

Martech Stack	Level 1 No focus	Level 2 Basic	Level 3 Moderate	Level 4 Strong	Level 5 World-leading
Mobile Messaging Platform		✓	✓	✓	✓
Customer Data Platform integrated w/Mobile Messaging Platform			✓	✓	✓
Analytics Platform integrated w/Mobile Messaging Platform			✓	✓	✓
Mobile Measurement Platform (UA) integrated w/Mobile Messaging Platform				✓	✓
External Reporting/BI Platform integrated				✓	✓
A/B Product Testing Platform integrated w/Mobile Messaging Platform					✓

Messaging channels	Level 1	Level 2	Level 3	Level 4	Level 5
Push Notifications		Broadcast only or managed by product team	Managed by CRM team	Managed by CRM team	Managed by CRM team
In-app Interstitials		Broadcast only or managed by product team	Managed by CRM team	Managed by CRM team	Managed by CRM team
Browser Notifications		Broadcast only or managed by product team	✓	✓	✓
Email		Managed by CRM team (broadcast only)	Managed by CRM team	Managed by CRM team	Managed by CRM team
SMS		Managed by CRM team (broadcast only)	Managed by CRM team	Managed by CRM team	Managed by CRM team
Web Inbox			Managed by CRM team	Managed by CRM team with message expiry/validity	Managed by CRM team with message expiry/validity & shared x-platform(s)
Web Interstitials			Managed by product/web team	Managed by CRM team	Managed by CRM team
In-app Carousel/Interactive HTML				Managed by CRM team	Managed by CRM team
App Inbox				Managed by CRM team	Managed by CRM team & shared x-platform(s)

Messaging Tech	Level 1	Level 2	Level 3	Level 4	Level 5
Segmented messaging (web)		✓	✓	✓	✓
Segmented messaging (app)		✓	✓	✓	✓
Rich Media (browser notifications)		✓	✓	✓	✓
Geotargeted messaging			✓	✓	✓
Rich Media (push notifications)			✓	✓	✓
Action Buttons (browser notifications)			✓	✓	✓
Dynamic (real-time) segmentation			✓	✓	✓
Event-triggered (app)			✓	✓	✓
Event-triggered (web)			✓	✓	✓
Event triggered (API)			✓	✓	✓
Multi-language			One campaign per language	Single campaign to cover all languages	Single campaign to cover all languages
Email reputation			Managed at ESP level	Managed at ESP level	Managed at ESP level
Channel preference centre			Yes, but channel on/off only	Yes, with campaign subtypes	Yes, with campaign subtypes & quiet times
Link management (email, push, deeplink)			System to manage some links in place	System to manage some links in place	All links used in campaigns fully managed
Deeplinking (push->app)			✓	✓	✓
QR Codes				✓	✓
Action Buttons (push notifications)				✓	✓
Deeplinking (web->app)				✓	✓
Messaging linked to redemption system or wallet (bonus/discount codes etc)				✓	✓
Countdown timers for specific events				✓	✓
Recommendation engine				✓	✓
Dynamic (real-time) message content					✓
Ability to generate promotional codes, bonuses from messaging system					✓
Silent (background) Push Notifications					✓
Beacons					✓

Generic Campaigns	Level 1	Level 2	Level 3	Level 4	Level 5
Tutorial(s)		Managed by Product	Managed by CRM team	Managed by CRM team	Managed by CRM team
Onboarding journey		✓	✓	✓	✓
Permission(s) opt-in			✓	✓	✓
Lapse-prevention			✓	✓	✓
Reactivation/winback			✓	✓	✓
Cross-sell campaigns			✓	✓	✓
Retargeting campaigns			✓	✓	✓
Abandoned intent			✓	✓	✓
Conversion-targeted campaigns				✓	✓
App Rating				✓	✓

Reporting	Level 1	Level 2	Level 3	Level 4	Level 5
Reporting frequency		Weekly	Daily	Daily	Real-time
Tracking opens/clicks		✓	✓	✓	✓
Day 1,7,14,30 retention impact reporting		✓	✓	✓	✓
Campaign		Yes, but only vs. control	✓	✓	✓
Email unsubscribes		✓	✓	✓	✓
App uninstall tracking			✓	✓	✓
Journeys			Yes, but only vs. control	✓	✓
Inferred attribution tracking of events			✓	✓	✓
Direct attribution tracking of events				✓	✓
Push opt-outs				✓	✓
Monetary value assigned to campaigns				✓	✓
Monetary value assigned to journeys				✓	✓

