MartechTribe

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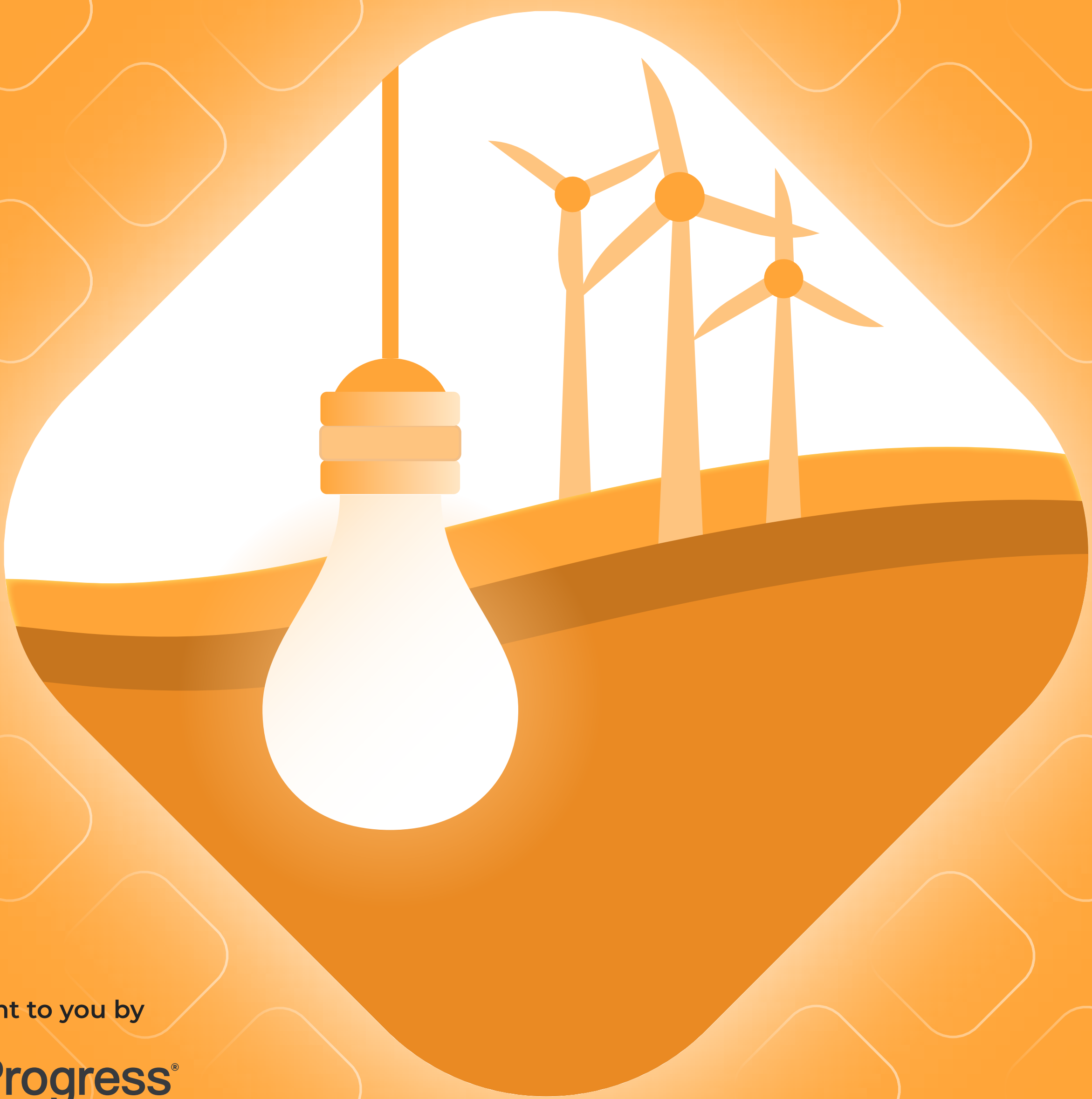
The State of Martech 2025 in Manufacturing & Utilities

Three Big Bets to Future-Proof Your Business

By Frans Riemersma, MartechTribe



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Foreword

On the surface, it might feel counterintuitive to rank human-centricity at the top of the priority list for Manufacturing and Utility organizations, but humans are the ones who buy, consume, or are impacted by the systems or technology.

As you'll read in this report, the most successful organizations understand this at a very deep level and are leveraging technology to ensure that the humans they serve remain their north star.

