

# CMO Quarterly

First Quarter 2026

## Leadership Vision for Marketing's **AI Transformation**



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# Letter From the Editor

The pace and magnitude of AI-driven transformation demands a new caliber of strategic leadership in marketing. CMOs are expected to demonstrate agility in reimagining not just their technology stack but their entire operating models, team structures and customer engagement strategies.

The theme of this edition, “Leadership Vision for Marketing’s AI Transformation,” explores how forward-thinking leaders can move beyond incremental change to architect marketing organizations that thrive amid disruption, harnessing AI to unlock new sources of value, trust and differentiation. The articles offer pragmatic insights, bold predictions and actionable frameworks for CMOs determined to shape the future, rather than be shaped by it.

As 2026 brings heightened disruption and flat budgets, CMOs are prioritizing revenue growth, martech transformation and brand awareness — while grappling with how to prove marketing’s value. “CMOs’ Top Strategic Priorities for 2026” explores how leading marketers are balancing short- and long-term goals, scaling AI judiciously and shaping enterprise strategy amid rapid change.

“Vision and Strategy for an AI-Driven World” outlines three imperatives for building resilient, high-impact marketing organizations in 2026 and beyond. Incremental change is no longer enough as CMOs must steer the shift to AI-driven operating models, zero-based channel strategies and future-forward marketing leadership.

“Mainstream Marketing Predicts 2026” delivers forward-looking predictions and equips CMOs to anticipate disruption, adapt strategies and seize opportunities in an AI-powered future. “The Strategic Impact of AI Agents” examines how AI agents are redefining marketing by automating complex processes, enabling predictive strategies and driving human-machine collaboration for greater efficiency. CMOs can use this guidance to assess their agentic capabilities, pilot use cases and build a flexible tech strategy that maximizes value and manages risk.

Then, “Build an Adaptive Marketing Collective for the AI Era” introduces a dynamic framework to reimagine the marketing organization as a flexible marketing collective that helps

leaders unlock innovation, amplify brand impact and scale capacity for the future.

“AI’s Impact on Marketing Resource Management” provides guidance for assessing your organization’s readiness for AI-enabled resource management, preparing a business case for such investments and measuring their impact.

Finally, “Scale AI Skills Quickly to Future-Proof Marketing Teams” recognizes that many CMOs are stuck at the pilot stage of AI, struggling to realize meaningful business impact due to skills gaps. This article shows how blending internal upskilling with strategic external partnerships can accelerate AI adoption and boost team resilience.

CMOs need to take bold steps to ensure marketing remains at the center of enterprise growth and innovation amid AI transformation. This edition of the Gartner CMO Quarterly will help you prepare for the uncertainty and opportunity of AI.

**Akanksha Borawake**

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# CMOs' Top Strategic Priorities for 2026

by Janine Kanters, Sharon Cantor Ceurvorst

CMOs are pursuing growth and technology transformation goals in 2026, which is challenging amid a quickly evolving environment. To succeed, they must proactively shape enterprise and AI strategies, focus on how technology specifically meets customer needs and set goals across multiple time horizons.

While CMOs have navigated significant change in the past, the degree of disruption, pace of evolution and heightened uncertainty make 2026 a particularly challenging year. CMOs face increased pressure to demonstrate marketing impact, heightened expectations to incorporate AI into decision making and growing tensions in trying to predict and adapt customer changes. Gartner's 2025 Marketing Future Strategic Priorities Poll helps CMOs benchmark what their peers are prioritizing and what they're struggling with going into 2026.<sup>1</sup>

## **CMO Priorities: Revenue Growth, Martech and Brand Awareness**

Revenue growth remains a top priority for CMOs<sup>1</sup> — a trend that has persisted for several years. This year, however, marketing technology has grown as a priority, particularly on the AI front. As AI is implemented and embedded across martech tools, including tools CMOs already own, CMOs may be encouraged to reevaluate their stack for consolidation opportunities.

Additionally, the importance of connecting data sources to enable AI decision making could increase the importance of martech integration. This will only accelerate as AI agents are increasingly deployed. AI is also likely contributing to channels and campaigns being a priority, with CMOs looking to AI tools to enable and optimize personalization and journey orchestration.

Brand awareness also remains a top priority for CMOs in 2026.<sup>1</sup> CMOs reference increasingly competitive environments as well as changing customer discovery and exploration behaviors as reasons why brand awareness is important. Furthermore, 30% of brand leaders say their organization went through a brand refresh or new brand launch within the last year, meaning CMOs will be aiming to increase brand awareness of these new brands.<sup>2</sup>

## **CMO Challenges: Budgets and Balancing Short- and Long-Term Priorities**

Most CMOs are concerned about budget and/or resource constraints hindering their ability to meet goals.<sup>1</sup> While Gartner's 2025 CMO Spend Survey reports marketing budgets holding steady at 7.7%,<sup>3</sup> evolving technology and uncertain customer behaviors may make budgets feel more stretched than in the past. For example, increasing customer AI usage for purchases may push CMOs pursuing growth to create dual strategies for both human and machine customers, all on a flatline budget.

Marketing technology leaders have high hopes that AI agents will alleviate some constraints: 94% of high performers think AI agents will deliver significant operational

efficiencies, and 98% think they will deliver significant business performance results. However, many organizations still struggle to see significant ROI from more basic generative AI (GenAI) applications.<sup>4</sup>

These budget tensions could also be why CMOs see short-term needs impeding long-term planning.<sup>1</sup> CMOs have long struggled with this, but uncertainty about technology and its impact on marketing strategies makes this challenge more acute heading into 2026. Marketing leaders have also articulated tensions between:

- Ambitious time-sensitive growth goals and the ability to deliver customer experiences that drive long-term growth
- The need to move more quickly and agilely today, while effectively managing organizational change and retaining talent

## What CMOs Should Do

- **Scale AI judiciously and strategically.** Be clear about what outcomes you expect and how you'll support internal change to fully realize value. Iteratively audit your martech stack to identify overlaps and assess value as embedded AI capabilities evolve.
- **Don't lose sight of the customer experience among changes.** Center on what customers need and expect from your brand and optimize toward that. Resist feeling like you need to adapt to every new change immediately. Instead, track trends in how behaviors are evolving to inform future planning.
- **Take a lead in enterprise strategy.** Take steps to become a "market shaper" (i.e., actively shaping enterprise strategies). These CMOs are significantly more likely to exceed executive expectations and earn recognition for marketing impact.<sup>5</sup>

<sup>1</sup> **2025 Gartner Marketing Future Strategic Priorities Poll.** This poll was conducted to explore the top priorities and most pressing challenges that marketing clients expect to face in 2026. The research was conducted online from September 2025 among 174 marketing leaders. Respondents included current or prospective Gartner clients from North America (n = 129) and Europe (n = 45). Respondents represented B2B companies (n = 118), B2C companies (n = 39) and other business models (n = 16). The question base varied because respondents were not required to answer all questions. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> **2026 Gartner Brand and Business Strategy Survey.** This survey was conducted to understand best practices related to brand strategy and its impact on business strategy development and performance. The survey was administered online from September through October 2025 and includes data from 426 senior marketing leaders responsible for brand strategy, and senior leader partners from other functions, including leaders from the U.S. (n = 228), U.K. (n = 87) and mainland Europe (n = 63). Leaders represent many industries, including banking and financial services (n = 65); IT products and services (70); manufacturing, energy and natural resources (n = 42); healthcare (n = 39); retail (n = 32); pharmaceuticals, biotechnology and life sciences (n = 40); insurance (n = 43); travel and hospitality (n = 34); and others (n = 61). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>3</sup> **2025 Gartner CMO Spend Survey.** This survey explored top-line marketing budgets with the goal of understanding how changing customer journeys, pressures from the C-suite and cost challenges affect marketing's spending priorities and channel effectiveness. Conducted online from January through March 2025, the research included 402 respondents from North America (n = 202), the United Kingdom (n = 97) and Europe (n = 103; including France, Germany, Belgium, Denmark, Finland, Netherlands, Norway and Sweden). Participants were required to be involved in decisions related to setting

or influencing marketing strategies/planning, aligning marketing budgets/resources or leading cross-functional programs and strategies with marketing. Seventy-seven percent of the respondents represented organizations with annual revenue of \$1 billion or more. The respondents came from a diverse range of industries: manufacturing (n = 52), financial services (n = 50), insurance (n = 43), consumer products (n = 43), healthcare (n = 42), travel and hospitality (n = 37), IT and business services (n = 36), retail (n = 36), pharma (n = 32) and media (n = 31). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>4</sup> **2025 Gartner Marketing Technology Survey.** This survey aimed to explore the key aspects of marketing technology including utilization, composability, scalability, measurement and collaboration. It also examined the implications of AI and data strategies on marketing technology. Conducted online from June through July 2025, the research included 413 respondents from North America (n = 186), the United Kingdom (n = 91) and Europe (n = 136; including France, Germany, Luxembourg, Denmark, Finland, Netherlands, Norway and Sweden). Qualifying organizations reported enterprisewide annual revenue for fiscal 2024 of at least \$100 million, with 77% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a diverse range of industries: IT and business services (n = 48), manufacturing (n = 48), insurance (n = 38), retail (n = 38), consumer products (n = 37), financial services (n = 36), travel and hospitality (n = 36), healthcare (n = 33), tech products (n = 33), media (n = 33) and pharmaceuticals (n = 33). All the respondents were required to be senior decision makers of their company's marketing technology strategy, where the majority of their daily responsibilities aligned with either business- or IT-focused marketing. Eighty percent of respondents were aligned to the marketing function, 10% to product marketing and management, 7% to IT and 2% to brand management or other business units. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>5</sup> **2024 Gartner Senior Executive Views of CMO Leadership Survey.** This survey was conducted to explore how CMOs are perceived by key C-suite leaders (i.e., CEOs and CFOs), and what distinguishes effective CMOs under different behavioral and company circumstances. The survey was administered online from August through September 2024 and includes data from 125 senior executives in North America (n = 84) and Europe (n = 41). Respondents were CEOs and CFOs at organizations with at least \$50 million in annual revenue, with 36% coming from organizations with at least \$1 billion in annual revenue. Respondents came from a wide variety of industries, including manufacturing and natural resources (n = 21); banking and financial services (n = 6); retail (n = 8); healthcare (n = 23); consumer products (n = 17); pharmaceuticals, biotechnology and life sciences (n = 6); insurance (n = 2); technology products (n = 14); travel and hospitality (n = 8); IT and business services (n = 16); and media (n = 4).

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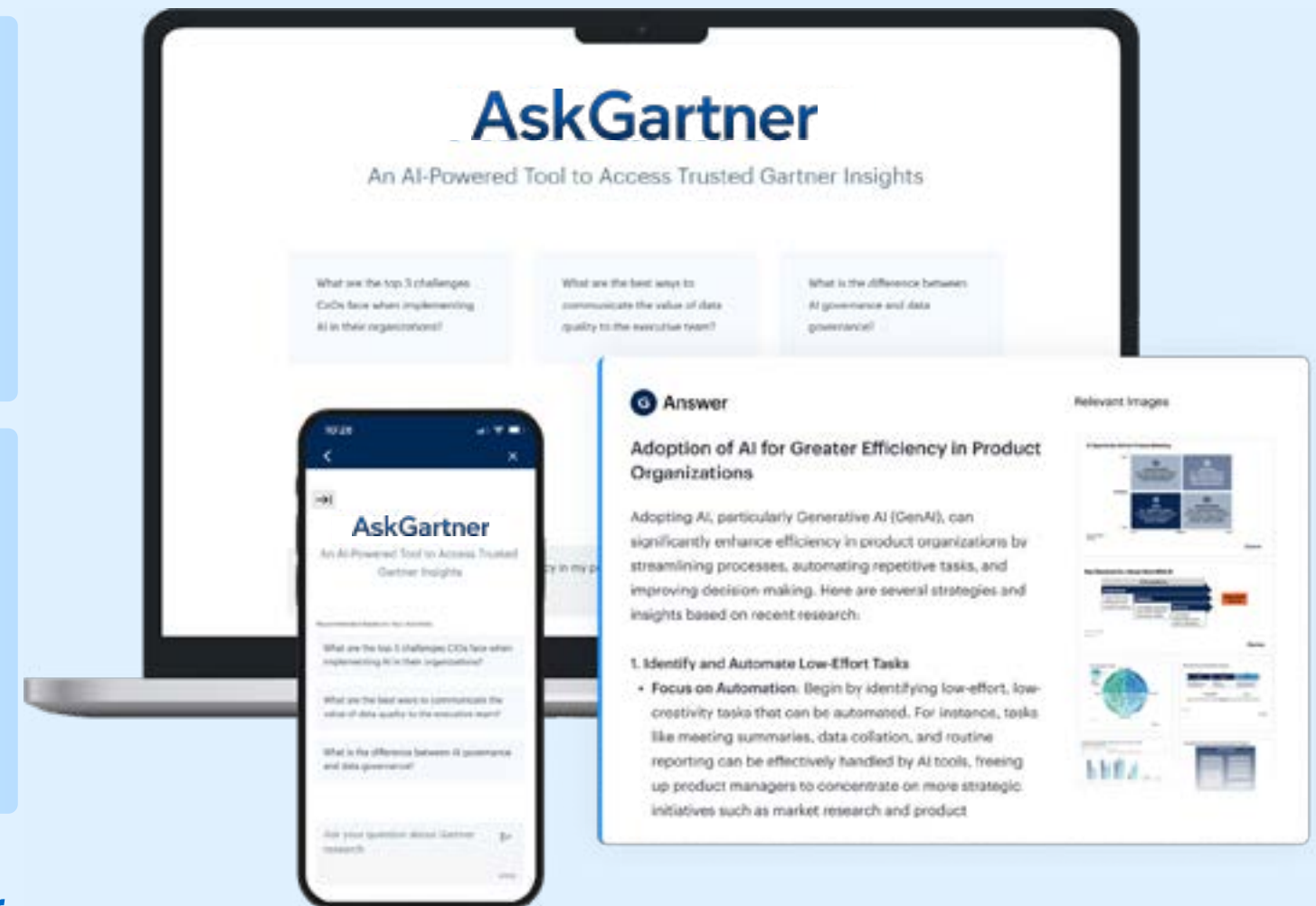
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# Vision and Strategy for an AI-Driven World

by Sharon Cantor Ceurvorst, Ewan McIntyre

The era of incremental change is over. CMOs who embrace AI's transformative opportunities will drive significant growth. In 2026, CMOs must lead the shift to agentic operating models, adopt a zero-based approach to channel strategy and use AI to rapidly enhance marketing's distinctive strengths.

The year ahead marks a turning point for CMOs. AI is no longer a peripheral tool; it is embedded in every facet of marketing. At the same time, proven engagement strategies are eroding amid AI-driven disruption, and the CMO role itself is undergoing a once-in-a-generation transformation.

