composed DIGITAL

WHITE PAPER · 2026

From Legacy to Lifecycle

Braze, composable architecture and the future of retail customer engagement in Australia

Audience

CMO · CFO · Chief Digital Officer

ABOUT THE PUBLISHER

composed DIGITAL

Composable by design. Integrated for growth.

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We're martech systems integrators, specialising in Braze and modern composable architecture.

The marketing landscape is shifting rapidly. Businesses that invested heavily in platforms like Adobe and Salesforce Marketing Cloud are discovering that monolithic suites can't keep pace with how modern marketing teams need to operate. The move towards composable architecture isn't a trend. It's a correction, and a necessity for the shift towards artificial intelligence.

Composed Digital exists because this transition demands a different kind of partner. One with genuine technical depth across the platforms you're leaving, the ones you're moving towards and the data that underpins it all. We're systems integrators who specialise in marketing technology, not a marketing agency that picked up some technical skills along the way.

We built Composed from decades of enterprise systems integration experience, having seen firsthand what works and what breaks when organisations try to modernise their stack without the right expertise in the room.

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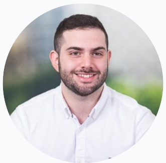

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From Legacy to Lifecycle

Braze, composable architecture and the future of Australian retail customer engagement

Australian retail is navigating one of its most difficult operating environments in a generation. Insolvencies rose 14.2% year-on-year in the six months to December 2024, consumer confidence remains fragile despite easing inflation, and the structural encroachment of global platform players (such as Amazon, TikTok Shop, Instagram) continues to compress margin and erode direct customer relationships. Against this backdrop, the marketing technology decisions retailers make in the next 12 to 24 months will prove consequential. The platforms that underpinned a decade of digital marketing investment are in active decline: Oracle has exited the advertising business, Salesforce is redirecting investment toward CRM and AI, and Gartner has observed that most large organisations are already in the midst of multi-year migrations away from these fragmented legacy suites.

The response to this environment is composable architecture: best-of-breed components, connected through open APIs and anchored to a shared cloud data foundation, with a modern customer engagement platform at the orchestration layer. At that layer sits Braze, purpose-built for real-time, cross-channel engagement across email, SMS, push, web personalisation, in-app, and WhatsApp, and recognised as a Leader in the Gartner Magic Quadrant for Multichannel Marketing Hubs for three consecutive years. The commercial evidence for this approach is unambiguous. Retailers engaging customers through even one coordinated owned channel versus none see a 2.2× uplift in 90-day retention; when all four owned channels are activated together, buyer rate uplift reaches 25.8×. This can represent the difference between a loyalty program that drives revenue and one that merely exists. The urgency is compounded by the cost of inaction, as reactive migrations consistently cost 30–50% more than planned transitions, and every quarter spent on infrastructure that cannot support real-time personalisation is retention opportunity and margin foregone.

This paper makes the financial case for migration at enterprise retail scale, modelled against a national retailer generating approximately $38 billion in annual sales. The case is built in two parts: confirmed cost savings from decommissioning a declining platform and retiring redundant point solutions, and an addressable revenue opportunity across cross-channel retention and retail media. The purpose of this paper is to demonstrate that the commercial case is equally compelling.

THE PROBLEM

Legacy platforms are in active decline

Oracle and Salesforce are redirecting investment. Retailers on these platforms are operating on borrowed time — and a forced migration costs 30–50% more than a planned one.

THE SOLUTION

Composable architecture with Braze at the centre

Tools connected through open APIs and anchored to a shared data foundation — with Braze orchestrating real-time engagement across every owned channel.

THE OPPORTUNITY

Cost savings that fund the move. Revenue opportunity that justifies it.

Modelled against a $38B national retailer, confirmed cost savings fund the move; cross-channel retention and retail media justify it.

NAVIGATION

Table of Contents

FOREWORD

— About Composed Digital 02

— Executive Summary 03

SECTION ONE — THE MARKET CONTEXT

01 Major Factors Affecting Australian Retail 05
Global macroeconomic pressures · Australian industry pressures · The platformisation of retail · Organisational challenges

02 The Decline of Legacy Platforms 07
The pattern of platform decline · The true cost of staying

SECTION TWO — THE SOLUTION

03 The Shift to Modular Martech 09
The end of the monolith · The rise of composable architecture · What's driving the change for enterprise retailers?

04 Braze: The Orchestration Layer 11
What Braze is · Selected Braze features for retailers · Braze AI

SECTION THREE — THE VALUE CASE

05 The Platform Advantage: Orchestration, Personalisation and the New Revenue Equation 13
The case for centralised orchestration · Channel diversity and retention · Personalisation as a revenue instrument · The full customer experience layer · Retail media with Braze · Australian case study

06 Quantifying the Opportunity 19
Building a business case · Business case dimensions · Reading the numbers

CLOSING

— Conclusion 28

— Sources & Bibliography 29

THE MARKET CONTEXT

Major Factors Affecting Australian Retail

Australian retail is navigating one of its most complex operating environments in a generation. A convergence of macroeconomic pressures, structural industry shifts, and rapidly evolving consumer expectations is reshaping the economics of the sector, exposing the gap between retailers with agile, connected technology and those still running on legacy infrastructure.

01

Global Macroeconomic Pressures

The past three years have left a visible mark on Australian retail. A sustained period of elevated inflation, aggressive RBA rate hikes (with the potential for more coming in 2026), and persistently weak real wage growth squeezed consumer confidence to multi-year lows. While inflation has since eased — falling from a peak of 7.8% in December 2022 to 2.4% by the end of 2024 — the hangover in discretionary spending behaviour has proven sticky.[1] Retail insolvencies rose 14.2% year-on-year in the six months to December 2024, with household names including Godfreys, Booktopia, and Mosaic Brands among the casualties.[2] Emerging US tariff policy and global trade uncertainty add a further layer of risk, particularly for retailers with exposure to imported goods or global supply chains.[3]

Australian Industry Pressures

Structurally, Australian retail faces pressure from multiple directions simultaneously. The ecommerce share of total retail spend has climbed steadily — online now accounts for roughly 20% of all retail spend — while physical store visits continue to decline outside of 'experience' driven formats.[1] International platforms and marketplace models have raised the bar on price transparency, fulfilment speed and range, forcing domestic retailers to compete on dimensions that require significant technology investment.

An entrenched discount culture has compounded the pressure, as consumers have continuously gravitated toward mid-year sales and deep discounts. This places retailers in a difficult position: to participate and erode margin, or hold pricing discipline and risk losing volume.[25] The cycle is self-reinforcing and increasingly ineffective, as traditional discounting is losing its pull as customers grow more value-conscious, and the brands pulling ahead are those investing in clear product value propositions rather than competing on price alone.[26]

THE NUMBERS

Retail insolvencies rose 14.2% year-on-year in the six months to December 2024. Among the casualties: Godfreys, Booktopia, and Mosaic Brands. The operating environment is not forgiving of technology that cannot keep pace.