But the technology they are leveraging today looks different than it did in recent years. It is evolving at a breakneck speed. The proliferation and democratization of AI has created an inflection point that is having a transformative effect on every facet of our lives – including the way we engage with organizations in the Manufacturing and Utilities sector.

By embracing these advancements and aligning Martech investments with customer behavior shifts, Manufacturing and Utility organizations can exceed customer expectations, delivering personalized and secure services that foster exceptional experiences.

The State of Martech 2025 in Manufacturing and Utilities is rooted in research and provides recommendations for creating human-centric, actionable go-to-market technology strategies. We hope you find these insights valuable.

Sara Faatz
Director Technology
Community Relations
Digital Experience Team at Progress

Introduction

Customers expect more than just a product. They also expect service. And for that, you need to establish a seamless relationship. But manufacturing systems don't talk to each other, content is buried in silos, and the CRM doesn't reflect what's happening in real-life. The days of isolated operations, where production, maintenance, supply chain, and customer-facing functions worked independently, are giving way to a new era of digital integration. Those who bridge the gaps first are pulling ahead.

And here's why this matters: When a customer's production line is at risk, waiting 48 hours for support isn't an option. When they need a part, they want more than a catalog. They want a tailored service based on their exact specs. And when they switch channels, they expect the conversation to follow them. That's not a luxury anymore. It's their new baseline.

Our research shows that outperformers in manufacturing and utilities don't wait for disruption, they pre-empt it. They invest in Martech capabilities that connect operations with customer expectations, turning service, personalization, and engagement into competitive advantages. Those who don't act risk losing not just customers but relevance in a digitized, service-driven market.

What are Manufacturing & Utilities Organizations?

Manufacturer and utility organizations include companies that produce physical goods at scale or provide essential infrastructure services. This category spans industrial manufacturers (e.g., 3M, Bosch, Siemens, Bruker) and utility providers (e.g., Veolia, E.ON, Engie) across sectors such as energy, water, waste management, and heavy industry.

They typically serve B2B customers, governments, and consumers and increasingly use marketing, sales, and service technology to manage complex buyer journeys, support partner ecosystems, and communicate around sustainability, innovation, and reliability. Digital transformation and operational efficiency are key drivers, often influencing how these organizations engage with stakeholders across long sales cycles and highly regulated environments.

A New Metric to Evaluate Martech

Based on five years of data science research, we introduced a new and meaningful metric for evaluating Martech: Stack Value. A "stack" refers to the combination of tools a company, or a specific business unit, uses to engage customers across service, marketing, content, and analytics.

Our research is grounded in over a decade of analysis: 1,500+ real-world Martech stacks, 14,000+ tools available on MartechMap.com, and 4,500+ curated requirements from our independent proprietary data warehouse, spanning 16+ industries and 30+ countries.

These data points are mapped against capability maturity benchmarks based on the Capability Maturity Model (CMMI) from the Carnegie Mellon University.[1]

One of our key insights is that higher maturity isn't always better. Especially in Red Martech, we found that chasing maturity for its own sake can add cost without improving outcomes. By contrast, industry outperformers show a distinct pattern, investing in the right capabilities at the right time, which correlates with higher revenue-per-employee ratios.

How Martech Drives Value

The Stack Value methodology helps organizations quickly see in a single chart where to invest (Green Martech), where to evolve cautiously (Amber Martech), and where to rationalize tools that add cost without great customer value (Red Martech), all tailored to their specific vertical. This empowers teams to make decisions that directly drive customer engagement and business performance.

Consider CMS: In the Nonprofit sector, it's categorized as Green Martech, delivering high value at an average maturity of 2.7. In BFSI, it's Amber Martech—valuable for the right use cases when kept at a moderate maturity level of 2.2. In Education, CMS is seen as Red Martech, requiring the right expertise to reach a high maturity of 3.0 to deliver foundational impact.

For this industry report, we combined our industry benchmarks with how leading analyst firms forecast the future of Travel & Transportation. We identified the most compelling industry shift and the impact on their go-to-market models and Martech investments. This report summarizes that evolution in three big bets so you can start preparing for the future today.

[1] Wikipedia - CMMI Model

The Shift From Standard Products to Tailored Service Models

Manufacturers are undergoing a fundamental transformation driven by the need for interconnected digital ecosystems. The days of isolated operations, where production, maintenance, and supply chain functions worked independently, are giving way to a new era of digital integration. This shift is essential: Deloitte's Digital Maturity Index found that 98% of surveyed manufacturers have begun their digital transformation journey, compared to just 78% in 2019.

