truth to power all the technologies and journeys that we're building to make marketing as impactful as possible.

So the GrowthLoop example I like to give: We're a composable CDP. Audience building is one of the use cases that a lot of our customers love to use us for because it's much faster and because they get to leverage their data cloud as the source of truth. They can fully define the audience they want. You don't need to bring your data to us. That's the composable way.

Leverage the data that's in your data warehouse — your Snowflake, Google Cloud, Databricks, whatever it may be — and create your audience using the freshest, up-to-date, powerful data because you have that centralized data approach.

**Here's a one million dollar question. When should marketers displace existing tools versus complement them? When to rip-and-replace versus composable?**

It's important to think about this, and I might get a little controversial. I hope I don't make folks angry, but I think it's important to really get to the meat of it.

There were a lot of technologies that were built for the all-in-one suite approach. Adobe and Salesforce are tools that usually have that mindset. That was fantastic not even that long ago when you just wanted a team to be able to have all the full functionality possible and move quickly. It was the suite approach that allowed us to move fast.

Well, now we're in the AI era, and it's access to data that's going to make us move fast. And here's the problem: as long as those technologies are optimizing for their customers to use their data, their tools, their selection — you can see it's closed, closed, closed, closed. It's going to create a ceiling on the ultimate AI strategy you might be able to produce.

So when you're assessing your tech stack, I would say, does this technology have an open approach? Does it allow me to explore an AI strategy that can be really impactful? Or does it create a ceiling that could limit the innovation that I want to have, which ultimately is going to slow me down and be quite painful long term?

**Is the traditional process of RFPs — 6 to 8 month evaluations, another 6 to 8 months in implementation — breaking down in this environment where everything's moving at AI speed? What do you do about it?**

It's tricky for sure. I have a lot of empathy for the RFP process because it was created with a lot of important fundamentals in mind. But then if you think about that evaluation process, it just takes months and months and months.

Just compare that to ChatGPT. How quickly is it evolving its models? It's monthly, it's weekly, it's wild. So if you're trying to leverage AI technology where these vendors are trying to innovate as fast as possible, what is possible at the time of your selection could be far beyond what you were evaluating in the beginning. It doesn't match anymore.

We're really encouraging organizations to take some of the fundamentals that are strong within the RFP process, but put them into a context where you can make selections much more quickly. Pilots can be a really great way to see real impact, faster.

**What makes a good pilot versus a bad one?**

We encourage pilots because we believe getting your hands on the technology as fast as possible is the best way to know what it's capable of in a real use case for your business. With AI, there's a lot of skepticism. Is it real? So with a pilot, it's all about show, don't tell.

What does a great pilot look like? Well, first, it's really specific. It's based on a very specific use case. A specific use case and outcome, time-bound, and a really clear outcome you want to drive from this.

You set that and implement it, you run it, and you see what the results are. And because it's time-bound and specific, you're much more likely to be able to do that quickly. And then use that as a proof point to say, okay, great. If I continued this, is this worth the long-term investment?

A bad pilot is just the opposite of all of that. It's broad. It's unspecific. It's based on someone saying they like it versus a concrete, proven outcome.

**I want to go back to your phrase about a marketing intelligence layer. What is this? Who should own it?**

The marketing team we're seeing evolve right now is a three-tier structure. First your C-suite, your marketing C-suite. What may be different is they're hopefully more connected to the data organization. There's a strong tie between VP of data and VP of marketing or CMO.

Then there's the marketing intelligence layer, which is an expansion of the marketing ops group. And then lastly, we're seeing these business units that may be organized around customer journey stages, or a product, or a particular strategic objective.

We're seeing an evolution of marketing ops into a strategic player that not only owns the systems, but also now thinks about that data investment. They think about how AI orchestration can power the whole organization. They think about AI and data and their martech tools for outcomes, not just activities.

I like to affectionately call this layer the dispatch group because they're acting as a traffic cop. In a world of one-to-one marketing, which I don't think is too far away, what customer is in which campaign based on what in their journey right now? So they're acting as that traffic cop.

I think it's going to be a powerful group that brings this new outcome-focused marketing, powered by AI, to life. And it's going to be a big deal for those individuals and a big career opportunity too.

**You mentioned earlier that to use that channel, marketers need to become lifecycle or customer experience marketers. What is the practical difference between optimizing channels versus optimizing outcomes?**

I'll go so far to say: channel marketer friends, hold on tight, get ready to evolve, because the role could even be at risk of becoming obsolete. But we're not too late.

Here's the thing: we talked about the marketing intelligence group acting as that traffic cop for one-to-one marketing. In that world, here's the irony — if you're a channel marketer trying to optimize TikTok or Facebook, you actually achieve the most optimized channel performance when that channel is only

used at the exact right moment for each customer. But that means you can't be thinking channel-first anymore. You have to think customer-first.

So what does the channel marketer do? They flip it and say, okay, I'm now a lifecycle marketer. I'm now a student of the customer journey, and I am flexing my customer empathy skills because I'm going to think about how to use what channels and when, what is the ideal buyer's journey for that individual? How can I really speak to their motivations in order to bring them along and use the channel when necessary?

And so it's a win-win because it's a better experience for the customer, likely to reach the company's goals, and actually optimize the channel inherently because you're only using it when you need it in the best possible circumstances.

### **What skills should marketers be actively developing right now to stay relevant and in demand in 2026?**

Being a student of the customer — it's really about flexing your customer empathy. A marketer with strong customer empathy, with AI in their hands, they're unstoppable. That person is going to have great discernment to manage AI because they have that empathy in mind.

I think they're students of the data and data centralization. They're a champion to think about how the whole org can continually invest in that data resource to support the overall AI strategy.

To summarize, getting proximity to data, customer empathy, buyer's journey, and driving to outcomes — just being obsessed about outcomes. Those are going to be key characteristics that are going to make for exceptionally strong marketers in this next phase.

### **If you would give marketers one piece of advice for preparing for AI and martech in the next year, what would it be?**

If you're a marketing leader, name your deputy that's going to champion that marketing intelligence layer.

Who are you going to empower to drive the change management to move things forward? That's a huge opportunity for them and a huge opportunity for the org. So make that decision because they're best suited to tackle the data centralization transformation, review your tech stack, and identify any technology that's limiting your ability to really harness AI at scale.

If you're not the marketing leader, then ask yourself: can I be that leader? Can I be the one that drives the change forward? Bring this point of view and have those conversations with your marketing leadership. Because that AI readiness gap is real. Don't fall into the trap of underestimating the work at the data layer to bridge it.

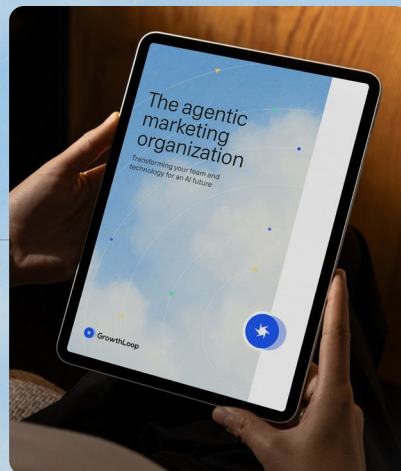
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# AI Agents and the Future of Marketing Workflows



Interview with *Tejas Manohar*  
co-CEO, Hightouch

**Welcome back Tejas Manohar, co-CEO of Hightouch. Could you give folks a brief introduction to yourself and Hightouch?**

I'm Tejas, co-founder and co-CEO of Hightouch. We started about six years ago with the theory that marketers need to be way more data-driven and be able to use all the data from their company to personalize their marketing campaigns. There was a whole generation of CDPs around this purpose, but what we realized is that they were often disconnected from the biggest source of data in the business, the data warehouse. And that's how we came up with the concept for composable CDPs.

A couple of months ago, we launched our first big generative AI product called Hightouch Agents, which you can think of as a purpose-built AI platform for marketing teams.

**Congrats on your launch! Since we're all about the agents in this report, tell us about Hightouch Agents.**

There's really two things that make Hightouch Agents unique. One is that Hightouch Agents are connected to the full context of your business's customer data. We can connect to the data warehouse and we have a method to label the data there so it's understandable for AI. Second, it can access all your marketing campaigns — Facebook ads, Google ads,

HubSpot, Salesforce — the campaigns in those systems and the content and the creative. And third, your brand. You can just start pointing us at Google Docs or Microsoft Office documents, incorporating brand guidelines, strategy docs, your quarterly goals into the AI.