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**82% of business leaders believe their company's identity must evolve to keep pace with AI's impact on markets, and 65% of CMOs expect AI to dramatically change their role within two years.<sup>1,2</sup>**

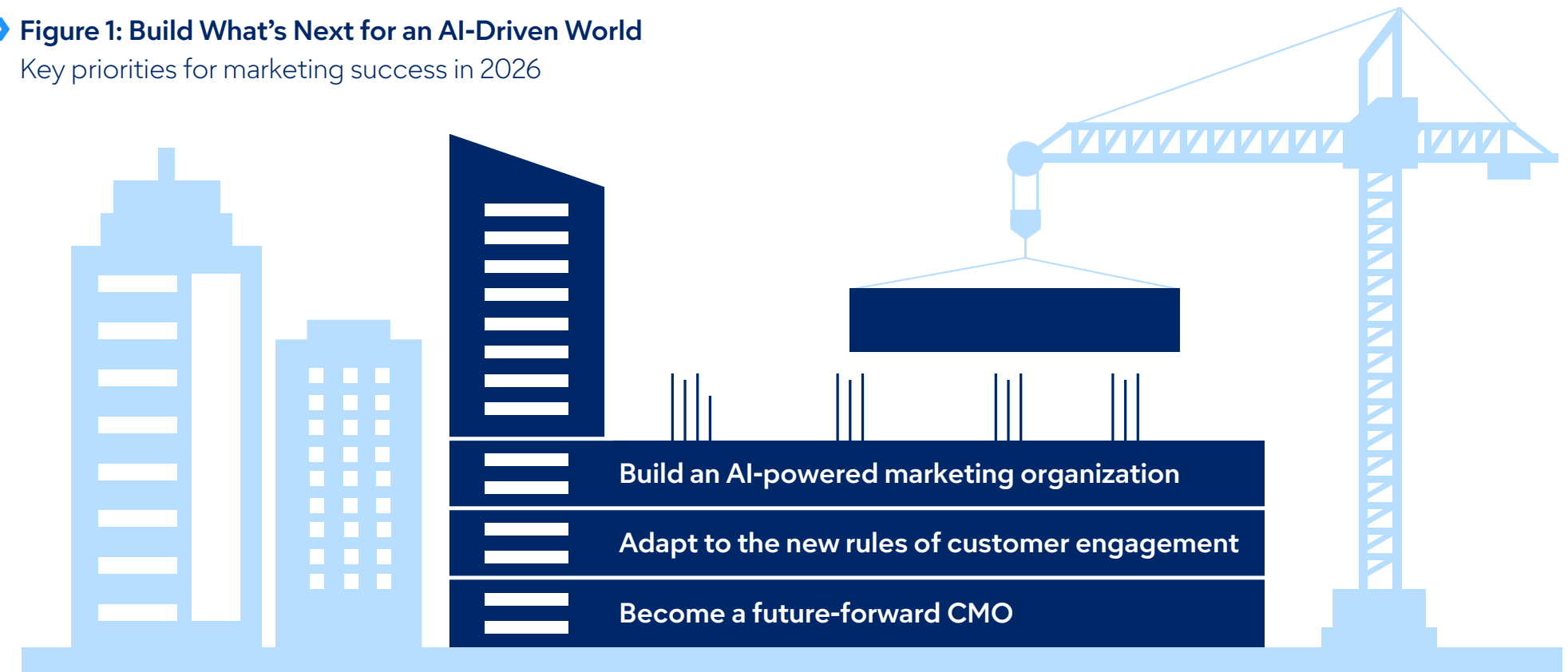
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These forces demand more than incremental change. They require CMOs to lead with clarity, adaptability and strategic vision. Three priorities will define success for CMOs in 2026 (see Figure 1):

- Build an AI-powered marketing organization.
- Adapt to the new rules of customer engagement.
- Become a future-forward CMO.

» **Figure 1: Build What's Next for an AI-Driven World**

Key priorities for marketing success in 2026



Source: Gartner

## Priority 1: Build an AI-Powered Marketing Organization

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CMOs who use AI to redesign operating models will lead and drive growth. However, those who simply bolt AI onto legacy systems will fall behind. The constant noise around AI has made it challenging for CMOs to navigate, but in reality, AI's impact follows a predictable trajectory:

- **AI as a tool:** Enhances productivity but rarely transforms outcomes
- **AI as an agent:** Orchestrates outcomes and makes semiautonomous decisions with human oversight
- **AI as an influencer:** Shapes decisions independently and exerts more influence over businesses and customers as AI becomes embedded in societal norms — expected within three to five years

Most marketing leaders are currently piloting AI agents, but even advanced adopters struggle to achieve meaningful business results.<sup>3</sup> Why? Because they start with technology instead of process.

### What to Do

Treat AI as the catalyst to transform marketing's operating model, rather than a simple technical upgrade. Build AI-native operating models where humans and AI agents collaborate seamlessly. Redesign workflows, decision points and strategic goals before deploying or upgrading technology.

AI agents are broadly capable, but not all processes are equally ready to be automated. Assess which marketing processes — such as journey orchestration, workflow automation, content creation and strategic planning — will extract the most value from agentic support.

- **Prioritize strategic direction:** Break down strategic objectives into focus areas and AI opportunities.
- **Map how AI fits into workflows:** Use existing process maps to identify where AI can reduce friction and where the organization is ready to use it. Layer new AI workflows onto process maps to ensure auditable, ethical and brand-aligned outcomes.
- **Invest in new talent needs:** Build composable teams and upskill marketers to manage hybrid human-agent systems.

## Priority 2: Adapt to New Rules of Customer Engagement

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GenAI is disrupting channels, while agentic buying promises to reshape purchase decision making in ways that reduce human involvement. Leading marketers are already restructuring their data, content and technology to keep their brands visible and relevant.

The last year saw unprecedented adoption of GenAI platforms, including a 608% year-over-year increase for ChatGPT.<sup>4</sup> As chatbots and AI-driven discovery accelerate, traditional channels such as search advertising, display and social may no longer deliver the reach or ROI marketers expect — either because they are integrated into AI interfaces or no longer reaching the same audience.

At the same time, AI-powered personalization brings a new risk of scaling ineffective approaches. Consumers and B2B buyers who encountered personalized messages during a recent purchase decision were 1.7 times more likely to delay decisions and 3.2 times more likely to regret what they bought.<sup>5</sup> If we simply turn up the gas on personalization, it could blow up the customer experience.

### What to Do

Adopt a zero-based approach to channel strategy that discards legacy assumptions of impact and ROI. This means every channel investment must be reearned based on its forecast contribution to business impact in an AI-mediated world.

- **Reassess channel ROI:** Use marketing mix modeling or attribution analysis to evaluate the real value of each channel today.
- **Rebuild the portfolio:** Start with performance channels that directly support purchases, then proven brand-building channels and finally experimental bets based on emerging trends.
- **Review quarterly:** Ensure proven channels don't crowd out the innovation needed to stay competitive.

Resetting the channel plan is only the first step. For the channels you choose to invest in, consider how you can build meaningful engagement and connection during increasingly scarce human touchpoints. Focus explicitly on how your brand differentiation shows up in the context of new channel engagements.

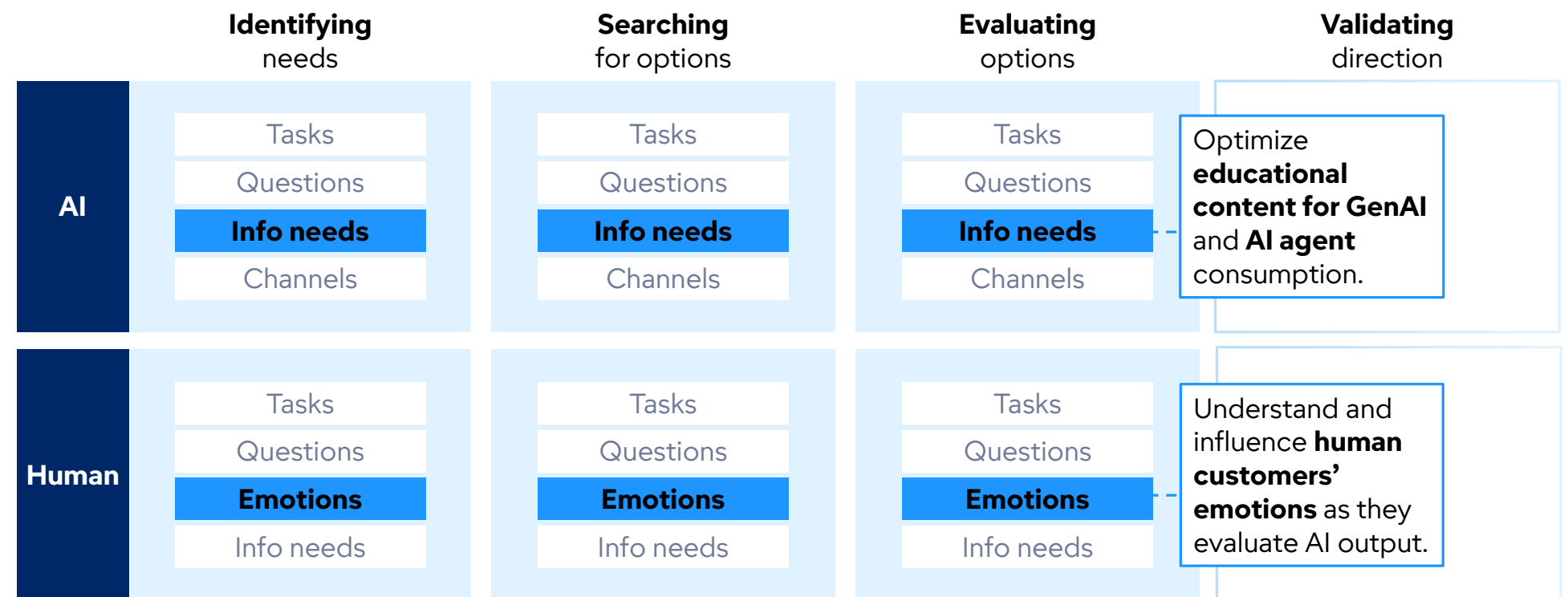
AI can fake closeness, but it cannot earn trust the way authentic human experiences do. Trust in machines will be based on confidence in the underlying data and models. Trust with humans will still involve emotion. CMOs will need the discipline to optimize for both.

Design for dual customer journeys: those of AI tools and agents on the one hand, and those of the humans evaluating their output on the other (see Figure 2).

- **Support AI information needs:** Optimize educational content for GenAI platforms to influence answers customers see first.
- **Reinforce your brand in human journeys:** Reinforce emotional connection at scarce human touchpoints. Use brand-aligned journey maps to help you dial up experiences that change customer beliefs and actions.

» Figure 2: Dual Customer Journey Maps for AI and Human Customer Personas

Illustrative example



Source: Gartner

## Priority 3: Become a Future-Forward CMO

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In addition to the transformations affecting marketing's operating model, channels and customer journeys, the CMO role is undergoing a fundamental shift. CEOs and CFOs say they plan to increase marketing's accountabilities from an average of five areas today to eight areas by 2029<sup>6</sup> — most likely without a proportional increase in resources.

To avoid getting caught in the swirl of cross-functional competition for influence, CMOs will need clarity, vision and focus. And CEOs and CFOs have been clear: They value CMOs' strategic insight over operational effectiveness. CMOs who excel as market shapers are eight times more likely to exceed CEO and CFO expectations than "enterprise operators" who get things done in complex organizations.<sup>6</sup>

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**Market shapers: CMOs with deep customer and market insight along with strong positioning and innovation capabilities**

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### What to Do

Use AI to accelerate your proficiency as a market shaper. This means leading with strategic insight into your customers and markets and building marketing team skills to reason with AI. Guide your enterprise to explore new AI-enabled business models and unique market moves.

- **Use AI to accelerate insight:** Leverage AI to sift data, simulate customer behavior and identify emerging needs, but avoid the competitive "sea of sameness" by applying human reasoning.
- **Build team skills in reasoning:** Develop capabilities in ethical, strategic, scientific and systems reasoning to interpret and apply AI-generated insights in unique ways.
- **Seize business advantage from AI strategic shifts:** Match your executive team's ambition to recalibrate digital strategies and harness tech capabilities for competitive advantage.

AI, shifting customer expectations and expanding executive accountabilities are rewriting the rules of marketing. Incremental change will not suffice; success requires bold, strategic action. CMOs who act decisively will not only navigate disruption but define the next era of enterprise leadership.

<sup>1</sup> **2026 Gartner Brand and Business Strategy Survey.** This survey was conducted to understand best practices related to brand strategy and its impact on business strategy development and performance. The survey was administered online from September through October 2025 and includes data from 426 senior marketing leaders responsible for brand strategy, and senior leader partners from other functions, including leaders from the U.S. (n = 228), U.K. (n = 87) and mainland Europe (n = 63). Leaders represent many industries, including banking and financial services (n = 65); IT products and services (70); manufacturing, energy, and natural resources (n = 42); healthcare (n = 39); retail (n = 32); pharmaceuticals, biotechnology and life sciences (n = 40); insurance (n = 43); travel and hospitality (n = 34); and others (n = 61). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> **2025 Gartner Marketing Transformation Survey.** This survey was conducted to explore what CMOs are thinking about the near future (i.e., the next one to two years) of the marketing organization amid the disruption of AI and how they are approaching organizational structure changes and marketing operations management in 2025. The survey was administered online from August through October 2025 and includes data from 402 senior marketing leaders. These results represent marketers from North America (n = 189) and Europe (n = 213). Respondents were required to have decision-making authority over marketing budgets and strategy at an organization with at least \$100 million in annual revenue. Fifty-eight percent of respondents came from organizations with at least \$2 billion in annual revenue. Respondents came from a wide variety of industries, including technology products (n = 59); banking and financial services (n = 55); consumer products (n = 47); retail (n = 47); manufacturing and natural resources (n = 43); healthcare (n = 41); insurance (n = 33); pharmaceuticals, biotechnology and life sciences (n = 23); media (n = 22); IT and business services (n = 20); and travel and hospitality (n = 12). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

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<sup>4</sup> Gartner analysis of Similarweb data (n = 4 general-purpose AI chatbots, from September 2023 through August 2025). Similarweb is a third-party data source that captures website traffic and engagement, email referral traffic, and LinkedIn traffic. Similarweb gathers data from a panel of hundreds of millions of monitored desktop and mobile devices, local internet service providers and public data sources, as well as directly from sites' first-party analytics.