- From 78% to 98% of manufacturers initiated digital transformation between 2019 and 2023.[2]
- From 60% of manufacturers using predictive analytics in 2022 to 85% projected by 2025.[3]
- From 50% of manufacturers offering personalized products in 2022 to 75% projected by 2025.[4]
- From 40% of manufacturers with omnichannel strategies in 2022 to 70% projected by 2025.[5]

A Real-World Example
Consider the transformation taking place in the automotive industry. Jaguar Land Rover has converted traditional factories into digital manufacturing hubs, integrating over 750 robots, laser alignment technology, and cloud-based systems. This shift not only improves efficiency but also enhances the customer experience. Buyers receive more tailored vehicles, faster production timelines, and higher quality standards.

[2] Deloitte - "2025 Manufacturing Industry Outlook"
[3] Deloitte Insights - "The Future of the Digital CX in Industrial Manufacturing", 2024
[4] McKinsey & Company - "The Future of Personalization", 2024
[5] Forrester Research - "Omnichannel Strategies in Manufacturing", 2024

How Tailored Products & Services Are Rewriting Go-to-Market Strategy

The rise of interconnected platforms, predictive technologies, and customer expectations is reshaping how manufacturing and utility companies approach the market. Historically, GTM strategies revolved around product catalogs, long sales cycles, and fragmented service models. That model no longer holds.

To compete today, organizations must align their GTM strategies with how customers expect to buy, configure, and interact across the full lifecycle, from interest to service. That evolution comes down to three priorities:

Big Bet #1: Develop Proactive Services Management.
Customers want resolution before escalation. They expect proactive support, not reactive ticketing.

Big Bet #2: Add Tailored Solutions to the Portfolio.
Customers want solutions, not SKUs. They expect offerings tailored to their specific needs.

Big Bet #3: Move to a More Integrated Omnichannel Experience.
Customers want one brand, not many silos. They expect consistent messaging and seamless transitions across every channel.

Outperformers are already investing in Martech stacks that enable these capabilities, not by adding more tools but by aligning them to real GTM needs. The opportunity now is to follow their lead and unlock competitive advantage where it matters most: in the end-to-end experience.

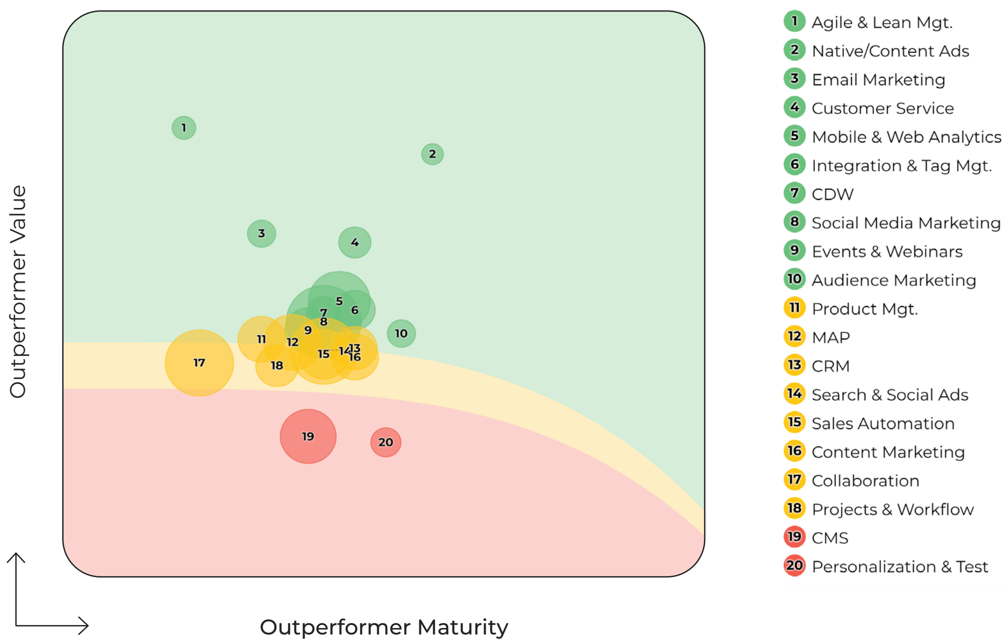
Why Act Now on Technology & AI?