Strategy & Team	Level 1	Level 2	Level 3	Level 4	Level 5
Data governance		Basic (ad-hoc reviews when something is reported)	Regular review of data, but no defined processes	Frequent review of data health, and fully defined processes to address issues	Frequent review of data health, fully defined processes & management reporting
Test & optimization of messaging		Rarely	Some messages	Most messages	All messages
Dedicated mobile CRM resource			✓	✓	✓
Omni-channel approach (channels linked)			Some channels	Most channels	All channels
Regular sessions with wider business to share learnings and update on strategy			✓	✓	✓
Digital -> bricks-and-mortar strategy				✓	✓
Bricks-and-mortar -> digital strategy				✓	✓
Dedicated design resource				✓	✓
Transactional messaging managed by CRM team				✓	✓
There is a solid understanding of the importance CRM has on user acquisition efforts				✓	✓
Regular catchups/working group with product				✓	✓
Lifecycle engagement automation				✓	✓
Regular catchups/working group with UA					✓
Adaptive journey/messaging based on acquisition source					✓

Compliance	Level 1	Level 2	Level 3	Level 4	Level 5
Clear unsubscribe processes in place for email		✓	✓	✓	✓
Clear unsubscribe processes in place for SMS		✓	✓	✓	✓
Data is collected and processed according to national & international (where applicable) data protection guidance		✓	✓	✓	✓
Incentivised rating campaigns are forbidden		✓	✓	✓	✓
User access to all systems is restricted based on requirement			✓	✓	✓
User data is stored in compliant regions/territories			✓	✓	✓
Established process for deletion of user data if requested			✓	✓	✓

**TIER SUMMARY:**

**LEVEL 1** At this level, no attention is given to Mobile CRM or it's impact on App growth, retention and conversions

**LEVEL 2** At this level there is a basic understanding of Mobile CRM, and it is given some focus within the business. Whilst some mobile-specific channels are in use they are largely treated in isolation to the wider CRM strategy, with only a couple of mobile-specific channels in use

**LEVEL 3** At this level, a reasonable amount of focus is given to mobile messaging, with mobile-specific channels in use and managed through a sophisticated platform. Integration between the CRM platform and some other systems has been coordinated, although there still remain significant gaps in creating a user-experienced martech. The business has embraced mobile to some degree, although there is still little automation and-mortar strategy (where present) hasn't been completed, leaving a notable gap in the overall user experience & journey. Most standard campaigns and journeys are in place, although there is still little automation in-use making the CRM management a fairly intensive task, especially for a team without dedicated mobile CRM resource. At this level though, compliance is fully managed and considered an important part of the CRM strategy

**LEVEL 4** A considerable focus is given to mobile, with dedicated resources allocated to manage CRM efforts. Nearly all 'typical' campaigns and journeys are in place, and there is a wide adoption of mobile messaging channels with campaigns coordinated across them in a considered fashion. However there are a few advanced technologies/messaging features not utilised yet. Testing and optimization of campaigns is standard, and automation is used to its fullest to reduce resource overheads on the team. Reporting is comprehensive and detailed, designed for both senior managers and executives. Reporting extends beyond simply campaign metrics and now examines areas of data integrity/health, with a feedback loop back into the CRM. Systems are fully integrated across the martech stack, although native product testing still isn't synchronised with the CRM team.

**LEVEL 5** World-class understanding of mobile messaging, with a dedicated mobile CRM team continuously updating their technical knowledge who utilise all mobile channels available in a joined-up fashion. Mobile CRM is seen as fundamental to the business' success, and is tightly integrated across the company with product/dev and user acquisition teams. Best-of-breed software is in place across the martech stack, and fully integrated providing an unparalleled view of user's behaviours from cradle to grave. Processes and management reporting are seen as essential and heavily used in order to drive continual campaign optimization and conversions.