

ODYSSEY

**WIRAYA** 







## Martech investments continues to be prioritised.

Martech investments will increase 80% according to the respondents. Investments are made in the field of Marketing Automation (51%) and Analysis (22%). Businesses within Retail and Consumer durables are investing heavily in Marketing Automation while Bank, Insurance, Tech and Nonprofits industries are investing more in analysis.

#### **Executive summary**

#### The ROI of Martech

Making the most out of Martech is a struggle. This report show that lack of an effective strategy, adequate contact data quality, system integration and focus on the customer seem to be at the core of the problem. It's easy to fall into the trap of thinking that software will solve all your problems when software are just tools. Ignoring the necessary upfront work on processes, metrics, and change management will lead to Martech failure and, ultimately, to low ROI.

#### The lack of proven customer focus is eminent

Sales and customer satisfaction are key KPIs but where are the true KPIs focusing on improving the customer experience and driving loyalty? Very few actually measure customer satisfaction or customer experience. Over 20% (of the total responses) – simply don't know how to. You probably know of NPS but what about CSAT, CLV and CES?

#### Digging for gold in customer data

Integration of data sources seems to be the biggest problem for many companies when it comes to creating actionable contextual data. At the same time, it should be a top priority as this is where you will find the real gold. Use customer data as a foundation for an improved customer experience through the use of Martech. The data also allows companies to improve the entire customer journey. From the actual product and service to the actual communication.

#### The complex role of the CMO

With the new, gained knowledge and with new KPI's the step to becoming CEO is getting closer for the CMO. Prove your value by securing contextual and actionable data, set the relevant KPIs to monitor and secure increased customer satisfaction levels and revenue and lead the transformation. Present the results of your efforts as the real business drivers they are.

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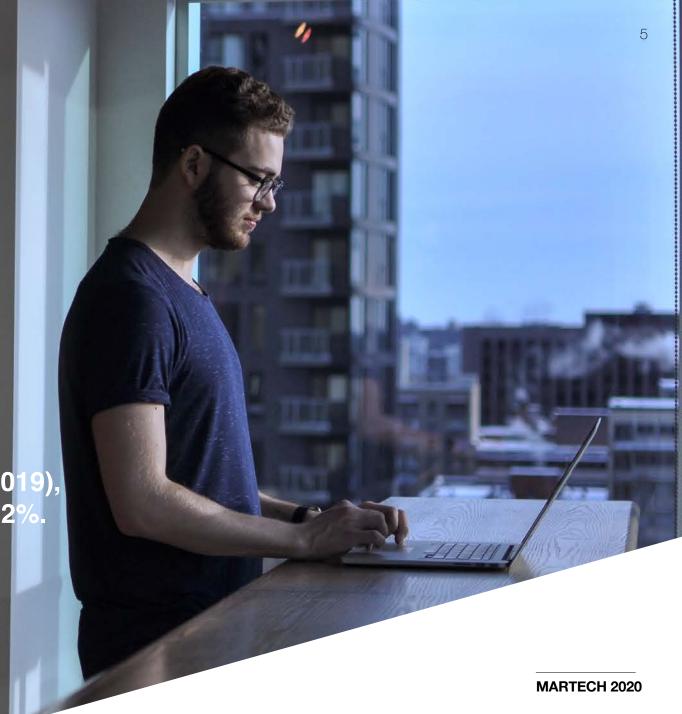
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The global marketing technology market is valued at an estimated \$121.5 billion (2019), representing a year-on-year increase of 22%.

Source: BDO, WARC, and the University of Bristol (2019)



## The increase in Martech shows no sign of slowing down.

Welcome to the Martech report of 2020! This report is made by Odyssey, Wiraya, CMO goes tech and Swedma, all representing different parts of the growing Martech community.

When we initiated this project over three years ago, we could see a need among marketing leaders to have a deeper understanding and inspiration around the topic of marketing technologies (Martech).. Many were asking the question, isn't Martech just another buzzword? (If they even knew what Martech meant). Maybe rightly so, many marketers have been working with marketing tools for years. However the complexity of these tools and ecosystems is increasing by the day. According to a report from late 2019, BDO, WARC, and the University of Bristol, estimates that the worldwide value on marketing technology market is \$121.5 billion.