The list of margin pressures facing retailers does not end there: rising input costs driven by global supply chain disruption and domestic manufacturing expense, wage growth following the most significant industrial relations reforms in decades, and ongoing capital commitment to omnichannel infrastructure.[1] One response from major Australian retailers has been a deliberate pivot toward private label expansion allowing them to control supply chains, protect margins, and build an assortment competitors cannot easily replicate.[5]

The Platformisation of Retail

Perhaps the most structurally significant shift reshaping Australian retail is the growing dominance of third-party platforms across the entire purchase journey. Amazon, TikTok Shop, and Instagram are no longer advertising channels; they are end-to-end commerce ecosystems, controlling product discovery, consideration, transaction, and most recently, fulfilment. For retailers, this creates a fundamental tension; these platforms offer access to massive, engaged audiences, but at the cost of margin, data ownership, and direct customer relationships. When a purchase happens inside TikTok or via an Amazon marketplace listing, the retailer fulfils the order but the platform owns the customer interaction, and that customer data never makes it back into the retailer's own systems.

The advertising dollar follows attention, and attention has shifted decisively toward these platforms. Australian retailers are now navigating a landscape where paid social and marketplace spend is non-negotiable, yet the return on that spend is increasingly difficult to attribute and the audiences built on rented platforms can be repriced or de-prioritised at any time.

> **STRATEGIC INSIGHT**
>
> The retailers best positioned to navigate platform encroachment are those who **use platform presence to acquire customers, then systematically move those relationships into owned channels** — email, SMS, app, loyalty — where they can engage directly.

Organisational Challenges

Many retail organisations are carrying the weight of accumulated technology debt: platforms bolted together over years of point solution procurement, with middleware dependencies, siloed customer data, and integration friction that customers can see and feel. This fragmentation makes it nearly impossible to operate at the speed or personalisation level the current market demands.

Loyalty programs have moved from a competitive differentiator to a baseline expectation. The gap between membership and meaningful engagement is increasingly a technology problem. Retailers that cannot personalise the loyalty experience in real time are sitting on enormous first-party data assets they cannot effectively activate.

> **MARKET DATA**
>
> Around **90% of Australian consumers** are enrolled in at least one loyalty program, **but only half actively engage with their programs.** The gap between membership and meaningful engagement is increasingly a technology problem.[6]

Retail apps have similarly shifted from optional to expected. Loyalty program integration, personalised offers, order tracking, and in-app commerce have made the mobile app the primary owned channel for direct-to-consumer engagement. Retailers without a coherent app strategy are ceding a critical touchpoint to competitors.

The rise of owned media (where retailers monetise their first-party audience through sponsored placements and brand partner campaigns) represents both an emerging revenue stream and a technology challenge. Executing retail media at scale requires the same connected data infrastructure that underpins personalisation and loyalty. Retailers whose systems cannot connect these capabilities are leaving margin on the table.

Each of these dynamics — loyalty, apps, owned media, personalisation — requires multiple technology systems to function in concert. The organisations that experience the most friction are those where those systems were never designed to integrate.

THE MARKET CONTEXT

The Decline of Legacy Platforms

As Oracle, Salesforce and Adobe pivot investment away from B2C marketing automation toward cloud infrastructure and AI, the platforms Australian retailers depend on are running on borrowed time.

02

The pattern of platform decline

Every category of enterprise software experiences generational transitions. CRM, analytics, and data management have each made the same journey, from legacy on-premise infrastructure to cloud-native architecture. Marketing technology is now going through its own generational shift, with many Australian retailers still running campaigns on platforms built for the email era.

When a software vendor that once competed aggressively for marketing cloud dominance begins pivoting its investment, executive attention and public messaging toward AI compute or enterprise resource planning, the marketing cloud may continue to operate, but it is no longer where the company sees its future. Marketers on those platforms are effectively running on borrowed time.

Evidence of this in the B2C marketing automation space is well documented. Forrester noted that Oracle is "divesting from B2C marketing automation," observing that Responsys has not kept pace with its B2B counterpart Eloqua, and that Oracle's strategic pivot toward cloud infrastructure and AI compute through OCI makes B2C martech a clear depriority.[7] Oracle's advertising revenue collapsed from $2 billion in 2022 to $300 million in 2024, and the company has already sunset related B2C products including Maxymiser and AddThis.[7]

Adobe's approach to product lifecycle management has placed significant operational and financial burden on its customer base. Adobe Campaign Classic v7 is approaching end of support, requiring customers to migrate to Campaign v8; a fundamentally re-architected, cloud-only platform that eliminates on-premise hosting and demands a comprehensive rebuild of data pipelines, integrations, and workflows at substantial cost. Simultaneously, Adobe Campaign Standard has been consolidated onto Campaign v8, effectively end-of-lifing two distinct platforms in parallel and forcing a second wave of customers through the same expensive transition. Rather than investing in the longevity of existing products, Adobe has repeatedly redirected its customer base toward newer, and typically more expensive, platform tiers.[27]

Salesforce Marketing Cloud presents a structurally similar challenge: a fragmented product portfolio built largely through acquisition, where investment is visibly shifting away from established platforms and toward newer, costlier alternatives. Industry commentary published in 2025 concluded that underwhelming product updates to Marketing Cloud Engagement "sparked fear among...veterans, raising questions about its future and relevance in the long run."[28] Salesforce's September 2025 announcement retiring Marketing Cloud Advertising Studio, with subscriptions non-renewable beyond August 2026, represents the latest in a pattern of product discontinuations that force customers into new licensing tiers and re-implementation costs.[29]

Gartner has observed that most large organisations remain in the midst of multi-year migrations away from their providers' fragmented, legacy suites toward modern, CDP-enabled platforms.[8] The longer an organisation delays, the more compressed and costly the eventual transition becomes.

The true cost of staying

Direct Costs

Licence fees on legacy platforms tend to increase year over year even as the platform's relative capabilities diminish. Specialist talent (engineers and practitioners who know these ageing systems) commands a premium because the pool is shrinking. Workarounds for missing or inadequate features consume engineering hours that could be directed elsewhere. The professional services required to operate these platforms carry rates that reflect scarcity rather than value.

Opportunity Costs

A platform that cannot support channels like WhatsApp, RCS or in-app messaging limits the organisation's ability to reach customers where they actually are. Batch-oriented data processing means campaigns are built on last week's behaviour rather than today's signals. Slow campaign velocity (driven by cumbersome interfaces and complex technical requirements) means the marketing team cannot move at the speed the market demands. For a retail environment where consumer sentiment is choppy and window of relevance is narrow, this is a direct commercial disadvantage.

Forced Migration Risk

If a vendor announces end-of-life or allows a platform to decay to the point of non-viability, the organisation faces a migration under time pressure and without strategic optionality. Forced migrations are invariably more expensive, more disruptive, and less transformative than proactive ones. Industry experience consistently suggests reactive migrations cost 30–50% more than planned transitions, a premium that reflects additional vendor fees, contractor costs, lost productivity and the opportunity cost of architectural decisions made under duress.

Technical Debt

Beyond licence fees and missed opportunities, legacy platforms generate technical debt that compounds silently over time. Every middleware layer added to bridge an integration gap, every custom script maintained to extract data that should flow automatically, and every workaround built to compensate for a missing feature consumes engineering capacity that could be directed at building new capability. A 2024 survey of technology executives found that for more than 50% of companies, technical debt already accounts for more than a quarter of their total IT budget, and for retailers running ageing marketing platforms stitched together with point solutions, that figure is likely conservative.[18] The teams that feel this most directly are marketing operations and engineering: perpetually occupied keeping existing campaigns running, with little capacity left to innovate.