Manufacturing companies use a variety of marketing technologies with different levels of success. The quadrant below demonstrates which technologies are used and which ones contribute most to company value (left axis). The right axis shows how proficient (mature) manufacturers are to reap those benefits.

At the center of this transformation are content management systems (CMS) and digital experience platforms (DXP). These technologies enable manufacturers to manage customer interactions across multiple channels, create self-service portals, and streamline product customization. As manufacturers embrace predictive maintenance, service-based revenue models, and AI-driven automation, CMS and DXP become critical tools for delivering seamless customer experiences.

These technologies ensure a seamless omnichannel experience and provide relevant and real-time engagement. The need to adapt is urgent, as for years, these technologies have operated in silos, failing to deliver a cohesive learning experience. No one role owns the stack with a cross-organizational mandate, and that lack of ownership is reason enough to act now on technology.

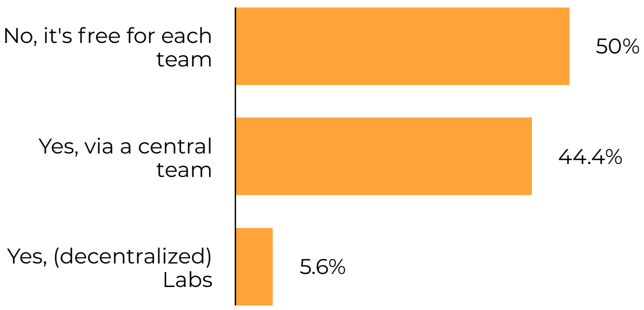
Stack Value Quadrant - Travel & Transportation Organizations



Note:
Bubble size = prevalence in Outperformer Stacks

But that's not all. There's also Generative AI. A measly 50% of the manufacturers state they have an AI policy in place. The ones that do have an AI policy in place do that via a central team.

Do you have a GenAI policy?[6]

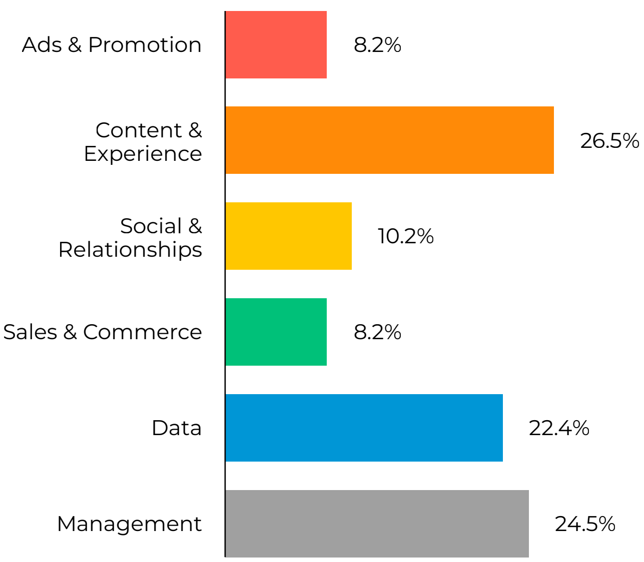


Manufacturing companies use GenAI mostly in content scenarios, such as brainstorming, creating, and producing copy, but also for testing content results.

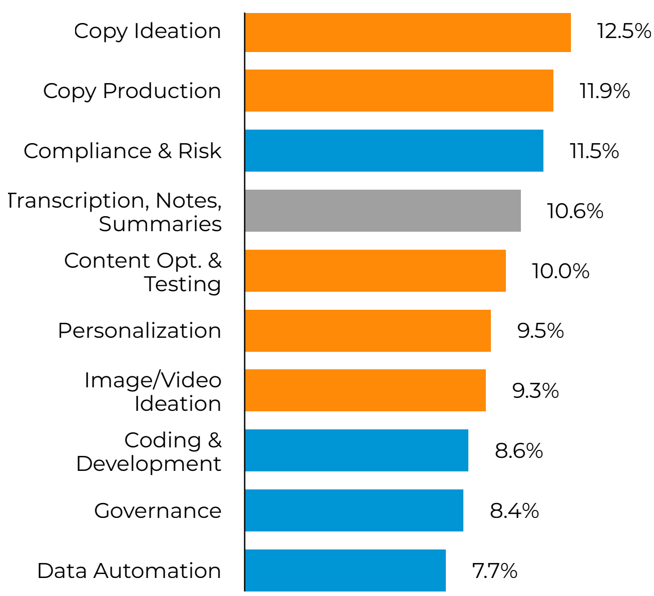
What is remarkable is the use of GenAI for *Personalization* use cases. Standard *Personalization & Testing* solutions are not yet widely successful among outperformers, as shown by their amber Stack Value rating (see *Big Bet #3*). GenAI, however, is emerging as a workaround offering more promising results in personalization scenarios, particularly where traditional tools fall short.