We encourage you take a minute or two to think about all the tools you use in the funnel to understand your prospects and customers, acquire, nurture and retaining them, keep track of their purchases etc. The list can go on, and we're sure you're already thinking about at least 10 tools. That is your *Martech stack*.

We hope this report will give you increased knowledge, new insights and valuable tools.

A massive THANK YOU to the marketing leaders participating in this survey, interviews and for sharing their knowledge, challenges, successes and insights. Sharing is caring!



#### CMO for president? The role of the CMO taken to a whole new, and complex, level.

A CMO of today has an increasingly complex job description. You need to start by understanding commercial data as well as costumer behavioral data which will guide you in what direction you should aim your marketing efforts. But you are also a very important person to safeguard the very best of the customer from the very foundation of the business – the actual product and service offer and how it is being sold. It is all part of both the brand and customer experience.

Throughout the customer journey there should be someone responsible of safeguarding the entire customer experience. A person who is able to detect inadequate parts preventing a supreme customer and brand experience. This ability is often gained after many years of experience covering marketing to e-commerce, product and digital innovation linked to insights via a numerous amount of data sources whilst having a constant focus on the customer. Not to forget years of interaction with sales- and customer services

representatives. With the complex and wide area of responsibilities as described, a question comes to mind: - what will the title of this person be? CMTO\* (Chief marketing technology officer) or CCO (Chief commercial officer) CXO (Chief customer officer) or something totally new? Or is there a need for a role split to cover complexity?



of the marketing managers and directors stated that their role has improved for the better thanks to Martech. With the new, gained knowledge and with new KPI's the step to becoming CEO is getting closer for the CMO. Prove your value by securing contextual and actionable data, set the relevant KPI's to monitor and secure increased customer satisfaction levels and revenue and lead the transformation. Present the results of your efforts as the real business drivers they are.

If you are the CEO make sure to provide your CMO with a clear mandate and support to work cross functional as this is core for success of the new role for the CMO.

The role has become more complex and requires an understanding of marketing, customer behavior and technology. It is a big challenge to switch between strategy and tactics whilst building the brand and being into tech development at the same time.

Marketing Manager, Finance Industry

#### How CEOs can help in this evolution

- Take time to understand what is really happening among customers.
- Foster the right connection between the CMO's efforts and those of the other parts of the organization
- Be a "thought partner" for the CMO as he or she transforms the marketing organization.

## A Queen of everything!

Today, it really is required that you have a great personality as a marketing manager. You should be able to build your brand and at the same time be tech savvy and have a fab reading for analysis. Be a good project manager, communicator and client. And not to forget - an inspirer and leader.

Marketing manager, Finance in Sweden



## The traits of a successful Chief Marketing Officer (CMO).

- A communicative maestro
- A team player
- A curious mind
- Humbleness
- A big-picture thinker
- Tech trend watcher
- □ A calculated risk-taker
- Inspirational
- Patient

- Brave
- Growth-obsessed
- Diplomatic
- A storyteller
- Open-minded
- T-shaped marketer
- Technically adept
- Multichannel understanding
- Revenue focused
- An eye for design

- An experimental mind
- Data literate
- A critical mind
- Sales savvy
- Deep customer lifecycle understanding
- Imaginative
- A black sheep

The role of the CMO has changed dramatically in recent years, and this new breed of CMO is being shortlisted for the top spot.

I would argue that the trend is still in its early stage, but as the CMO continues to own the customer across all channels – as well as the data that drives the business – the CMO quickly becomes a logical person to own the company's growth agenda in the CEO role.

David Shrank, Deloitte Consulting.

#### The Martech organisation; New teams and roles have been established.

Many companies have developed new ways of working with Martech, some even have specific units or teams who are responsible or dedicated just for Martech. This is a huge step since the first report martech report took place, when more than 50% of the CMO's we interviewed did not know the definition of Martech. In 2019, Martech as a concept was well established and this year our findings are that the companies have taken the next step and are building specific units and competence for the Martech area.