<sup>5</sup> **2025 Gartner Marketing Personalization Survey.** This survey was conducted to explore which elements of marketers' personalization efforts most impact customers' journey experiences and commercial outcomes. The survey was administered online from November through December 2024. It includes data from 1,464 B2B buyers and consumers in the U.S. and Canada (n = 961), the U.K. (n = 265), and Australia and New Zealand (n = 238). B2B buyers (n = 556) came from a wide variety of industries, including manufacturing and natural resources (n = 152); technology products (n = 106); banking and financial services (n = 80); healthcare (n = 58); retail (n = 39); pharmaceuticals, biotechnology and life sciences (n = 28); and others (n = 93). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>6</sup> **2024 Gartner Senior Executive Views of CMO Leadership Survey.** This survey was conducted to explore how CMOs are perceived by key C-suite leaders (i.e., CEOs and CFOs), and what distinguishes effective CMOs under different behavioral and company circumstances. The survey was administered online from August through September 2024 and includes data from 125 senior executives in North America (n = 84) and Europe (n = 41). Respondents were CEOs and CFOs at organizations with at least \$50 million in annual revenue, with 36% coming from organizations with at least \$1 billion in annual revenue. Respondents came from a wide variety of industries, including manufacturing and natural resources (n = 21); banking and financial services (n = 6); retail (n = 8); healthcare (n = 23); consumer products (n = 17); pharmaceuticals, biotechnology and life sciences (n = 6); insurance (n = 2); technology products (n = 14); travel and hospitality (n = 8); IT and business services (n = 16); and media (n = 4). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

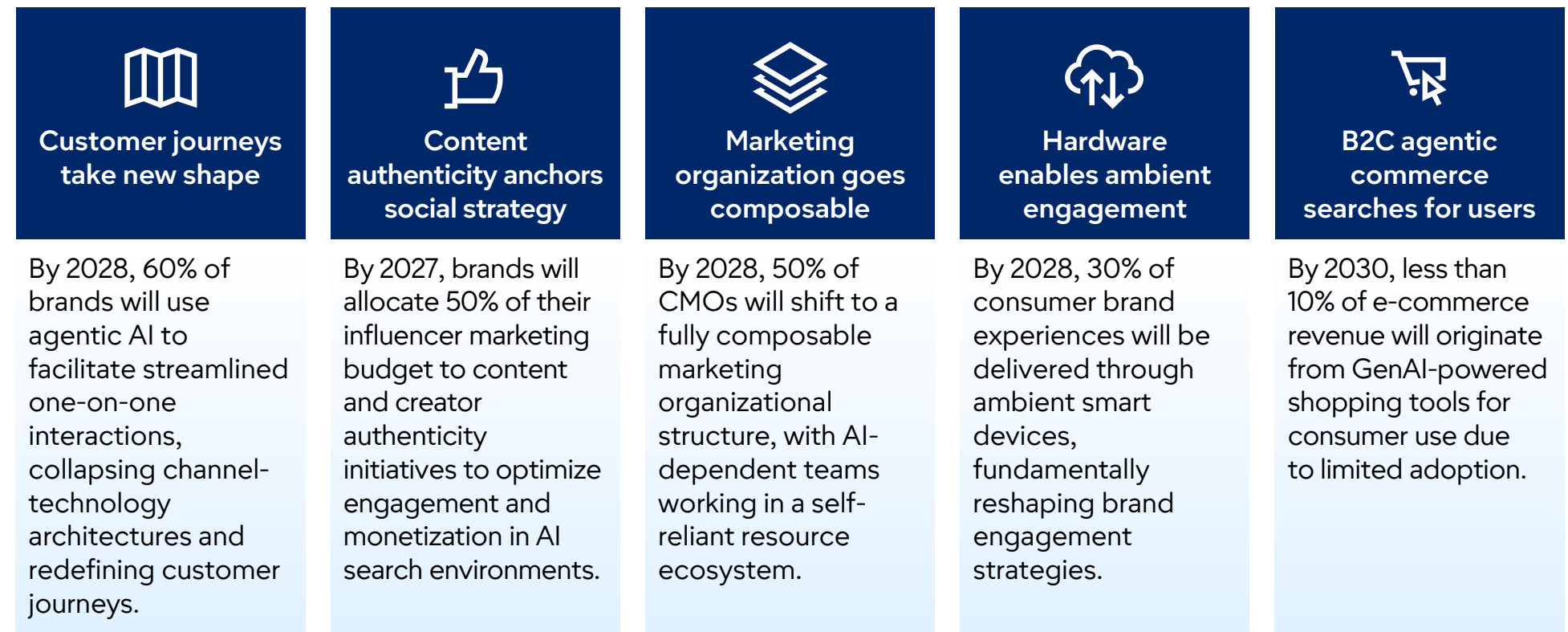
# Mainstream Marketing Predicts 2026

by Alexandra Bellis, Sharon Cantor Ceurvorst, Nicole Greene, Dan Gutter, Leah Leachman, Kate Muhl, Claudia Ratterman, Suzanne Schwartz, Emily Weiss, Jay Wilson, Sally Witzky

AI has significantly transformed the nature of marketing's role within business units and for its customers. Gartner's 2026 predictions provide a window of opportunity for CMOs to prepare for an increasingly AI-driven future.

The agentic-driven marketing function has arrived, and the conditions it presents are as promising as they are precarious. Our mainstream marketing predictions for 2026 to 2030 (see Figure 1) provide signals for how CMOs and their organizations will need to reinvent their operating models, team composition and customer journeys to deliver value to both customers and the business as an AI-powered function.

» Figure 1: Top Predictions for Chief Marketing Officers in 2026



Source: Gartner

**Gartner predicts:** By 2028, 60% of brands will use agentic AI to facilitate streamlined one-to-one interactions, collapsing channel-technology architectures and redefining customer journeys.



**Key Findings:**

- 56% of U.S. consumers agree they will embrace or already have embraced AI, up from 48% in 2023.<sup>1,2</sup>
- 81% of marketing leaders have AI agents in the piloting or production phase.<sup>3</sup>
- Multichannel marketing vendors now offer conversational APIs for unified channel access, real-time interactions (email, mobile) and dynamic experiences, improving agents' ability to access data and business processes in the future.<sup>4</sup>

**Market Implications:**

In the future, AI agents will facilitate one-on-one interactions, including automating orders, proactively notifying customers of product or service updates, and customizing financial recommendations. AI agents will learn from each interaction to deliver even more refined future customer engagements.

Marketing will shift from rigid, app-specific martech interfaces to AI-agent-driven protocols that orchestrate customer engagement. Instead of launching campaigns, marketers will oversee autonomous systems that deploy personalized experiences across journeys and channels.

The agentic AI evolution will also enable intelligent machine-to-machine communications. This paves the way for machine customers — smart appliances, connected cars and virtual assistants — to make purchasing decisions based on rules and data.

Answer engine optimization (AEO) is already disrupting search marketing, reshaping website-driven buying journeys into conversations, facilitated by AI agents acting as digital concierges. This shift will collapse traditional channel strategies and redefine how campaigns are executed.

### Recommendations:

- **Prepare for personalization at a new scale** by having data, content and context governance in place now, enabling agentic systems to interact with customers securely and ethically in the future.
- **Track customer journey changes** — channel KPIs such as website visits, click-through rates, qualified leads and search results — on a weekly basis. Begin socializing changes in these metrics with the C-suite now so everyone understands the impact.
- **Account for the total cost of ownership** of each agent considering vendor pricing models and data management costs. Unpredictable runaway costs from API and large language model (LLM) usage will be a barrier to approval of efforts.
- **Request transparent pricing** from vendors, especially for integrated platforms with agentic components.
- **Upskill your team to be strategists first and specialists second.** Marketers who can evaluate and guide agents based on business acumen, analytic skill sets, and AI and GenAI fluency will be required.

**Gartner predicts:** By 2027, brands will allocate 50% of their influencer marketing budget to content and creator authenticity initiatives to optimize engagement and monetization in AI search environments.



### Key Findings:

- The share of AI overviews containing social media links grew nearly 200% since October 2024.<sup>5</sup>
- The share of social content at the top of the SERP has nearly doubled in the past year, rising from 11.2% to 21.7% for users.<sup>5</sup>
- 78% of consumers say that, as AI-generated content becomes widespread, the explicit labeling of AI-generated content is very important or the most important thing.<sup>6</sup>

### Market Implications:

The increasing use of AI in content creation and curation, combined with the greater visibility of social-originated content in search results, is amplifying the reach and influence of active creators and brands. It is also heightening the brand risks associated with multimedia deepfakes and the spread of disinformation on social media.

In recent years, social algorithms have primarily rewarded engagement volume. Now, emerging AI-powered search and recommendation systems increasingly prioritize content authenticity, provenance and trust signals, placing verified, high-trust creator content at the forefront of user discovery.<sup>7</sup> Traffic to retail sites from GenAI sources has grown dramatically, further accelerating the shift toward shoppable, social-originated content.<sup>8</sup>

#### Recommendations:

- **Adopt clear labeling conventions** to differentiate between “fully human-generated,” “AI-assisted/human-curated” and “fully AI-generated” content, aligning with emerging regulatory and platform standards. Prioritize disclosure when the use of AI is material to the audience’s understanding or trust, rather than blanket labeling.
- **Monitor regional and vendor-specific disclosure mandates**, and remain agile in adapting verification and labeling practices to local requirements and platform standards.
- **Enhance verification process for external creators** by leveraging advanced influencer marketing platform (IMP) capabilities, including automated identity checks, AI-powered content provenance analysis and third-party credential validation.
- **Invest in robust content verification tools** to ensure all published assets are authentic and nondeceptive.
- **Test and adopt new monetization models**, such as affiliate partnerships, shoppable modules and agentic commerce integrations with platforms like Shopify.

**Gartner predicts: By 2028, 50% of CMOs will shift to a fully composable marketing organizational structure, with AI-dependent teams working in a self-reliant resource ecosystem.**

#### Key Findings:

- CMOs expect their teams to take on more work. As a direct result of AI-driven time savings, marketers are expected to experiment with new ways to use AI tools (64%), accept more complex and strategic work (62%), and increase individual output (58%).<sup>9</sup>
- 49% of CMOs report that they need to make significant changes to their marketing team’s composition and skills over the next two years. The top three most important skills are digital dexterity (48%), strategy (33%) and critical thinking (29%).<sup>9</sup>
- Over the next year, 37% of CMOs say they plan to create new AI-focused roles, and 34% plan to reallocate staff to very different work.<sup>9</sup>

#### Market Implications:

CMOs will soon embrace dynamic, composable marketing organizational structures that leverage technological innovation and exceptional cross-functional collaboration. AI-dependent teams must be both collaborative

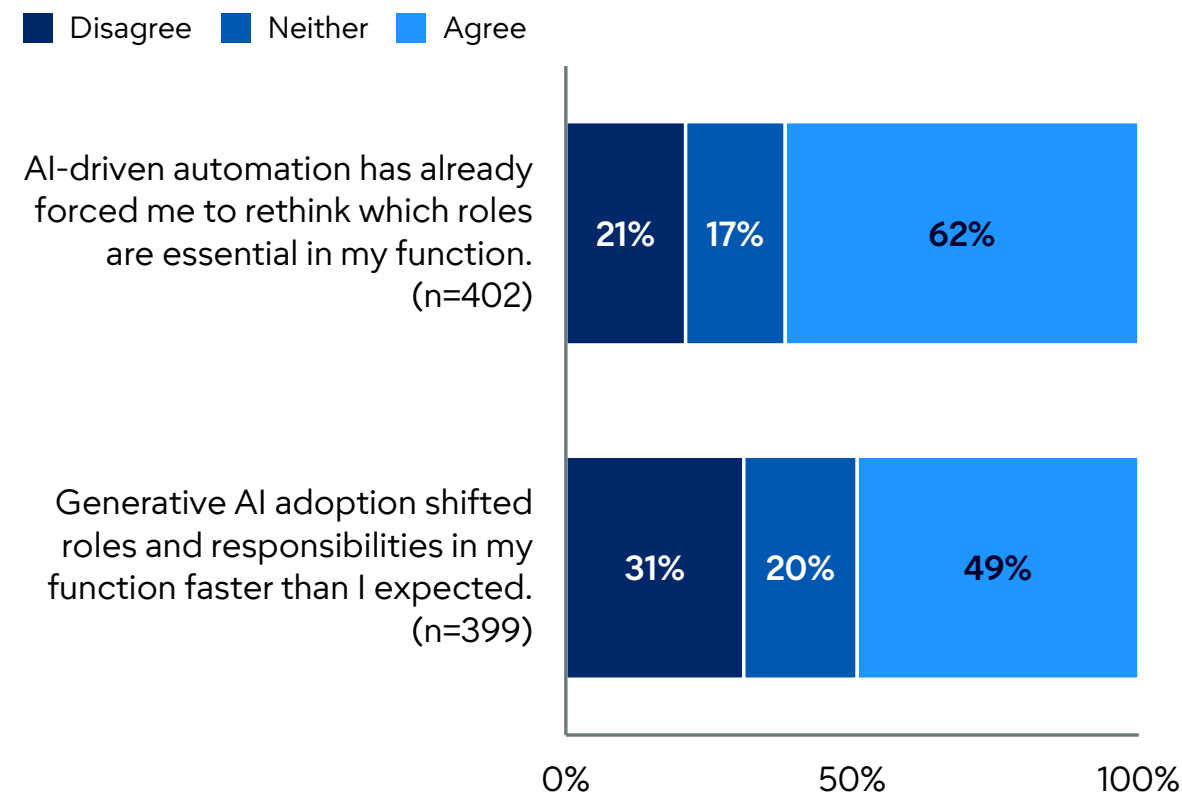
and adaptive within a self-reliant resource ecosystem. Yet individual contributors will work independently due to the nearly do-it-all-yourself ability created with AI assistance at their techno-fingertips. The organizational structure will flatten, collapse, become increasingly conflated and look more like a diamond than a pyramid.<sup>10</sup> It will morph itself into an outcomes-based collective with the principles of composability:

- **Modularity** to scale and flex within a constant state of change
- **Autonomy** to reduce dependencies, increase self-reliance and gain speed rapidly
- **Discovery** to adapt and learn to promptly create value and realize opportunities
- **Orchestration** to coordinate teams and resources so the organization can continually recompose itself as needs evolve
- **Interoperability** to exchange data and insights and seamlessly integrate martech

Hybrid human and agent job roles are evolving to deconstruct and reform, redistributing some responsibilities while assuming others of greater value (see Figure 2).

» **Figure 2: AI Has Forced CMOs to Rethink Marketing Roles Faster Than Anticipated**

Level of agreement regarding the impact of AI on marketing roles



n = 402 senior marketing leaders (base varies by item), excluding don't know  
 Q. Please rate your agreement with each of the following statements about AI and your marketing function.  
 Source: 2025 Gartner Marketing Transformation Survey

**CMO insights:**

- 62% of CMOs say that AI-driven automation has forced them to rethink marketing roles and determine which ones are essential.
- Nearly 50% of CMOs report that GenAI adoption has shifted marketing roles and responsibilities faster than expected.