The adoption of GenAI use cases in managing internal processes (*management* bar) is mostly driven by T*ranscription*, *Notes*, & *Summaries* for internal meetings.
Data use cases are popular, especially for *Compliance & Risk* and *Governance* purposes, aligning with broader goals of corporate responsibility. GenAI is also supporting manufacturing companies with *Coding & Development* and *Data Automation*. These two use cases often work well in combination with personalization efforts and experiments across different platforms.

GenAI Adoption by (AIDARI) Category[7]



Top 10 GenAI Use Cases[8]



[6,7,8] Data source: 2024 GenAI Survey, chiefmartec & MartechTribe
[7,8] 49 recorded use cases (18 organizations responded)
Additional resources about AIDARI categories

The Three Big Bets

This report introduces three big strategic bets, each driven by technological advancements and evolving customer behavior and backed by research and proprietary data. These bets come with actionable go-to-market technology recommendations grounded in our unique Stack Value research.

1. **Develop Proactive Services Management**
   Shift from reactive support to predictive, data-driven service. By leveraging customer and machine signals, manufacturers can engage earlier, resolve issues faster, and build trust through proactive experiences.

2. **Add Tailored Solutions to the Portfolio**
   Evolve beyond generic product offerings by introducing personalized, configurable solutions. This requires automating customer journeys, structuring content delivery, and using agile methods to adapt quickly to changing demand.

3. **Move to a More Integrated Omnichannel Experience**
   Break down communication silos and ensure customers receive a consistent, seamless experience across channels. By aligning teams and activating integrated platforms, manufacturers can engage more effectively throughout the entire buying cycle.

	Big Bet 1	**Big Bet 2**	**Big Bet 3**
Shift	**FROM** Reactive Support **TO** Proactive Service	**FROM** Generic Offerings **TO** Tailored Solutions	**FROM** Siloed Channels **TO** Integrated Omnichannel Experience
Strategy	**Develop proactive services management**	**Add Tailored Solutions to the Portfolio**	**Move to a more integrated omnichannel experience.**
Tactics	1. Connect audience signals to CDW 2. Use analytics to trigger service actions 3. Engage proactively via events and service tools	1. Automate personalized products using Product Management tools 2. Structure journeys in MAP through a CMS and content framework 3. Adapt fast using Agile product teams	1. Activate consistent content across channels 2. Align teams via shared platforms 3. Deliver account-specific engagement with automation
Technology	1. CDW, Audience Marketing, CRM 2. Integration & Tag Management, Customer Service, CDW 3. Events & Webinars, Customer Service, CRM	1. Product Management, CDW, CRM 2. MAP, CMS, Email Marketing 3. Agile & Lean Management, Projects & Workflow, Collaboration	1. CMS, Content Marketing, Video Marketing, Native/ Content Ads 2. Collaboration, Projects & Workflow, CMS 3. Sales Automation, MAP, Mobile & Web Analytics, Social Media Marketing, Search & Social Ads, Events & Webinars

#1 Develop Proactive Services Management

The Shift
Manufacturers are evolving from reactive support models to proactive service strategies. Traditionally, service began only after a problem occurred. Today's customers expect continuous uptime, predictive maintenance, and early issue resolution. This expectation is reinforced by the rise in digital transformation 98%[9] of manufacturers are now undertaking it, up from 78% in 2019 (Deloitte). Proactive service is no longer a value-add; it's a requirement.