However, the overall responsibility for Martech remains mainly within the marketing department with support from other departments. This is where the new dedicated Martech teams, roles and ways of working have been established in several companies.

Do you have the right competence in place and tools for your employees to develop at peak performance? Lack of competence is the 3rd key challenge to get value out of your Martech investments.



%

of the respondents say that Marketing are responsible for Marketing technologies and



%

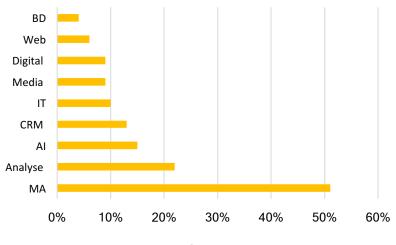
have a jointly responsibility with other departments. Very few of the respondents have left the responsibility of Martech to the IT department.

# 8/10 will increase investments

Most investments are made in the field of Market automation (51% of the total responses) and (22% of the total responses) in analysis. It seems that business within Retail and Consumer durables are investing heavily in Marketing Automation and that Tech, Bank, Insurance and Nonprofits are investing more in analysis.

It's clear that the areas of investments vary between industry's but the reasons behind the investments in Martech are the same regardless of industry, size of the company or revenue. Over 71% of the marketers answered to drive an increase in sales and profit. We can also see a strong correlation with the wish to develop and retain customers with upselling and crossselling opportunities. When asked about the effect post corona most marketers in this study answered that although cuts have been maid in their marketing budgets most will continue as planned with their Martech investments.

In which area will your investments take place?



Procent

#### Challenges

To get the most value out of martech investments, when respondents were given only one option.

System integration 33%

2

Team collaboration 19%

3

Competence 16%

4

Time 13%

### Integration; the show stopper for succeeding with martech investments

Marketing without data is becoming impossible as customers expect personalised communication and interactions with your brand. To deliver a seamless experience you will need to integrate your data sources.

Many of the respondents in the in-depth interviews confirmed that lack of integration is difficult to achieve and even more so without collaboration from different departments. To truly get a 360 view of customers (that most companies only dream of) all data sources needs to come together.

While martech leaders seem to agree that lack of integration and difficulties to collaborate within the organisation are the most common martech challenges there are some differences in terms of what challenges companies are facing. While smaller companies are notice the lack of competence within martech more than other cohorts, larger companies tend to struggle more than others with lack of time. Marketing and

communication functions are also lacking time (19%) to more extent than any other function .

Diving into company size there tends to be a correlation between number of employees and increase of lack of integration in marketing technologies. The larger the company the bigger the challenge. Interesting enough lack of collaboration doesn't seem to have that same correlation. Are companies more equipped to handle people than technology when expanding their business?



### Differences based on company revenue.

0-10 M €

11-100 M €

>100 M €

Competence 24%

Integration 21%

Budget 14%

Collaboration 14%

Integration 33%

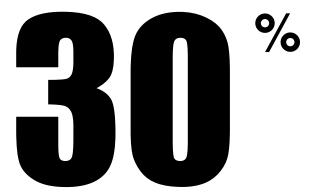
Time 29%

Competence 17%

Integration 39%

Collaboration 36%

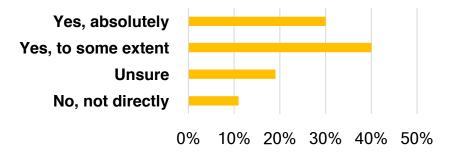
Competence 9%



of the marketers in this study believe their investments have paid of.

When asked 30% of the respondents stated: Yes, absolutely! But at closer look you can see a big difference between industries. Companies within the Tech industry and Banking, Insurance, and Customer durables seem to do better. 53% in the IT/Tech industry and 40% of Consumer durables believe that their investment has paid off. But only 7% of the Retailers. And as many as 21% of the respondents from the Retail industry are unsure and 7% states that no, it hasn't paid off at all.

#### From your perspective, has the investment in Martech paid off?







Connecting marketing technology metrics to customer measures is a real struggle.

