RSW/US
2021 Marketing Technology & Agency New Business Tools

Survey Report

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Chapter 1 | Introduction

RSW/US is committed to helping marketing service firms of all types and sizes better their business.

While the bulk of our business is focused on operating as an outsourced sales and marketing group for marketing agencies looking to build a more productive agency new business program, we also work with marketing service firms to help them build more organic growth from existing clients, and counsel them in other areas of their business to help improve their overall position in the market and add value to their clients.

As part of this effort, RSW/US conducts surveys among marketers and agencies to gather insights that help agencies better build their business and service their clients.

The Marketing Technology & Agency New Business Tools survey is one of the many surveys we sponsor annually and was conducted among marketers and agencies during the April/May 2021 time period. The survey was sent to our database of 10,000+ marketing agencies and 60,000+ marketers.

We asked Marketers a short series of questions about their use of marketing technology platforms to better their marketing efforts, how their use of marketing technology tools has changed over the years, and how they expect this to change in the years to come.

We also explored questions relative to their agencies and the degree to which they felt their agencies were staying ahead of the curve in the marketing technology space.

The survey among agencies was much more involved.

We broke the agency survey into two sections:

The first focused on tools marketing agencies are using for the benefit of their clients.

The second focused on tools marketing agencies are using to better their own new business efforts.

Chapter 1 I Introduction

We wanted to determine, in broad terms, how agencies use marketing technology and see that changing over time, as well as understand what tools they use and the value (or lack thereof) they perceive in tools across a range of categories.

We asked agencies questions about usage of technology tools across 19 different marketing and agency new business categories, including Data Visualization, CRM, and Audience Analytics.

And we asked them to share the specific tools they use in each of these 19 categories, along with satisfaction ratings for each tool.

Each category in this survey is reported separately, with all the technology tools shared by agencies included in the report.

If an agency noted that they were either "Very Satisfied" or "Dissatisfied/Very Dissatisfied", we specifically called this out to help guide you in your evaluation of technology tools, and every platform is hot linked to their website's URL in order to make it easy for you to learn more about the platform.
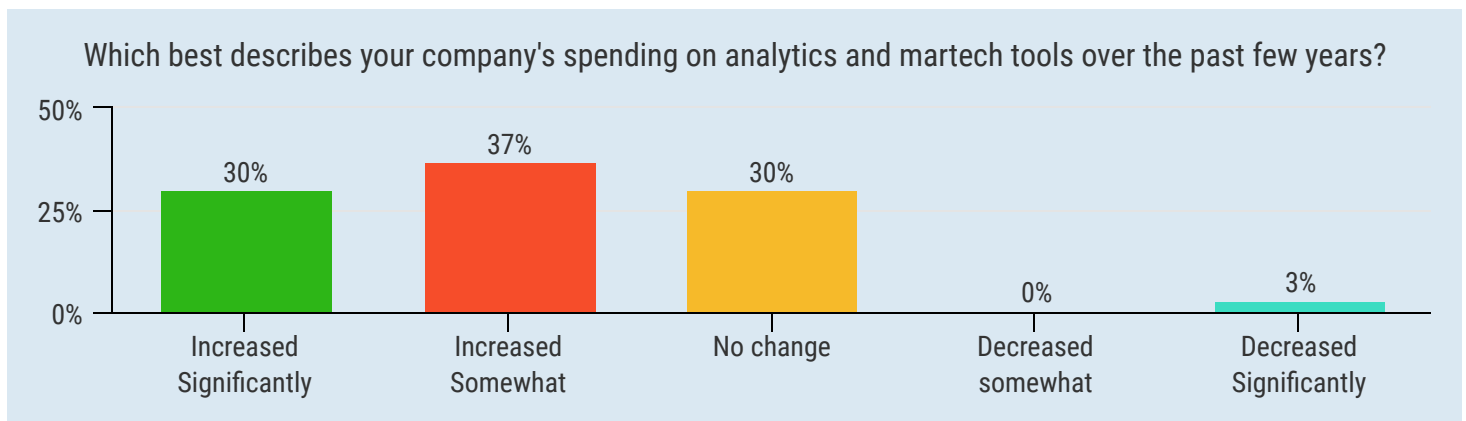
Please note that this report is not intended to be a scientific study of technology tool performance. The reporting of data reflects opinions of your agency peers and is delivered from a neutral stance by RSW/US, without endorsement of any specific platform.

We hope you enjoy the read and find this report to be helpful in moving your business to an even better level!
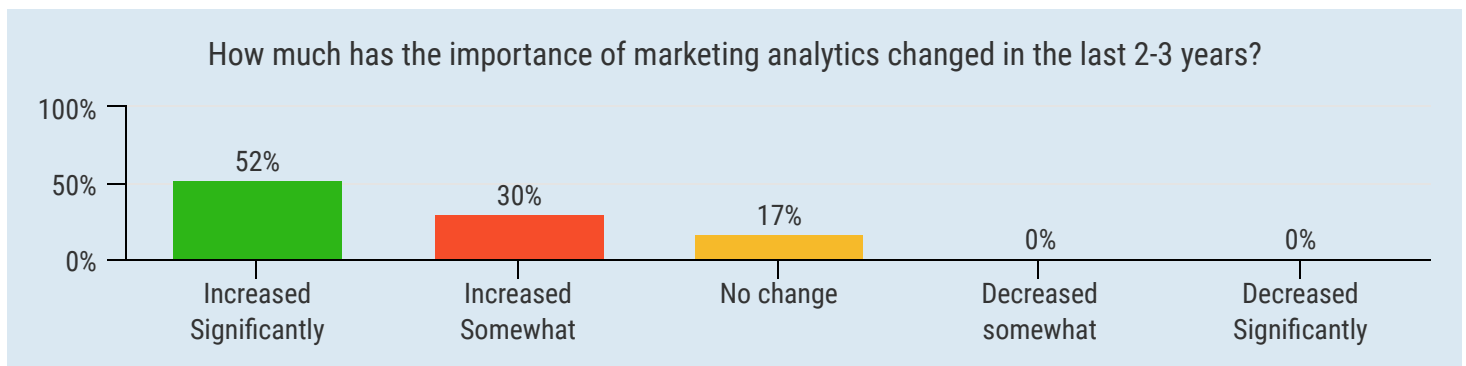
Chapter 2 | How Important Are Marketing Technology Tools to Marketers?

We start by framing the tools and technology space from the vantage point of the marketer. We all know that marketers are being asked to do more with less these days and are looking for any help and advantage they can in moving their business forward.

When asked, 67% of all marketers surveyed said that their company's spending on analytics and marketing technology tools has either "increased somewhat" or "increased significantly" over the past couple of years.

Which best describes your company's spending on analytics and martech tools over the past few years?

Increased Significantly	Increased Somewhat	No change	Decreased somewhat	Decreased Significantly
30%	37%	30%	0%	3%

It is no surprise that spending has increased among marketers given the importance of marketing analytics – and how that importance has significantly increased in the past 2-3 years. **52%** of marketers in our survey tell us that they've seen dramatic increases in the importance of using marketing technology platforms.

How much has the importance of marketing analytics changed in the last 2-3 years?

Increased Significantly	Increased Somewhat	No change	Decreased somewhat	Decreased Significantly
52%	30%	17%	0%	0%

Chapter 2 | How Important Are Marketing Technology Tools to Marketers?

Generally speaking, marketers feel that their agencies are doing a decent job of investing in marketing analytics and technology tools to support their business. 58% of marketers stated that their agency's spending in this area has either "increased significantly" or "increased somewhat" over the past couple of years.

Which best describes how you feel your marketing agency's spending on beneficial analytics and tech tools has been changing in recent years?