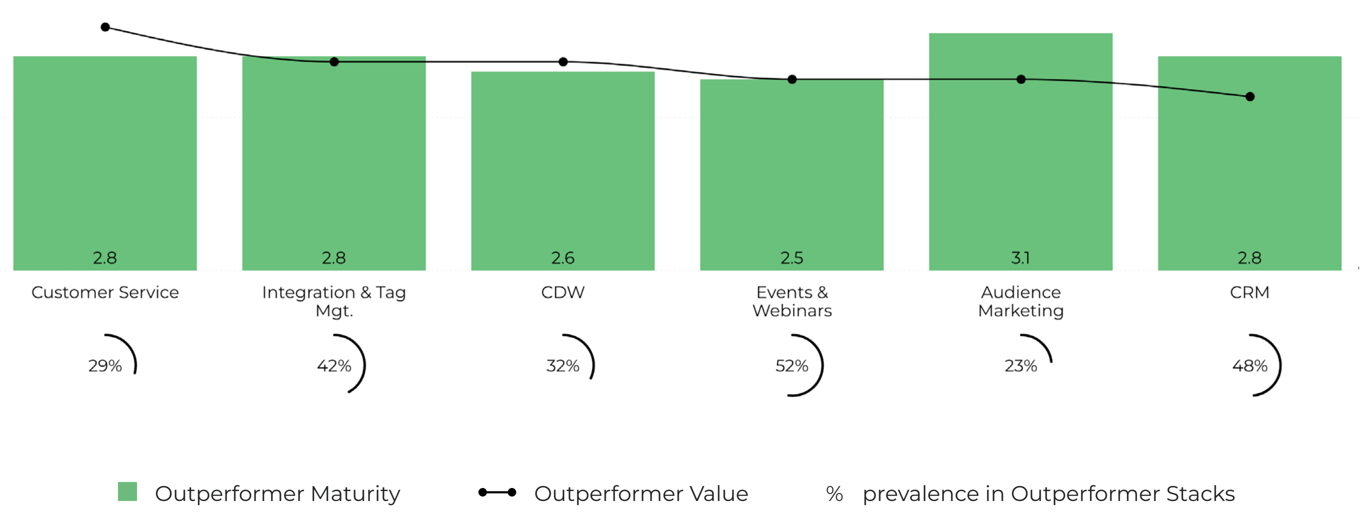
The Big Bet
Organizations must embed proactive service into the core of their customer engagement. The goal is to detect needs before the customer voices them, using data to anticipate problems and respond in real time, improving both satisfaction and operational efficiency.

Tactics
To enable this evolution, manufacturers should:

- Connect audience and product usage signals to a Customer Data Warehouse (CDW).
- Use analytics to trigger timely service interventions.
- Engage proactively via digital service channels and customer events.

Technology's Role
For this bet, Green Martech delivers increasing value as proficiency grows (capability maturity), based on our research.

Proactive Services Management-stack



[9] Deloitte - "2025 Manufacturing Industry Outlook"

Connect audience signals to CDW. At the heart of proactive service is understanding when and where needs arise. *Customer Data Warehouses* (CDWs) such as AWS, Snowflake, and Databricks store and analyze structured data from machines, service logs, and product usage. Combined with *Audience Marketing* platforms, which enrich customer profiles using behavioral data, and *CRM* systems for account-level insights, these tools help create a clearer picture of customer health before issues arise.

Use analytics to trigger service actions. To move from insights to actions, manufacturers rely on *Integration & Tag Management* platforms like Zapier or Make to ensure signal flow across systems. These platforms enable real-time analytics triggers for service workflows. *Customer Service* platforms then orchestrate responses, whether through automated tickets, alerts, or chat. Combined with *CDW* data, this stack enables faster and more accurate interventions.

Engage proactively via events and service tools. Digital service channels are critical for early engagement. *Events & Webinars* platforms like Zoom or MS Teams facilitate proactive customer check-ins, virtual diagnostics, or maintenance briefings. These interactions can be enriched by insights from *CRM* systems and routed through *Customer Service* platforms to ensure follow-up and context-aware support.

#2 Add Tailored Solutions to the Portfolio

The Shift

Customer expectations are shifting from one-size-fits-all offerings to hyper-relevant, tailored solutions. Buyers no longer want to be sold to, they want products that solve their unique problems. This move toward mass customization means that manufacturing organizations must offer configurable solutions rather than fixed SKUs. According to McKinsey, companies that excel at personalization generate 40%[10] more revenue than those that don't.

The Big Bet

The strategic response is to evolve the portfolio from generic products to modular, tailored solutions. This requires not just different products but also a rethinking of the digital journey, from awareness to purchase, with personalization at every stage.