### Marketers are missing customer-focused metrics

The marketers in our study measure (and are measured on) a number of different KPI's that are connected to Martech. Sales (49%), customer satisfaction (38%), marketing ROI's are the most common ones if you look at the total responses. Divided into industries the outcome becomes a bit different. Especially if you look at customer satisfaction. Most follow financial measures such as impact on customer churn rate, average revenue per customer, up sell and attach rates. But only about 30% of the marketers in this study said they measure customer satisfaction or customer experience. Over 20% don't or simply don't know how to.

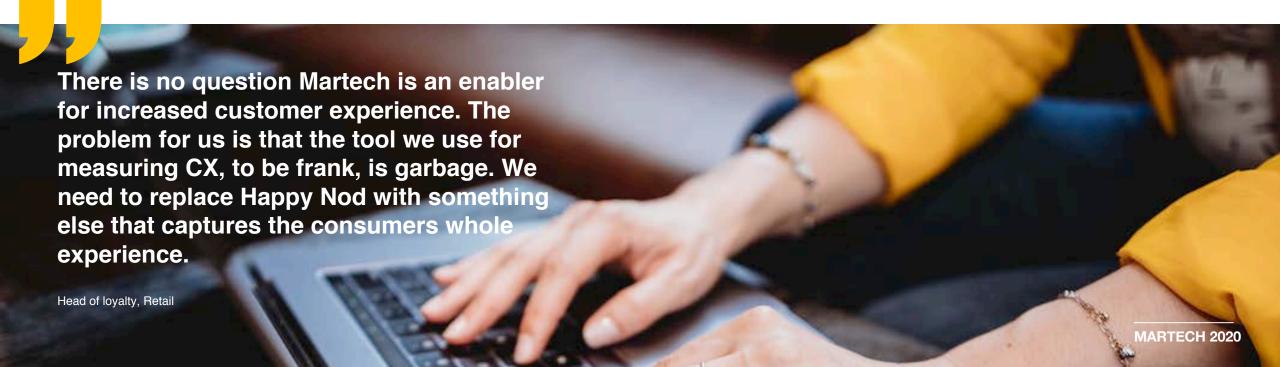
## 20%

Over 20% of the marketers in this study say they don't' measure customer satisfaction/ customer experience.

of the respondents say
Martech has improved
their Customer Experience.

It's clear that the marketers in this study believe that the use of Martech has improved their CX even though many doesn't measure it. Over 58% stated it had improved their CX but this doesn't correspond to all. Retail for instance, only 21% of the respondents from the Retail industry said yes, 50% were unsure and 29% said no. This might correlate with the fact that many of the Retailers barley measure Customer satisfaction. Only 13% of the marketers from Retail said they did. Compared with the total of 30% in this study.

Customer-centric organisations know they must also find a way to incorporate customer measures into the success of any marketing technology implementation.





## marketers no 1. go to metric

Among those who measure the effect Martech has on CX NPS is the most common CX metric. Most use NPS and one or several of these five CX KPIs below.

#### Net Promoter Score (NPS)

Global market leaders like Apple and Airbnb, benefit from this metric. Why? NPS is short and simple for customers to answer and it is very easy to track for companies. It is often used to rate a brand, service or product in general.

#### Customer Satisfaction (CSAT)

CSAT, together with NPS, is one of the most commonly used CX metrics. It has many forms and scales, but the most common is a scale from 1 to 5. Google or Facebook ratings are a good example of CSAT. CSAT is an excellent tool to measure customer satisfaction. with one-time interaction. It is most often used in customer service (or customer support).

#### Customer Effort Score (CES).

Customer Effort Score is the third most popular customer experience metric that involves customer's input. CES is a pure transactional metric and it typically assesses the simplicity of a single solution. CES typically answers; "how easy was it to solve your problem today?" and has a 5- or 7-point scale system.

### Customer Lifetime Value (CLV)

Customer Lifetime Value (CLV) is a prediction of the net profit attributed to the entire future relationship with a customer. CLV can be calculated both as a business value that customers brings during the entire time of the relationship with a company or as a value over a defined period of time (a year, 5 years or anything else that makes sense to the particular company).

#### **Churn rate**

Customer churn rate reflects the number of your customers who terminate your product or service. Generally, customer churn rate counts the total number of lost customers or the percentage of lost customers within a defined time period. Sometimes, customer churn rate is calculated as a lost business value.