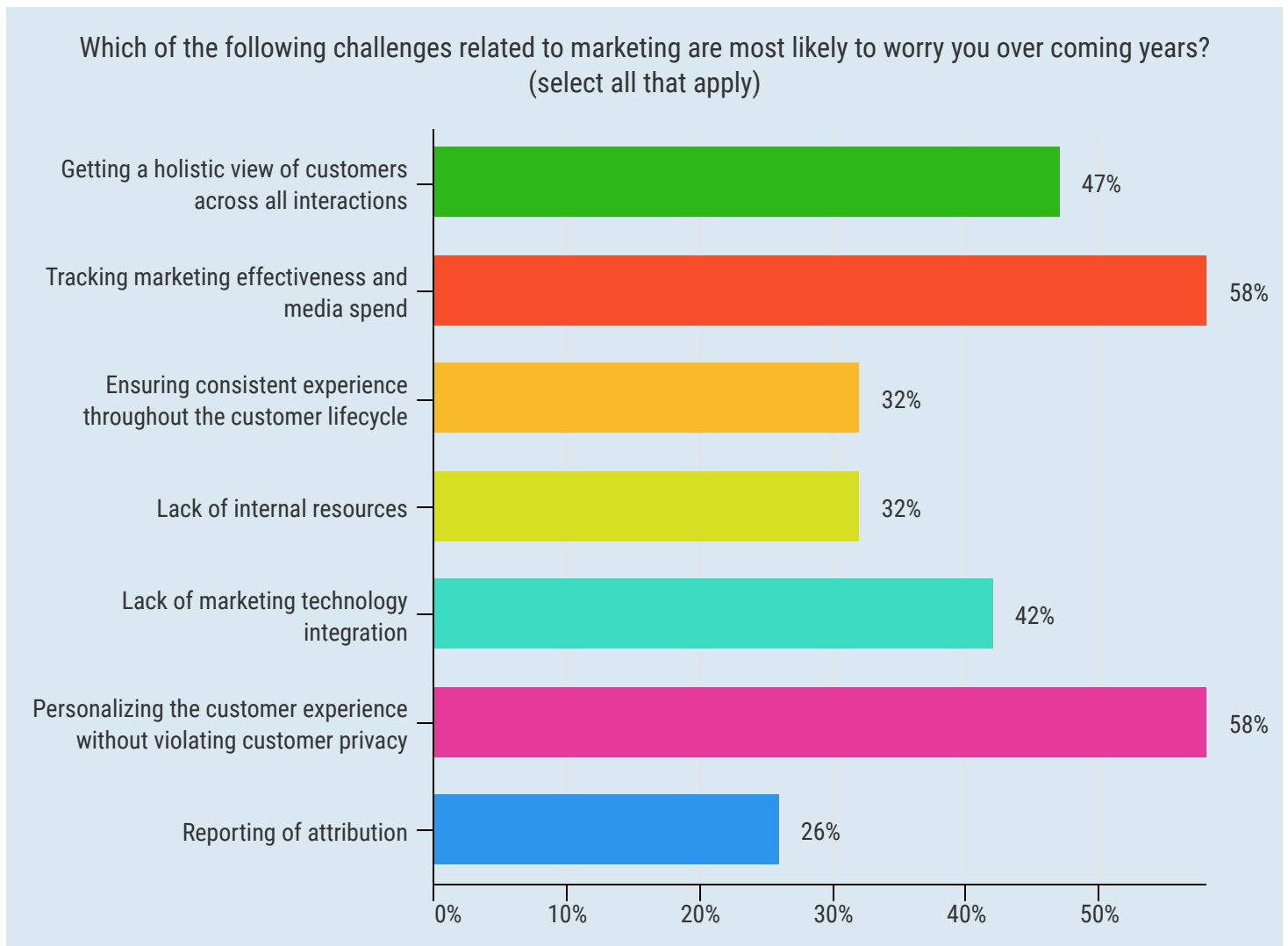| Increased Significantly	Increased Somewhat	No change	Decreased somewhat	Decreased Significantly
12%	46%	42%	0%	0%
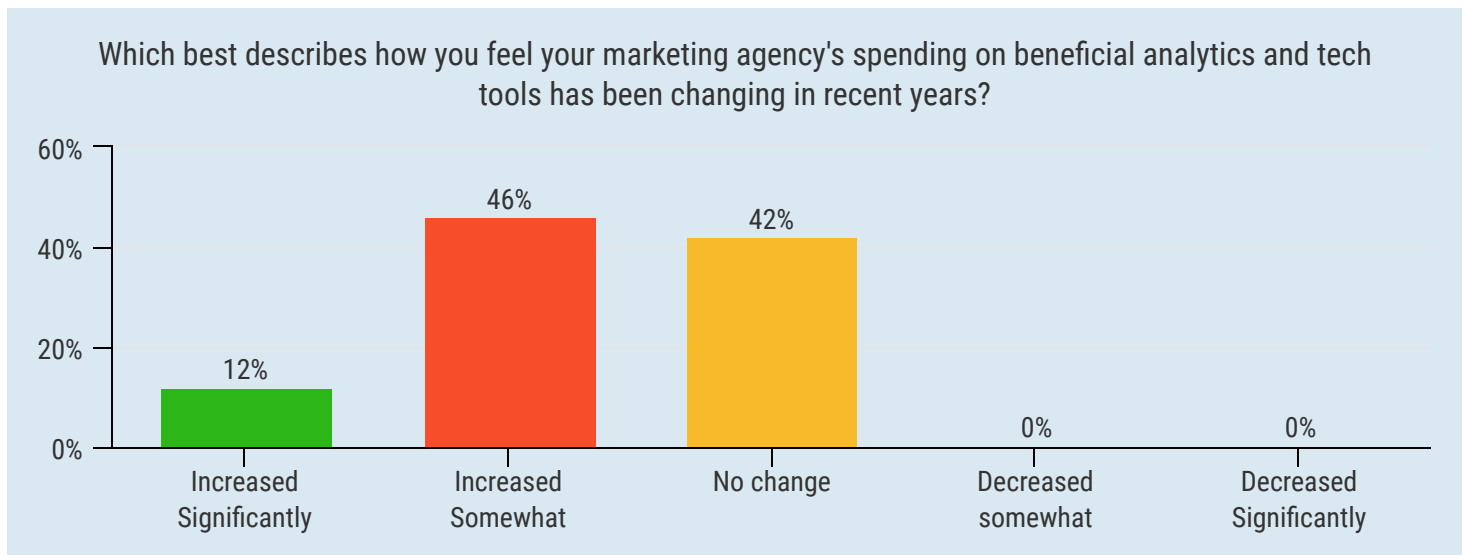
RSW/US Perspective

As noted above, marketers are being asked to do more with less. There are growing pressures being placed on senior level marketers to prove out the value of everything they do. Having the tools and technologies to support their marketing efforts is critical given their "leash" (tenure) in these higher level marketing positions historically has been relatively short. Having the tools in place to validate their efforts is key.

Anything your agency can do to help support your senior level marketing clients provides more value to them and from your firm. In our past surveys among marketers, they tell us that some of the top reasons why they look for new agencies is because they feel their agency hasn't been proactive, hasn't been strategic, or hasn't brought them enough (or any) new ideas. Being a "partner" and not a "player" (or do'er/ tactical agency) is what marketers want and what agencies need to consistently think about and deliver.

Chapter 3 | Marketer Challenges and Future Focus in the Analytics & Technology Space
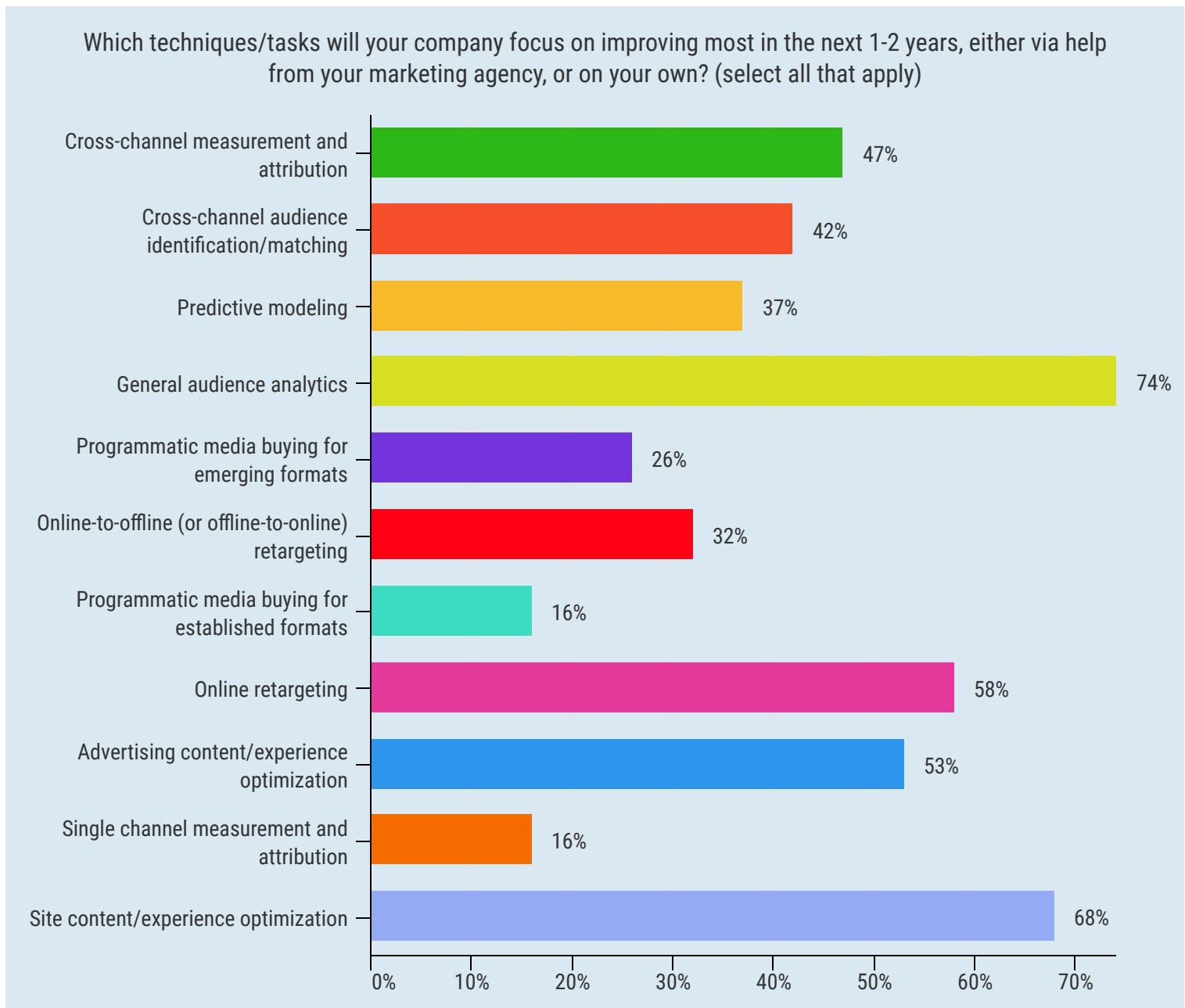
In this survey, we presented a number of different challenges to marketers, specific to issues in/around the marketing technology space. We asked these questions with the intent of helping agencies focus their efforts in solving the problems more critical to marketers in the analytics and technology space.

Ranking highest among the challenges are issues related to personalization (without violating privacy), tracking and measuring the effectiveness of marketing efforts, providing a holistic view of their customers across the entirety of their journey, and a general lack of marketing technology integration.