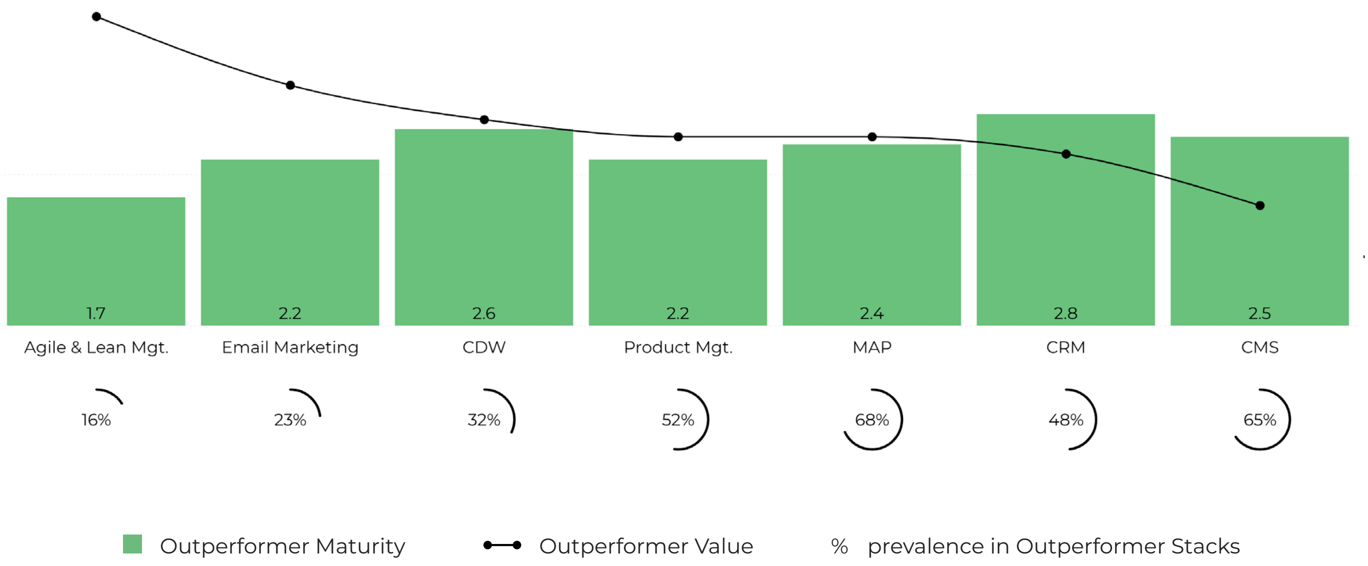
Tactics

- Automate personalized products using Product Management tools
- Structure journeys in MAP through a CMS and content framework
- Enable fast iteration and adaptation via Agile product teams.

Technology's Role

For this bet, Green Martech delivers increasing value as proficiency grows (capability maturity), based on our research.

Tailored Solutions for the Portfolio-stack



[10] McKinsey & Company - "The future of personalization", 2019

Automate personalized products using Product Management tools. To offer personalized products at scale, outperformers turn to *Product Management* platforms to design and manage configurable options. These tools integrate tightly with *CDW* systems and *CRM* platforms to pull in preferences, past purchases, and industry needs. Together, they support real-time customization and automated product recommendations that align with customer demands.

Structure journeys in MAP through a CMS and content framework. From awareness to conversion, the buyer journey must reflect personalization. *MAP* platforms handle email workflows and segmentation, while *CMS* systems deliver tailored web content and product visuals. Supporting this is *Email Marketing*, which facilitates one-to-one communication based on mapped product configurations or known needs, all orchestrated across a modular content architecture.

Adapt fast using Agile product teams. Agility matters when needs change rapidly. Outperformers use *Agile & Lean Management* platforms to manage sprints and test new configurations. These are often complemented by *Projects & Workflow* systems for coordination across departments. While *Collaboration* platforms (e.g., Trello, JIRA) are widely used, they tend to show lower impact, often better suited to support tasks than driving product evolution.