Number two is that we've trained Hightouch Agents' AI to be purpose-built for marketing. It deeply understands things like how to analyze ad performance, how to identify creative fatigue, or how to perform customer segmentation out of the box, versus something like ChatGPT, which has a somewhat hazy memory of that from its training.

### **Agents are, of course, a kind of a buzzword. Can you de-buzz-ify it for us? What makes something an agent?**

Agents are a buzzword. I totally agree. The thing that clicked for me on the difference between agents and AI is really when OpenAI came out with their o1 model last December, which actually gave the AI models the ability to reason and effectively talk to each other. So one AI prompting another AI to solve a complex task through a lot of reasoning. And that I see is agentic, versus when you just ask an AI model or an ML model to answer something one-shot through one computation.

Things become agentic when you combine the ability of AI models to reason with tools and perform actions in the external world. For example, run SQL queries on your data warehouse, build predictive ML models, or analyze creative in Facebook ads. And so why we call "Hightouch Agents" agents is it's not like you're just putting in a prompt like, "What are my top ads and what makes them special?" And just one LLM call is going to be able to answer that.

We've actually built agents behind the scenes that will take that prompt, think about all the things it needs to do to answer that question, like pull all your creative from different places, start tagging it in different ways, start comparing it to performance data, run SQL queries and so on. And that is truly agentic, even if it's exposed through a chat interface.

### **What does the work of a marketer look like before agents and after?**

The pain point we saw consistently is that marketing teams would say, yes, I want to do better segmentation, better journeys, better personalization. But to launch a single campaign takes fifty plus steps and hundreds of hours at an enterprise company. It's spread across many teams and many handoffs and oftentimes an agency. When I saw the flow charts we developed with customers of what each of those steps look like, I was mind blown.

We didn't quite have the technology to solve this until this latest wave of LLMs and, particularly the reasoning models, which only came out last December. We believe that with agents it's possible to make it 10X faster for marketers to launch campaigns and do their everyday work by automating the most mundane of tasks, like designing experiments, sizing opportunities, answering data questions, researching different angles, and giving marketers time back to focus on the most creative and the most strategic tasks.

### **Break down another buzzword for us: what is "context engineering"?**

This is a fun one because when context engineering first came out, I didn't quite get it, frankly. But I have really gotten it over time. I think it's a phenomenal word. I believe Andrej Karpathy started popularizing it.

The problem is that there's a limited window of information that AI systems can operate on. There's a finite window and there's even a smaller window that the system can operate on reliably. If you pass that limit, you're starting to lose information, hallucinate. The performance of the model is degrading.

If you think about a marketer asking a question like, "I want to get rid of my excess summer inventory, help me run marketing campaigns to do that." You actually want the agent to go look through all your past marketing campaigns and see what's worked in past summer sales. Look at your sales forecast. Look at what products are underselling. Look through your customer data and start thinking about what segments may make sense to run targeted offers on. You want it to come up with a ton of hypotheses, and do a bunch of reasoning to figure out who are the best people to target, should you have an offer strategy, what messaging should you use, what can we learn from the past, and so on.

And that vastly exceeds the context window that AI models are capable of handling reliably. And so, context engineering is all about how to take the limitations of AI models with regard to context and build a system that splits up the work into different AI models, doing things like pruning all the information to just the necessary information. Maybe the agent looking into all the past marketing campaigns doesn't need to be the same agent that's looking into your product data to see what products are undersold. And then maybe another agent can have a limited set of that information and join it together.

This sort of context engineering is what makes building AI apps that are complex for disciplines like marketing really, really hard. And it's something we've put a ton of work into here at Hightouch.

### **Does being warehouse-native give you an edge in context engineering?**

It does. When you think about the limited context window of an LLM, you can't possibly put all your customer data into an LLM. It's just not feasible. Having a centralized store of data that your agents are trained to reliably run SQL queries and data science models against is a huge advantage because it now allows AI to process terabytes and petabytes of data once it knows how to write code against it effectively, just like a data analyst or a data scientist does.

### **Having all the data in your data warehouse is great. But what do you need to make it actionable?**

AI isn't magic. There's actual math and science behind this. And one thing that is very similar between AI and people is that they can't just explore a random data warehouse. To really get to 99% accuracy, you have to give AI a semantic understanding of the data that it's actually operating on.

When it comes to data sources like Facebook ads, Google ads, Braze, Iterable, Salesforce, these are a little bit more standardized across companies. We're able to teach the AI how to understand those data models out of the box. But when it comes to a company's data warehouse, everyone names everything differently.

To make AI useful across the organization, you first need a semantic model — basically saying which tables in your data warehouse matter for marketing and what each field within those actually means. Just write a quick description to link them together.

That is something we've built a platform around inside of Hightouch Agents. It's actually the same solution that we use on our CDP side. AI and marketers have the same exact problem here. They don't know what the data means until there's labeling.

I think there are only a few tasks within a marketing organization which you might be able to delegate towards autonomous agents, at least in the next one to two years. For every company, there's a small set of tasks that you're really willing to delegate to fully autonomous agents, and the world for most marketing tasks should be evolving into a state where agents are doing a lot of legwork for you, but you're able to revise and launch the campaigns that make sense for your business.

We actually have products that play on both ends of the spectrum. Our AI decisioning product is about finding those tasks that are better optimized and kind of close to fully run by a machine.

If you think about a company like DoorDash sending customers push notifications to try to get them to purchase more frequently — you want to send some customers different offers, experiment to see what's best, but not send too many offers because that'd be too expensive. You want to send it to their favorite restaurant, but also consider whether you should introduce them to new restaurants. This is something that a machine is just, frankly, better at optimizing. The possibilities are endless and the problem is pretty constrained.

And then when you look at Hightouch Agents, it's really more about the human in the loop tasks. I don't think most organizations are ready to fully delegate an AI to run a campaign on Friday afternoon automatically. You want it to write down, based on the data, five campaigns it thinks would work best, or draft all the copy for a variety of experiments, and then allows the marketers to look through which ones they like the most on Monday, riff with them a little bit more and send them out.

That's the future where you're doing this marketing that is not possible without AI, but it's still very human in the loop for 80% of things. And then there's kind of a twenty percent where truly it's a constrained problem, like let the machine handle this.

### ■ hightouch

#### AI that understands your brand and helps marketers move 10x faster

Hightouch Agents have the full context of your customer data, campaigns, and brand to help marketers answer questions, uncover opportunities, and automate workflows.



#### Things are moving fast. What's one thing CMOs should think about differently as they're heading into 2026?

Earlier this year, the sentiment was, how do we use AI to speed up creative work? And I think the models were a bit too young for that. That's changing quickly. If you look at Nano Banana and Sora, the latest AI models from OpenAI and Google, they have incredibly impressive capabilities on the image and video front. So I think that's a really good trend to bet on.

But from what I'm seeing in marketing organizations, creative is actually really limited to a certain subset. It's only one team that's producing that creative. There's so much other work that marketing teams are doing between planning the campaigns, writing the briefs, analyzing the results, asking and answering analytical questions, looking at signals like social signals or trends on TikTok, that isn't going to be solved by a creative tool.

And so my big push for CMOs is actually to write out the marketing process end to end. If you feel your team is time constrained, which I haven't met a

CMO that doesn't feel that yet, write out your process end to end and really analytically look at where can you save time. And then think about what solutions are best for those tasks. Because when AI came out, it's like, it's going to change marketing creative generation and content generation, which I think is totally true and has a huge unlock. But when you actually list out your task, it's only one part of the problem. There're actually other bottlenecks across the stack.

And then the second advice is probably just try to talk to as many companies as possible and see who's willing to give you free workshops or really go hands on with your company and figure out where AI can add the most value. I think it's hard to navigate the space. There's just so much content online and it's really important to have a partner that will just do a bunch of free consulting, honestly, to help figure out what is the right solution for your organization before just selling you tools.

**10% the technology, 90% the strategy, the people, the process. It's a truism that has stuck with us here throughout martech's evolution. Tejas, thank you so much.**



# AI and the Mid-Market Marketing Revolution



Interview with *Alexis Karsant*  
Senior Director, Intuit Mailchimp

**Welcome, Alexis Karsant of Intuit Mailchimp. Before we dig into questions about AI, could you intro yourself and Intuit Mailchimp for anyone in the audience who — hard to imagine — isn't familiar with the company?**

Thanks for having me. My name is Alexis Karsant, and I'm the director of product marketing for Intuit Mailchimp. I'm part of the marketing leadership team here, focused on helping mid-market businesses sell and grow.