The sum of all brand touch points builds the brand, drive the brand, drive loyalty & sales.

Quality in a service or product is not what you put into it. It is what the customer gets out of it.

**Peter Drucker** 



#### You can't buy love. That goes for loyalty as well.

BY PATRIK STOOPENDAHL

'I haven't bought a mascara full price in 10 years' – exclaims Gunilla, an informant in her 40's. She rather waits for the department retailer to send the 20% coupon every two months for her to go to the shops. And it stops there. She says she doesn't spend additional money at the brand. Actually, in her opinion, it's not even a department store she visits during the seven weeks in-between.

I'm not saying that Gunilla represents all customers. But what I'm saying, or questioning, together with the results in the report is if the loyalty-machine may in fact be broken to the degree that we're better off returning to the drawing board, rather than investing even more into fixing it, hoping it at some point down the road – starts functioning as we want it to function. As this report shows, respondents foresee an increase in investment into marketing technology, but simultaneously struggle to measure its effects. I can't shake the feeling if we're actually witnessing a classic case of 'sunk cost fallacy' at full swing? There is always reason to consider if the path we find ourselves on really is the right one. It holds especially true to the issue of 'loyalty. 'Sunk cost' basically entails that we as economic species will

resist to abandon a project that we've invested in, even if it isn't capitalizing as we hoped. The effect also holds true for movie sequels. We drag ourselves to see Spiderman 3, 4 and 5, because if we don't, number one and two become sunk costs of both time and attention. What if we've been investing both money, attention and time in 'loyalty' over the years to the degree that even if many struggle to see evidence of success (something that some in the research community has dared to point out), we simply can't abandon it. Like a rusty old car, we keep taking it to the service station, hoping that an upgrade will make it last and perform just a little bit better. 'If we just upgrade another customer journey flow in the market automation system, we'll start to see measurable results.

For most it's about focus on number of customers, conversion rate, frequency, time-to-purchase and cost per order. It's about up-selling and cross-selling to the customer you recently served with a product or service identifying high and low CLV. We struggle to create user experiences that will pull the customer back (because we can't compete with price anymore, or can we?), and we use data analysis to predict the next movement of the customer(s).

But right now, we're at a crossroad. Either we continue to invest and hope the KPI's eventually align and are met. Or we simply harvest what we believe does well in the loyalty-framework and re-imagine what a modern-day relationship with a customer should look like.

I hope to see you in the future. Where loyalty has been re-booted into something that actually makes sense to both customers and consumer focused companies alike.



Patrik Stoopendahl is responsible for the scientific research at Odyssey. He's also a PhD-student at INSiDR at the University of Borås.

## Isn't time to make some sense of loyalty? What exactly are we chasing?

As many as 69% of the marketers in this study think that some of the KPIs they follow are outdated. Maybe it's time to redefine our metrics? We asked a couple of the marketers in this study to give us their best tips and this is what they suggested.



#### From 'send all' to 'send one'

Make the digital personal! We've anticipated a revolution of the sales staff and 'personal connection' in retail a long time. But post-corona entails physical distancing that may put that to a halt. Make sure you finally make the 'send all' button into a 'sent one' button and start conversing with customers at safe social distance using the digital!

#### From 'analyze for improvement' to 'analyze for opportunity'

Create an organization that allow the brand to understand the world using more than narrow customer data. Trace and track data that maybe isn't relevant to the core business and allow the brand to foresee major opportunities, rather than minor improvements.

#### From 'measurable control' to 'elusive love'

Loyalty (emotional/social/cultural) occur after a certain amount of positive interactions with a brand or product/service. Learn to be patient and strive for quality, not quantity. We already know, that when it comes to the creation of positive customer experiences, more data isn't always the answer to crack the code.

#### Insights from across the pond with

#### PRINCIPLE DESIGNER



#### What do you see is the main purpose of Martech?

It's really easy to over-purchase technology to try to compensate for what you think your team might not be able to do. But, that needs to be flipped around: technology should be empowering the individuals who are doing the communication, whether that's marketing or other touchpoint in the lifecycle.