Which of the following challenges related to marketing are most likely to worry you over coming years? (select all that apply)

- Getting a holistic view of customers across all interactions — 47%
- Tracking marketing effectiveness and media spend — 58%
- Ensuring consistent experience throughout the customer lifecycle — 32%
- Lack of internal resources — 32%
- Lack of marketing technology integration — 42%
- Personalizing the customer experience without violating customer privacy — 58%
- Reporting of attribution — 26%

Chapter 3 I Marketer Challenges and Future Focus in the Analytics & Technology Space

And when marketers were asked what techniques/tasks their companies would work to improve over the next 1-2 years, they zeroed in on "experience optimization" and "general audience analytics". Getting to know their customers better, optimizing their experiences, and keeping messaging front and center in a personal, yet non-intrusive way, all count as important areas of concern for marketers.

Which techniques/tasks will your company focus on improving most in the next 1-2 years, either via help from your marketing agency, or on your own? (select all that apply)

Technique/Task	Percentage
Cross-channel measurement and attribution	47%
Cross-channel audience identification/matching	42%
Predictive modeling	37%
General audience analytics	74%
Programmatic media buying for emerging formats	26%
Online-to-offline (or offline-to-online) retargeting	32%
Programmatic media buying for established formats	16%
Online retargeting	58%
Advertising content/experience optimization	53%
Single channel measurement and attribution	16%
Site content/experience optimization	68%

Chapter 3 | Marketer Challenges and Future Focus in the Analytics & Technology Space

RSW/US Perspective

Paying lip service to the optimization of your client's consumer experience is a disservice to your client. Agencies need to take maximizing performance seriously. Finding the right tools and technologies to help optimize the experience across all platforms is critical to optimizing the brand's performance and keeping a happy client.

Unfortunately, doing this for your clients isn't a single platform solution. And frankly it might need different platforms for different clients or categories of clients.
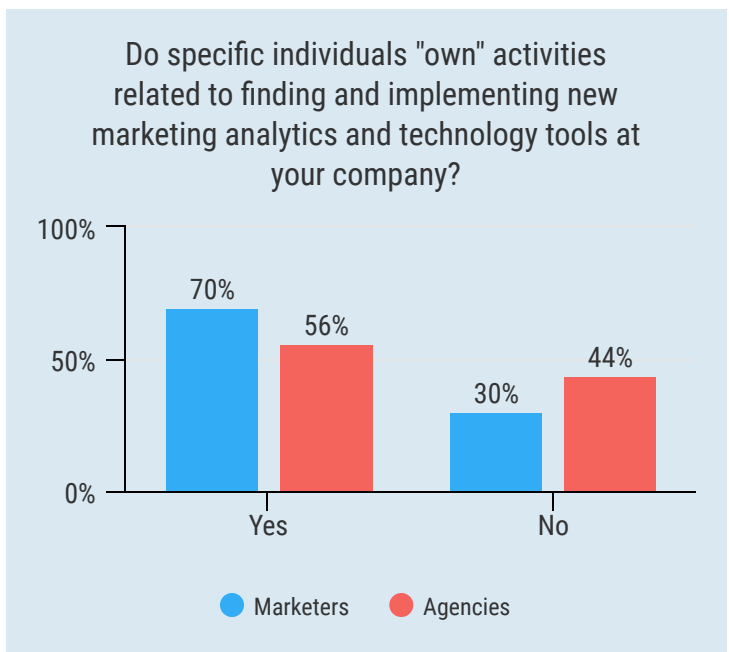
Finding those "right" platforms isn't an easy task. This is part of the reason why we pulled this survey report together.

Having a person or persons in your agency to help with this task is a good first step.

Only **56%** of agencies have specific individuals that "own" activities related to finding marketing analytics and technology tools at their agency. This is short of the **70%** of marketers who responded saying that they have dedicated people exploring new ways to use technology to drive their business.

We fully recognize that smaller and mid-size agencies might find it difficult to dedicate a single person to this task due to overhead concerns…but it doesn't have to be one individual. This can be a shared responsibility with your key strategy person and account executives, who are in constant contact with your clients, for example.
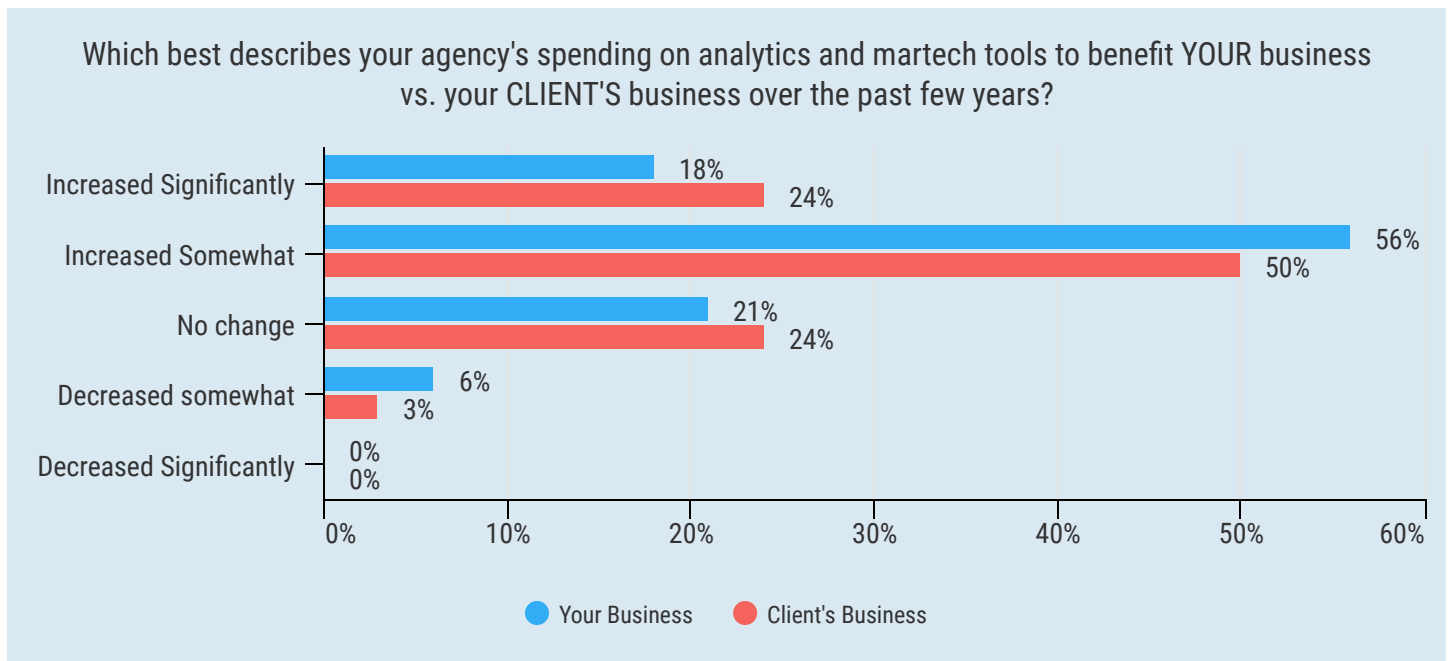
Think about it this way, if you don't do it, one of two things will eventually happen: your marketing client will assume full responsibility for the task and your value will diminish, or other agencies that make performance and experience marketing a significant part of their culture and offering will slide right in behind you.

Do specific individuals "own" activities related to finding and implementing new marketing analytics and technology tools at your company?

	Yes	No
Marketers	70%	30%
Agencies	56%	44%

● Marketers ● Agencies

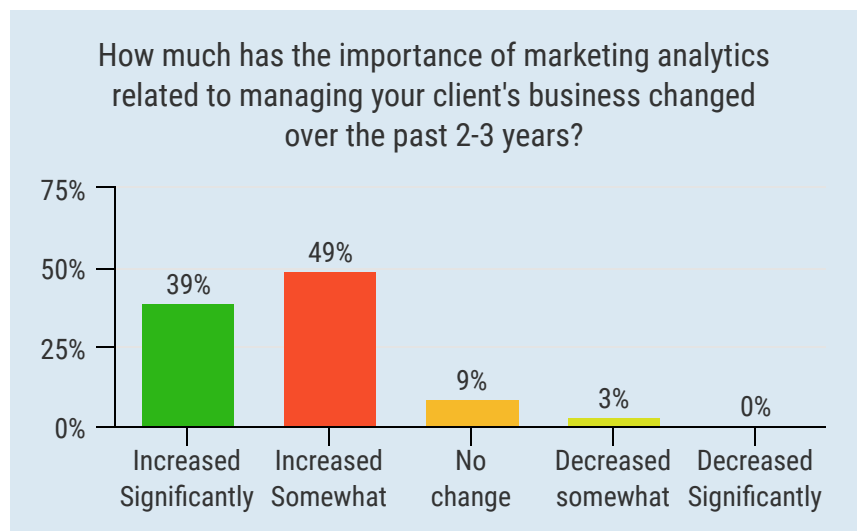# Chapter 4 I How Important Are Marketing Analytics and Marketing Technology Tools to Agencies?

Agencies seem to have a solid understanding of the importance of marketing analytics and technology to the on-going viability of their agency.

73% of agencies stated that their investment in tools and technology have increased "somewhat" or "significantly" over the past couple of years – both for the benefit of their agency and their clients.

Which best describes your agency's spending on analytics and martech tools to benefit YOUR business vs. your CLIENT'S business over the past few years?

Category	Your Business	Client's Business
Increased Significantly	18%	24%
Increased Somewhat	56%	50%
No change	21%	24%
Decreased somewhat	6%	3%
Decreased Significantly	0%	0%

● Your Business   ● Client's Business

88% of agencies also recognize that the need for analytics and technology tools for marketing has grown over the past 2-3 years.