For those who might not know Intuit Mailchimp, we're the #1 email marketing and automation platform that recommends ways to get more opens, clicks and sales. We have 11 million users globally and 24 years of experience helping businesses sell more. With Mailchimp, our customers are using both email and SMS to target the right audience, convert more customers, personalize their messages with AI and understand performance from what we call first click to final sale.

Our legacy has been serving the small business community, and we definitely still do this, but our product has evolved. As we do that, we have more mid-market customers who are using us and benefiting from our advanced features.

**Can you elaborate on that? There's a field of enterprises on one hand and small businesses on the other. What is mid-market?**

We spent a lot of time talking about mid-market and trying to define exactly that. They're a critical but misunderstood segment. It's defined by this unique mix of challenges and dynamics that set it apart from both small businesses and these larger enterprises.

We recently partnered with WARC, who's a leader in marketing effectiveness, on a research report that we're calling the Marketing Equalizer. The goal was to better understand these mid-market marketing teams. We defined those as companies with 10 to 499 employees. According to our findings, the core challenge for these mid-market marketers is this mismatch between ambition and resources. They're expected to deliver enterprise level results, but they're operating with really lean teams.

The research showed that over half of mid-market organizations have 10 or fewer marketers on staff. They're relying on these overstretched generalists to manage the entire funnel. That widens their capability gap. They can't compete for specialized talent like a data scientist. And the talent that they develop, they're losing it to bigger enterprises.

They're in this tough position and it limits both the quantity and quality of their output. And it's really why we believe AI is going to be essential to leveling the playing field.

**We'd love to hear more about this WARC report. What did they learn about AI adoption within mid-market marketing teams? And what's impacting that adoption?**

AI adoption among the mid-market is still in the nascent phase. Adoption is broad but it's shallow, it's not deep. According to our research with WARC, the majority of these marketers, almost half of them, are what we're calling AI applied. That means they partially adopted AI or are in the pilot or partial investment phase. Only 35%, a minority, are in what we're calling the AI embedded phase. That's where they've really systematized AI as a partner across their strategy.

The biggest problem is this capability gap. 39% of mid-market marketers feel that they don't have the knowledge or skills to embrace AI in their businesses. That knowledge gap snowballs into other things like the

difficulty of integrating tools within their tech stack or other barriers around data privacy and security.

The good news is we learned from the report that the market is clearly asking for an equalizer. These mid-market marketers are extremely optimistic. 98% of them, nearly all of them, believe that AI is going to improve their marketing effectiveness. They want easily implemented turnkey tools that can integrate seamlessly into the tech stacks they already have, and they want those to solve foundational pain points for their businesses.

### **Where do you think AI could most immediately benefit those mid-sized companies and marketers?**

Good question. I think we're all experimenting here. It's not going to be about brainstorming content ideas. They can already do that with publicly available gen AI tools. It's something that we're doing with our teams every day. The real opportunity based on the report is helping them bridge that effectiveness gap.

We talked about their teams being really small. AI can help their teams act bigger. I'd say there's two ways it can instantly benefit them.

The first one is synthesizing and acting on customer data. These teams are struggling with collecting data, analyzing data, and integrating that data across their platforms. We know that these businesses can use between 7 to 25 different tools to run their business. That is up to 25 different tools that have data in them. AI can ingest all that disparate data and instantly segment audiences and surface relevant insights. It could predict customer churn or identify cross-sell opportunities. That frees up time that would otherwise be spent by these marketers stitching those systems together manually.

The second thing is automating high-volume execution. AI excels at done-for-you tasks. It can autonomously optimize email subject lines or refine ad targeting and identify, for example, best send times for a campaign. That is going to help with that effectiveness gap. It's going to make the output not only higher quality, but it also allows that team of one, for example, to act like the team of five. By handing off those tasks, that human marketer can

spend more time on revenue needle-moving activities and do more of the strategic high-value work for the business.

**For these mid-market marketing teams who don't have AI specialists, do they need them? Is there anything that's holding them back there?**

I don't think that you need them. Teams can stop waiting for that perfect talent out there. Instead, what you could do is take a structured journey. Actually the nimbleness of these smaller teams is an advantage here.

There are three things that we would advise. First is to figure out what your biggest pain points are. You don't need to do everything all at once. Start by assessing where are you falling short of expectations? Do you have low engagement? Is customer churn a problem? Then choose one or two of those top challenges that if you improved could meaningfully impact growth of the business.

Then what they can do next is look for AI embedded solutions from trusted partners. The smartest starting point is leveraging AI directly embedded in the tools that they're already using. You need to look for vendors that have easily designed to use tools specifically for the mid-market. Look for things that are AI done for you, automation, or AI done with you, augmentation, to address those identified pain points.

The third thing is while you don't need a specialist, you do need an internal champion. You don't want these AI experiments to sit in a silo or be isolated projects. You need to have that person help create space for the team to play and test AI against real business problems. If you don't experiment now, especially through tools that you're already using today, you're going to be left behind when competitors have built that lead.

Really, you don't need a specialist, but you do need to be intentional. You need to find clear use cases and pick specific goals that you want to move towards and start small. Get out there. Do it now. Those early wins are going to build momentum and help the business to find where you go next.

**So it's more heading towards the human marketer changing the role they're performing. How does that change in an AI organization? What are the specific skills they should prioritize to stay competitive?**

Exactly. There's going to be a real shift toward augmentation. The role of the human marketer is not going to be replaced, but it's going to be fundamentally redefined. Marketers on a daily basis are going to move from doing a bunch of repetitive tasks to instead directing and validating the AI.

There's probably three key ways that the human marketer role will pivot. The first is strategic oversight. There's going to be a lot more focus on defining the why. What are the strategic goals? How do you clarify the brand voice? And how do you ensure that the AI and its execution is going to remain consistent with customer intent and brand values?

The second is a pivot toward prompt engineering and critical thinking. This means the ability to communicate clearly and strategically with AI. You need to be able to become an AI whisperer of sorts and communicate with it. That is going to be a competitive advantage. You need to know how to ask the right questions and not only ask the right questions, but interrogate the output to make sure that it is correct.

And then last I would say is customer empathy. AI can optimize execution all day long, but where there is a big gap is that it can't authentically understand the human experience. So the marketer really needs to double down there in areas like empathy or creativity or intuition. Those skills are the ones that connect the brand to the consumer on this emotional level, which AI cannot do.

Stepping back, the most competitive marketers in the next five years are not going to be ones that can code, and they're also not disappearing, but it's going to be the ones who are these directors of AI, these strategic and empathetic directors of AI tools.

**One of the key findings from the WARC report related to that was marketers who self-identified as being more competitive in nature were also using more tools in their martech stack than their less competitive peers. Is this actually a dimension of how people are competing?**

Yes, totally. The stack is their structural advantage. One of the key findings from our survey was super interesting. Mid-market marketers, as you said, who self-identify as highly competitive are using a broader array of martech tools.

When we asked respondents to rate their competitiveness as a marketing organization in comparison to similar size companies in their category, those who were working for businesses that had access to 4 or more martech platforms were 11 points more likely to rank themselves ahead of their competitors than those that had fewer than 4 martech platforms.

We saw a similar pattern emerge in companies where AI was widely adopted, but the difference was smaller, 9 points. We think that's because most of the mid-market is only just starting their AI journey.

The stack is their structural advantage. They recognize that to scale without a large team, they have to invest in these tools that are going to allow for this seamless data flow and augmentation across their channels. The reliance on multiple integrated systems, it's this pivot in these organizations toward effectiveness over simple convenience. They're using their technology as an equalizer. Instead of investing in just the size of the team, they're actually choosing to invest in the capability of the stack.

**Talking about capability of the stack, one of the things that sits in all that technology is data. If AI is using data as fuel for its engine, then what is the single most critical data challenge that you see for mid-market marketing teams?**

I'd say the single most critical challenge is data integration and curation. The reality for these teams, and we talked about this before, is that their data is sitting in all of these different silos. They use up to 25 different tools. Some of their data is in their CRM, some's in their email platform, some is probably in a spreadsheet, and a lot might be in a bunch of ad platforms.