Technology doesn't know anything about your users and your customers. You have to tell it everything, even when it's "intelligent". So, the goal of all solutions—and the entire stack—should be empowering the people the understand and care about customers to actually create a business that benefits everyone.

#### What advice do you give customers on how to measure their martech investments?

It is difficult. If it were easy, everyone would know how to do it. Over the long term, it's important to keep all metrics in one place to help create contextualized data. To figure out the best way to measure investment in shorter terms, agree as a team on marketing and revenue outcomes and evaluate your

Martech stack's ability to support the team in achieving those outcomes.

#### What is the main differences between how companies work with martech in Europe vs North America?

In comparison with Europe, companies in the US are way more willing to try new, unproven tech with the assumption that it might work or may prove valuable within a few years. At the same time, the end users of the technology at these companies seem more willing to try another solution on their own and advocate for change in company purchase decisions.

#### How do you make sure you stay up to date in this rapidly changing Martech?

The easiest way to keep up with the changing Martech landscape is to talk to your customers. All that matters is your ability to connect to potential and current customers. Understand how to connect with them and how to do research well. Once you do, you can leverage the technology to scale this type of connection and research.

#### What do you think will be the next thing to look out for in the Martech field?

I believe there will be a clear, worldwide resetting of economies, and marketing teams going back to the basics. Thriving in this reset is about having the right mindset: think about what won't change in the next 20-30 years. For example, Amazon knows people will always want to buy things and receive them quickly. That basic need won't change. Don't chase trends.

To keep up with changes in marketing tactics and concepts, I encourage marketers to study "systems thinking". This approach helps you see what does and doesn't change over time, and understand how changing technology will affect outcomes.

\*Systems thinking is a holistic approach to analysis that focuses on the way that a system's constituent parts interrelate and how systems work over time and within the context of larger systems. https://searchcio.techtarget.com/definition/systems-thinkingx

What to think about when buying new technology.

You should be able to say out loud, very clearly, what it is you will be able to do with your new purchase, whether it's a new system or a feature. Focus on what fits your business. Don't over-spend on something that you don't need. Do your research to find what technology will produce the outcomes you want...

...The best way to connect technology purchases and marketing outcomes is to talk to your customers regularly. This will help you ensure you're having the internal and external impact you want. Purchasing decisions will become clearer, but you'll also end up with more realistic ways to measure your ROI.

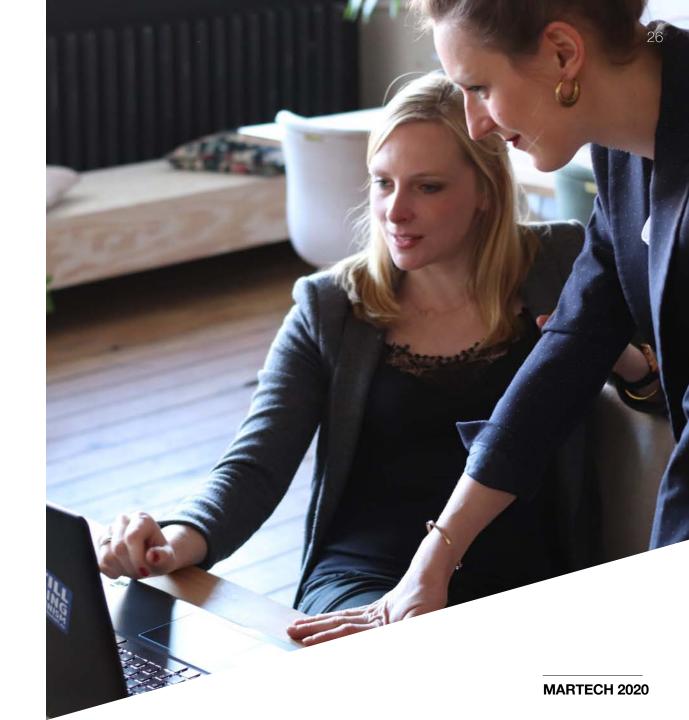
#### For more inspiration:

For more inspiration: one of Cliff's favorite authors is Seth Godin —a great example of staying focused on what doesn't change in Marketing over time.

https://www.sethgodin.com/

## Recommendations from other marketing leaders.

- Make sure to have a clear goal in place with your Martech investment and share that goal with top management as well as its users before moving forward.
- Set up a strategy before you invest from a customer perspective.
- Get buy-in early in the process you will thank yourself for it when it's time for implementation and onboarding.
- Work with your requirements, many fail when it comes to this. If your company lacks this type of knowledge internally, invest in taking help.
- Think holistic and multichannel. Some projects will take time!
- Don't get stuck planning! Some systems and tools are relatively easy to get up and running with. Dare to experiment and scale up as you go!