**CMO actions:**

- Immediately assess all marketing roles to determine role evolution and essential value.
- Regularly monitor marketing roles to determine the ability to shift capacity toward higher-value, strategic work.
- Optimize marketing roles no less than quarterly.

#### Recommendations:

- **Assess all marketing roles and tasks for impact** from automation and increased productivity. Shift capacity to higher-value work, and automate or eliminate lower-value activities.
- **Make frequent, incremental changes to organizational structure** and operations to stay ahead of shifting business priorities and avoid disruptive, large-scale restructures.
- **Consolidate and simplify marketing capabilities using composability principles**, centralizing insights generation and eliminating duplication to build a more agile, efficient and adaptable team.
- **Proceed optimistically yet cautiously to capitalize on growth opportunities.** As digital dexterity and AI literacy increase, augmented AI-enabled marketers will become standard. Increased output and improved quality can create more opportunities for net-new human jobs.

**Gartner predicts:** By 2028, 30% of consumer brand experiences will be delivered through ambient smart devices, fundamentally reshaping brand engagement strategies.



#### Key Findings:

- Internet of Things (IoT) devices — such as wearables and smart home devices, smart tags and sensors — are becoming more available and decreasing in cost.
- AI in the cloud will support the higher performance necessary to process the large volume of data from ambient smart devices to generate intelligence, make decisions and take action based on customer behaviors in real time.
- Brand interactions will be mediated through devices operating without explicit user commands. This places a premium on incidental discoverability — and “invisible analytics” — where customers will connect with brands based on behaviors rather than active search and discovery.

## Market Implications:

Today's consumers are beginning to leverage AI to improve shopping efficiencies, fill out online forms and create memes, paving the way for new brand interactions.<sup>11</sup> Some consumers are implicitly opting into data collection that can be used for ambient experiences in the future. Additionally, many ambient IoT devices are projected to integrate capabilities such as real-time image and video analytics, enabling improved personalization through contextual cues. GenAI is being tightly infused with the main platforms or operating systems that run personal tech devices to integrate these capabilities. These emerging technologies will have an impact far beyond mainstream device categories (e.g., smartphones).

Voice will be a critical component of brand discovery through purchase, facilitating immediate, hands-free engagement and supporting real-time personalization. Visual search enhances engagement by bridging the physical and digital worlds, allowing consumers to scan physical items for immediate brand information and offers.

Brands will collect and process behavioral customer data by connecting an ecosystem of advanced devices with ambient smart devices, allowing brands to deliver real-time contextual engagement. This continuous data flow presents unparalleled opportunities for personalization but also raises significant concerns regarding privacy and data security.

## Recommendations:

- **Optimize content for AI-driven search and multimodal interfaces.** Ensure content meets traditional SEO and AEO criteria. Prepare for multimodal interactions (fusion of voice, visual inputs and tactile interactions) by optimizing content to be easily extracted by the AI models used in voice and visual search.
- **Prioritize investments in AI technologies and robust IoT infrastructure** capable of processing and integrating data from multiple sensor points in real time. This allows brands to leverage “invisible analytics” in the cloud where AI will analyze, decide and trigger actions in real time.
- **Champion strong security and compliance frameworks.** Given the continuous collection of data by the connection of IoT, including smart and ambient devices, CMOs must take ownership over how customer data is managed and communicate transparently about the use of AI to engage customers, offering clear opt-outs and data usage policies to bridge the trust gap.
- **Develop journeys for human customers, machine customers and combinations of both.** CMOs must rethink the brand-customer relationship to include machine customers, preparing to meet their rule-driven requirements while maintaining emotional connection and differentiation for human customers.

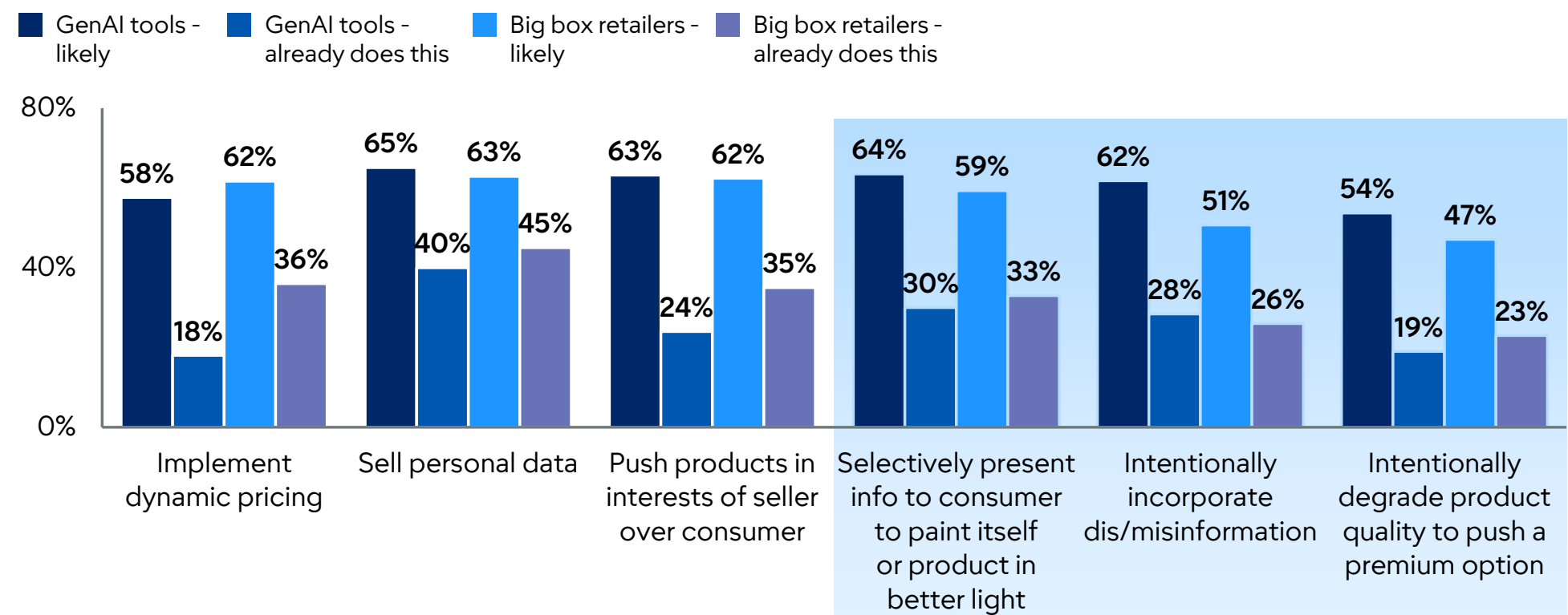
**Gartner predicts:** By 2030, less than 10% of e-commerce revenue will originate from GenAI-powered shopping tools for consumer use (including those housed on B2C brand-owned platforms and within GenAI platforms) due to limited adoption.

**Key Findings:**

- Trust is the biggest barrier to consumers adopting agentic shopping. Whether the agentic shopping experience is housed in a tool from a retailer or in a GenAI platform, consumers expect both to give them biased shopping recommendations at similarly high rates (see Figure 3).<sup>6</sup>
- Agentic adopters make up only 13% of the U.S. population.<sup>1</sup> And only 54% of the most agentic-friendly minority of U.S. consumers say they would allow AI to complete a purchase automatically when the AI tool recognizes something it thinks they want or need.<sup>1</sup>

» **Figure 3: Likelihood to Implement Anticonsumer Actions**

Percentage of respondents, net of very likely and somewhat likely; percentage reporting already doing action



n = 335 U.S. consumers age 18+

Q. How likely do you expect the following types of companies are to implement the below listed actions? Please select which actions, if any, each of the following already does today?

Source: 2025 Gartner Consumer Community Survey (27 October to 3 November 2025)

### Market Implications:

To date, few true digital agents that can act autonomously for consumers have materialized. Consumers have not had the opportunity to be delighted or disappointed in the technology. But when considering the possibility of a digital agent, consumers are lukewarm at best. And that is primarily driven by a lack of trust.

Retailers and B2C brands without massive market power and scale should exercise caution in pursuing agentic commerce initiatives, whether through brand-owned channels or in partnership with GenAI platforms. Instead, organizations deciding to move ahead with consumer-facing agentic offerings should expect that return on investment may come in other forms besides revenue, such as gaining relevance with agentic adopters. But even then, there is a risk of alienating everyone else.

### Recommendations:

- **Work first to establish consumer trust** by introducing noncommerce AI tools as a part of your brand experience so consumers begin to associate your brand with the benefits of these lower-risk AI tools.
- **Encourage rationality within the organization.** The potential of agentic commerce is exciting, but the consumers who are most ready to adopt may not represent the most important consumer targets for the business.
- **Prioritize feature development around lower-stakes shopping tasks.** Even in these early days, GenAI enthusiasts will likely prefer to make final decisions for themselves. Brands should avoid language that hints at that eventuality and focus instead on discovery and research over transactions.
- **Focus positioning and messaging around time and attention savings.** Agentic adopters value convenience, enjoyment and relaxation. Agentic commerce already promises to deliver on all three. Seize the brand opportunity to align agentic commerce with personal freedom.

<sup>1</sup> **2025 Gartner Cultural Attitudes and Behaviors Survey.** The purpose of this survey was to understand consumer attitudes and emerging behaviors. The research was conducted online from 8 through 24 October 2025 among 1,539 U.S. respondents. Of these, 1,139 were recontacted respondents aged 15 and older who had previously taken the 2025 Gartner Values and Lifestyle Survey in August or September 2025. The remaining 400 respondents were aged 15 or older and had volunteered or registered to participate in online surveys. The survey included screening, demographic and category-specific (such as consumer sentiment, generative AI, information sources, financial outlook and retail behaviors) questions. Quotas in both the recontacted and overall samples were set for geographic areas, age, gender, ethnicity and employment status to approximate the U.S. population as a whole.

<sup>2</sup> 2023 Gartner Cultural Attitudes and Behaviors Survey.

<sup>3</sup> 2025 Gartner Marketing Technology Survey.

<sup>4</sup> [Market Share Analysis: Communications Platform as a Service, Worldwide, 2024.](#)

<sup>5</sup> Gartner analysis of Google search data (n = 5,436 keywords, from August 2024 through August 2025). Gartner has developed proprietary crawlers for collecting results and other unique elements on Google search engine results pages (SERPs). Our tool collects SERPs for over 40,000 keywords daily, rotating through roughly 16,000 city-level locations across the United States to obtain a representative landscape of results. These results should still be taken directionally as they do not wholly reflect the targeting parameters that are available to search marketers.

<sup>6</sup> **2025 Gartner Consumer Community Survey** (n = 355, 27 October to 3 November 2025). While the Gartner Consumer Community (n ≈ 500) resembles the U.S. general population, the data cited is based on the responses of community members who chose to take each activity. These samples may not be representative of the general population and the data should only be used for directional insights.

<sup>7</sup> [How E-E-A-T SEO Builds Trust in AI Search Results in 2025](#), Single Grain.

<sup>8</sup> [AI-Powered Shopping Growing Dramatically](#), Adobe Reports, Forbes.

<sup>9</sup> **2025 Gartner Marketing Transformation Survey.** This survey was conducted to explore what CMOs are thinking about the near future (i.e., the next one to two years) of the marketing organization amid the disruption of AI and how they are approaching organizational structure changes and marketing operations management in 2025. The survey was administered online from August through October 2025 and includes data from 402 senior marketing leaders. These results represent marketers from North America (n = 189) and Europe (n = 213). Respondents were required to have decision-making authority over marketing budgets and strategy at an organization with at least \$100 million in annual revenue. Fifty-eight percent of respondents came from organizations with at least \$2 billion in annual revenue. Respondents came from a wide variety of industries, including technology products (n = 59); banking and financial services (n = 55); consumer products (n = 47); retail (n = 47); manufacturing and natural resources (n = 43); healthcare (n = 41); insurance (n = 33); pharmaceuticals, biotechnology and life sciences (n = 23); media (n = 22); IT and business services (n = 20); and travel and hospitality (n = 12). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>10</sup> [AI's Impact on Jobs Is Decoupling Headcount From Revenue \(and Value Creation\).](#)

<sup>11</sup> 2025 Gartner Omnibus Survey.

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# The Strategic Impact of AI Agents

by Nicole Greene, Lizzy Foo Kune

AI agents can automate interactions, processes and strategies for both marketers and customers. CMOs must understand what AI agents can do and act now to stay ahead of the impact on marketing across data, people, process and technology.

Agentic AI is less a successor to GenAI and other AI practices and more a set of capabilities that have been given transformational potential by their forerunners' advancements. Increasingly, AI agents can (semi)autonomously execute complex processes and human tasks, enabling more effective generative outputs.

For CMOs, AI agents allow teams to move beyond reactive bots and assistants to deliver personalized, efficient and adaptive customer experiences. They offer several specific benefits to marketing teams:

- AI agents help marketers optimize omnichannel experiences by analyzing behavior and preferences to recommend content, automate tasks and support smarter decisions.

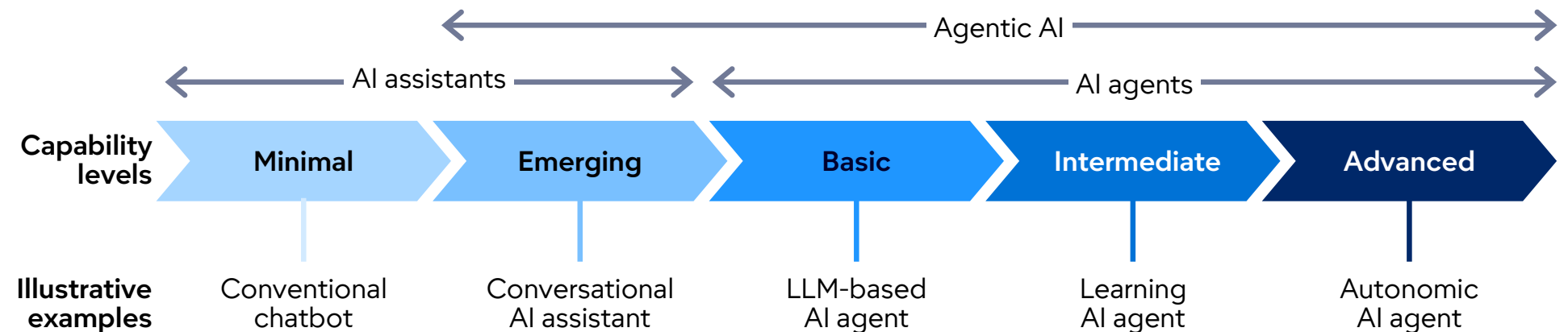
- Agents are built to perceive, decide, act on and achieve goals, making strategies more predictive and proactive. Using GenAI for reasoning and planning, agents can access tools, take unscripted actions and request user input in semiautonomous scenarios.
- Each agent operates with a defined goal, bounded by guardrails to limit scope and reduce errors.
- This approach to using AI agents drives personalization, boosts conversions and enhances the customer journey, ultimately improving efficiency, agility and marketing performance.