There's so much data in so many different places. And especially as their businesses grow, there's more and more in each of those platforms.

AI is a powerful engine, but it runs on data. Garbage in, garbage out. Marketers really need a clean and curated database that's going to serve as that single source of truth for the customer journey. They really need to prioritize the collection and standardization of their zero-party and first-party data from their own channels. Things like email signups or website behavior or purchase history. That is the proprietary fuel that's going to make their AI powerful and unique for their business.

Without that data as the foundation, AI is just going to automate poor decisions, which is the opposite of what we want to be doing here. Solving the data fragmentation issue first is that essential groundwork. It's the foundation to unlock meaningful AI adoption and meaningful AI advantage.

**One of the other challenges, particularly as AI becomes more deeply embedded inside an organization, is governance and risk management. How should these mid-market AI teams be thinking about implementing this to build trust and ensure compliance?**

Governance is not just a concern for Fortune 500 or enterprise companies. We're learning in our research that 33% of these mid-market businesses are citing data privacy concerns as a barrier to building their AI skillset.

What we would say is that it's an essential part of the structured journey in order to get to the AI adoption that we would like to see these businesses meet. Mid-market teams have to implement these foundational elements now so that in the future they can prevent roadblocks that are related to compliance or data security.

We'd advise on three non-negotiable pillars: accuracy, privacy, and scalability.

In terms of accuracy, you have to establish a process for human-in-the-loop review. We spend a lot of time at Intuit talking about AI and HI, artificial intelligence and human intelligence, and we really feel you need both. You can never allow AI output, whether it's creative or data insights, to go live without a human validating it. That will prevent the spread of misinformation or biased content.

The second pillar is privacy. AI has to operate within clear guardrails regarding data usage, especially concerning your customer zero- and first-party data. You need to make sure that who you're using is meeting the most stringent compliance and security standards because that data is so crucial to you.

And the third is scalability. You have to ensure the solutions that you use now as a mid-market business are going to be robust enough as you grow. You don't want to continue to keep having to switch and you want them to

seamlessly integrate with your tech stack so that they cannot create new security vulnerabilities as you grow.

If you prioritize these pillars of accuracy, privacy, and scalability, you're going to build trust. And you're not only going to build trust with customers, but you're going to build trust within your own teams. That is crucial as you try to achieve long term adoption of AI within your company.

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**We're nearing the start of 2026. I would like you to go back to the beginning of 2025. What do you think is going to be very different comparing the two dates?**

Things are moving fast. At the start of 2025, the mid-market experience with AI was characterized by partial adoption, just beginning to invest in these pilots. The teams, the mid-market teams, were focused on efficiency. They're testing the waters, using AI for tactical tasks like content generation or basic automation. We talked about the skills gap, this lack of internal knowledge or competence really being a barrier to adopting.

By the start of 2026, we think the dynamics will have fundamentally changed for these competitive firms. The core difference is that AI is going to move from being this simple project to more of an embedded, systematized function within these companies. And the market is going to split based on those who are committed to this AI adoption journey.

To recap, 2025's challenge: AI was all about efficiency. And 2026's

difference: AI is going to be a differentiator and used for sustained growth. We learn from the report that AI is becoming the market's competitive edge. Marketers who are committing now are going to have moved beyond those pilots into deeper integration. They're going to, at the same time, move from the initial efficiency gains that they were seeing into more sustained growth for their companies.

And those who delay are going to risk losing significant ground to those faster moving competitors that have built AI into the fabric of their martech stack.



# AI and the First-Mile in Digital Experiences



Interview with *Patrick Harrington*  
Head of AI/ML, MetaRouter

**Welcome, Patrick, the head of AI and ML at MetaRouter. We've been so looking forward to this conversation with you because apparently AI is a thing. First, could you give folks an intro on yourself and MetaRouter?**

Thanks. AI is certainly a thing, and I'm not too old, but it's changed a bit in 20 years.

A little bit about myself: I have a doctorate in machine learning and AI from the University of Michigan. I've spent my career at large public companies, heading up AI initiatives at Walmart, Workday, Square, and Block. I helped use a lot of AI back in the Walmart days about fourteen years ago, standing up their e-commerce offerings and Walmart's media platform, Walmart Connect. I've also been at various startups in the financial domain before joining MetaRouter.

MetaRouter is really interesting. We're first-mile customer data orchestration and infrastructure. We help anyone from retailers to e-commerce companies effectively have plumbing around their behavior streams — how customers are interacting with their brands. That allows us to route data accordingly to various advertising destinations like Facebook, TikTok, Pinterest, and Google, but also to their "last mile" data assets, whether it be CDPs, Snowflake, or Databricks. We're able to shape what that data message looks like on the fly and take action on it.

MetaRouter is really critical for companies with retail media networks, significant advertising spend, and those reshoring their first-party data.

**So much to talk about. We hear you talk a lot about the first mile in digital experiences. Can you tell us what it is and why it matters now, maybe more than ever?**

Yes. Maybe the best way to talk about the first mile is to talk about the last mile first.

Most of the digital commerce over the past twenty years has involved observing how customers interact with digital properties, and that data in bulk ultimately lives in some database, distributed database, or data lake. That data is sitting there to be mined, to run queries on, to train machine learning models — but it's after the fact. Time has ticked away to where that data is sitting there for cold storage and offline analytics.

What the first mile is, is when that data is being created from the behavior of a particular consumer interacting with a digital property. In the first mile, before that data gets into the data lakes, before that data object gets routed for advertising purposes to Facebook or TikTok, it's mutable in the sense that MetaRouter is able to change it and affect where it goes. We can enrich it, suppress it where maybe it does not go. We're able to take action on that data that impacts where it goes.

That's really important because we're able to drive incremental value, whether it be in retail media networks or increasing return on ad spend by either suppressing or routing to the appropriate destination. We're ultimately able to deploy AI, machine learning, and other business logic while that data is hot, which then impacts the consumer experience and the business driving desirable outcomes.

**With the large AI providers like OpenAI and Anthropic expanding the way they engage users, how is that changing things? How can marketers work with those new AI channels while still maintaining control of their data?**

That's a great question. The capabilities of these large language models and generative AI systems are really transforming how we think about customer

interactions. When you look at conversational AI, recommendations, and personalization at scale, these systems can process and respond to unstructured data in ways that weren't possible before.

The key is that first-party data. For marketers, the richness of their behavioral data — what customers are clicking on, what they're purchasing, how they're navigating — becomes the training ground and the context for these AI systems. The challenge is: how do you leverage these powerful AI capabilities while maintaining control and privacy over your data?

This is where the first-mile approach becomes even more critical. By intercepting and processing that data in real-time before it hits various destinations, we can use AI to make smarter routing decisions, better personalization decisions, and more effective campaign optimizations — all while ensuring that sensitive first-party data stays under the marketer's control.

**The nature of customer interactions is changing with AI. We're seeing conversational interfaces, AI-driven search, recommendation engines. How should marketers think about measuring and optimizing these new interaction patterns?**

That's an excellent question. The measurement challenge is significant because we're moving from traditional page views and click-through rates to much more complex interaction patterns. When someone is having a conversation with an AI assistant about products, or when they're being served AI-generated recommendations, the signals we capture need to be richer and more nuanced.

Traditional event tracking — page view, add to cart, purchase — is still valuable, but we need to layer on top of that things like: What was the quality of the conversation? What was the sentiment? How many turns did it take to get to a decision? Was the AI providing helpful information?

This is where real-time processing in the first mile becomes crucial. We can instrument these new AI interactions to capture not just what happened, but the quality and context of what happened. Then we can use that enriched data to optimize the experience on the fly and route the appropriate signals to advertising platforms and data warehouses.

### **So when you think about 2026 and where things are heading, what should marketers be preparing for? What are the big shifts you see coming?**

I think we're in a transition period where several major shifts are happening simultaneously. First, the interaction surfaces are changing dramatically. We're moving beyond traditional web and mobile apps to conversational interfaces, voice assistants, AR/VR experiences, and AI-powered discovery mechanisms. Each of these throws off different types of data at different velocities.

Second, the expectations for personalization are skyrocketing. Customers now expect every interaction to be contextually relevant and responsive to their immediate needs. AI makes this possible, but only if you have the infrastructure to process and act on data in real-time.

Third, privacy and data governance are becoming even more critical. With AI systems processing so much data, marketers need to be more thoughtful about what data they collect, how they use it, and how they protect customer privacy. The regulatory landscape is evolving, and companies that get this right will have a competitive advantage.