#### Inside the head of

#### **CHRISTIAN CABAU**

#### Klarna.

Klarna won the Martech Award last year for being in the forefront of using martech to enrich its customer experiences.

#### Christian, can you tell us a little bit about what has happend since then?

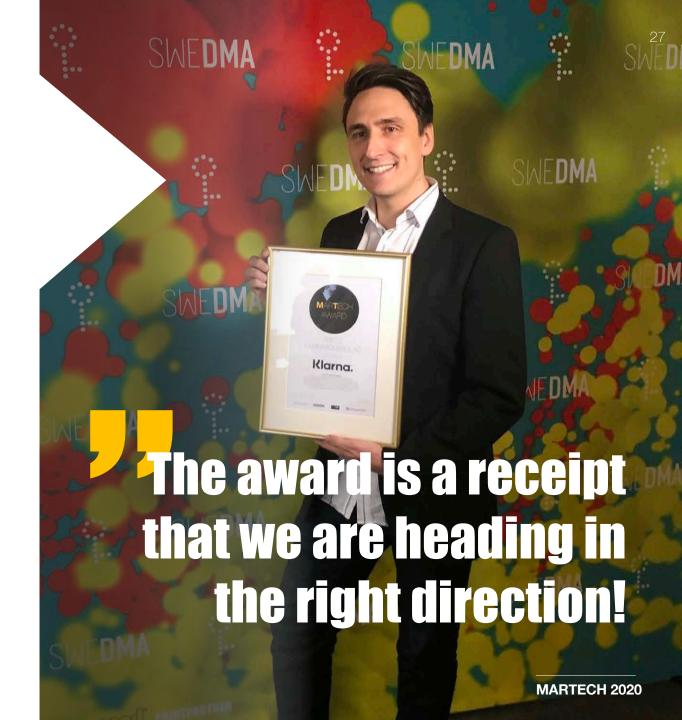
We've been focusing on sourcing talent and building a globally scalable Martech setup.

#### How was it to win the Martech Award?

The award is a receipt that we are heading in the right direction. It has also been a source of motivation for our teams. Good publicity in trade media is essential to attract the right talent.

Many organisations are trying to start or optimise their cross-functional teams. How is Klarna working with crossfunctional teams and do you have any learnings?

It's working very well! All teams at Klarna are cross-functional, it's essential for rapid time to marketing and high quality. It also makes it even more fun to do the work since it sparks even more passion from each area.





## Invest in specialist competence, not only the tools.

#### What are your current challenges and initiative?

We are increasing the number of connected touchpoints in Klarna's channels through the customer journey, which requires a lot of integration and collaboration between teams.

#### What kind of effects have you seen of your investments? How do you measure your effect?

We are happy with the uplift we see from our Martech investments in terms of user growth and retention. During Q1 2020, more than six million consumers have been added, and now, more than 90 million consumers have used Klarna. Consumer preference and engagement continues to be high. In the US, more than 80% of the Klarna app shoppers during the period are returning users.

#### In which areas will you increase your investments in Martech?

We have a solid Martech platform in place, and we are now primarily investing in staffing and integrations.

#### How important are customer satisfaction in relation to your Martech investments?

We are obsessed with our customers, so we closely monitor our net promoter score. We also measure the growth in app downloads, which globally has increased by 240% compared to the same period last year (Q1). New features, including wishlist and price drop notification, have seen immediate success.

#### How do you mesuare success?

We use a mix of using A/B testing and control groups, multitouch attribution, and brand tracking studies.