There are still a good chunk of agencies that have either done nothing to change their investment or are actually seeing their investments decline – neither of which is a good position to be in.

How much has the importance of marketing analytics related to managing your client's business changed over the past 2-3 years?

Increased Significantly	Increased Somewhat	No change	Decreased somewhat	Decreased Significantly
39%	49%	9%	3%	0%

Chapter 5 I Agency Challenges and Areas of Agency Focus

Interestingly, the tightening of agency internal resources is viewed by agencies as the #1 challenge facing agencies over the coming years.

This could prove problematic for agencies. While they seem to recognize the importance of measuring effectiveness of their clients' marketing efforts (which aligns well with marketer concerns), agencies don't place as much emphasis on optimizing their clients' customer's "experience", as do their marketer counterparts.

Which of the following challenges related to marketing are most likely to worry you over coming years? (select all that apply)

Challenge	Percentage
Getting a holistic view of customers across all interactions	30%
Tracking marketing effectiveness and media spend	45%
Ensuring consistent experience throughout the customer lifecycle	21%
Lack of internal resources	58%
Lack of marketing technology integration	30%
Personalizing the customer experience without violating customer privacy	39%
Reporting of attribution	27%

The good news is agencies know that this is where they need to focus. The bad news, as noted above, is they may not have the necessary resources to do what marketers need them to do.

Managing the consumer experience and customer journey is only going to become more important as technology tools advance and avail marketers with the ability to create programs specifically created for specific consumers.

Chapter 5 | Agency Challenges and Areas of Agency Focus

RSW/US Perspective

Marketers tell us in our surveys that they are much more open today than they were, say 5-7 years ago, letting their lead agency be the curator/contractor for best-in-class services. In our last survey incorporating this topic, 70% of marketers said they felt this way. Dialing the clock back 5-7 years ago, marketers expected their agency partners to have everything under one roof/within their four walls.

Today, the complexity of our collective space makes it harder for agencies to do this…and marketers recognize this.

The key is for your agency to step up and be proactive in the practice of bettering your client's business.

Marketers tend to look for new agencies for a few reasons. One is that marketers feel like their agency isn't proactive enough, and they're bringing new ideas to the agency – and not the other way around.

A second reason is that marketers feel like their agency isn't keeping them ahead of the curve. Marketers read a lot about new platforms and new approaches to marketing their business. They get calls and emails from other agencies talking what appears to be a different and better game.

You don't need all the talents within the four walls of your agency to make your client happy. It takes a good partner, some extra effort on the part of your team, and the willingness to invest- either directly in a platform or indirectly, This could mean losing some margin by partnering with an analytics group, but it is worth it in the long run. The key is taking the steps forward to do something.

Chapter 6 I What Marketing Technology Platforms Agencies Are Using Most

We asked agencies questions about 12 different categories of marketing technology tools they are using to support the marketing activities of their clients.

We wanted to get an understanding of the breadth of usage among different platform categories (comparatively) and provide agencies with a list of specific tools they could consider if a) they are not using anything; or b) they are looking for a more effective platform.

The platforms most used by agencies only begin to focus on the challenges most mentioned by marketers (i.e. personalization, tracking marketing effectiveness, and journey mapping).

78%, 71%, 69%, and 63% of agencies respectively use Reporting/Dashboard tools, Website Optimization tools, Retargeting Ad tools, and SEO Management tools to better their clients' businesses. We'll talk specifics behind each category later in the report.

As we move into the second tier of most used tools, our numbers do drop precipitously, which is of concern, because many of the tools in this grouping tend to be important platforms to help move a client's business ahead in a smarter, more strategic way. These tools are tied, in part, to helping clients optimize their consumers' experiences.

57% of agencies use Data Visualization and Audience Analytics tools. Only 45% of agencies use Social Listening tools, and only 30% of agencies use Competitive Tracking tools.

And finally, three of the four least used tools by agencies are (one could argue) probably the most important tools agencies should be using, as they line up with the specific needs cited by marketers as of greatest concern.

Unfortunately, only 17% of agencies are using Cross-Channel Measurement & Attribution tools, 14% Predictive Modeling tools, 13% Cross-Channel Audience Identification tools, and 5% Fraud Tracking & Management tools.

The following provides a complete look at all 12 marketing technology tools agencies use to support their clients' marketing activities - and the percent of agencies in our survey that are currently engaged in using them.

Chapter 6 I What Marketing Technology Platforms Agencies Are Using Most

Technology Tool	% of Agencies Using Platform
Reporting/Dashboarding tools	**78%**
Website Optimization tools	**71%**
Retargeting Ad tools	**69%**
SEO Management Tools	**63%**
Data Visualization tools	**57%**
Audience Analytics tools	**57%**
Social Listening Software tools	**45%**
Competitive Tracking tools	**30%**
Cross-Channel Measurement & Attribution tools	**17%**
Predictive Modeling tools	**14%**
Cross-Channel Audience Identification tools	**13%**
Fraud Tracking & Management tools	**5%**

Chapter 7 I The Marketing Technology Tools Marketing Agencies Use to Help Their Clients - Specific Tools

We are now going to take a walk through each marketing technology tool – presented from those most used, to those least used.

We'll recap the usage results, share the list of tools marketing agencies use, and then highlight any of those tools that any given agency particularly likes (rating them "Very Satisfied") or dislikes (rating them either "Dissatisfied" or "Very Dissatisfied").

We have hot linked each of the technology platforms mentioned to make it easy for you to connect with the platform's site and learn more about it.

Again, we hope this proves helpful in your efforts to better your agency offering.

Reporting/Dashboarding Tools

Does your agency use reporting/dashboarding tools to support your client's business?

Yes	78%
No	17%
Don't Know	5%

0%   10%   20%   30%   40%   50%   60%   70%

78% of all agencies surveyed use Reporting/Dashboarding tools to support their client's business.

Platforms that received higher satisfaction ratings among agencies were Google Data Studio, Hubspot, and Tableau.

Platforms that received lower ratings by agencies were DashThis, Klipfolio, and Excel.

The following is a list of all Reporting/Dashboarding tools mentioned, and each are linked to their respective websites:

DashThis	Microsoft BI	Google Data Studio
HubSpot	PowerPoint	SCORO
Klipfolio	Ninjacat	Agility
Swydo	Tapclicks	Excel
Tableau	Databox	

Website Optimization Tools

Does your agency use website optimization tools to support your client's business?

Yes	71%
No	21%
Don't Know	8%

0%   10%   20%   30%   40%   50%   60%   70%

71% of all agencies surveyed use a Website Optimization tool to support their client's business.

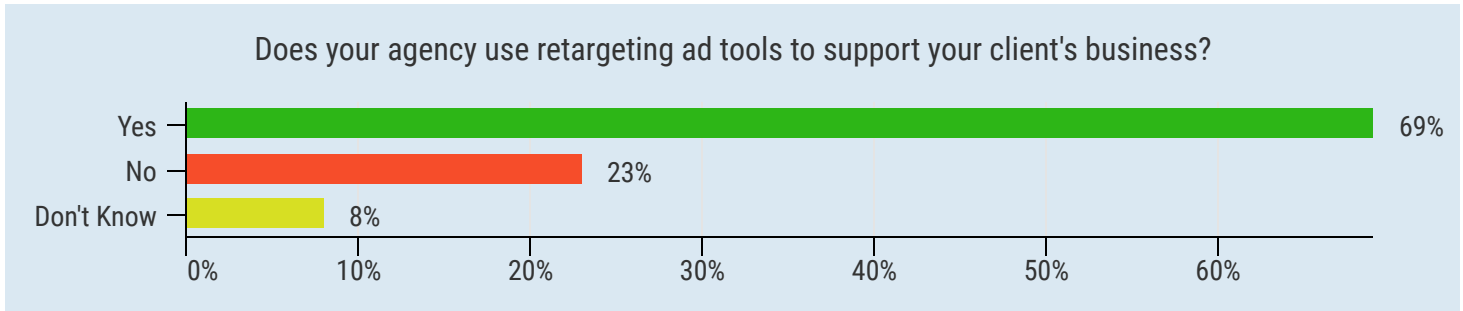Platforms that received higher satisfaction ratings among agencies were Ahrefs, SEMrush, Hotjar, and Google Optimize.

There were no ratings of dissatisfaction for any of the Website Optimization tools mentioned by agencies.

The following is a list of all Website Optimization platforms mentioned, and each are linked to their respective websites:

Ahrefs	Google Analytics	SEMrush
Hotjar	The Hoth	FunctionPoint
Mangools	Screaming Frog	Google Optimize
Optimizely	Crazy Egg	Pagespeed Insights

GT Metrix	Supermetrics

Retargeting Ad Tools

Does your agency use retargeting ad tools to support your client's business?

Yes	69%
No	23%
Don't Know	8%

0%   10%   20%   30%   40%   50%   60%

69% of all agencies surveyed use Retargeting Ad tools to support their client's business.