Fourth, we're seeing a shift from batch-oriented analytics to real-time decisioning. It's no longer acceptable to wait hours or days to understand customer behavior and adjust campaigns. The expectation is that systems can learn and adapt in real-time.

For 2026, marketers need to be thinking about how their data infrastructure supports these shifts. Can you capture rich, contextual data from new interaction surfaces? Can you process and act on that data in real-time? Can you leverage AI while maintaining data governance and privacy? These are the critical questions.

### **What about the tools and platforms themselves? How do you see the martech landscape evolving with AI?**

The martech landscape is going to go through significant consolidation and transformation. We're seeing AI capabilities being built into virtually every tool, but there's a difference between AI as a feature and AI as a fundamental architectural shift.

Tools that were built in the batch-processing era — collecting data, storing it, analyzing it later, then acting on it — are going to struggle. The future belongs to platforms that can process and act on data in real-time, that can handle multiple data modalities including structured and unstructured data, and that can normalize and route data intelligently.

I think we'll see winners and losers here. There's no free lunch. Some changes will have to happen in terms of how people work, the types of tools they use, and the investments they need to make. We're in a transition right now, and that requires folks to operate like they're in a transition.

**That's a great point about being in transition. What's the question you wish marketers would ask you about AI that they almost never do?**

I think a lot of folks come with a mentality of concern — more of a point of view that this is maybe a risk. But I think the flip side of that coin is opportunity.

If you frame questions from that side of the coin — how can we use this as a differentiated capability? What knobs and levers do we have available? — rather than focusing on risk to the status quo, you open up different conversations. It becomes about opportunity to enhance beyond the status quo.

I think there's a perspective change that would lead to the right conversations and questions around how this can be used as an opportunity to drive growth, to drive longer customer lifetime value, to have better-performing campaigns.

When you distill what's going on in the world — the changing surfaces, the types of data being thrown off, the time scales that data is moving — there's an opportunity to close the loop and optimize in ways that weren't possible before. We're not trying to help retailers just manage chaos at the top of these new modalities. We're trying to help them see it as a strategic knob and lever they have access to, to drive growth.

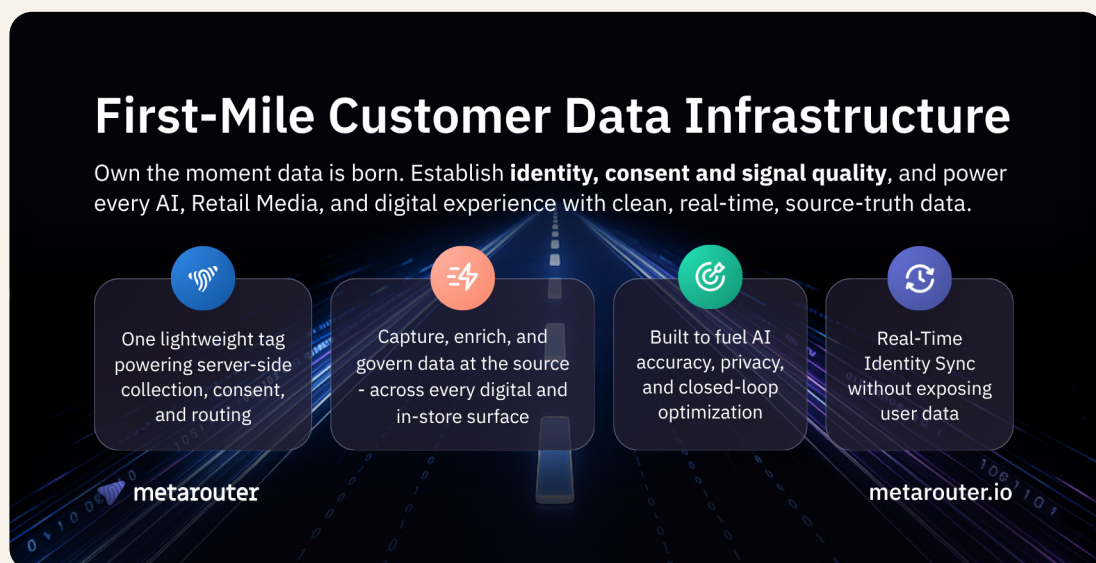
I think it's really about pivoting from a risk and status-quo point of view to a growth mindset with these new AI capabilities. Yes, there will be dislodgement of entrenched channels and players, but there's also going to

be considerable opportunity.

For retailers and the marketers supporting them, behavioral data, purchase data, and customer interactions are valuable first-party assets that can create value above and beyond what has been done in the past.

**There's a phrase that keeps coming to mind: the only way out is through. This thing is happening. It's hitting everyone. Folks who are saying, "Okay, yeah, this is scary, but there's something really interesting that's happening here, let's head toward it" — that's a cultural advantage for companies that are willing to take that adaptive approach.**

| 100%.





# The Human Dimensions of AI in Martech



Interview with *Sara Faatz*  
Senior Director, Progress

**Hello, Sara. We're excited to have you back to talk about where Martech is headed for 2026. For those who aren't familiar, can you give a brief intro?**

I'm Sara Faatz. I lead community and awareness at Progress, and I'm the host of the Ten Minute Martech podcast. Progress allows organizations to build, deploy, and manage responsible AI-powered applications and experiences. From the martech perspective in particular, Sitefinity is our flagship product, which is both a CMS and a DXP.

**Let's dive right in. It feels like the overarching theme that everyone is wrestling with is that AI is just ten-xing everything—speed, volume. What happens to the marketing organization when we ten-x speed and volume?**

Everything. It turns it upside down and inside out. On the plus side, you can experiment quickly, you can fail fast, you can succeed fast by the same token. But it's also requiring a massive amount of cross-functional collaboration and communication at a level we haven't seen before. There are data silos in different areas. You need to be talking to sales even more than you ever did before. You need to be talking to the different functions within the marketing organization. So it's a super exciting time to be a marketer, to be in the martech space. But it's changing the playbook in a very real way.

**We're almost at 2026, and 2025 gave us the term "AI slop." What is slop and how do we counter it?**

I like to call it digital waste. That's how we refer to it on our team. I think it's all these poor little ones and zeros that are being experimented with that may or may not make it out into the world. We'll create a lot of digital waste and things that aren't necessary — probably a lot of technical debt as well. But on the flip side, AI is giving us an opportunity to clean that up, to have better data hygiene, to have better digital hygiene. But it is a real problem, and there will probably be some unintended consequences. Maybe you don't know what the single source of truth is any longer because you have this digital waste or AI slop just hanging around.

**Somebody once said we need an AI garbage collector.**

100%. I think what concerns me — it comes down to communication. It becomes a human problem at that point that we have this digital waste. How do you know which part is waste versus which part is real, which part you should be looking at? If we're not hypervigilant about that as the humans in the loop, that's where we're going to see problems. I don't think creating it is the issue. It's determining what part of it we should trust that's the problem. And you really need human intervention for that.

**One of the other phrases that's become popular in 2025 is "context engineering." What does this look like in practice?**

I think it's a great new role. Context engineers exist in different forms and fashion, but their ability to come in and be that subject matter expert beyond the AI, and to really think differently about data, about content, about all of it, and what that journey looks like — we're all guilty of having old versions of everything laying around in some way, shape, or form. Making sure that there is a true understanding of that single source of truth is going to be what sets people apart when it comes to LLM discoverability. That context engineer is going to be critical in making sure the data is as clean as it can be.

**One of the things that's been introduced is the Model Context Protocol, the MCP. What's your take on where we're at with that?**

I couldn't be happier that we have MCP and that it has come to the forefront. I think it's one of the things that's needed in an industry where so many people are creating so quickly and they're building agents and AI-embedded experiences and search and RAG implementations. With an MCP server on the back end, it ensures that you're going to have an easy way for that communication and connection and for those agents to work together. So having standardization this early on in a revolution is really exciting.

**Content is king, but LLMs put content on steroids. Do you think in AI-powered businesses that context is king in a bigger sense now?**

Content's still king. I would say content is king, but AI is keeping court. By that, I mean your content becomes something bigger and it becomes context. But when you start thinking about what content means and how that impacts how people are engaging with a brand, how they're engaging with a martech stack, what it does to the journey — that context all of a sudden becomes critical because your content becomes so many different things other than just written word or video. It is the data. It is the architecture. It's so much of what the actual experience is full scale.