## How AI Agents Differ From AI Assistants

AI agents are goal-driven and can take autonomous actions to achieve outcomes, while assistants are typically reactive, responding to user commands without independent decision making. Such agency and other capabilities are not all-or-nothing properties. Instead, there exists a spectrum of agent capability levels: from minimal to advanced (see Figure 1).

CMOs can use this spectrum to gradually introduce agentic processes into well-scoped use cases that align with

» Figure 1: Gartner AI Agent Assessment Framework



Source: Gartner  
LLM = large language model







enterprise capabilities. Rather than aiming for full autonomy immediately, marketing can scale gradually as governance, data, risk mitigation and team readiness mature.

## What AI Agents Can and Can't Do

The hype and investment around AI agents inflate expectations and create confusion around what AI agents can and can't do to help marketing achieve its goals. If the promise of AI agents is that marketers can do more with less, that seemingly boundless potential also presents risks for CMOs assessing agentic investments. Additionally, even “qualified” AI agents require training in key capabilities such as perception.

To ensure sound decisions about building, buying or deploying AI agents, CMOs must objectively differentiate capabilities in the assessment process. Additionally, using consistent terminology aligned with IT, chief AI officers, operations and others to evaluate AI agents can keep CMOs from being misled by hype or AI washing. The levels of agent capabilities in Figure 2 help evaluate an agent's sophistication, from minimal to advanced, across defined capabilities.

» Figure 2: Levels of Agent Capabilities

		Minimal	Emerging	Basic	Intermediate	Advanced
 <b>Perception</b> Understanding environments with variable complexity		Simple	Signals	Attentive	Active	Integral
 <b>Decisioning</b> Analysis and problem solving to reach (multiple) goals		Mechanical	Deterministic	Analytical	Optimized	Strategic
 <b>Actioning</b> Management and execution of tasks		Rigid	Controlled	Situational	Orchestrated	Proactive
 <b>Agency</b> Level of independency in operations		Reactive	Assistive	Augmented	Autonomous	Independent
 <b>Adaptability</b> Adjustment to changes in environment or goals		Static	Contextual	Dynamic	Learning	Evolving
 <b>Knowledge</b> Manage and apply knowledge effectively in dynamic contexts		Limited	Specialized	Multidisciplinary	Abstracted	Universal

Source: Gartner

## How to Adopt AI Agent Technology for Marketing

AI agents are broadly capable, but not all processes are equally ready to be automated. CMOs should assess which processes, such as journey orchestration, workflow automation, content creation and strategic planning, will extract the most value from agentic support. From a feasibility perspective, end-to-end process mapping and a workforce capability assessment will help determine if your organization is ready to use AI agents.

Ask teams to evaluate these processes for AI agent-enabled performance gains:

- **Customer journey orchestration:** Use reasoning models to analyze situations, make inferences and guide actions across commerce, personalization, advertising and sales enablement.
- **Workflow optimization:** Agents interact with tools to automate repetitive tasks such as segmentation, ideation, project tracking, campaign optimization and content personalization.
- **Competitive research and customer insight:** Combine and act on disparate data streams to uncover insights and identify key events.

- **Scenario and strategic planning:** Process structured and unstructured data to deliver timely context and adjust strategies.
- **Content and campaign creation:** Use tools to draft, test and generate content across modalities (vision, audio, language), bypassing traditional design and approval cycles.

Assess readiness for these processes by considering advancing AI agent capabilities:

- Automating time- and data-intensive tasks in new ways
- Acting independently to eliminate redundancy and free teams for strategic work
- Learning and adapting based on customer feedback and data shifts
- Interacting with customer-facing agents to configure offers, negotiate and fulfill requests
- Creating new governance, experimentation and operational models to scale agents
- Evolving into multiagent systems for complex, multistep goals
- Replacing always-on martech with on-demand agents for specific tasks

## The AI Agents for the Marketing Provider Landscape

CMOs face a fragmented and evolving vendor and provider landscape, offering a growing selection of marketing-specific solutions. Understanding the range of agentic capabilities from basic automation to more advanced, semiautonomous systems will support informed, context-appropriate investment decisions.

This mix of opportunity and risk has created a diverse provider landscape. Hyperscalers, enterprise vendors, startups, custom builds and consultants each offer agentic services for different needs (see Figure 3). CMOs should adopt a flexible, composable tech strategy that accommodates multiple provider types to capture value and manage risk as agent maturity evolves.

The cost of AI agents varies widely. Recurring costs of AI agents at scale are driven by the number and complexity of reasoning steps in an agentic AI workflow or decision flow, the size of context prompts and output, the deployment model, the license model and AI data readiness. Vendor pricing models and data management costs are key drivers of cost variability.

» Figure 3: Competitive Vendor Landscape for Highly Automated Business Process Services



Source: Gartner  
BOAT = business orchestration automation technology

CMOs should begin investing in foundational capabilities now, including API development with IT and operations teams. Widespread adoption of open-source protocols such as Model Context Protocol (MCP) and Agent2Agent (A2A) will lead to more APIs and more API usage, not less.

AI agents offer solutions to legacy challenges such as tech debt and lack of stack harmonization, but the impact extends beyond technology. AI agents blend human and machine work into new forms of automation, raising challenges around data quality, governance, process and explainability.

## What Marketers Need to Do Today

- Incorporate AI agents into strategic planning by investing in understanding their capabilities and potential applications across marketing, including data and analytics, content creation, advertising, e-commerce and sales enablement.

- Be mindful that not every problem is best solved by an AI agent or even GenAI. Map existing human-led workflows and understand decision-making logic, objectives and the tools used. This forms a framework to determine how an agent can automate or augment workflows.
- Promote the development and integration of a variety of AI practices, enabling learning, workflow automation and decision-making capabilities.
- Position marketing as a pilot environment with a secure, internal simulation environment for testing agentic applications and for controlled, limited pilots that have passed trials to build confidence before deployment.

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# Build an **Adaptive Marketing Collective** for the AI Era

by Sally Witzky

The hierarchical org chart is outdated. Due to AI's rapid impacts on marketing, today's CMOs require dynamic capacity. Redesign marketing as a collective of adaptable resources around four key areas of responsibility: strategy, operations, brand and digital.

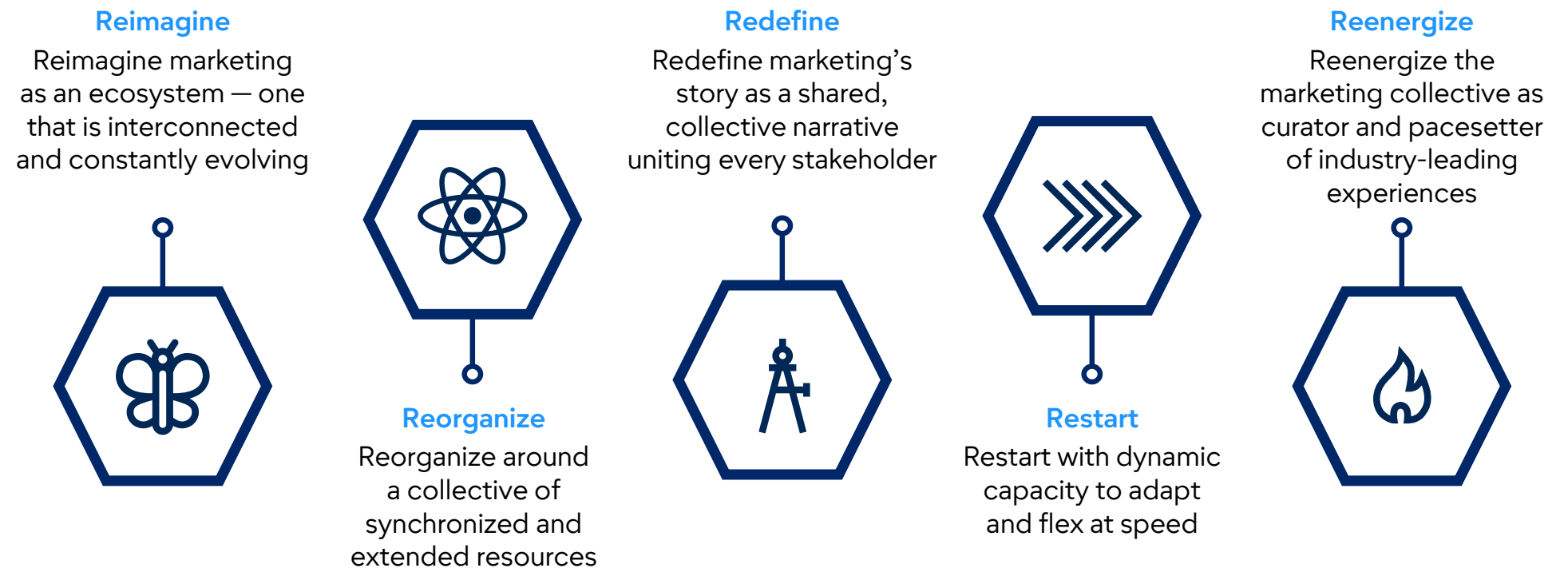
## The CMO's Marketing Collective Framework

Hierarchical marketing org charts limit the CMO's ability to flex and scale resources for evolving business needs. These charts suggest a fixed capacity, overlooking the extended resources — agencies, contractors, consultants, freelancers, vendors and AI — that CMOs regularly use to fill talent gaps. Marketing budgets and headcount face increased scrutiny, which makes resource scalability a critical art form.

In the face of this scrutiny, CMOs struggle to showcase the full scope of resources beyond full-time staff, making it difficult to project marketing as a dynamic resource ecosystem that is closely aligned with growth priorities. This forces CMOs to respond to business complexity with more complexity instead of simplicity.

Approach marketing organizational design by completely rethinking a traditional and restrictive marketing org chart and creating a marketing collective<sup>1</sup> instead (see Figure 1).

» Figure 1: How CMOs Transform the Marketing Org Into a Marketing Collective



Source: Gartner

**Reimagine** marketing as an adaptive, interconnected and evolving ecosystem.

**Reorganize** around a collective of synchronized and extended resources.

**Redefine** marketing as a collective, with a singular and amplified voice.

**Restart** with dynamic capacity using purposeful roles.

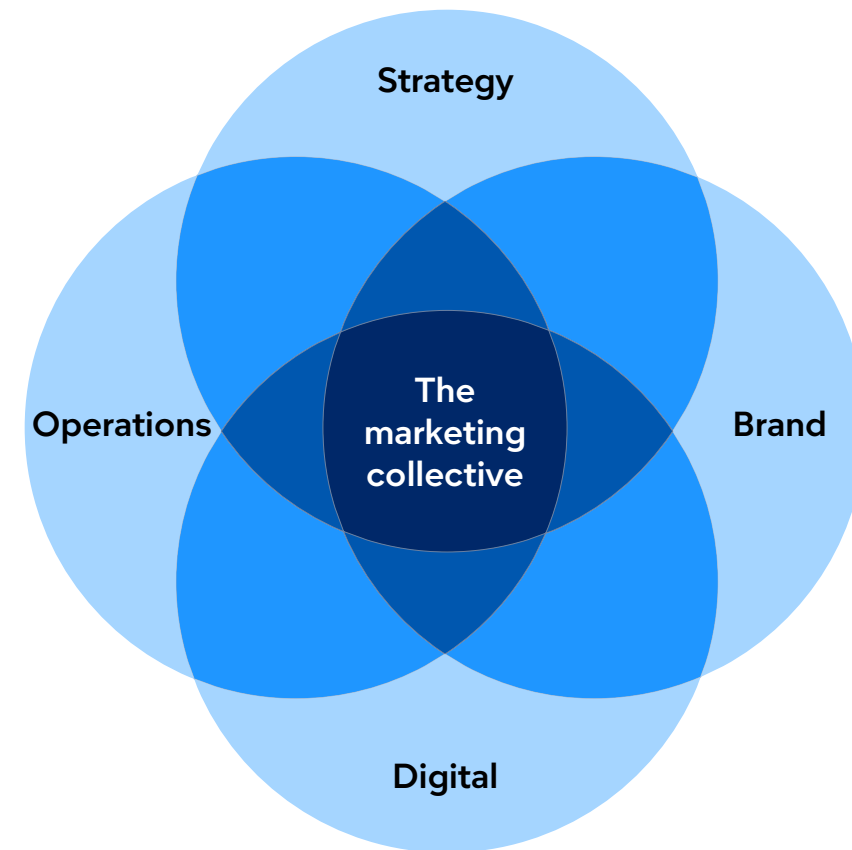
**Reenergize** the marketing collective to curate innovative experiences.

What is the business opportunity?

- First-mover advantage for organizations that redefine marketing structure and strategy
- Enhanced differentiation and growth through dynamic capacity and rapid innovation
- Industry leadership by setting the pace for transformational experiences

Getting this right means shaping the future of marketing and your organization's value. Figure 2 depicts the CMO's marketing collective framework,<sup>1</sup> which builds from four core areas of marketing responsibility: strategy, operations, brand experience and digital experience. It's a flexible framework that CMOs can contextualize to fit their needs.