Platforms that received higher satisfaction ratings among agencies were Stack Adapt, Display Video 360, and SharpSpring.
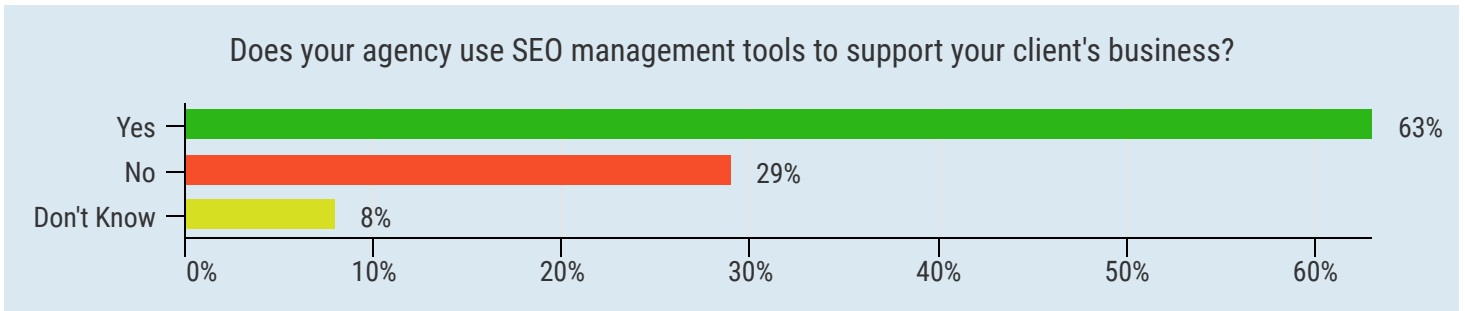
None of the platforms mentioned by agencies were viewed negatively. All were neutral-to-positive.

The following is a list of all Retargeting Ad platforms mentioned, and each are linked to their respective websites:

Stack Adapt	Display Video 360	Google
Townsquare	Basis	SharpSpring

Simplify	Perfect Audience

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SEO Management Tools

Does your agency use SEO management tools to support your client's business?

Yes	63%
No	29%
Don't Know	8%

0% 10% 20% 30% 40% 50% 60%

63% of agencies surveyed use an SEO Management tool to support their client's business.

Platforms that received higher satisfaction ratings among agencies were Ahrefs, SEMrush, and SEO Quake.
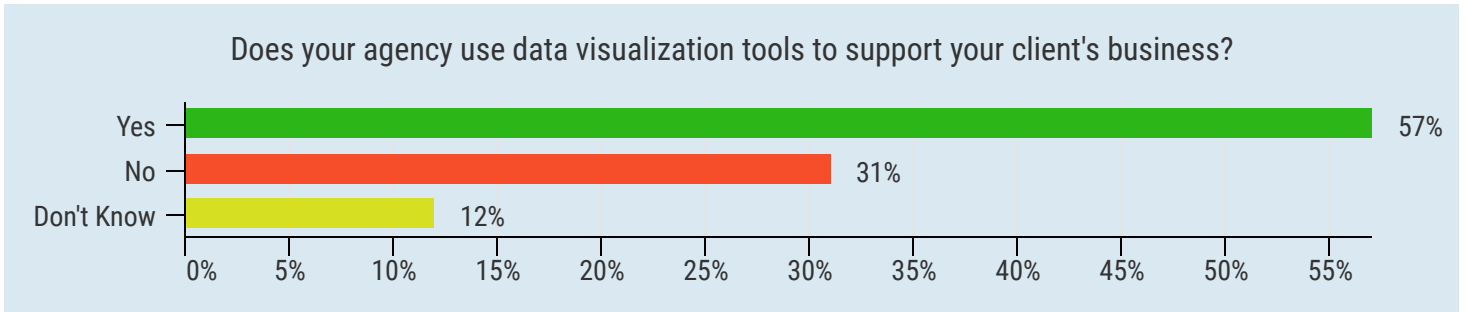
None of the platforms mentioned by agencies were viewed negatively. All were neutral-to-positive.

The following is a list of all of the SEO Management tools mentioned, and each are linked to their respective websites:

Yoast	Ahrefs	The Hoth
Hubspot	Ubersuggest	Screaming Frog
SEMrush	SEO Quake	MOZ
SpyFu	Google Analytics	

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Data Visualization Tools

Does your agency use data visualization tools to support your client's business?

Yes	57%
No	31%
Don't Know	12%

0%   5%   10%   15%   20%   25%   30%   35%   40%   45%   50%   55%

57% of all agencies surveyed use Data Visualization tools to support their client's business.

Platforms that received higher satisfaction ratings among agencies were Google Data Studio, Tableau, HubSpot, and Databox.
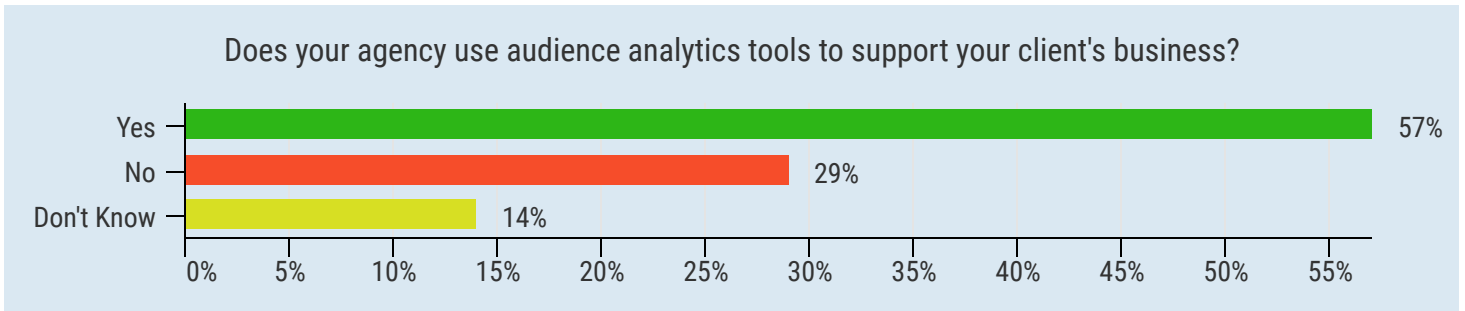
Platforms that received lower ratings by agencies were DashThis, Klipfolio, and "rudimentary tools like Excel".

The following is a list of all of the Data Visualization tools mentioned, and each are linked to their respective websites:

Databox	DashThis	Google Analytics
Microsoft BI	Tableau	Google Data Studio
SEMrush	Buffer	Domo
Klipfolio	Swydo	Funnel
	Tap Clicks	

Audience Analytics Tools

Does your agency use audience analytics tools to support your client's business?

Yes	57%
No	29%
Don't Know	14%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55%

57% of all agencies surveyed use Audience Analytics tools to support their client's business.

There were just two tools that agencies stated they were most satisfied with, and they were Google Analytics and HubSpot.
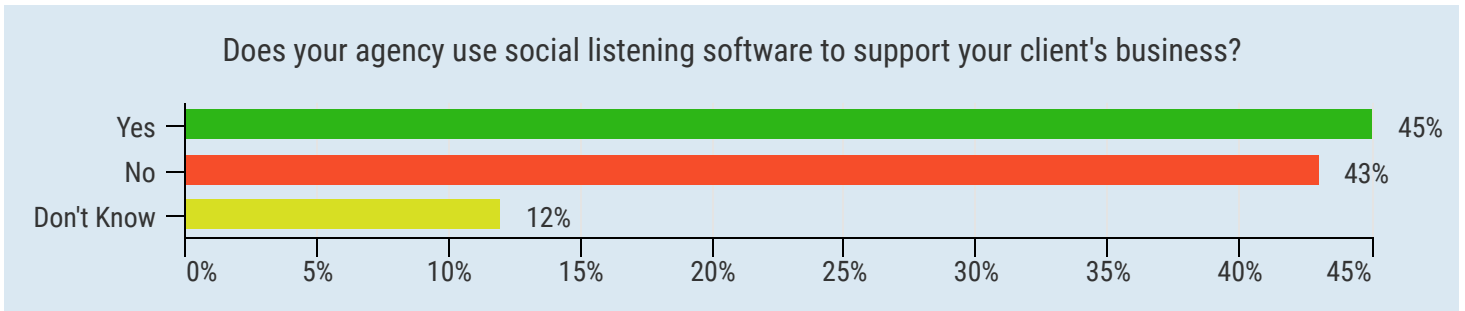
There were no mentions of dissatisfaction among agencies relative to the tools they were using.

The following is a list of all of the Audience Analytics tools mentioned, and each are linked to their respective websites:

Sprout Social	Melt Water	Alliai
Google Analytics	SharpSpring	HubSpot
	Helixa	

Social Listening Software Tools

Does your agency use social listening software to support your client's business?

Yes	45%
No	43%
Don't Know	12%

0%   5%   10%   15%   20%   25%   30%   35%   40%   45%

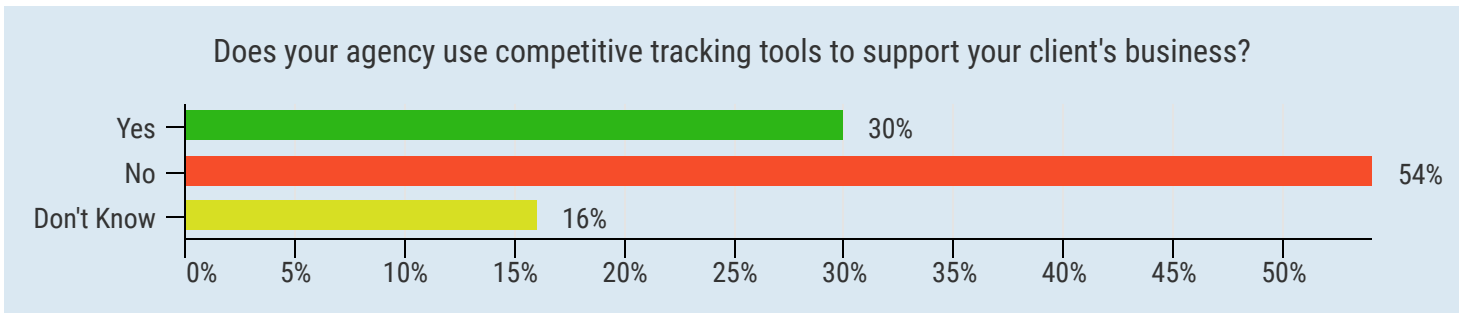45% of all agencies surveyed stated that they use Social Listening Software tools to support their client's business.