THE SOLUTION

The shift to modular martech

Best-of-breed tools, connected by APIs and anchored to a shared data layer, are replacing the all-in-one suites that never delivered on their promise.

03

The end of the monolith

For the better part of a decade, enterprise marketing teams were sold the same story: invest in a single marketing cloud, consolidate everything under one vendor, and seamless customer engagement would follow. One platform for email, web, mobile, analytics, data management and personalisation; and one vendor's roadmap to go with it. Where that roadmap goes, and how fast it moves, is entirely their decision.

The reality has been very different, as organisations found themselves locked into rigid platforms with siloed data, fragmented customer views and slow time-to-value. When one platform tries to do everything, it inevitably does most things adequately and very few things exceptionally. Acquisitions get bolted on and never fully integrated, meaning marketing teams need extensive workarounds to meet basic use cases. All the while the licence fee grows each year for a platform that falls further behind what modern marketing actually demands.

The rise of composable architecture

The response to these inefficiencies is composable architecture, a modular approach where organisations assemble their technology stack from best-of-breed components. Each component is chosen for a specific capability, anchored to a shared data foundation, cloud-hosted, and designed to connect easily with other tools through open APIs.

This architectural approach has deep roots in software engineering. Containerisation (the practice of packaging individual services so they run independently and can be swapped without disrupting the broader system) has been a foundation of modern software infrastructure for over a decade. What has changed is that the same principle is now being applied at the Martech layer: instead of one monolithic platform attempting to own every function, organisations are assembling a stack of specialised tools that each do one thing well and communicate through a common data layer.

The best way to understand this architecture is to think in layers. At the foundation sits the cloud data warehouse (Snowflake, BigQuery or Databricks) serving as the persistent system of record for all customer data. Above it, an organisation can add a composable data layer (a Customer Data Platform, or equivalent composable tooling) to handle identity resolution, audience building and real-time data activation. The orchestration and engagement layer, increasingly occupied by modern customer engagement platforms like Braze, coordinates cross-channel communications in real time. From there, specialist tools (loyalty systems, analytics, business intelligence, content and e-commerce) each perform well in one specific niche. Critically, if one part of the system is no longer fit for purpose, it can be replaced without rebuilding the entire stack.

According to the 2025 State of Martech Report by Scott Brinker and Frans Riemersma, cloud data warehouses rose to 23.9% as the identified centre of martech stacks, while marketing automation platforms — once the gravitational centre of most stacks — declined from 30.7% to 26%. Customer engagement platforms grew from 19.4% to 26.1%, and in pure B2C businesses, 92% now report having a martech-integrated data warehouse or lakehouse.[9]

THE SOLUTION

The Modern Composable Martech Stack

Composable architecture is a modular approach where organisations assemble their technology stack from best-of-breed components, each chosen for a specific capability, connected through open APIs and anchored to a shared data foundation.

MODERN COMPOSABLE STACK — LAYER MODEL

Data Foundation Layer
Cloud data warehouse (Snowflake, BigQuery or Databricks) the persistent system of record for all customer data.

↓

Identity & Audience Layer
CDP or composable data layer, identity resolution, audience building and real-time data activation across touchpoints.

↓

Orchestration & Engagement Layer — Braze
Coordinates cross-channel communications in real time across email, SMS, push, in-app, WhatsApp and paid media.

↓

Specialist Tools Layer
Loyalty · Analytics & BI · Content management · eCommerce platforms · Retail media networks.

THE KEY PRINCIPLE

If one part of the system is no longer fit for purpose, it can be **replaced without rebuilding the entire stack**.

MARKET SHIFT

Customer engagement platforms grew from 19.4% to **26.1%** as the centre of martech stacks. In B2C, **92%** now report a martech-integrated data warehouse. — State of Martech 2025

What's driving the change for enterprise retailers?

For retailers specifically, the move to composable architecture is being driven by four converging forces:

1. **Ownership of customer data.** Retailers operate across an extraordinary number of touchpoints, such as physical stores, ecommerce platforms, mobile apps, loyalty programs, call centres and third-party marketplaces. A unified, extensible data foundation is the only way to connect these experiences coherently.
2. **Maturation of cloud-native technologies.** Hyperscalers like AWS and cloud data platforms like Databricks have made it practical to build modular, real-time data architectures at enterprise scale, at a cost that was not feasible five years ago.
3. **Evolution of modern martech and CDP platforms.** The rise of event-driven architecture, exemplified by platforms like Braze, is transforming what is possible in personalisation and operational efficiency. These tools were purpose-built for real-time engagement, not retrofitted from batch-era email systems.
4. **Ageing of the ecosystem clouds.** Organisations that invested heavily in Adobe, Salesforce Marketing Cloud and Oracle are discovering that these suites cannot keep pace with how modern marketing teams need to operate.[8]

THE SOLUTION

Braze: The Orchestration Layer

Braze was designed from the ground up for event-driven, cross-channel engagement — which is precisely why it sits at the orchestration layer of a modern composable stack.

04

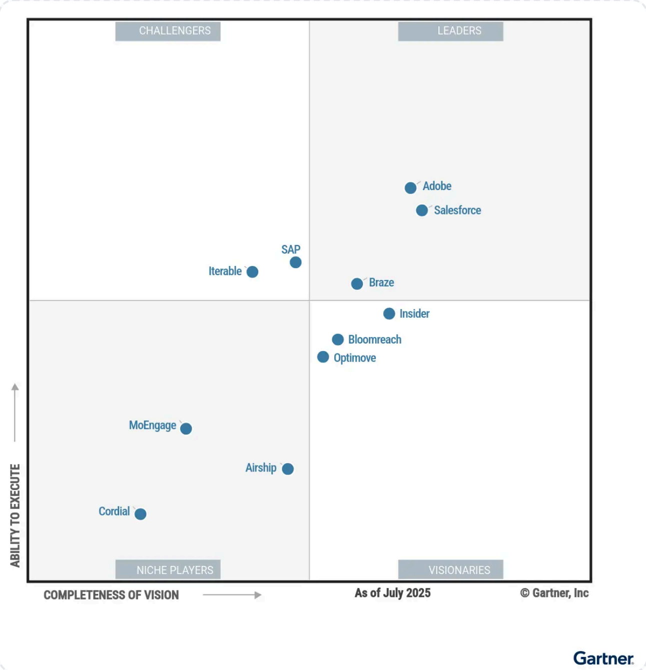
The fundamental difference between Braze and the legacy platforms it replaces is architectural, not cosmetic. Legacy marketing automation platforms were built for batch email and extended to other channels over time, each addition bolted on rather than built in. Braze is not adapted from a B2B automation tool or scaled up from an SMB email product, rather it was designed from the ground up around a stream processing architecture that ingests and acts on customer data in sub-seconds, making it the right fit for enterprise retail.