#3 Move to a More Integrated Omnichannel Experience

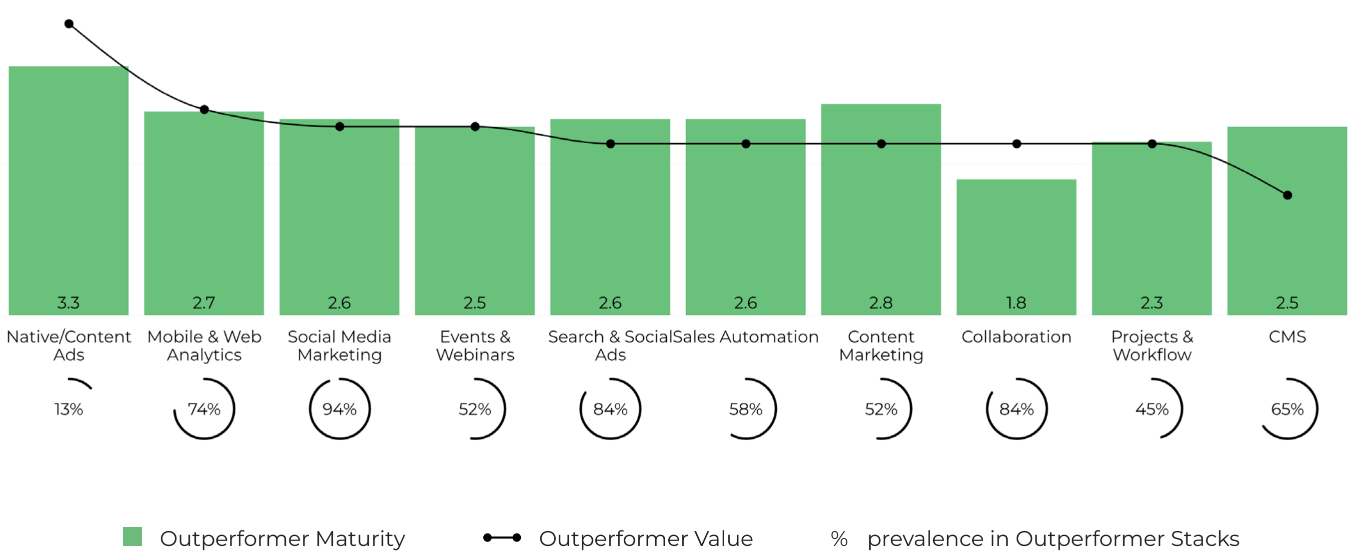
The Shift
With customized products and tailored services come more personalized communications. Manufacturers have historically operated through siloed communication channels, sales, service, events, and marketing often ran independently. But today's buyers expect seamless transitions across platforms and departments. Whether online, at a trade show, or on a service call, they expect a unified brand experience. Omnichannel is now the standard, not the exception.

The Big Bet
The response is to deliver a fully integrated omnichannel experience. This means consistent messaging, shared context, and smooth handoffs, regardless of where or how the customer interacts.

Tactics
- Activate consistent content across all channels (social, events, paid, direct).
- Align teams using shared planning and collaboration platforms.
- Deliver account-specific content through sales automation.

Technology's Role
For this bet, Green Martech delivers increasing value as proficiency grows (capability maturity), based on our research.

Integrated Omnichannel Experience Transition-stack



Activate consistent content across channels. A seamless omnichannel experience begins with consistent content delivery. *CMS* platforms act as the core content engine, distributing messages across channels. *Content Marketing* (e.g., Canva and Indesign) and *Video Marketing* platforms (e.g., Vimeo and Vidyard) help teams produce tailored digital assets, from whitepapers to how-to videos, while *Native/ Content Ads* ensure these materials appear contextually in external channels like industry blogs and news platforms.

Align teams via shared platforms. Cross-team coordination is essential to eliminate messaging silos. Manufacturers use *Collaboration* tools (e.g., Asana, Notion) to ensure teams work from shared plans and assets. *Projects & Workflow* tools (Asana, Basecamp, Workfront) support execution across marketing, sales, and service. *CMS* platforms further reinforce alignment by centralizing content that all teams can access and deploy consistently.

Deliver account-specific engagement with automation. Outperformers use *Sales Automation* tools to deliver tailored messages to individual buying committees. These tools, when connected to *MAP* platforms, allow for personalization across campaign types. *Mobile & Web Analytics* helps track engagement signals in real time. Meanwhile, *Social Media Marketing*, *Search & Social Ads,* and *Events & Webinars* (On24, GotoWebinar, EventBrite) support omnichannel presence across digital touchpoints, ensuring customers receive timely, relevant messages wherever they are.

About The Author

Frans Riemersma founded MartechTribe, a company specializing in Martech research and benchmarking.

With 30+ years in consultancy, he combines qualitative expertise with quantitative Martech data on stacks, vendors, and requirements in a proprietary Martech Data Warehouse.

He is the author of *A Small Book on Customer Technology* and co-author of *Marketing Tech Monitor*, *Customer Technology Sector Trends*, and *Hello Firstname*.

In collaboration with Scott Brinker, he also co-produces the MartechMap, an overview of the marketing technology landscape.

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