None of the platforms mentioned were rated by any agencies as either "Very Satisfied" or "Dissatisfied/Very Dissatisfied". All were either rated "Satisfied" or "Neither Satisfied nor Dissatisfied".

The following is a list of all of the Social Listening Software tools mentioned, and each are linked to their respective websites:

Sprout Social	Radian 6	Hootsuite
Brandwatch	CoSchedule	Meltwater
	HubSpot	

Competitive Tracking Tools

Does your agency use competitive tracking tools to support your client's business?

Yes	30%
No	54%
Don't Know	16%

(Chart x-axis: 0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%)

Only 30% of all agencies surveyed use Competitive Tracking tools to support their client's business.

Two of the platforms were mentioned as "Very Satisfied": Spyfu and Media Radar.

No platforms received a "Dissatisfied" or "Very Dissatisfied" rating.

The following is a list of all of the Competitive Tracking tools mentioned, and each are linked to their respective websites:
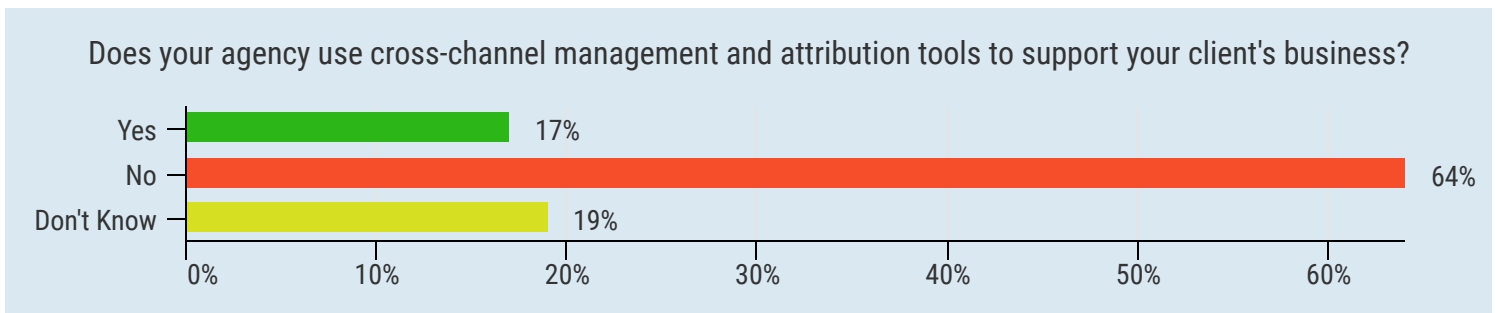
Kantar	Spyfu	Media Radar
Similarweb	SEMrush	HubSpot

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Cross-Channel Measurement and Attribution Tools

Does your agency use cross-channel management and attribution tools to support your client's business?

Yes	17%
No	64%
Don't Know	19%

0%   10%   20%   30%   40%   50%   60%

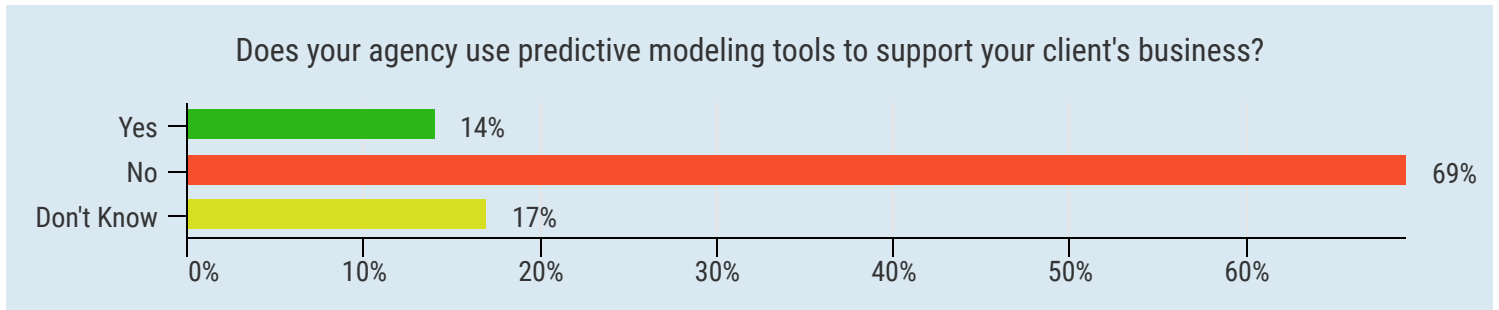17% of all agencies surveyed use Cross-Channel Measurement and Attribution tools to support their client's business.

None of the platforms mentioned rated very high or low on satisfaction. All were neutral to "Satisfied".

The following is a list of all of the Cross-Channel Measurement and Attribution tools mentioned, and each are linked to their respective websites:

Alliai	**Agility**	**Google Analytics**
Critical Mention	**Google Data Studio**	**HubSpot**
	Sendible	

Predictive Modeling Tools

Does your agency use predictive modeling tools to support your client's business?

Yes	14%
No	69%
Don't Know	17%

0%   10%   20%   30%   40%   50%   60%

14% of all agencies surveyed use Predictive Modeling tools to support their client's business.
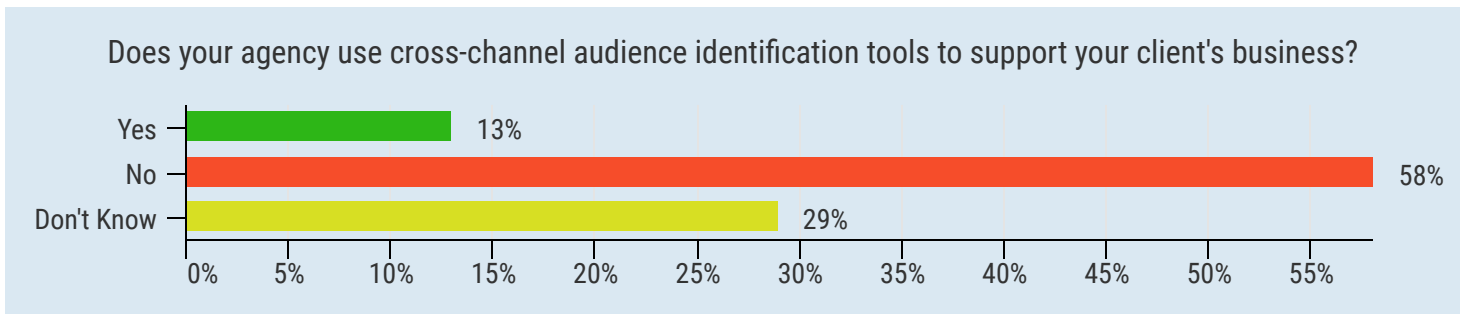
None of the platforms mentioned rated very high or low on satisfaction. All were neutral to "Satisfied".

The following is a list of all of the Predictive Modeling tools mentioned, and each are linked to their respective websites:

A/B Testing	Proprietary Excel worksheets	Proprietary solutions we've built

In-House	Tableau

Cross-Channel Audience Identification Tools

Does your agency use cross-channel audience identification tools to support your client's business?

Yes	13%
No	58%
Don't Know	29%

0%   5%   10%   15%   20%   25%   30%   35%   40%   45%   50%   55%

13% of all agencies surveyed use Cross-Channel Audience Identification tools to support their client's business.

None of the platforms mentioned rated very high or low on satisfaction. All were neutral to "Satisfied".

The following is a list of all of the Cross-Channel Audience Identification tools mentioned, and each are linked to their respective websites:
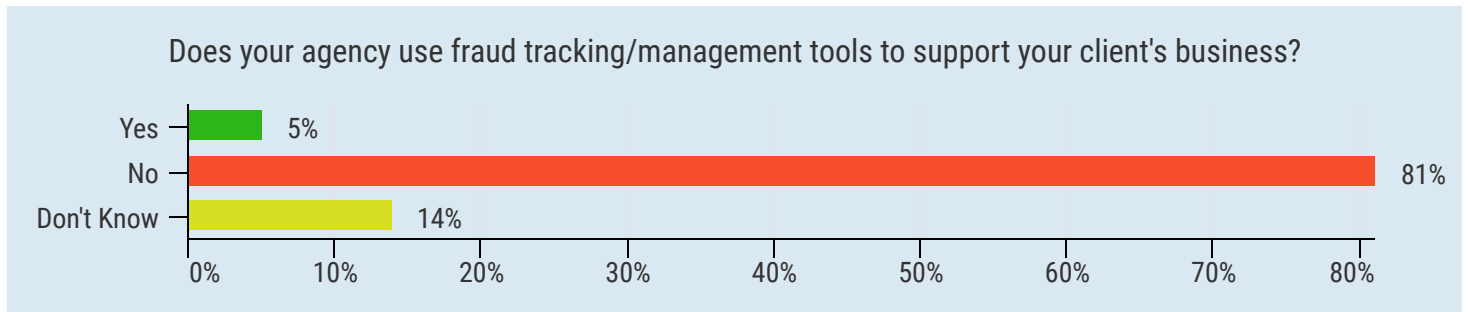
SharpSpring	Google	HubSpot

Chapter 7 |

Fraud Tracking/Management Tools

Does your agency use fraud tracking/management tools to support your client's business?

Yes	5%
No	81%
Don't Know	14%

0% 10% 20% 30% 40% 50% 60% 70% 80%

Only 5% of all agencies surveyed use Fraud Tracking/Management tools to support their client's business.

There was only one mention of a tool used: "Native within some Google products"

Chapter 8 | The Technology Tools Marketing Agencies Use In Agency New Business

We asked agencies questions about 7 different technology tool categories they use to support their own agency new business efforts.