In a composable stack, that architecture is exactly what the orchestration layer needs to do. The data warehouse holds the record of truth. Where needed, a composable data layer handles identity resolution and audience building, feeding clean, resolved signals downstream. Braze takes those signals and acts on them in real time across every owned channel — email, SMS, push, in-app, WhatsApp — without any single step requiring a data export, a batch job, or an engineering ticket.

For marketing teams, this changes the operating model entirely. Journeys that previously required technical resources across multiple systems can be built, tested and launched by marketers from a single interface with intelligent channel selection, send-time optimisation and AI-powered decisioning available natively.

Braze is also designed to connect rather than contain. Pre-built integrations with loyalty platforms, CDPs, cloud data warehouses and ecommerce systems mean it amplifies every other investment in the stack. A loyalty platform feeding real-time tier events into Braze becomes a trigger engine.

The market has validated the approach. Braze has been recognised as a **Leader in the Gartner Magic Quadrant for Multichannel Marketing Hubs for three consecutive years** (2023, 2024 and 2025).[8]



Gartner Magic Quadrant for Multichannel Marketing Hubs, 2025.[8]

ARCHITECTURE ADVANTAGE

Braze operates on a **proprietary stream processing architecture** that ingests and activates data in sub-seconds, making every customer interaction immediately available for segmentation, personalisation and triggering. The data model is event-driven, built around what customers actually do rather than static, table-based records that update overnight.

THE SOLUTION

Selected Braze features for retailers

Canvas Flow — Journey Orchestration

- Drag-and-drop journey builder with real-time triggering, A/B and multivariate testing, and AI-powered channel selection
- Activates email, SMS/RCS, WhatsApp, LINE, push, in-app, Banners and Content Cards from a single interface
- Syncs audiences to paid media channels without leaving the platform
- Built for marketers to operate independently, no IT or specialist support required for day-to-day campaign management

SDK and Native Integrations

- SDKs available for iOS, Android and web; embed directly into a retailer's app
- Captures real-time behavioural signals: product views, search queries, cart events and purchase completions
- Triggers personalised in-app experiences based on live behaviour; mid-browse offers, loyalty milestone notifications, inactivity re-engagement

Cloud Data Native

- Two-way analytics and event data flows which automatically into all major data warehouses
- Eliminates unnecessary reliance on data teams and redundant data pipelines across business units
- Allows commercial analysts, merchandise planners and retail media teams direct access to customer engagement data

Connectivity to Other Platforms

- 100+ pre-built integrations; operates as the orchestration layer within a composable stack, not a replacement for it
- Direct integrations with Shopify, loyalty platforms, CMS and analytics tools common in the local market
- Connects to legacy systems; no need to decommission existing infrastructure before realising value

Braze AI

- Decisioning Studio — reinforcement learning engine (via OfferFit acquisition) that determines the optimal channel, message, offer and timing per individual customer; moves personalisation from rule-based segmentation to genuine 1:1 decision-making at scale
- Agent Console (Beta) — build and deploy custom AI agents directly within Canvas and Catalogs to handle content generation, data enrichment, profile normalisation and journey personalisation
- BrazeAI Operator — conversational interface for marketers to run campaign analysis, automate workflows and generate assets using plain-English prompts; integrates with Snowflake Cortex AI
- Predictive scoring — identifies customers likely to churn, convert or disengage, enabling proactive targeting before behaviour changes

THE VALUE CASE

The Platform Advantage: Orchestration, Personalisation and the New Revenue Equation

Disconnected tools are a measurable drag on revenue, retention and operational efficiency. The retailers pulling ahead have recognised that a centralised engagement platform is no longer a marketing investment, it is a commercial infrastructure decision. This chapter makes the case for unified orchestration across channels, teams and revenue streams.

05

Instinctively, when a marketing or digital team identifies a capability gap, the solution is to fill it with a new tool. Repeated across dozens of decisions, the end result is a patchwork of disconnected solutions, each operating on its own data, its own logic and its own reporting. The consequences are measurable: 39% of brands that missed their revenue goals were using disconnected point solutions, even as 50% of surveyed brands have moved to a unified platform.[11]

While disconnected tools have obvious costs — such as extra licensing fees, lost time, and administrative burden — consolidating them into an orchestration layer like Braze can unlock UX improvements, greater personalisation capabilities, and new monetisation options through owned channels.

The case for centralised orchestration

A centralised orchestration platform places every channel under a single customer view, a single set of journey logic and a single reporting framework. Without that foundation, personalisation becomes guesswork and frequency management is impossible. The operational efficiencies are immediate, as marketers can build, test and launch campaigns across all channels from one interface, consolidating licence fees, integration maintenance, data pipelines and team training into a single cost centre. Top-performing brands are 16% more likely to use three or more channels,[11] something that is only practical when those channels are managed from one place.

Let's consider a post-purchase cross-sell flow: when a customer buys a high-consideration item such as a coffee machine, an in-app message fires immediately surfacing compatible accessories; a push notification follows 72 hours later once the product has likely arrived; an email arrives at the one-week mark with a curated bundle offer based on the specific model purchased; and an SMS fires at 30 days if no accessory purchase has been made. Each subsequent step is suppressed automatically if the customer converts.

This kind of coordinated, escalating engagement is simply not achievable when channels are managed by separate tools with separate triggers and separate data.

Channel diversity and retention

Email remains a workhorse, but it cannot carry a retailer's engagement strategy alone. Customers expect their journey recognised across every interaction; an order update via push, a product recommendation via in-app, a re-engagement message via WhatsApp.

The majority of personalisation in retail today is still retrospective, built on what the customer did last week rather than what they are doing right now. Unfortunately, this is a limitation of the tooling, not ambition. Real personalisation requires real-time data, dynamic segmentation and AI-powered decisioning working in concert.

SEGMENTATION INSIGHT

While 41% of retail brands segment customers based on past behaviour, only 27% segment in real time as new inputs are collected.[11]

Retailers who sent messages using even one channel versus none increased 90-day customer retention by 2.2 times. Adding a second channel drove a further 78% increase in retention over single-channel engagement.[16] Companies with strong omnichannel engagement retain an average of 89% of their customers, compared to just 33% for those with weaker strategies, as customers who purchase both online and in-store are worth 30% more over their lifetime.[12, 19]

Intelligent channel selection also adds a cost optimisation dimension unavailable to teams operating across point solutions. By routing each message through the most effective channel for each individual customer, rather than defaulting to the most expensive, organisations will reduce per-message cost while maintaining or improving engagement rates. A customer who responds reliably to push notifications does not need to receive an SMS at a materially higher cost per message. The platform's decisioning layer handles this allocation automatically, an efficiency that is only possible when all channel data lives in one place.

2.2x

Uplift in 90-day customer retention for retailers engaging through even one coordinated channel versus none.

Braze 2025 Retail Customer Engagement Review

89%

Customer retention rate for companies with strong omnichannel engagement, vs. just 33% for weak implementations.

UniformMarket, 2025

Personalisation as a revenue instrument

The most important distinction a CMO can make when building a business case for personalised channel orchestration is the difference between attributed revenue and incremental revenue. Standard attribution models credit a channel with any purchase that follows a message, regardless of whether that message caused the purchase.