» Figure 2: The CMO's Marketing Collective Framework



Source: Gartner

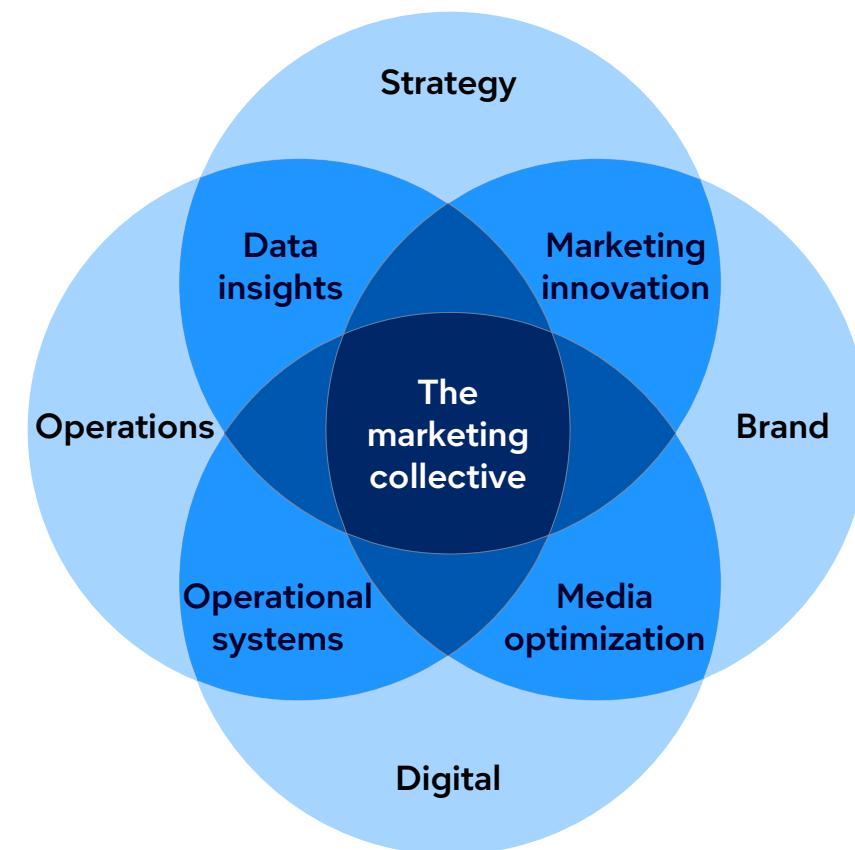
**Marketing org design insight:** All responsibilities fit holistically within four intersecting groups. While it may not translate to four direct reports, it simplifies each person's collective contribution. Keep it simple and don't overthink it.

## Step 1: Reimagine Marketing as an Adaptive Collective

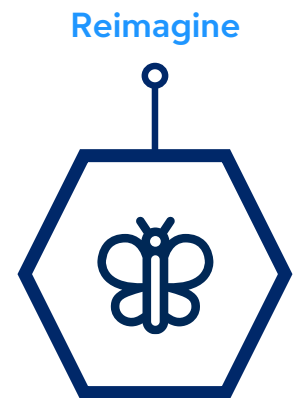
Reimagine the marketing organization as a resource ecosystem — one that is adaptive, interconnected and constantly evolving. A hybrid marketing team of humans and AI agents is fast becoming a reality. Think of the marketing organization as a living organism, able to sense change and respond fluidly, always learning and growing. While org charts still exist for the time being, prepare now for an alternative landscape. Figure 3 of the marketing collective adds four secondary focus areas essential to marketing:

1. **Insights:** Aggregated and synthesized quantitative and qualitative data become insights that drive decisions and actions and can be infused into marketing's work for continual differentiation.
2. **Innovation:** Ideation, ingenuity and creativity come naturally to many marketers, so it makes sense to capitalize on those abilities to lead innovation efforts.
3. **Media:** Paid media budgets have increased, and the spend must be optimized for maximum impact in awareness and demand generation.
4. **Systems:** AI-enabled marketing technology provides the operational systems for marketers to do their work, deliver results to key stakeholders and communicate with target audiences.

» Figure 3: Reimagine Marketing as an Adaptive, Collective Resource Ecosystem



Source: Gartner



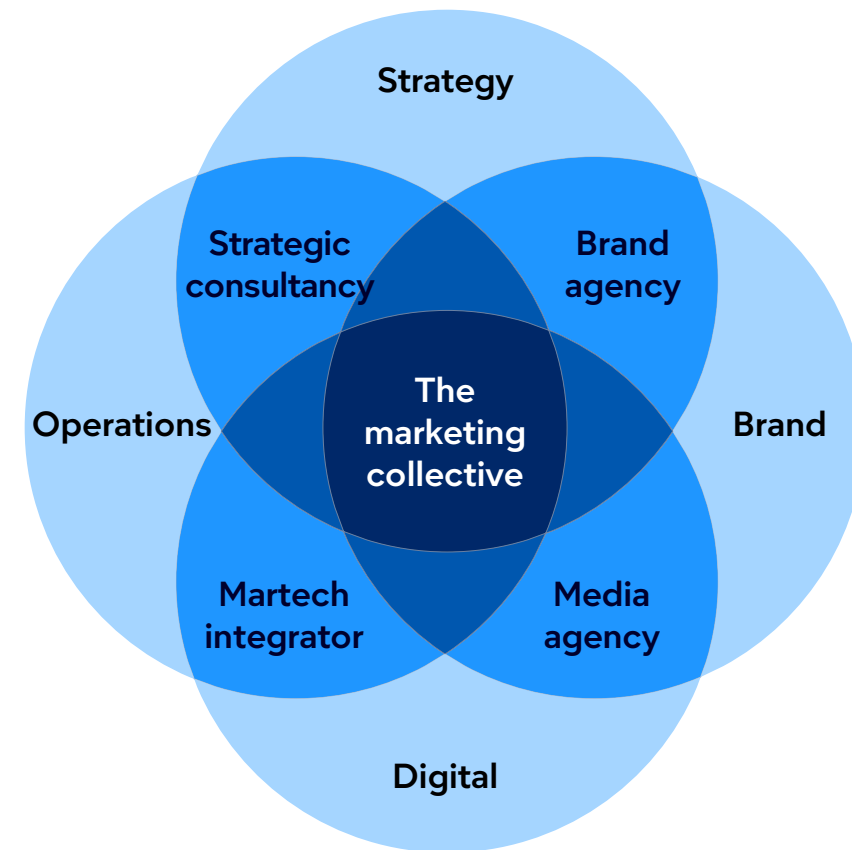
**Marketing org design insight:** Primary focus or role clarification can be included as subsets to the core four. The collective begins to take shape as a blooming flower or an in-motion wheel. It advances together in synchronous and harmonious movement.

## Step 2: Reorganize by Blending Resources

Reorganize around a collective of synchronized, extended and blended resources to become a single marketing entity. Move beyond the traditional team of full-time employees alone to include versatile contributors, partners and technologies that work together seamlessly. Strengthen team skills to work with agencies and integration or other partners.

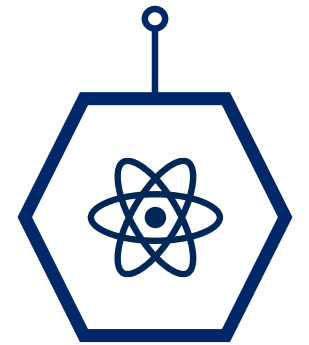
Depict external resources within the marketing collective framework by showcasing them where they belong in the team, not separate from it (see Figure 4).

» Figure 4: Reorganize Marketing Around External Resources



Source: Gartner

Reorganize



**Marketing org design insight:** Key service providers are typically considered outsiders as external resources. If they're treated as insiders, the CMO can scale with continuous momentum and unwavering consistency.

### Step 3: Redefine Marketing as a Singular Voice

Redefining marketing's story as a collective helps in other ways. When marketers work in silos, it has a negative effect on brand voice and amplification since they often end up independently focusing on similar work.

The collective can unite every stakeholder — internal and external — around a common purpose and voice, amplifying impact and clarity internally and within the served markets. The “one brand, one voice” mantra must be applied to all creative, content, channel and commerce strategies. This org design approach prevents silos and clarifies specific roles and responsibilities under the four core areas.

### Step 4: Restart With Purposeful Roles

Move forward with dynamic capacity, adapting and adopting at speed. Build a culture and infrastructure that can pivot rapidly, embracing new approaches, technologies and insights to stay ahead.

Use the marketing collective framework to align the team on modern marketing's mission to care for and become stewards of the:

- **Business experience**, to deeply understand the unsolved challenges
- **Marketer experience**, to adapt to change and transition to future-fit roles
- **Brand experience**, to be unique and differentiate from competitors
- **Customer experience**, to respond to their ever-changing needs and expectations

Most importantly, marketing roles must have purpose. Set the stage for marketers to strengthen their ability to become strategists, futurists, creators and technologists, and be prepared to scale resources with external agencies.

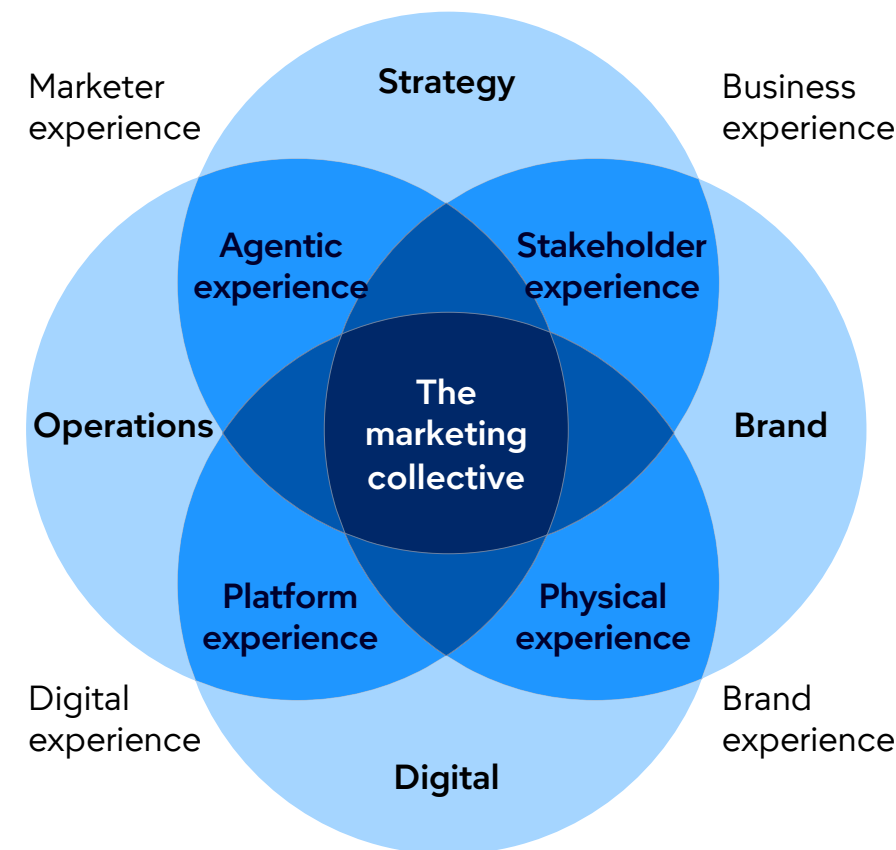
## Step 5: Reenergize by Curating Innovative Experiences

Reenergize marketing to set the pace in curating innovative experiences for all customers, expanding the collective’s impact far beyond the traditional boundaries of the marketing organization.

If the marketing collective owns the mandate to help curate the best experience for all customer groups — internal and external — it could become an experiential pacesetter. While not owning all the work, the collective would effectively collaborate with those who do (see Figure 5).

When CEOs and CFOs evaluate CMO performance, they look for CMOs who manifest and capitalize on marketing’s distinctive strengths. The singular marketing collective framework helps CMOs strategically magnify and clearly communicate marketing’s remarkable, value-creating qualities.

» Figure 5: Reenergize the Marketing Collective as an Industry-Leading Experience Pacesetter



Source: Gartner



### Marketing org design insight:

Elevating a marketing organization is no easy feat and can feel like a heavy lift, but energizing a single collective is much easier. Unify the collective to curate innovative experiences for all. One focus, one brand, one voice.

<sup>1</sup> The “CMO’s Marketing Collective” framework was first introduced as a pilot in August 2023 during a Gartner webinar entitled “Transform Your Marketing Organization Into a Strategic, Adaptive Powerhouse.” It was based on hundreds of client calls and marketing org charts from 2018 to 2023. Since the webinar, the framework has been discussed with CMOs in subsequent inquiry calls and refined through ongoing feedback from both the original webinar attendees and Gartner for CMO practice clients. Many CMOs say the framework helps them radically reimagine and simplify their marketing organization design, moving beyond the traditional org chart required by HR. Supported by published research containing primary survey data evidence, this Gartner framework is more relevant than ever for use by today’s modern marketing leaders. It has been created, tested and updated based on seven years of client inquiry calls with org chart document reviews and will continue to evolve for the AI era.

# AI's Impact on Marketing Resource Management

by Amy Jenkins, Michael McCune

CMOs turn to resource management as a lever for driving returns on AI investment through improved efficiency and cost reduction. To succeed, CMOs must assess their readiness for AI and avoid missteps that can derail resource management use cases.

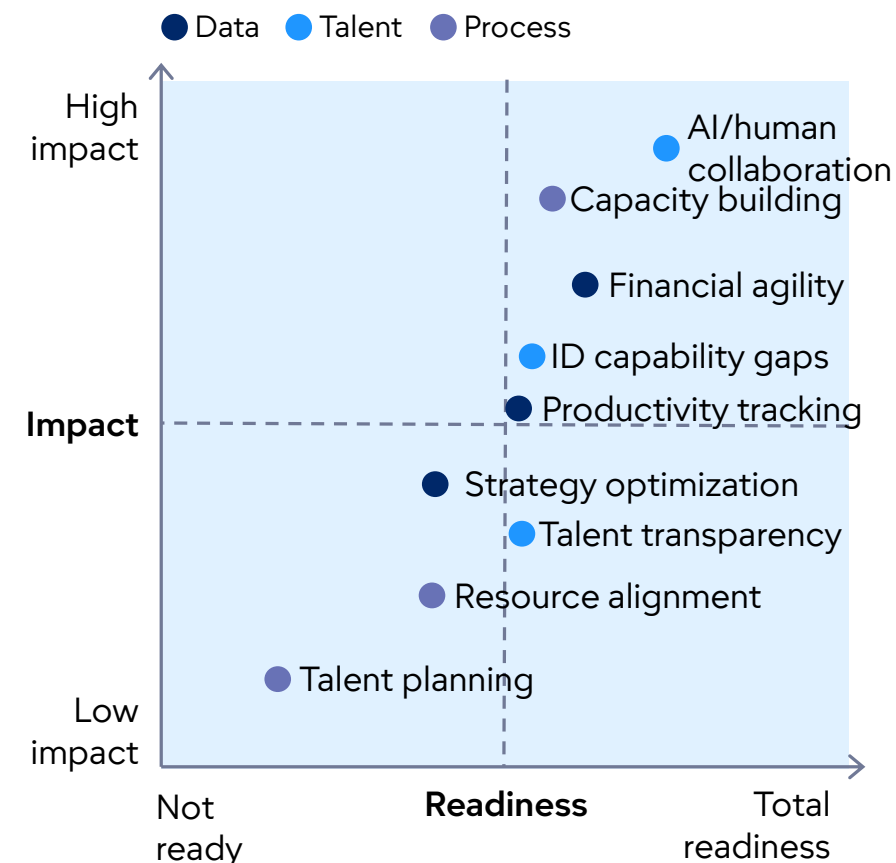
CMOs and their marketing operations teams are under growing pressure to maximize efficiency and reduce costs by harnessing AI innovation. In fact, 49% of senior marketing leaders are currently piloting or using AI solutions for workflow and project management.<sup>1</sup> The extent of automation may differ; however, the types of automation implemented are as follows:

- **Advanced automation:** Triggers and rules are not new to marketing work management (MWM) and project management tools. These controlled deterministic actions are human-defined and -maintained but also increasingly easier to build and deploy. Libraries of prebuilt automations that transform data or request actions by other tools help make workflows more efficient. Natural language automation builders help generalist roles create multistep actions, depending on permissions.
- **Contextual advice:** Searching for and identifying information is a long-standing feature of MWM platforms. AI models can greatly help expand the reach and understanding of what may be useful to a user. Incorporating knowledge of user role, skills, team, work and tasks enriches contextual awareness and helps prioritize results. Further development of the model application can also help interpret results as probabilistic advice for the user — their “next best work.”
- **Digital colleague:** True goal-directed and autonomous action in a specified domain of work aligns with the AI promise, but it is the least found AI assistant in MWM platforms. Enabling a model to reason, decide, execute, learn and adapt requires human governance and trust. Like humans, the role needs to be defined, with candidates evaluated, onboarded, trained, developed and, at times, let go. Still, the context-rich and prescribed environment of MWM platforms is ripe for practical, low-risk use.