We wanted to get an understanding of the breadth of usage among different platform categories (comparatively) and provide agencies with a list of specific tools they could consider if: a) they are not using anything to support their new business efforts; or b) they are looking for something different and better to use.

Those platforms most used by agencies aren't surprising – they are CRM tools and Project Management tools. While most agencies do actually use Project Management tools, we tend to be suspect on CRM usage numbers, as having and using (or the degree to which they are using) are two different things.

78% and 74% of agencies respectively use CRM tools and Project Management tools to better their own business.

About half of agencies use Marketing Automation tools (58%) to support their new business efforts. By "marketing automation" we do hope that most agencies mean they are using some kind of platform like SharpSpring or Zoho to manage outreach on a broader scale – versus literally automating outreach to prospects.

We believe that human touch (and not machine touch) is more effective in the world of agency new business. While marketing automation might be good in very specific situations – like we use it to send promotional codes to people that show interest in our RSW/Lists business – using it to "personalize" messaging to prospects about an agency's business doesn't work nearly as well.

As we move to the last set of agency new business technology tools, we see participation among agencies fall off further – which is concerning as most of these are tools an agency needs to operate effectively in the agency new business space.

Without sound list building tools, the right intelligence and insight gathering tools, and the right research tools, an agency new business program is likely to fall flat.

While agencies don't have to invest heavily in expensive platforms like WINMO or Zoominfo to make an agency new business program work, they should dedicate the right number of internal resources to organically pull this information together.

At RSW/US we invest in all these tools – and have developed our own proprietary tool for gathering early access insights into the mind of the marketer to help better the efforts of each of our client programs.

Chapter 8 I The Marketing Technology Tools Marketing Agencies Use In Agency New Business

The following provides a complete look at all 7 agency new business technology tools agencies use to support their selling efforts - and the percent of agencies in our survey that are currently engaged in using them.

Technology Tool	% of Agencies Using Platform
CRM tools	**78%**
Project Management tools	**74%**
Marketing Automation tools	**58%**
List Building Platform tools	**25%**
Prospect Intelligence Gathering tools	**22%**
Target Audience Research tools	**19%**
Marketing Intelligence tools	**19%**

Chapter 9 | Agency New Business Technology Tools - Specific Tools Used

We are now going to take a walk through each agency new business technology tool – presented from those most used to those least used.
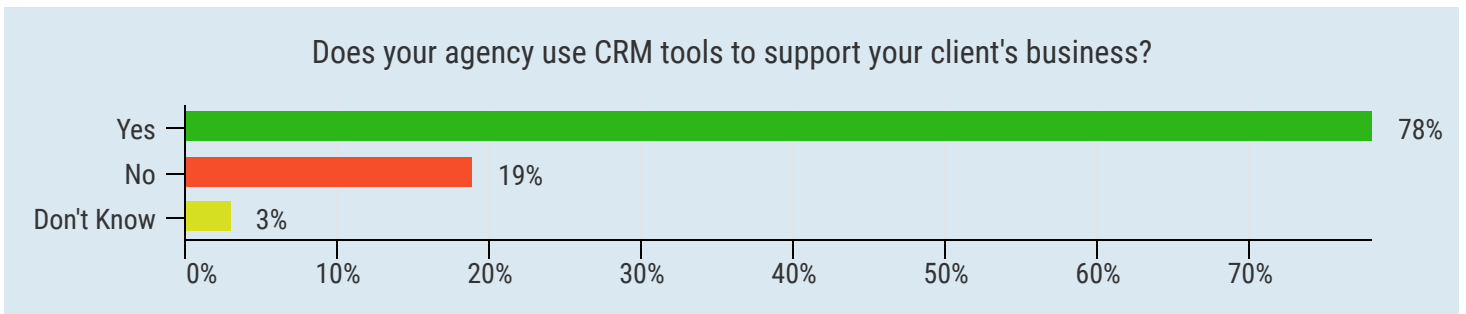
We'll recap the "usage" results, share the list of tools marketing agencies are using, and highlight any of those tools that any given agency particularly likes (rating them "Very Satisfied") or dislikes (rating them either "Dissatisfied" or "Very Dissatisfied").

We have hot linked each of the technology platforms mentioned to make it easy for you to connect with the platform and learn more about it.

Again, we hope this proves helpful to you in your efforts to better your agency new business program.

Chapter 9 |

CRM Tools

Does your agency use CRM tools to support your client's business?

Yes — 78%
No — 19%
Don't Know — 3%

0%   10%   20%   30%   40%   50%   60%   70%

78% of all agencies surveyed use a CRM to support their own new business efforts.

Platforms that received higher satisfaction ratings among agencies were SharpSpring and Hubspot.
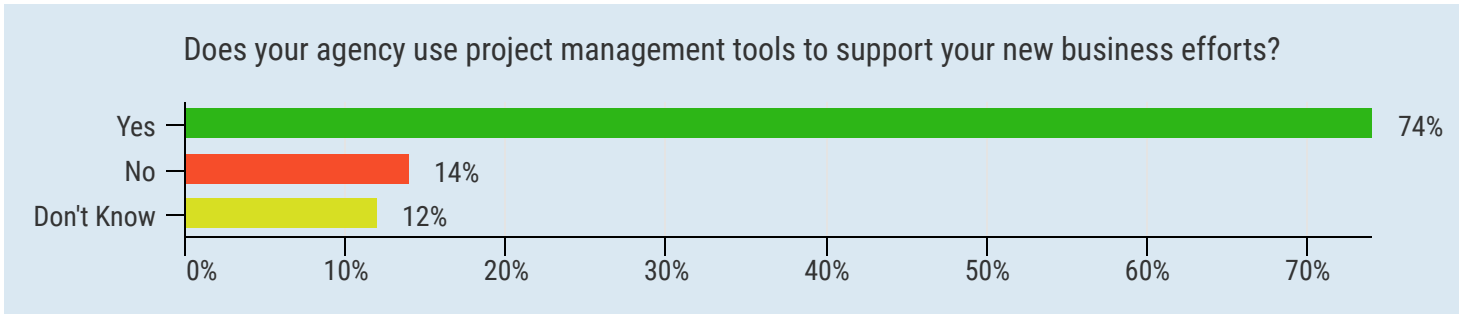
There were no platforms that received lower satisfaction ratings from agencies.

The following is a list of all CRM platforms mentioned, and each are linked to their respective websites:

SharpSpring	HubSpot	RSW
SCORO	Nutshell	SoPro
Nimble	Keap	Workamajig

Agency New Business Technology Tools - Specific Tools Used

Project Management Platform Tools

Does your agency use project management tools to support your new business efforts?

Yes	74%
No	14%
Don't Know	12%

0% 10% 20% 30% 40% 50% 60% 70%

74% of all agencies surveyed use a Project Management Platform to support their own new business efforts.

Platforms that received higher satisfaction ratings among agencies were Basecamp, FunctionFox, Workamajig, Workfront, Teamwork, and Daylite.
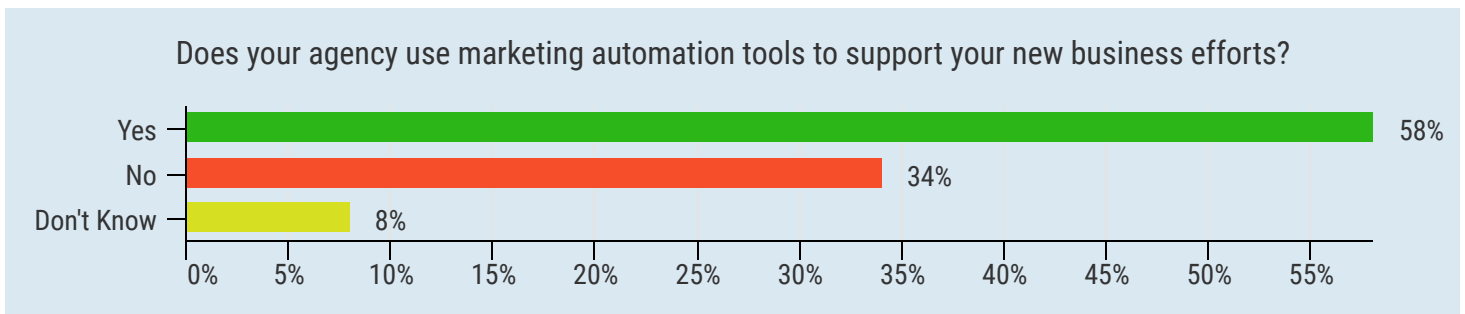
There were no platforms that received lower satisfaction ratings from agencies.

The following is a list of all Project Management platforms mentioned, and each are linked to their respective websites:

Basecamp	**Clients and Profits**	**FunctionFox**
Workamajig	**SCORO**	**Workfront**
Teamwork	**ProWorkflow**	**Asana**
Streamtime	**Daylite**	**Monday.com**

SharpSpring	**Trello**

Chapter 9 |

Marketing Automation Tools

Does your agency use marketing automation tools to support your new business efforts?

58% of all agencies surveyed use a Marketing Automation tool to support their new business efforts.