Incremental measurement uses holdout groups to isolate the genuine causal lift of engagement activity; comparing purchase behaviour among customers who received a personalised message against a statistically equivalent group who did not. This is the methodology Braze's built-in experimentation tools support natively, and it is what transforms a marketing platform from a cost centre into a provable revenue lever.

Retailers who personalise consistently see a 10–15% revenue lift just from getting offers and content right, and AI-powered personalised recommendations now account for up to 35% of ecommerce revenue for brands that use them effectively.[13] Braze's own platform data found that retailers using email, in-app messaging, mobile push and SMS together drove a 25.8x uplift in buyer rate compared to customers who received no messaging at all, and a 10x uplift in purchases per user compared to customers receiving messages on other channel combinations but no SMS.[14] Critically, these gains are achievable without blanket discounting; personalisation allows retailers to focus incentives only on customers who actually need them to convert, protecting margin while driving net new sales.

⚠ **STOP AND THINK**

A customer who was already going to buy does not represent an incremental win, they represent a measurement error. Your attribution models need to account for this.

Centralised orchestration also enables rigorous incremental measurement. Integrated holdout groups and unified analytics make it possible to prove that the engagement strategy is driving additional revenue, not simply taking credit for purchases that would have happened anyway. For any CMO making the case for continued investment, this capability is invaluable. For example, a retailer turning over $500M annually, a 10% incremental lift on even a fraction of the addressable customer base is a material number; one that finance will understand without translation.

10–15%

Revenue lift from personalisation — just from getting offers and content right for the right customer at the right time.

Braze, Personalisation in Retail Guide, November 2025

25.8x

Uplift in buyer rate for retailers using email, in-app messaging, mobile push and SMS together vs. no messaging.

Braze 2024 Retail & eCommerce Marketing Trends

The full customer experience layer

For large retailers, personalisation has long been claimed by the marketing function; a lever for campaign performance, conversion rates and promotional ROI. That framing is too narrow.

The customer does not distinguish between a marketing message and a service interaction. When a push notification promoting a product arrives the same morning a customer is waiting on an unresolved delivery query, the damage is not limited to that one message. A centralised engagement platform, deployed across the full customer experience function, becomes the connective tissue between every team that touches the customer.

Post-purchase and order communications are among the highest-engagement touchpoints a retailer owns, yet they are routinely treated as transactional afterthoughts. Bringing order confirmations, dispatch updates and return confirmations into Braze means these communications can be personalised, timed intelligently and suppressed or modified based on live customer context. Customer service deflection follows as a direct cost saving; proactively surfacing a delivery delay notification before a customer contacts support, or an FAQ prompt when a customer repeatedly opens the app without converting, reduces inbound contact volume while improving the experience simultaneously.

Loyalty programs are where the single customer view pays its most obvious dividends. A program that lives in isolation from the broader engagement platform means the points balance is updated, but the customer's behaviour across channels is invisible to the team managing rewards. With Braze as the orchestration layer, loyalty events — a tier upgrade, a reward expiry, a milestone reached — become triggers for personalised, real-time engagement across whichever channel that customer actually uses. The result is a program that feels alive rather than administrative.

When personalisation is treated as a CX capability — embedded across post-purchase, service, loyalty and physical retail — its ROI is measured in retention, cost-to-serve reduction and lifetime value. Those are metrics that matter to the CFO and the CEO, not just the CMO.

THE BIGGER PICTURE

The customer doesn't experience your org chart, they experience your brand. Every team that touches the customer needs to be working from the same data.

Retail Media with Braze

That same first-party asset base — the loyalty program, the app, the transactional email program — can do more than improve the customer experience. For retailers with high-traffic owned digital surfaces, it represents a monetisable media network that most are significantly underutilising.

A retailer's owned channels provide direct, authenticated access to a known, purchase-ready audience. That audience can be packaged and sold to brand partners as premium ad inventory, enabling brands to activate campaigns directly within the retailer's owned environments. In practice this means a grocery retailer surfacing a sponsored recipe module within its app to an FMCG brand partner, or a fashion retailer selling placement within its loyalty portal to a complementary accessories label during a campaign period. Unlike third-party programmatic inventory, this is first-party, cookieless and contextually relevant by default. These attributes are increasingly scarce and increasingly valuable to brand advertisers at a time when third-party cookie deprecation is reshaping the digital advertising landscape.

THE BOTTOM LINE

The investment case for a modern engagement platform isn't solely about retention or cost reduction, it can also be revenue diversification. A high-margin owned media stream that offsets licence costs is a fundamentally different proposition for a CFO than a marketing technology upgrade.

The commercial model can operate across several formats within Braze: sponsored placements via personalised Content Cards, branded modules within transactional emails, co-funded loyalty reward activations via persistent Banners, or campaign-specific push notifications targeted at highly engaged users. Critically, because the retailer controls the platform, brand partners benefit from the retailer's audience intelligence (purchase history, category affinity, engagement behaviour) without any data leaving the retailer's environment. This is a meaningful selling point for brand partners increasingly constrained by privacy regulation and the erosion of third-party data.

For retailers, this creates a high-margin revenue stream that can meaningfully offset the cost of the engagement platform itself. In an Australian context, Woolworths' Cartology and Coles' 360 have already demonstrated that owned retail media is a viable and growing business at scale.[15] What Braze enables is the same capability further down the market, and with greater personalisation precision than traditional retail media infrastructure typically supports. Without a unified view of the customer and a single orchestration layer across owned channels, retail media inventory cannot be targeted, measured or sold with the credibility brand partners now expect.

OPPORTUNITY

First-party, cookieless and contextually relevant. These are the attributes brand advertisers are struggling to find as third-party data erodes and retailers already have them. The opportunity is in recognising that and packaging it accordingly.

AUSTRALIAN CASE STUDY

National Retailer — Overhauling Customer Engagement

One of Australia's most established retailers, operating many bricks-and-mortar locations alongside a growing ecommerce and retail media business.

60%	3 mo.	↑ NPS
Uplift in email click-through rates across targeted campaigns[17]	App download target achieved ahead of schedule[17]	Measurable improvement in customer NPS from more relevant communications[17]

THE CHALLENGE

As one of Australia's oldest retailers, this business was operating with fragmented backend systems and disconnected data that limited its ability to engage customers on a one-to-one level. Ahead of a significant digital transformation, including the launch of a new mobile app, the business recognised that its existing platforms lacked the real-time capability needed to deliver personalised, cross-channel communications at scale, while also competing for the next generation of shoppers against specialty and online retailers.

THE OUTCOME

The retailer implemented Braze as its central customer engagement platform. Within the first year it launched email and SMS campaigns, followed by mobile push notifications upon the release of its app. The platform enabled dynamic segmentation, automated journey building, abandoned cart recovery via Web SDK, and send-time and channel optimisation using Braze's built-in AI tools. Braze is one of the main technologies underpinning the newly launched retail media business.

Braze was described publically by the retailer's CMO as a "critical enabler" of its broader transformation strategy, with the business moving toward a fully cross-channel engagement model. It also set the foundation for the subsequent launch of a tiered loyalty program in partnership with a major airline rewards program, including exclusive offers, bonus points events and birthday rewards.