**With AI accelerating things so much, we have a challenge with human communications inside organizations, keeping people aligned.**

Yeah, it's actually super exciting. I'm seeing teams here internally coming together in ways that we haven't before, because it's not just a marketing issue. It's not just a sales issue. It's product as well. But I think a lot of organizations have kind of fallen back on talking about features and functionality. And when you start thinking now, the consumer, the human has so much more control over that journey and telling you what they want. That information is out there. There's a gold mine for you as an organization — your customer or potential customer today is searching for things and telling me exactly what they're looking for.

If you're not bringing your product teams into that conversation, if you're not bringing your sales and your support and your marketing all together for that conversation, you're missing a huge opportunity. As I said at the very beginning, we have teams that are sitting down in ways that we never sat down before and talking about product differently, marketing differently,

support differently. And that is all thanks to AI and the way people are leveraging it.

**There's a lot of talk about agents. But if I listened to you, maybe one of the oldest agents, the change agent, is the one that's most important?**

Oh, absolutely. A change agent — that's where my heart is in a lot of this. At the end of the day, AI is not actually what's keeping people up at night. They'll tell you that it is, but it's not. What's keeping them up at night is that the world has changed. It's vastly different. Our playbooks have all been thrown out. The way we engage, or the way we thought we saw the world and the way we thought the world behaved — all of that's gone.

People are now searching differently. They're communicating differently. They are buying differently. And so that change agent is critical from a customer perspective to be able to help your customer understand and find you still. They are looking for things and telling you exactly what they want. They are saying, "This is what I am searching for. Help me find X, Y, or Z." If you're a travel company, "I want to take a trip to Barcelona. And I want to see the top five sites. And I have three days to do it. And I want to eat paella."

There's no excuse for us to not be listening to that and at the same time thinking about how we should change the way we are operating so that we can accommodate the way humans are interacting in the world.

**While we've talked a lot about the state of martech, you've made the point that the focus really needs to stay on the state of your customer.**

Absolutely. How is your customer? How are they doing? Are they happy? Are they buying? Do they know how to buy now? Especially for somebody who works in a tech company, I think it's very easy to get wrapped up around the fact that the technology is new and it's exciting and we're using it. There might be people who are using it but don't realize they're using it. Do they know how to search? Do they know where to find what they need to find? So really understanding your customer at a very deep level is going to be super important.

It always has been, but I think it's even more important now because there will come a time where AI will get you this far. You still have to have that human in the loop. Humans still crave human interaction. This change agent is showing us how we need to show up for them, and from that state of the customer, they'll tell us how we need to be there for them.

**With AI and the speed and scale we're talking about, what does failing fast mean in this era of AI?**

The hard part about failing fast in the era of AI is that "fast" is 10X the speed it was before. So it's hyper-critical that you have those lines of communication open and that you have stakeholders from each one of the functions of the organization understanding what those experiments are and why you're trying to do them and what you hope to accomplish from them.

Because I think that a lot of organizations will talk about failing fast, they'll talk about experimentation, but there isn't necessarily a real appetite for that. So you need to be able to say to your teams, "These are the 10 experiments we want to run. These involve martech. These are going to involve the IT team. These also involve product. Let's all get on board. Let's fail fast together."

**There is talk about huge changes in search engine optimization, zero-click searches. One could be bold and state, "Websites are dead." What's reality for this look like in 2026?**

I think 2026 and beyond, you're going to start to see more adaptive experiences. If you think about the evolution of a website, when they first came out, they were brochure-ware. And then all of a sudden they took the next step and they were more a storefront and then portals. But it's how your customer, how your end user engages with them and what their expectations are.

So I think when you start thinking about the ability to have multiple agents on the backend who are allowing you to hyper-personalize and adapt to your end user's needs, I think that is what we're going to start seeing in 2026 and beyond. The website is still going to play a critical role, in my opinion. It just is going to look a little different.

Because we've seen evidence left, right, and center that fewer people are going directly to a website. They're doing a lot of their research offsite. So your offsite brand all of a sudden becomes critical. It is crucial that you're showing up on Reddit and LinkedIn and YouTube, that you're being quoted in articles. All of a sudden all of those things matter.

And what we are seeing is that when people do come to your website, they're typically more ready to buy than they would have been in the past. So a lot of that means that once they get there, you have to be ready to be adaptive. You have to adapt to what they're looking for, what experiences they need.

### **Where do humans fit and should lead in AI-powered systems?**

Yeah, humans still crave human interaction. I don't think that changes in the era of AI. I just think where they're inserted might be different.

But I think if you're talking about buyer-side, "know thy customer" is that much more important than it ever was before. The state of the customer is incredibly important. Understanding, maybe for my developer tools products, maybe they're not going to want to talk to me or anybody else until the very, very end, or if ever. Maybe they are more predisposed to an e-commerce experience or a commerce experience where they don't actually have to talk to somebody.

And then you may have a different generation of people or buyers who are saying, "You know what, I want to talk to somebody." Or maybe you hit a price point where people are like, "If I'm spending that much money, I want to know that there's a human behind this."

So I think it's understanding exactly who you're selling to, exactly who you're talking to, and where their level of comfort is going to be from an AI agent perspective versus a human. But I believe — and maybe this is my hope — that there will always be a need for human engagement in some way, shape, or form.

### **Before we close out, what are you most looking forward to in 2026?**

I think for me, the exciting thing is that the playbook really has been thrown out. And we start to rewrite it and then we're like, "Oh, wait a minute,

something else has happened.” That page can be torn out. I think that how we see humans engaging, how you take a subject matter expert and translate that knowledge to either the AI or to a younger generation that’s coming in to work — I think that jobs and roles change, but you still always have to have a subject matter expertise in some way, shape, or form, because that’s what feeds your AI, that’s what feeds the LLMs.

How can we ensure that we as humans — and this is going to get philosophical — but how do we ensure that we as humans continue to evolve? Because if we stop with the current level of knowledge that we have today, or even within the next 10 years, and we’re only then training AI on what is known today, then we’re never going to evolve.

So we have this younger generation that’s coming into the workforce that may not have subject matter expertise today. How do they build that so that we continue to grow and that we continue to have, as we’re fine-tuning models, that we’re fine-tuning them to be even more intelligent than we are in 2026?

**Well said. You have the opportunity to rewrite what this playbook is.**

Absolutely. It’s a very exciting time to be part of all of this. I feel incredibly fortunate to be alive and in martech in 2026.



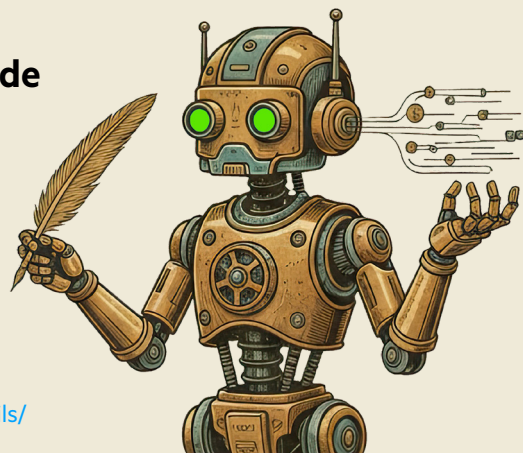
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# With AI, More Is Not Better — Better Is Better



Interview with *Jonathan Moran*  
Head of Martech Solutions, SAS

**We're very excited to have our returning champion, Jonathan Moran from SAS. Just in case someone isn't familiar with you and SAS, can you give us an introduction?**

My name is Jon Moran. I'm responsible for the marketing of our martech or customer engagement solutions at SAS, which we call SAS Customer Intelligence. SAS is most widely known as a data management and analytics company. We've been in the space for a number of years now and have a variety of different solution lines that span industries and geographies. But I focus on our martech solutions all day long, which is why I'm super excited to be here talking to you guys about all things martech.

**There was a report you published a couple of months ago: "Marketers and AI: Navigating New Depths." This was a year-over-year study from 2024 to 2025, which is fantastic to see the year-over-year progression. What in that report stood out to you? Was there anything particularly surprising?**

The thing that stood out the most to me was really the general dichotomy that exists in the market and how the 80/20 rule — or in this case, the 20/80 rule — applies. Let me explain what I mean.