Platforms that received higher satisfaction ratings among agencies were SharpSpring, Hubspot, and Keap.
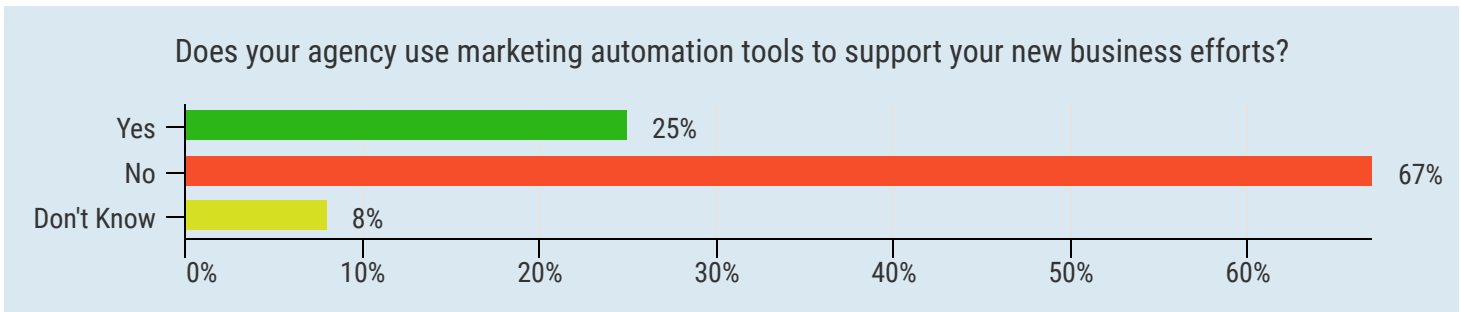
There were no platforms that received lower satisfaction ratings from agencies.

The following is a list of all of the Marketing Automation tools mentioned, and each are linked to their respective websites:

SharpSpring	HubSpot	MailChimp
SF Marketing Cloud	Keap	Marketo
	ActiveCampaign	

Marketing Technology Tools Used In New Business - Specific Tools Used

List Building Platform Tools

Does your agency use marketing automation tools to support your new business efforts?

Yes	25%
No	67%
Don't Know	8%

0% 10% 20% 30% 40% 50% 60%

25% of all agencies surveyed use List Building tools to support their own new business efforts.

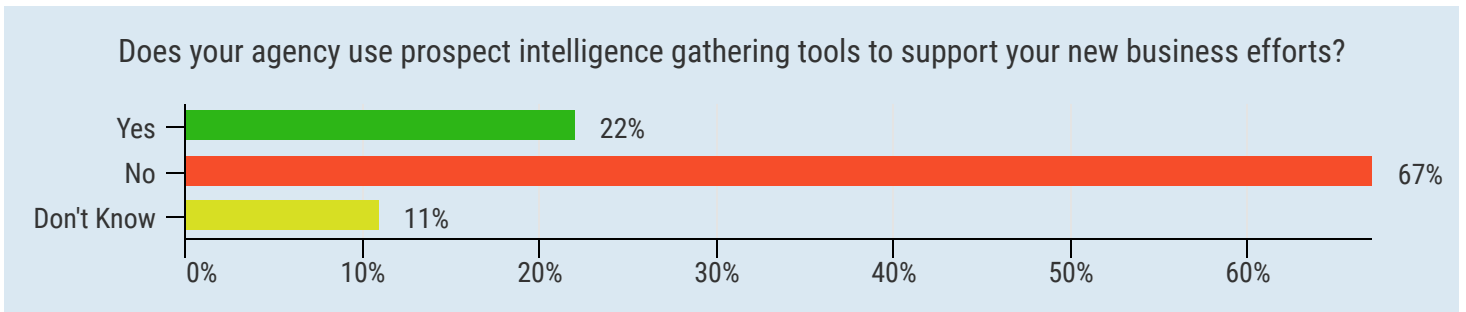There were two "Very Satisfied" mentions. One was "developed internally" and the other was Seamless.AI.

No platforms received a "Dissatisfied" or "Very Dissatisfied" rating.

The following is a list of all of the List Building tools mentioned, and each are linked to their respective websites:

"Developed internally"	HubSpot	LinkedIn
LinkedIn Sales Navigator	**Seamless.AI**	**ClickedIn**

Prospect Intelligence Gathering Tools

Does your agency use prospect intelligence gathering tools to support your new business efforts?

Yes	22%
No	67%
Don't Know	11%

0%   10%   20%   30%   40%   50%   60%

Only 22% of all agencies surveyed use Prospect Intelligence Gathering tools to support their own new business efforts.

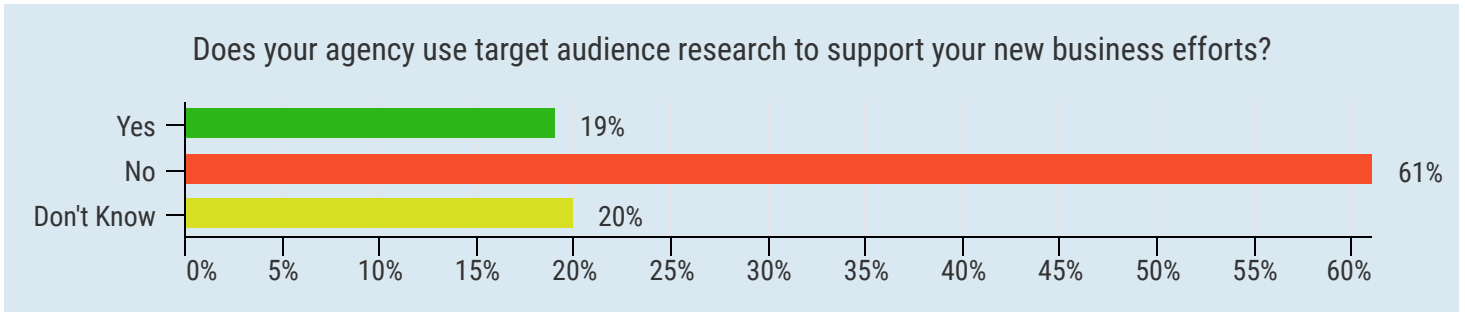There were two "Very Satisfied" mentions: Hubspot and Seamless.AI.

No platforms received a "Dissatisfied" or "Very Dissatisfied" rating.

The following is a list of all of the Prospect Intelligence Gathering tools mentioned, and each are linked to their respective websites:

HubSpot	Seamless.AI	Zoominfo
Wonder	Leadfeeder	Bombora
	Winmo	

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Target Audience Research Tools

Does your agency use target audience research to support your new business efforts?

Yes — 19%
No — 61%
Don't Know — 20%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60%

Only 19% of all agencies surveyed use Target Audience Research tools to support their own new business efforts.

There was one platformed mentioned by agencies, where the agency stated they were "Very Satisfied" (Alchemer).
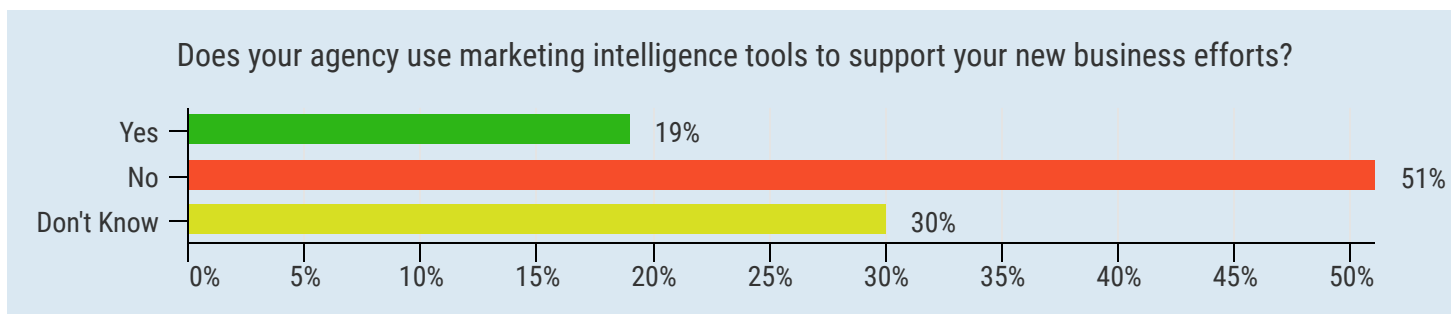
No platforms received a "Dissatisfied" or "Very Dissatisfied" rating.

The following is a list of all of the Target Audience Research tools mentioned, and each are linked to their respective websites:

Dynata	Zoominfo	Helixa
LinkedIn	Alchemer	HubSpot
Seamless.AI	Leadfeeder	Wonder
Bombora	Winmo	

Marketing Intelligence Tools

Does your agency use marketing intelligence tools to support your new business efforts?

Yes	19%
No	51%
Don't Know	30%

0%   5%   10%   15%   20%   25%   30%   35%   40%   45%   50%

19% of all agencies surveyed use Marketing Intelligence tools to support their client's business.

None of the platforms mentioned rated very high or low on satisfaction. All were neutral to "Satisfied".

The following is a list of all of the Marketing Intelligence tools mentioned, and each are linked to their respective websites:

eMarketer	Similarweb	Competiscan

HubSpot

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Chapter 10 I Conclusion & Next Steps

Without a doubt, our marketing and advertising world is getting more and more complex by the day.

And without a doubt, the need for marketing agencies to add value beyond the scope of what they produce for their clients is growing by the day.

Your marketing clients are being put under increasing pressure to deliver returns on their investments, faster than ever before. And that investment includes you, their agency.

So while we would never expect any agency to be able to wholesale change the way they manage their clients' worlds - or their own new business world - overnight, keeping technology advantages top-of-mind is key to the long-term viability of an agency.

As you think about what's next for your firm, think about the categories or platforms we presented, the challenges faced by marketers and how that compares to your clients, and begin to prioritize where you want to focus your technology building going forward.

We've given you the names of the platforms/tools. We've given you easy access to their sites. Now have your team give them a look and try on a couple to see what fits best functionally and fiscally for your firm.

Don't sit around and do nothing.

Start thinking about what the future holds and recognize how quickly things have and will continue to change...and start making a difference today.

RSW/US

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