MIGRATION INSIGHT

This deployment reflects conditions common across Australian retail. There is legacy infrastructure constraining personalisation, fragmented data preventing a unified view, and a digital transformation agenda that requires a platform capable of scaling. Building a project plan around these three factors ensures the migration delivers on its technical and commercial objectives.

THE VALUE CASE

Quantifying the opportunity

06

The strategic arguments for modern customer engagement architecture are compelling, but every CMO making a case to the board needs to translate strategy into numbers.

Most enterprise retailers already hold the data needed to build a compelling business case, it is largely a matter of knowing where to look and how to structure the calculation across six dimensions.

Cost dimensions — where to find your inputs

D1 — Legacy platform: Pull current licence contracts, vendor invoices, and specialist contractor spend from finance and procurement. Compare against a modern platform quote from an implementation partner.

D2 — Point solutions: Run a full tool inventory across marketing and IT. Include vendor contracts, integration maintenance overhead, and ops administration time for each tool.

D3 — Operational efficiency: Ask marketing ops for average campaign build time and annual campaign volumes. HR or finance holds blended FTE costs.

D4 — Risk reduction: Request a scoped proactive migration estimate from an implementation partner. Apply a 1.3–1.5× multiplier to model the forced migration scenario.

Revenue dimensions — where to find your inputs

D5 — Retention uplift: Pull total loyalty members and active vs. lapsed split from your CRM or data warehouse. Average customer value comes from finance — typically annual revenue divided by active customer count.

D6 — Retail media: Your commercial or media team will hold current retail media network income. Apply the three platform-driven levers — audience segmentation, new inventory, and measurement credibility — against that base. Exclude organic market growth.

Building a business case

To ground this framework in Australian commercial reality, the dimensions below are modelled against a hypothetical major national retailer generating approximately $38 billion in annual sales, with 10 million active loyalty members, a growing ecommerce business, and a nascent retail media network. Its engagement platform, an incumbent system built for batch email, relies on middleware to connect loyalty, ecommerce and store operations. Their campaign velocity is slow and real-time personalisation is limited. Leadership has begun receiving signals that their long-term product investment is being redirected.

A NOTE ON ASSUMPTIONS

Financial inputs are derived from publicly available data including ASX annual reports and industry benchmarks. They are illustrative rather than audited, and individual retailer inputs will vary. This model is illustrative and does not represent any single organisation's actual cost or revenue position. The framework, not the specific figures, is what translates to any enterprise retailer building their own business case. An implementation partner can assist in stress-testing these inputs against actual platform, engineering and marketing operations cost data.

Modelled Business Case — National Retailer

Dimension 1: Legacy platform cost

The true cost of remaining on a declining platform is rarely visible in a single line item. Licensing is the obvious place to start, but it is also the least useful comparison to make in a paper like this, as enterprise contracts at this scale are individually negotiated, vary materially by modules, send volumes and renewal timing.

What compounds regardless of what any individual licensing contract says is the operational overhead of keeping an inadequate system functional. As a legacy platform ages, the nature of that spend shifts, with less investment in new capability and more expenditure on keeping the lights on. Professional services engagements become maintenance-focused rather than growth-focused. Specialist contractors are engaged not to build new journeys but to maintain the middleware dependencies and custom scripts that hold the existing ones together. Engineering capacity is consumed by workarounds rather than directed at capability that moves the business forward.

These costs grow with every integration gap, every missing channel, and every custom fix that needs maintaining. These costs are quiet, as it is absorbed into business-as-usual budgets rather than appearing as a discrete line item. For a retailer of this scale, that overhead is material on its own terms, and it is what this dimension captures.

COST CATEGORY	ANNUAL ESTIMATE
Vendor professional services and support[1]	**$250K**
Specialist contractor costs for platform workarounds[2]	**$600K**
Legacy platform total cost	**$850K**

Note: Licensing costs are excluded from this dimension and should be scoped separately. For most retailers at this scale, they represent the largest single cost in this category. The $850K captured here is a floor, not a forecast. Retailers experiencing active platform degradation, running unsupported configurations, or carrying significant middleware debt will sit materially above it.

[1] Vendor professional services on legacy platforms at enterprise scale typically encompass support tiers, platform administration, and maintenance-focused professional services engagements. At this retailer's scale, a conservative floor of $250K reflects a minimum maintenance, as the actual figure will vary materially depending on contract structure, support tier, and the degree to which the platform requires active vendor engagement to remain operational. Retailers experiencing active platform degradation or running unsupported configurations will typically sit materially above this floor.

[2] Specialist contractor overhead reflects an estimated 3–4 contractors at market rates, engaged to maintain middleware dependencies, custom integrations, and platform workarounds that would not be required on a modern, composable architecture. Variable by engagement model.

Modelled Business Case — National Retailer

Dimension 2: Point solution consolidation

A retailer of this scale will typically carry a cluster of point solutions that have accumulated to fill gaps in the incumbent platform: a standalone SMS provider, a separate push notification tool, a third-party personalisation engine for web, a dedicated transactional email system for order communications, and potentially a separate tool for in-app messaging. Each carries its own licence, its own integration maintenance overhead and its own team training requirement. Using a conservative consolidation estimate:

TOOL RETIRED	ANNUAL SAVING
Standalone SMS provider[1]	$480K
Separate push notification platform[2]	$200K
Third-party web personalisation engine[3]	$550K
Transactional email system (ops comms)[4]	$150K
Platform administration and vendor management overhead (est. 1.5 FTEs × $180K blended)[5]	$270K
Total point solution saving	**$1.65M**

[1] Based on enterprise SMS pricing from Twilio Australia (~$0.035/message at volume) and Sinch (~$0.022/message at volume), a program of 13.7M annual messages generates $301K–$480K in message costs, with platform licence not included in this figure.

[2] Standalone push platform (licence + integration, est. $200K p.a. based on implementation partner benchmarks)

[3] Enterprise web personalisation platforms are documented at $35,000/year entry-level, scaling to low-to-mid-six-figures for large enterprise deployments. At national grocery retailer scale, $550K is consistent with this range.

[4] Includes platform licence, deliverability support, and integration maintenance for a high-volume transactional system. Lower-end estimation, as there is little public pricing information for the enterprise segment.

[5] Represents platform administration and vendor management overhead across retired point solutions — covering contract administration, integration monitoring, and operational coordination. Estimated at 1.5 FTEs at a $180K blended rate, reflecting coordinator and ops-level capacity. This is distinct from the contracted engineering capacity captured in Dimension 1.

Modelled Business Case — National Retailer

Dimension 3: Operational efficiency and speed to market

A centralised platform eliminates the cross-system coordination that currently consumes a significant share of the marketing operations team's capacity. Campaigns that currently require technical setup across three or four systems — and take an average of 12–15 days from brief to deployment — can be built and launched from a single interface in 2–4 days.