CMOs regularly assess their organization's readiness for AI, yet nearly a third of senior marketing leaders aren't seeing expected returns, and a quarter are unsure what actions to take to keep pace with AI techniques and tools.<sup>1</sup> To boost team capacity, AI agents are increasingly being deployed to handle marketing tasks such as project triage and compliance approvals, streamlining workflows and accelerating time to market.

Reviewing your organization's data, talent and process readiness — using criteria like those in Figure 1 — can help prioritize initiatives and ensure successful AI integration into marketing resource management.

» Figure 1: Impact and Readiness: AI-Enabled Resource Management



Source: Gartner

## Assess Organizational Readiness for AI-Enabled Resource Management

To determine if your organization is ready to modernize its approach to marketing resource management, assess the following elements:

- Data:** AI-powered marketing resource management leverages diverse data sources, including talent skill sets, strategic goals and OKRs, project time tracking and budget information. Comprehensive access to each data source is essential for developing an optimized resource management model, although the data sources do not need to be centralized. Additionally, access to the organization's cross-functional work management system is necessary to transition resource management from human-driven processes to AI-driven solutions.
- Talent:** Unify marketing work requests to better identify resourcing challenges. This requires evaluating current talent capabilities and skills gap information taken from HRM/talent management applications as well as where marketing skills are tracked within marketing teams. Team members should also possess the experience and willingness to collaborate with AI assistance and AI agents.
- Process:** Assess readiness for AI adoption across project prioritization, process optimization, and compliance and approval workflows. Shifting from manual to highly automated and eventually autonomous operations demands ongoing process improvements, dedicated resources, robust data access and scalable technology.

Figure 2 provides detailed guidance to determine the organization’s readiness to support AI-enabled resource management.

» Figure 2: AI-Enabled Marketing Resource Management Use-Case Requirements (Data, Talent, Process)

	Not ready	Risky implementation	Ready for innovation	
Data	<b>Strategy optimization:</b> Are project requests aligned to marketing and corporate objectives?	Not aligned with objectives.	Manually aligned to objectives. Automation is used for priority assignment.	Automatically aligned to objectives using defined logic. Reprioritized periodically based on workload demands.
	<b>Productivity tracking:</b> Is the amount of time per work request tracked and accessible to automation?	Planned and actual dates are tracked for risk assessments on project completion.	Time stamps are used to dynamically show project-per-FTE estimates and workflow variance for optimization opportunities.	Project costs are measured against market activation to show impact.
	<b>Financial agility:</b> Are outcome achievement and budget tracked by the project?	Budget and outcome are not connected to projects.	Reporting can identify insights and highlight reallocation suggestions.	Suggestions are identified using AI to optimize the next best spend.
Talent	<b>Talent transparency:</b> How is marketing work being requested and tracked?	Different systems or no system are/is used to track work to be completed.	Standardized platform shows who did what work, when and why.	A holistic system of record presents options for staffing work, and adjustments are made based on dynamic conditions.
	<b>Identifying capability gaps:</b> Are the required skills to complete marketing work documented?	Gaps in talent skills are unknown.	Resourcing gaps are manually realized through bottlenecks caused by requests’ backlog.	Resource gaps are identified through an analysis of resource skills and time required for completion of work.
	<b>AI/human collaboration:</b> Is the marketing team using AI to augment marketing tasks and complete projects?	Inconsistent success with use of AI assistants and lack of control over contextual awareness.	Tasks are delegated to agentic AI but lack governance standards, cost controls or context engineering skills.	Requisition, development, onboarding and management of digital colleagues improve marketing productivity.
Process	<b>Resource alignment:</b> How is the marketing team assigning resources to the work to be done?	Managers assign staff manually to projects based on future availability.	Resources are autoassigned by availability and performance.	Resources are automatically realigned as priorities change or projects stall.
	<b>Capacity building:</b> How are areas needing additional capacity identified for future work requests?	Snapshots of siloed workflows guide requests for new hires or budget for agency support.	Dynamic modeling of project data shows where selective hiring improves capacity.	Adaptive planning of skills and tool acquisitions helps adjust capacity without new hiring.
	<b>Talent planning:</b> Are the skills for each marketing resource tracked and updated frequently?	Skills are not tracked in a system.	Skills information is updated periodically to augment resources with new skills information.	Skills are continuously updated based on learning development platforms, integrations and data from past projects.

Source: Gartner

## Tools: Representative Vendors

Figure 3 identifies three sample vendors and the unique capabilities they offer for AI-enabled marketing resource management.

Native functionality within MWM and project management tools is a common place to explore AI-enabled marketing resource management. However, some tools also explore creating MCP frameworks to bring your own AI to the existing platform. Examples of these providers include Salesforce Agentforce, Oracle AI Agent Studio and Ema.

## Prepare the Business Case for AI-Enabled Resource Management

Integrating AI into marketing resource management demands strategic planning, strong data governance and continuous alignment between technological capabilities and organizational resources. Consider these use-case nuances for your project scope to advance AI-powered marketing resource management (some may need additional investment):

### » Figure 3: Sample Vendors That Offer AI-Enabled Marketing Resource Management

#### Atlassian

AI can **triage work requests** and **analyze resource workload** to suggest reassignment.



#### ClickUp

AI agents can **estimate effort, update fields** and **suggest a timeline** for completion while highlighting resource project overlaps.



#### monday.com

AI makes **suggestions for resource assignments** based on availability, related campaign experience, skills and developmental needs.



- **Complex distributed organization:** Large enterprises with diverse global marketing needs require robust automation, assignment capabilities and tracking of strategic alignment of work to prioritize projects.
- **Agency-dependent organization:** Businesses that rely mainly on agency partners require strong collaboration tools and integrated approval workflows to coordinate internal and external resources.
- **Compliance-driven organization:** Enterprises with specific requirements due to brand, regulatory, legal or privacy policies require an efficient intake process that emphasizes the use of in-context collaboration within projects, enabling the tracking of approvals and monitoring of resource allocations.
- **Self-reliant organization:** Marketing organizations with intense work demands fulfilled by in-house resources require comprehensive resource data for team assignment and tracking against deadlines.

Source: Gartner

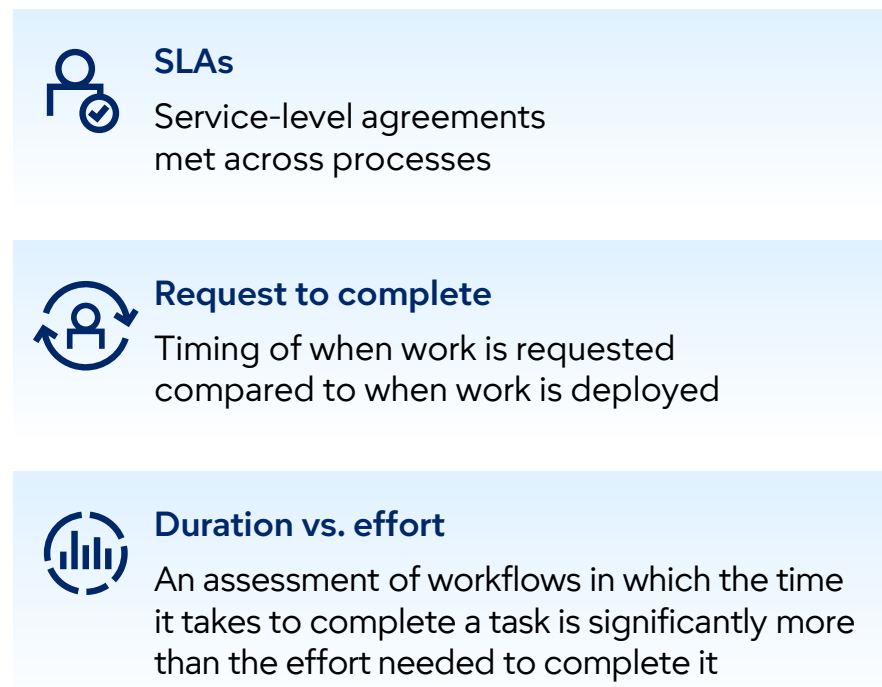
Note that pricing models for AI functionality remain highly dynamic. Currently, some providers offer AI-powered resource management features in beta, often using a freemium approach, but we anticipate a shift toward consumption-based pricing in the future. Therefore, closely monitor usage within any selected tool and help staff improve prompts to maintain effective cost control.

Assessing the impact of investments in AI-enabled marketing resource management is a vital component of the business case. Figure 4 provides example metrics that can be used to showcase the anticipated business outcomes.

Evaluating and reevaluating an organization's readiness to implement AI capabilities — including AI agents — is a frequent exercise for CMOs. To begin your journey toward incorporating AI within marketing resource management:

- **Document and analyze team skills:** Maintain current records of capabilities to identify gaps and inform resourcing decisions. Gather skills information from HR systems, learning platforms and past project insights to develop a complete view of team capabilities.
- **Track time and outcomes:** Systematically capture time spent on marketing activities, and link outcomes to budgets for optimization.
- **Foster trust in AI agents:** Build feedback loops and performance reporting to support collaboration between human and digital colleagues.

#### » Figure 4: Sample Metrics



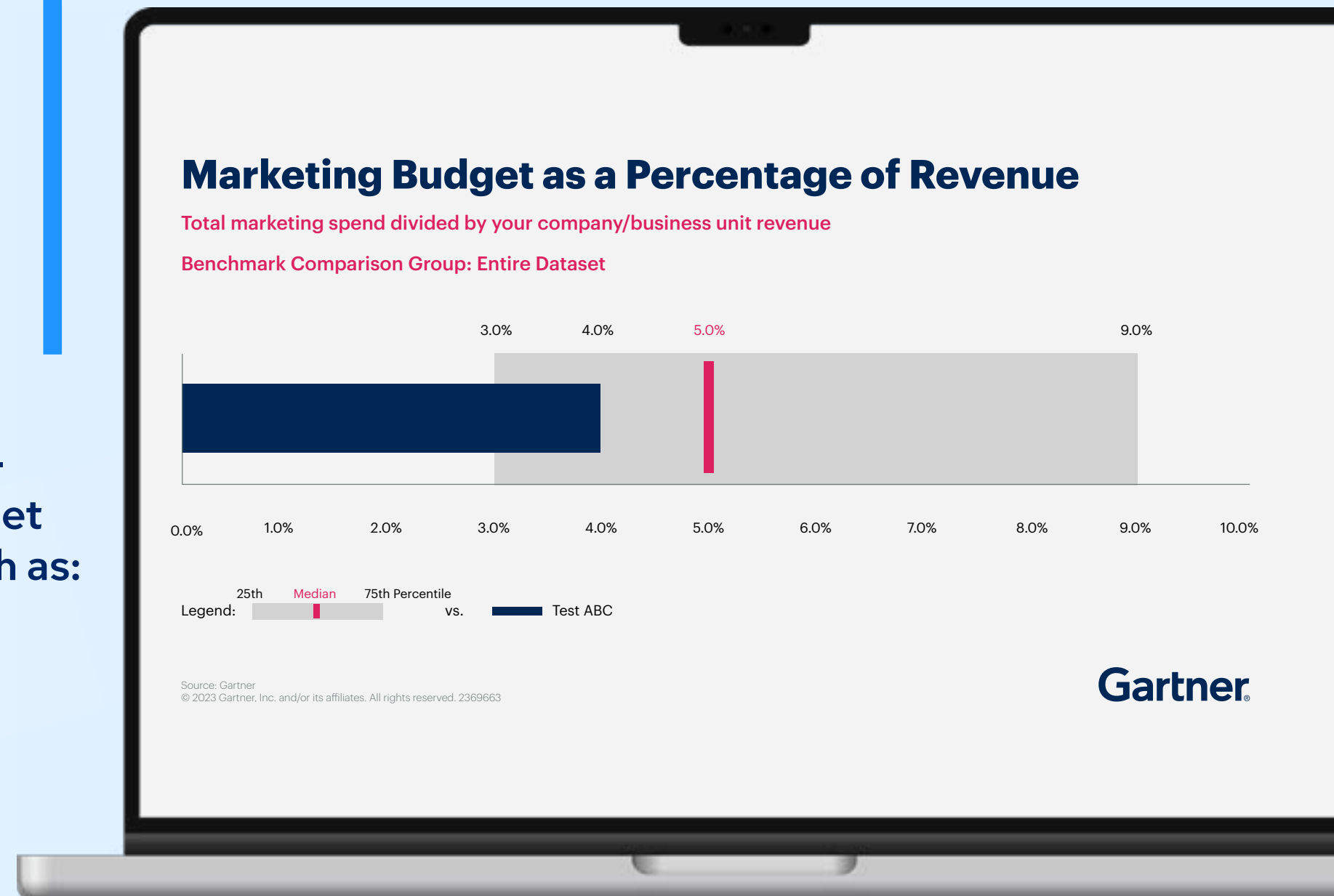
Source: Gartner

<sup>1</sup> **2025 Gartner Marketing Transformation Survey.** This survey was conducted to explore what CMOs are thinking about the near future (i.e., the next one to two years) of the marketing organization amid the disruption of AI and how they are approaching organizational structure changes and marketing operations management in 2025. The survey was administered online from August through October 2025 and includes data from 402 senior marketing leaders. These results represent marketers from North America (n = 189) and Europe (n = 213). Respondents were required to have decision-making authority over marketing budgets and strategy at an organization with at least \$100 million in annual revenue. Fifty-eight percent of respondents came from organizations with at least \$2 billion in annual revenue. Respondents came from a wide variety of industries, including technology products (n = 59); banking and financial services (n = 55); consumer products (n = 47); retail (n = 47); manufacturing and natural resources (n = 43); healthcare (n = 41); insurance (n = 33); pharmaceuticals, biotechnology and life sciences (n = 23); media (n = 22); IT and business services (n = 20); and travel and hospitality (n = 12). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