#### What are your best tips to get to best and most out of your Martech investment?

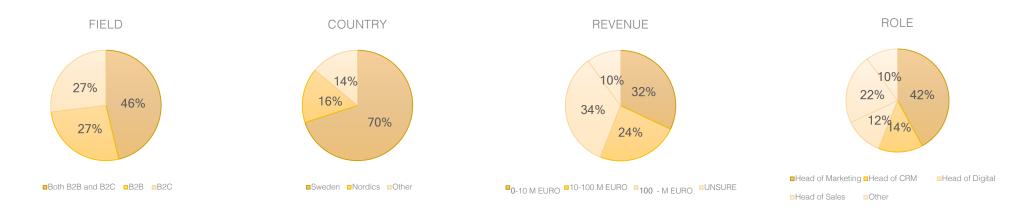
Invest in specialist competence, not only the tools.

## Steps to Martech success.

It's clear that many marketers in this study struggle to make the most out of Martech. This year is no exception. When we look back at the results from the last three years, the reports show that lack of an effective strategy, lack of an adequate contact data quality, organisations that are weighed down by the overall complexity of systems and the lack of focus on the customer seem to be at the core of the problem. During our interviews with companies that succeeded with their Martech implementations, those who answered that their investments not only paid off, but also contributed to an enhanced customer experience we've been able to single out five does (or don'ts)

- Make sure you measure the effect Martech has on customer experience.
- Don't forget that the employee experience is just as important.
- Make sure you align your Martech goals with the top-line business goals.
  - Make sure your tech stack can adapt to changes rapidly.
- Focus on the customer before the tech.

#### **About the survey**



**Martech 2020 Survey:** Results presented are based on a Odyssey, Wiraya, Swedma and CMO goes TECH exploratory study to understand how marketers are investing in, deploying and getting value out of Marketing technology. The primary research was conducted using a mixed methodology (online survey/in depth interviews) from October 2019 through April 2020 among 122 respondents in Northern Europe. (Sweden 70%, Nordics 16% and other 14%).

The respondents came from a variety of industries (both B2C and B2B) and were required to have a primary role in involvement in decisions pertaining to their company's marketing technology strategy.

#### Behind the survey.

#### ODYSSEY

Odyssey is an insight agency delivering strategic self-service products that helps large B2C and B2B companies quickly identify the changes that will deliver improvement and impact on their brands. We strive to not only answer questions regarding the state and position on your brand but also deliver strategic understanding based on actual consumer behavior data, trends, and simulation for future brand performance.

Simply put. With our products & platform you can collect, structure, model, analyze and automate your insights. And above all – act on them.

Chief marketing officer **Jenny Sondell** Jenny.sondell@odyssey.se +46 76 218 49 76

#### **WIRAYA**

Wiraya is a managed Precision Customer Activation software that enables large B2C brands to reach and interact with existing customers in critical moments of the customer journey. By using data-driven insights Wiraya delivers the the optimum blend of voice, text and landing pages to get your customer to take action.

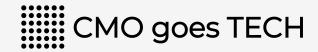
Whenever you need your customers to do something, know something, update something, start something, stop something, change something or buy something, it's guaranteed to improve the metrics that matter to your business.

Marketing Manager **Sara Bremdal-Vinell** sara@wiraya.com +46 72 209 55 57



**SWEDMA** is the association for all Swedish companies and organizations that work with data-driven marketing communications. SWEDMA's members use data for effective marketing and improved customer experience through all communications channels. SWEDMA's members cover the full customer value chain, from data analysis to performances As an association we have a unique insight into the conditions given and demands on all companies and organizations working with data-driven marketing communications. Every member commits to work according to the regulations (business and ethics) developed jointly with others in our business community. Together we maintain and strengthen the credibility of the entire marketing industry.

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**CMO goes TECH** - An International network for the CMOs of the future. Our international network is for everyone working as CMO, innovation director or similar. Like-minded people who are interested in exploring trends and technology in order to identify how marketing and technology meets for an improved customer experience. We offer our members trendspotting, presentations from thought leaders and relevant companies, collaborations and the possibility to learn more about Tech in a series of inspiring events where members share their thoughts on how to be successful.

The network consists of over 600 CMO/CDO or similar from over 10 different countries.

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