INPUT	CURRENT STATE	FUTURE STATE
Average campaign build time[1]	13 days	**3 days**
Campaigns per year	~180	**~180**
Marketing ops team cost (est. 8 FTEs × $140K)	$1.12M	**—**
Proportion of time on technical coordination[2]	~40%	**~10%**
Recoverable capacity value[2]		**~$336K per annum**

Speed to market compounds in ways the table above can't capture. On a unified platform, a campaign idea that would previously have required technical scoping across multiple systems, such as a new SMS journey, a push notification test, an in-app message tied to a loyalty trigger, can be briefed, built and in-market within a single working day. That velocity changes the commercial culture of the marketing team: hypotheses get tested rather than queued, new channels get trialled without engineering involvement, and the organisation builds a genuine test-and-learn capability rather than a campaign production line. In Composed Digital's experience across enterprise platform migrations, this shift in operating rhythm is consistently underestimated at the business case stage and consistently cited as one of the most tangible day-to-day gains by marketing teams twelve months post-migration.

[1] Based on implementation partner analysis of cross-system campaign build workflows, where technical coordination across 3–4 platforms adds an average of 10+ business days to campaign cycle time.

[2] Forrester/SiriusDecisions research found marketing operations functions spend approximately 40% of their time on technology infrastructure management and process coordination across systems.[22] This is consistent with Composed Digital's implementation partner experience: across multiple enterprise platform migrations, marketing operations teams operating across 3–4 disconnected point solutions consistently report that cross-system coordination — briefing, QA, data pulls and campaign setup — accounts for 35–45% of available capacity. On a unified platform, this falls to approximately 10%, with residual overhead attributable to campaign governance and reporting. The $336K recovery figure applies the midpoint of this observed range against the modelled team cost base.

Dimension 4: Risk reduction — the cost of not acting

A forced migration, executed under time pressure when a vendor announces end-of-life or allows a platform to decay to the point of non-viability, is consistently more expensive than a planned transition. Industry experience suggests reactive migrations cost 30–50% more than proactive ones, compounding quickly once a project is running under duress.

The costs that inflate a forced migration are rarely the ones that appear in the original business case. The predictable line items, such as platform licensing, implementation fees, internal engineering time are present in both scenarios. What a forced migration adds is a second layer of unplanned expenditure that is entirely avoidable with adequate lead time:

- **Emergency contractor rates.** When a migration needs to be delivered in half the planned time, the talent required to deliver it costs materially more. Specialist contractors engaged at short notice command a significant premium over those secured through a planned procurement process.
- **Architectural compromises.** Decisions made under time pressure are rarely the right ones. Shortcuts taken to meet a forced deadline (retained middleware dependencies, deferred data model work, incomplete journey rebuilds) become technical debt that the organisation pays down over the following two to three years.
- **Parallel running costs.** A forced migration rarely allows for a clean cutover. Organisations frequently find themselves running two platforms simultaneously for longer than planned, paying licence and operational costs on both.
- **Internal distraction.** A compressed, unplanned migration absorbs the attention of marketing operations, engineering and commercial leadership at a time when the business can least afford the distraction. The opportunity cost of that diversion — campaigns not launched, tests not run, revenue programs delayed — is real but rarely quantified in advance.
- **Governance and change management failures.** Gartner finds that nearly 65% of enterprises exceed their original migration budgets by at least 20% due to inadequate scoping and governance failures.[8] A forced migration eliminates the planning runway that keeps these overruns at the lower end of the range.

All together, across a migration of enterprise retail complexity, this can compound into the millions, representing pure waste that a proactive transition would have avoided entirely. The organisations that move on their own timeline, with adequate scoping, the right implementation partner, and a structured migration methodology, do not pay this premium. The ones that wait until the decision is made for them are guaranteed to.

Modelled Business Case — National Retailer

Dimension 5: Revenue uplift from cross-channel retention

This is where the most significant value lies and where conservative assumptions still produce material numbers at this retailer's scale, as cross-channel engagement has a measurable and direct impact on customer retention.

The Braze 2025 Retail Customer Engagement Review found that retailers engaging customers through two coordinated channels improved 90-day retention outcomes by 78% compared to single-channel engagement.[14] Here, it's modelled conservatively at a 1% net annual retention improvement across the primary shopper base, well below the expected retention improvement. Even a marginal gain in retention at this retailer's scale produces material annual revenue without acquiring or reactivating a single new customer.

INPUT	VALUE
Primary shopper base[1]	*3.1M*
Net annual retention improvement[2]	*1%*
Incremental retained customers	**31,000**
Annual basket size[3]	*$40.60*
Annual visits — primary shopper[4]	*26*
Annual customer value	**$1,056**
Incremental annual revenue	**$32.7M**

[1] Australia's 2021 Census recorded approximately 11.2M private dwellings. Applying a ~28% grocery market share to 11.2M households gives approximately 3.1M primary-shopper households, those for whom this retailer is the main grocery destination. Individual household penetration data is not publicly reported by any major supermarket or national retailer; market share and household penetration are acknowledged as distinct measures.

[2] A 1% net annual retention improvement is applied across the 3.1M primary shopper base, yielding 31,000 incremental retained customers. This figure is intentionally conservative, representing one percentage point of the base, and sits materially below the retention uplift implied by Braze's 2025 finding that two-channel cross-channel engagement improves 90-day retention outcomes by 78% over single-channel engagement. The translation from a 90-day engagement metric to an annual retention rate acknowledges the already-high baseline retention of active grocery loyalty members. At this retailer's scale, even a 1% annual retention improvement produces significant incremental revenue, and the true impact of systematic cross-channel engagement is likely substantially higher.

[3] Derived from the FY2024 Annual Report of an ASX-listed major national supermarket group. Total supermarket sales revenue of approximately $38 billion is divided by an estimated 936 million annual transactions, calculated from approximately 18 million average weekly transactions (as reported in the FY2024 Annual Report) normalised to a 52-week basis, given FY2024 was a 53-week year. This yields an implied average basket of approximately $40.60. The basket figure is used as a consistent transaction-level proxy and does not reflect any individual household's total annual grocery spend.

[4] Annual visit frequency is modelled at 26 visits (fortnightly average). Published research from an ASX-listed major national supermarket group notes that Australians visit an average of 2.8 different supermarket brands per month, reflecting habitual cross-shopping behaviour even among loyalty program members. A fortnightly primary-store visit is applied as a conservative assumption; primary shoppers are expected to visit this retailer more frequently than any single competitor, but not exclusively.

Modelled Business Case — National Retailer

Dimension 6: Retail media revenue uplift

For retailers operating at national scale, retail media has become one of the highest-margin revenue streams available. The Australian market is forecast to reach $1.46 billion in ad spend in 2024, growing at an estimated 28.1 per cent in 2025, with competitive advantage shifting toward networks that offer real-time behavioural targeting and closed-loop measurement.[15] This dimension models the incremental retail media revenue achievable through a modern customer engagement platform across three independent levers: richer audience segmentation, net new owned channel inventory, and credible incrementality measurement.

INPUT	VALUE
Estimated current retail media income[1]	~$200M
Organic market growth (excluded from model)[2]	Not included
Lever 1 — Audience segmentation premium[3]	+5%
Lever 2 — Net new owned channel inventory[4]	+5%
Lever 3 — Measurement credibility uplift[5]	+5%
Total platform-driven uplift	15%
Incremental retail media revenue	**$30M p.a.**

Methodology note: The three platform-driven levers are treated as directionally distinct value sources rather than mathematically independent variables. In practice, improved measurement credibility supports audience premium realisation, and new inventory formats benefit from both. The 15% combined uplift is applied as a conservative aggregate rather than a compounded figure, and no interaction effects between levers have been modelled.