This report surveyed hundreds of marketers globally, and we looked at three tiers from an adoption perspective. The highest, most mature tier was what we're calling "adopters"—those who are using a lot of AI technologies

now. “Planners” is the second tier, using AI within the next year. And then “observers” who are not doing anything yet but are planning to use things in the next two years.

What we found was that adopters, which represent 20%, are giving some pretty wild numbers. Three out of four adopters feel that they are using AI to its full potential. Almost half are using AI decisioning. Meanwhile, the observers and planners aren’t touching things like agentic AI yet, but they’re watching, waiting, and planning.

Along with that dichotomy between the adopters and the rest of the world, we saw a continued lack of readiness for AI, which I think is why we’re seeing so many planners and observers comprise that 80%. Overall, only 8% say they are very confident in their organization’s AI governance. And that 8% is only a very minimal single percentage increase between last year and this year. So there are still a lot of folks struggling with that organizational AI governance topic.

**Are we over-indexing on the advanced AI topics with the analysts and vendors? Are we leaving too many people behind, and is that maybe not what marketers are asking for at the moment?**

I think about that question almost every day because part of my role involves thinking, talking, and speaking about forward-facing topics. But I always have in the back of my mind: is this even resonating with some of these large enterprise brands — where their teams aren’t doing it and more broadly — the organization that supports them is not ready to allow them to do it?

We typically hear from the large analyst firms that there’s a gap of about three to five years between what vendors are saying and what brands are actually doing. I think that gap is going to close significantly from a technology perspective because AI has become so democratized. We have open-source foundation models, we have commercially available foundation models through APIs that are easily accessible. The technology is there.

But I think the challenge is going to lie in that readiness component — whether organizations as a whole are going to be able to leverage those capabilities. That’s where I think we’re going to see the gap stay pretty stagnant over the next few years, and the technology is going to far outpace organizational adoption.

**There's all this buzz about agentic AI. But should we be talking more about things marketers can do with more basic "AI 101"? Where are you on that spectrum of being forward-looking versus making sure people aren't missing what's already here?**

That's a great question. In this report, we looked at 22 different AI capabilities across the marketing tech stack — everything from data cleansing and visualization to more advanced capabilities like next-best-action decisioning and agentic AI. What we found was that things like data cleansing and visualization, personalization, A/B testing — these are all capabilities that brands have been able to leverage for years. And yes, AI is part of them, but they're not necessarily the latest and greatest new AI shiny object.

Those capabilities had high use and high perceived value, which I think speaks to what you're referencing. Sure, there's a place for the advanced stuff, but sometimes going back to basics and doing them better, maybe using a better algorithm or approach, is going to go a long way. And I think we saw that in the research.

Now, with that being said, there are some of the more advanced capabilities that I think marketers absolutely should be prioritizing and looking at as potential use cases. For instance, when we talked to the respondents about next-best-action decisioning and next-best-offer decisioning, 62% said they're using AI for offer decisioning. But when we dug into what "offer decisioning" really meant, it ranged significantly. Some said it was rules-based, some used the term "AI," and there were many different interpretations.

So while there is some value in kind of going back to basics, I also think that marketers need to push the envelope a little bit and think about some of the more advanced capabilities.

**That's an important point about how "AI-driven offer decisioning" can mean very different things. We've seen that throughout the history of martech — buzzwords get applied to a wide range of implementations. What would you say true AI decisioning looks like?**

When I think about true AI decisioning, we're not just presenting an offer based on rules like "if this person clicked here, show them this."

We're looking at multiple variables — behavioral data, transactional data, contextual data — and using machine learning models to predict what offer or action will drive the best outcome for that specific customer at that specific moment.

It's also about continuous learning. The system should be evaluating the outcomes of those decisions and using that feedback to adapt and improve future decisions. That's where techniques like reinforcement learning come into play. It's not a static ruleset; it's a dynamic, learning system.

**Speaking of more advanced capabilities, let's come back to agentic AI. What's your take on where agentic AI fits into the marketing landscape?**

Agentic AI is fascinating, and I do think it's going to have a significant impact on marketing. But I also think we need to be realistic about the timeline and the prerequisites. In our research, we saw that agentic AI was one of those capabilities where adopters were showing some interest and experimentation, but planners and observers were largely in a wait-and-see mode.

Agentic AI, at its core, is about AI systems that can take semi-autonomous and autonomous actions to achieve goals. In marketing, this could mean an AI agent that manages an entire campaign—from strategy to execution to optimization — with minimal human intervention. But to get there, you need a lot of foundational elements in place: clean data, integrated systems, clear governance policies, and organizational trust in AI decision-making.

I think we'll see pockets of agentic AI in marketing over the next couple of years, but widespread adoption is probably three to five years out for most organizations.

**One of the other things that struck us in your report was the continued challenge around AI governance. Can you talk more about what you're seeing there and why it's such a persistent issue?**

AI governance remains one of the biggest barriers to adoption, and frankly, it's not improving as quickly as we'd hoped. As I mentioned, only 8% of respondents said they were completely ready from an AI governance perspective, and that's barely changed from last year.

AI governance encompasses a lot of things: data privacy and security, ethical use of AI, transparency and explainability, bias detection and mitigation, regulatory compliance, and risk management. For large enterprises especially, these are not trivial concerns. They have legal departments, compliance teams, and risk management frameworks that need to be satisfied before they can deploy AI at scale.

What we're seeing is that the technology is moving faster than the policies and frameworks. Organizations are scrambling to create AI governance structures, but it takes time to get buy-in across departments, establish clear policies, train people, and implement the necessary controls.

**Do you think vendors have a role to play in helping with AI governance, or is this purely an organizational challenge?**

Vendors absolutely have a role to play. In fact, I think it's critical. Vendors need to be transparent about how their AI works, what data it uses, how it makes decisions, and what safeguards are in place. They need to provide tools and frameworks that help organizations implement governance controls.

At SAS, for example, we focus heavily on explainable AI — being able to show not just what decision the AI made, but why it made that decision. We also provide tools for bias detection and model monitoring. These capabilities help organizations meet their governance requirements and build trust in AI systems.

But ultimately, governance is a partnership. Vendors can provide the tools and transparency, but organizations need to do the work of establishing policies, training people, and creating a culture that supports responsible AI use.

**On the practical side of things, there's more discussion about the costs associated with AI. Some organizations are finding that AI initiatives are more expensive than anticipated. What's your perspective?**

I think the cost question is nuanced and depends on several factors: the type of AI you're using, the scale and volume of data you're processing, and where you're sourcing that data from. Costs can certainly be high,

especially if you're using large language models at scale or processing massive amounts of data.

On the flip side, if you're using lower-cost solutions, open-source models (if your organization permits it), or newer AI solutions that have been optimized for efficiency, the costs can be more manageable. I think this cost concern is part of why we're seeing that 80%t who are taking a wait-and-see approach.

Looking further out — three to five years — there's a whole other conversation about cost when it comes to quantum computing. The availability and cost of GPUs and accelerators are still very high now, which is why we're seeing chip makers with such high stock prices. But over time, as these technologies become more democratized and, dare I say, commoditized, costs will come down. There's even talk of compute becoming tradable, similar to energy markets, which could help with the economics and supply-and-demand dynamics.

I think quantum computing should definitely be on CMOs' radars. I know there are some financial institutions today that are already looking at quantum and how to use it. It's coming — maybe not as quickly as generative and agentic AI hit us, but it's definitely coming in the next three to five years.

**Let's turn this interview around: what's a question that you wish marketers would ask you about AI that they never do?**

That's a great question. I think back to the report and some of the analysis that was done, particularly when Scott mapped some of those capabilities to a hype cycle — a version of the Gartner hype cycle. If we look at that, we saw that topics around customer journey were in what we were calling the "trough of disillusionment."

When I think about customer journey orchestration and customer journey optimization, to truly do that correctly, there are a lot of things that have to happen behind the scenes. And maybe that's why we saw those capabilities in that trough. But I never — or rarely — get asked: how does customer journey optimization actually work?

How can I use reinforcement learning to adapt and learn, apply state-action values to past consumer behaviors, and then use that to model and adapt customer journey workflows on the fly in order to improve outcomes? There's a lot of technology behind it. I rarely get asked about it. Maybe it's because there is so much technology and people don't want a thirty-minute answer for a thirty-second question. But that's one area I would love to talk about more.