# The Gartner Marketing Budget and Efficiency Benchmark

Optimize your marketing investments and drive long-term improvements with the Gartner Marketing Budget and Efficiency Benchmark, focusing on key areas such as:

- Budget and spend
- Headcount and staffing
- Expenditures



→ **Get Started**



Build business cases



Defend budgets



Make data-backed decisions



# Scale AI Skills Quickly

## to Future-Proof Marketing Teams

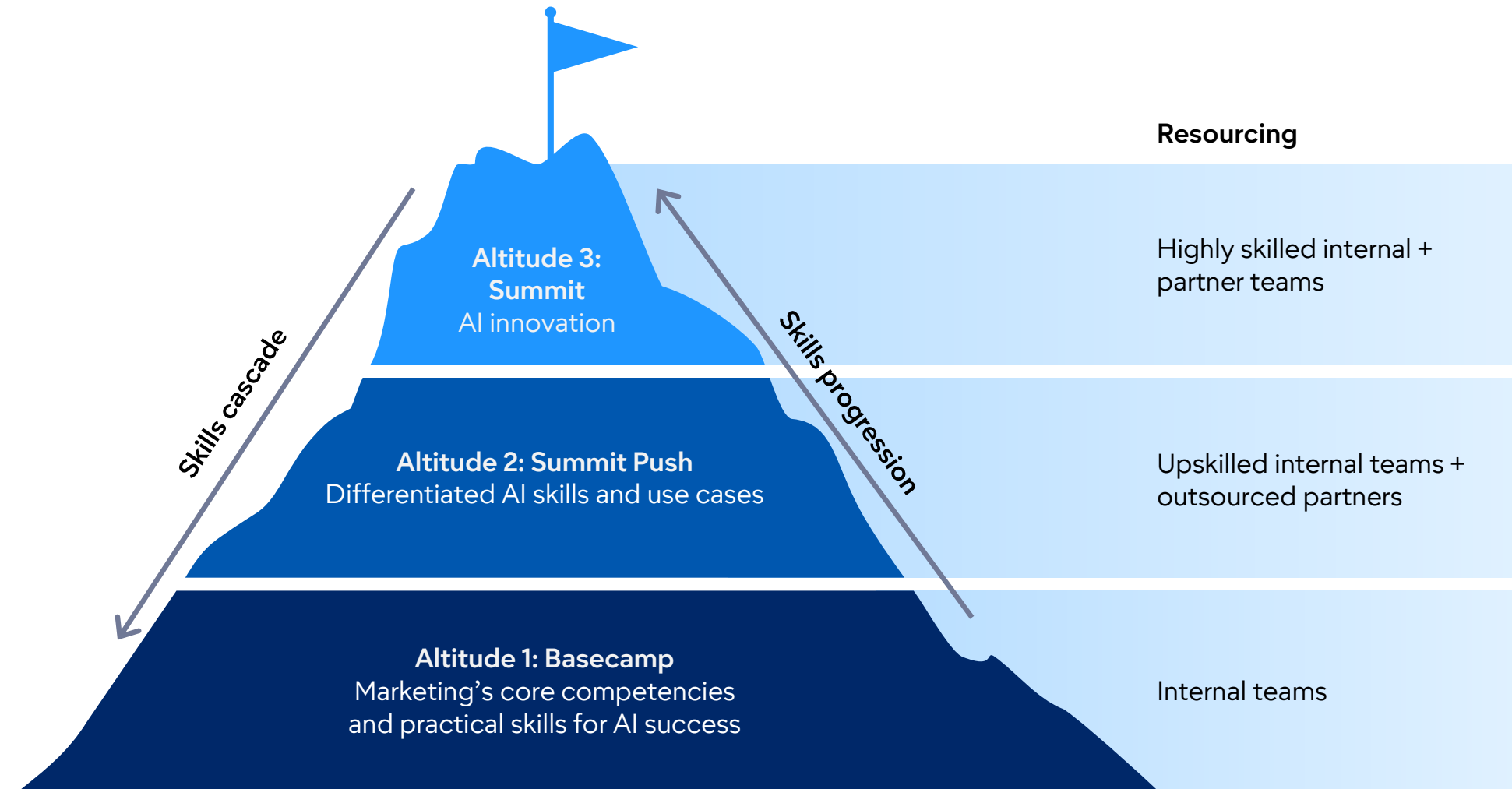
by Jay Wilson, Nicole Greene

Despite AI's promise, many CMOs are stuck, with their teams tinkering with AI tools but struggling to make a real business impact. Getting value from AI is less about technology and more about how well you can upskill your marketing team and blend their talent with the right external partners.

## Framework for Scaling AI Skills

Gaps in marketing roles and skills are the most common challenge to marketing's ability to execute successfully across AI use cases.<sup>1</sup> CMOs must blend internal team upskilling with the expertise of external partners with access to specialized skills and tools. This scaling approach improves business impact and reduces risk while amplifying the return on existing investments (see Figure 1).

» Figure 1: Framework for Scaling AI Skills



Source: Gartner

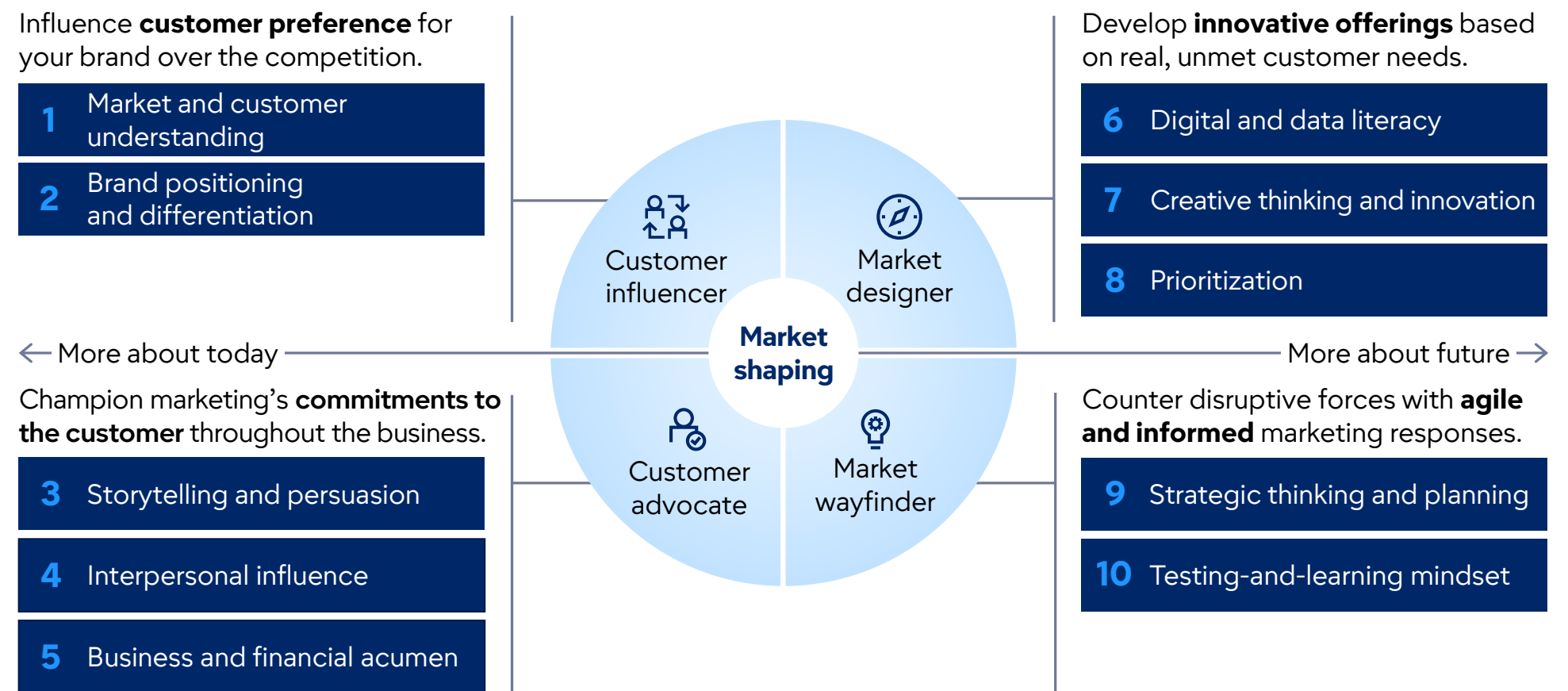
## Altitude 1: Basecamp – Develop the Foundational Capabilities of Internal Marketing Teams

Before you can scale the heights of AI innovation, you will need a solid foundation. That starts with your people. Organizations that excel at learning and development are nearly twice as likely to outperform their rivals in revenue and growth.<sup>2</sup> For CMOs, this means prioritizing practical AI skills that empower marketers to work smarter, while also improving their ability to oversee external partners' more technical or innovative AI work.

So, what are these practical AI skills? First, the ability to spot an AI opportunity: use-case identification. Can your team recognize where AI can remove friction in the customer journey or automate repetitive tasks? Next, there's AI tech fluency: keeping up with the relentless pace of martech innovation and knowing which tools are worth your time. Prompting skills are also crucial – after all, the quality of output depends on the quality of input. And finally, output discernment: the wisdom to know when an AI-generated insight is actually useful (and when it's off-brand or just noise).

The best CMOs also build core marketing competencies [business acumen, customer insight and creative problem solving] that make their teams resilient, no matter how the technology evolves (see Figure 2).

» Figure 2: 10 Competencies That Define Market-Shaper Teams



Source: Gartner

Strengthening these competencies fosters market-shaping behaviors, leading to deeper customer insight, stronger positioning and greater innovation.

But AI adoption brings a real concern: fear. Nearly nine out of 10 marketers worry about AI replacing their jobs.<sup>3</sup> Agencies have seen months of job cuts, and change fatigue is real. Yet here's the twist: Those who embrace GenAI are actually less likely to be burned out and find more time for creative work.<sup>3</sup> The lesson? Position AI training as a win-win: good for business competitiveness, good for career growth.

## **Altitude 2: Summit Push — Blend Internal and External Talent Strengths**

Once your team has mastered the basics, it's time to advance further. The next altitude is all about blending internal expertise with the right external partners — agencies, martech vendors and consultants that specialize in GenAI. Your internal teams know your products and customers inside out, while agencies and martech vendors bring cross-industry experience and bleeding-edge tools. Together, they can unlock differentiation that neither could achieve alone.

But many marketers still find it challenging to collaborate and work efficiently with external partners. CMOs need to break down these barriers by setting clear goals, aligning incentives and making martech utilization part of employee performance reviews.

Invest in agency- and martech vendor-led training and certifications to quickly build technical capabilities and streamline AI adoption. These hard skills are transferable to other platforms. Also, don't underestimate the power of “communities of practice” — informal groups where marketers share tips and troubleshoot problems together.

To keep engagement high, consider hosting thought leadership days, where partners showcase their latest GenAI wins, or run a hackathon — one or two days of friendly competition to prototype new AI-driven campaigns. These events aren't just fun; they're catalysts for cross-pollination and rapid learning.

## **Altitude 3: Summit — Pilot Innovative Use Cases With Skilled Internal and External Partners**

At the summit, CMOs should pair their most skilled internal talent with external partners to pilot the boldest, most innovative AI use cases. Working with external partners will help reduce the risk of investing too heavily in unproven or episodic use cases. Agencies and martech providers can afford to experiment, spreading their AI investments across multiple clients. They have the tools, the scale and the appetite for innovation.

The trick is knowing what to outsource and what to keep in-house. Use partners to pilot “calculated risk” projects, but don't cede all your expertise. Build internal strength alongside external innovation. And always vet your partners — for not just technical chops but also brand safety, ethics and privacy.

## Key Take-Away

Don't expect AI technology investments to pay for themselves. The Trough of Disillusionment for AI is real, but so is the opportunity. Build hybrid teams that blend internal savvy with external perspective, like agencies, to scale your upskilling. Use a “buy and build” approach: Upskill your people, leverage agency and martech investments, and balance innovation with cost control to also account for CFO priorities.

Above all, remember that scaling AI for marketing is a journey, not a sprint. Focus on upskilling on practical AI skills and market-shaping core competencies that will make your marketing organization future-ready — no matter what the next big technology disruption brings.

<sup>1</sup> **2024 Gartner Marketing Analytics and Technology Survey.** This survey was conducted to explore how senior marketing leaders approach proving the value of their function, how they perceive and collaborate with their marketing data and analytics teams, and how they are approaching generative AI and marketing technology utilization. The survey was administered online from April through May 2024 and includes data from 378 senior marketing leaders. These results represent marketers from North America (n = 187) and Europe (n = 191). Respondents were required to have decision-making authority over marketing budgets and strategy at an organization with at least \$100 million in annual revenue. Forty percent of respondents came from organizations with at least \$3 billion in annual revenue. Respondents came from a wide variety of industries, including manufacturing and natural resources (n = 62); banking and financial services (n = 61); retail (n = 60); healthcare (n = 41); consumer products (n = 39); pharmaceuticals, biotechnology, and life sciences (n = 34); insurance (n=32); technology products (n = 18); travel and hospitality (n = 12); IT and business services (n = 10); and media (n = 9). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> **2024 Gartner Strategic Skills Development Survey.** This survey was conducted to understand the current status of agile learning, specifically with an eye to agile learning execution and the ways in which such learning supports key C-level priorities. The research was conducted online from 27 April through 13 June 2024 among 330 respondents from North America (n = 123), EMEA (n = 115) and Asia/Pacific (n =92), with revenue distributed across midsize (n = 103), large (n = 107) and global enterprises (n = 120). Respondents were required to be involved in training and learning at their organization. Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.

<sup>3</sup> **2023 Gartner Marketing Talent Survey.** This survey asked about marketing employees' experiences with collaboration, agencies and technology, career development and organizational changes. It was administered in August and September 2023 and included data from 627 marketing employees, including 457 individual contributors and 170 managers. These results represented marketers from the U.S. (n = 291), Europe (n = 256) and Canada (n = 80). Respondents were required to be full-time employees working in the marketing function at an organization with at least \$100 million or equivalent in annual revenue. Forty-five percent of the respondents came from organizations with over \$2 billion or equivalent in annual revenue. Respondents came from a wide variety of industries, including travel and hospitality (n = 82), retail (n = 77), IT and business services (n = 62), technology products (n = 59), manufacturing and natural resources (n = 57), media (n = 51), healthcare (n = 45), financial services (n = 44) and consumer products (n = 44). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

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