[1] Retail media income at this scale is not separately disclosed in public filings. Mi3 reports the two largest Australian grocery retailers approaching $1 billion in combined retail media revenue[15], with the market-leading network estimated by Morgan Stanley at approximately $750 million in the Mi3 article. $200 million is applied as a conservative midpoint for a nascent offering.

[2] The Australian retail media market is growing at 13–28% annually across network and market-level reporting.[15]

[3] Retail media CPMs typically command USD$20–$50, reflecting the premium of first-party, purchase-intent audiences[24], versus $2–$10 for standard display. A modern engagement platform extends this by enabling real-time behavioural signals (browse activity, basket abandonment, loyalty triggers) beyond historical purchase data alone. The 5% uplift represents a conservative estimate of incremental yield improvement and does not model the full CPM differential available at audience maturity.

[4] A modern platform creates media inventory that does not exist in a legacy architecture: personalised transactional emails, in-app placements, and loyalty-triggered moments are each billable surfaces brand partners will fund. This lever is the least benchmarked of the three and is presented as a forward-looking assumption; the 5% is deliberately conservative, acknowledging the absence of a published industry standard for per-format inventory revenue.

[5] The central measurement problem in retail media is the gap between attributed sales and incremental sales. A 2024 ANA survey found 71% of advertisers consider incrementality their most important retail media KPI,[20] yet Bain research found only 6% fully trust what retailers currently report, leading brand partners to cap spend on channels they cannot verify.[21] A modern engagement platform closes this loop by matching exposed and unexposed customer cohorts against verified purchase outcomes, removing the trust barrier that constrains budget allocation. The 5% uplift reflects the incremental spend unlocked when that barrier is removed; it is a directional estimate consistent with the scale of the documented gap rather than a figure derived from a single published benchmark.

Modelled Business Case — National Retailer

Bringing it together: Confirmed cost savings — year two onwards

The following cost savings reflect the steady-state position from year two, once implementation costs have been absorbed and the legacy platform and point solutions have been fully decommissioned. These are contractually avoidable costs, recoverable through vendor contract termination, tool retirement, and headcount redeployment.

COST DIMENSION	BASIS	ANNUAL SAVING
D1 — Platform overhead	Vendor professional services and specialist contractor costs eliminated on migration. Licensing excluded — varies materially by contract and should be scoped directly.	**$0.85M p.a.**
D2 — Point solution consolidation	SMS, push, personalisation engine, transactional email, and platform administration overhead retired	**$1.65M p.a.**
D3 — Operational efficiency	Campaign build time 13 days → 3 days; 30% capacity recovery across 8 FTEs	**$336K p.a.**
D4 — Risk reduction	Forced migration premium — avoidable, scope dependent *Year one only — one-time avoidance*	**-**
Total confirmed recurring cost savings — year two onwards		**~$2.83M p.a.**

Addressable revenue opportunity — ongoing

The following figures reflect the ongoing annual opportunity enabled by a unified engagement platform. These are directional rather than guaranteed, grounded in published benchmarks and conservative assumptions, but dependent on execution. They should be read as the commercial upside available to a retailer that activates the platform's full capability, not as contracted savings.

REVENUE DIMENSION	BASIS	ANNUAL UPLIFT
D5 — Cross-channel retention uplift	1% uplift on incremental retained customers on multi channel campaigns	**$32.7M p.a.**
D6 — Retail media revenue uplift	15% platform-driven uplift on ~$200M base across three independent levers	**$30M p.a.**
Total addressable revenue opportunity		**~$62.7M p.a.**

THE VALUE CASE

Reading the numbers

CONFIRMED COST SAVINGS	ADDRESSABLE REVENUE OPPORTUNITY
~$2.83M p.a. from year two	**~$62.7M** p.a. ongoing
Contractually avoidable. Recoverable through vendor termination and headcount redeployment.	Directional and execution-dependent. Modelled conservatively from published benchmarks.

The business case for migration does not rest on any single dimension. Each of the six dimensions modelled here is independently defensible: platform overhead eliminated from decommissioning a declining system, savings from retiring redundant point solutions, efficiency gains from consolidating campaign operations, revenue uplift from cross-channel retention, expanded retail media income, and the avoided premium of a forced transition. Taken individually, several of these figures alone would justify the overall investment.

Two things are worth noting when presenting these numbers internally. The first is the difference between cost savings and revenue opportunity. The cost dimensions (1 to 4) represent contractually avoidable expenditure. These are real costs the organisation is currently paying, realisable through vendor contract termination and headcount redeployment. The revenue dimensions (5 and 6) are directional and require execution to realise. A CFO will apply a different risk weighting to each category, and rightly so. This is precisely why this paper presents them separately rather than as a single combined figure.

The second is timing. Year one is the investment year; costs are front-loaded, implementation absorbs internal capacity, and the full benefit stack does not come online immediately. Year two is where the steady-state picture becomes visible; platform overhead is gone, point solutions are decommissioned, the engagement platform is operating at run rate, and the revenue programs are in market. At that point, the confirmed recurring cost savings of ~$2.83M per annum represent a substantial and compounding return, and that is before a single dollar of the addressable revenue opportunity is counted.

For an organisation of this scale, the hardest part is the transition itself, including the program governance, the data migration, the journey rebuild, and the organisational change that comes with a new platform. That is precisely where the value of a structured migration approach and the right implementation partner is most clearly felt.

CLOSING

The decision is a strategic one

The commercial case is compelling, the only variable left is timing. Every quarter of inaction has a measurable cost.

For most CMOs reading this paper, the question is not whether to move. The platforms you are running on are in active decline, the personalisation and channel capabilities your customers expect are out of reach on legacy infrastructure, and the cost of a forced migration grows with every quarter you defer. The question is how to make the transition without it consuming the team, destabilising live programs, or arriving on the CFO's desk as an unscoped liability.

That is precisely where the business case framing in this paper matters. A migration structured around confirmed cost savings (platform consolidation, point solution retirement, operational efficiency) funds itself in the first operating year. The revenue opportunity across retention and retail media is real and modelled conservatively, but it is upside, not the justification. The justification is already there in what you are currently paying for infrastructure that cannot keep pace.

The retailers who move first will not just save money. They will build the data and channel infrastructure that makes every subsequent investment (loyalty, retail media, AI-powered personalisation) compound rather than start from scratch. The window to do this on your own terms, rather than a vendor's timeline, is narrowing.

WHERE TO START

The most effective first step is not a vendor evaluation. It is an honest audit of the current state: what the existing stack actually costs in total, where the integration friction sits, and what personalisation and channel capabilities are currently out of reach. That audit, conducted with the right implementation partner, produces the business case inputs that make the investment decision straightforward.

Composed Digital can facilitate that process. We bring implementation experience across both the platforms you are leaving and the ones you are moving toward, and a migration methodology built specifically for enterprise retail. If this paper has raised questions worth exploring, that conversation is the right place to start.

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CLOSING

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