**To paraphrase an Elton John lyric: customer journey optimization aren't just pretty words to say. We'll definitely look forward to more conversations on these topics with you in the year ahead.**

Absolutely. Thanks, guys. Talk soon.



**"If AI creates risk and distrust faster than organizational value, it's not better, it's just more."**

Jonathan Moran, Head of MarTech Solutions, SAS





# The Future of AI and CDPs in Marketing



Interview with *Rafael Flores*  
Chief Product Officer, Treasure Data

**Welcome, Rafa Flores, Chief Product Officer of Treasure Data. Thanks for joining us, Rafa. For the audience that isn't familiar with Treasure Data yet, can you give us a bit of an intro — your background and what Treasure Data does?**

My name is Rafael, Chief Product Officer at Treasure Data. I've been doing product management for over fifteen years. I've led different companies from small scale all the way through exits — Datanize, Meltwater, Arm Holdings, 6sense, and Treasure Data.

I'm a boomerang. I was at Treasure Data for seven years, left for three, and came back. I couldn't be more excited and proud to be back because we have a lot of cool things going on.

Historically, we've been known as an intelligent customer data platform. The market has evolved and so have we as a company. I'm very pleased to announce that we're now the next-gen AI marketing cloud. Think about it this way: You can deploy any marketing program in seconds. You can create all digital assets in milliseconds. And you can personalize at high scale to finally master one-on-one personalization across all your different brand needs. That's what we do.

**Treasure Data has been a leader in the CDP space, but the CDP space is evolving in this AI environment. What is the role of Treasure Data in this transformation?**

You hear about agentic AI everywhere — on every vendor's website. When it comes to the CDP, the market has evolved. The needs of a CDP and the true ROI of a CDP have evolved.

AI is only as good as the memory — the data that you feed to it. What I mean by that is CDPs are really becoming that trusted and secure intelligence layer that can power your different models at high scale.

You're also seeing, because of agentic taking off, that there's a higher need to personalize in real time. Real time is no longer just when somebody logs into your website — it's from one behavior to the next across your website. Even if it's scrolling down the page, you want to ensure that they're seeing the next best product or the next best offer so you can drive the next best action.

Finally, the ROI of a CDP has evolved. CDPs are going to be measured a little bit differently now. Historically it was all about performance — can you help me achieve that high scale at high speed? Now it's about whether you can actually influence revenue. Are you actually impacting dollars? Do you have an impact across my channels?

**Do you see that change happening — moving more from efficiencies to the revenue side? Is that maybe driven by Gen AI?**

When it comes to AI, the biggest pitch you get oftentimes is it's going to drive operational efficiency. It's going to allow you to move faster, in a smarter way, and punt the mundane tasks from day to day.

But you're not measured on efficiency in your day-to-day job — you're measured on business impact. I'm not measured by how fast I can ship a feature; I'm measured by the revenue that feature brings. So when I think about outcomes, outcomes are purely business impact. AI should be helping you measure and track how you're driving those key performance indicators that have to do with business revenue and top-line results.

I think the biggest mistake that companies are making with gen AI when they're deploying is they're thinking about efficiency. They're not thinking about top-line growth. The problem for marketers is you have to disassociate yourself from saying, "Let me prove business value by saying I'm more efficient." That would be like me saying as Chief Product Officer, "I only drove efficiency," and have nothing to do with how much revenue we drove — well, you'd probably fire me in a year or two.

The same thing applies for CMOs and marketers thinking about gen AI and agentic systems. Make sure that you're measuring outcomes properly and that you can tie it to business value — not tie it to operational efficiency and speed.

### **Can you explain how AI agents can help marketers deploy programs faster and personalize at scale?**

When you think about an agent, you have to think about agents like the persona of your CMO and your marketer, and you have to orient yourself around that, not around the task at hand.

The first thing is you have to go and create a target audience. That's where a lot of your resources go — understanding which audience makes sense for me to actually go and run a campaign on. Audience building has historically been very formulaic. You have drag-and-drop that gets very complex because you have 30 or 40 different criteria you have to drag-and-drop. We allow you to do it in natural language, and it's faster. Imagine asking your AI, "Find me the audience most likely to convert for this new campaign," and within moments, it surfaces exactly who you need to reach. That's what our Audience Agent does.

Instead of dragging through endless filters and criteria, Audience Agent taps directly into your first-party CDP data, understands your campaign intent in natural language, and builds high-impact segments automatically. It's audience creation that's intuitive, intelligent, and lightning-fast.

Marketing operations managers can move from weeks of manual segmentation to minutes of strategic clarity, ensuring every campaign is powered by the audiences that actually move the needle. Once you see it in action, you won't go back.

The second part is in the creative realm. How do you ensure that once you've understood your audience, you can actually go and create those assets? Can I generate the text? Can I generate the email? Can I generate a headline, a button, a description? And can I also generate the images? That's what we call the Creative AI Suite, and it allows you to do that right out of the gates within seconds.

The third part is on the journey side of things. If you have an agent that generates an audience, another agent that does your copy, but then you don't have an agent that helps you think through, "What channel should this be on? What campaign frequency? When should I launch this? At what time should it hit my customers?" Well, what's the point? So we created a Marketer Super Agent that can help you with that.

**What about your Creative AI Suite? What can marketers do now in terms of real-time personalization of the visual — the banner or whatever is visual, maybe even videos? And where do you see it going?**

Creative AI Suite is fascinating because it's not just, "Hey, let me generate an image." Everyone does that for you. What we added to it are two key things.

First is staying on brand. As part of Creative AI Suite, we have a brand guidance agent where you can actually, as a brand, say, "Hey, there are certain things that I want to make sure that whatever we create using your product is in line with the values of our brand and what we're trying to evoke in our potential buyers." For example, I had a brand the other day say, "We never want to speak poorly of another brand. So in whatever we generate, we want to make sure that it's specific to us and not against the market."

Second is image variation. You can generate an image, but you can also quickly edit an image. If you're trying to do one-to-one personalization and you're a top hospitality brand and you need to deploy a new program because summer's around the corner and you have all these digital assets that you worked on and spent \$10 million with an agency on, but they all happen to show rooms in front of a pool and not in front of a beach — well, that's an issue. Because you want to make sure that you can drive the beach ones first. Why? You get more dollars there. It's more expensive to

stay at a hotel beachfront than it is to have a pool view.

Well, you could do that with one click. You can just vary the image and say, "Hey, instead of a pool, have a beach." That's what Creative AI Suite powers. I think that's what the future will be of creative. How can I master the art of one-on-one personalization, whether it's via landing pages or email, so that things can happen in a matter of seconds?

You have a new catalog to roll out. So many millions of dollars go into those agencies for modeling photos. You don't need that anymore. We've seen the generative AI models. It's something that we could power, and I think that's where we're headed.

### **What should CMOs think about differently as they're heading into 2026 compared to where we were with this stuff at the beginning of 2025?**

If you're a CMO and you're looking at 2026, I highly recommend that you sit your team in front of you and tell them that it's not about replacing them. It's about making sure that they have the right tools to succeed and embracing AI, as scary as it may sound to some folks. If done right, it can really change things for you.

I read an article the other day about product management. Sometimes I hear from my team, "Is the role of PMs going to die over time?" I don't think so, because there's a certain craft that comes with the human element. It's not 100% of the craft of being a PM, but it's going to be that 10%, 20% that has to be human-led, which is the art of the craft. AI can give me 80% of the legwork, but if that prototype doesn't sell, it won't work. That's where that 20% craft comes in.

It's the same for a lifestyle marketer. Use the tooling. If you're a CMO, tell your team: use the tooling, embrace it, use it for that 80% of stuff that can just happen on autopilot while you sleep, while you read to your kids, while you hang out, whatever. And then focus on the 20%. Drive your team that way.

And the bonus part is AI budget. Separate it from the rest of your budget. I think CMOs are struggling so far this year trying to figure out, "Okay, I have higher expectations, but I still have a flat budget." It's okay to have a flat

budget, but I think you need to start separating some of those dollars out and then map it to the function of where you think the AI tooling can really actually save you costs and drive some operational efficiency.

**Rafa, thank you. This has been a fascinating conversation. Excited to see where Treasure Data is headed in 2026.**

It's very exciting times here and in the market. I can't wait to meet the market where it is. Market moments — let's generate those.

 TREASURE DATA

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## Additional Credits

A special thanks to the survey participants who contributed their insights, and to the industry promoters who shared this project with their networks and communities out of genuine support for its mission.

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