



What Are You Buying?

*The Platform Illusion:
Cutting Through Agency Tech Narratives*

Authored by 3C Ventures
June 11, 2026



EXECUTIVE SUMMARY

At some point over the last five years, every major agency unveiled a proprietary technology platform. Dentsu launched Dentsu.Connect, Horizon Global bluConverged, Kepler KIP, Monks its AI platform, Omnicom Omni, PMG Alli, Publicis Marcel, Stagwell STAGE/The Machine, and WPP Open. These platforms, at varying stages of build and deployment, are positioned to advertisers as transformative operating systems designed to meet the velocity and accuracy demands of modern marketing. What they share, regardless of maturity, is a vocabulary: AI-powered, end-to-end, transparent, open ecosystem, and agentic.

AI has long been present in marketing technology. What changed in 2022 and 2023 was not the existence of AI but its visibility. It moved from the background into the pitch deck and brought an entirely new commercial language with it. That language is now so uniformly adopted that, stripped of branding, most platform descriptions are functionally indistinguishable from one another. The underlying capabilities, however, vary dramatically.






That gap between language and capability is the subject of this paper. Before any advertiser signs a platform-based agency agreement, the following questions require written, specific answers:

- ◆ What data does the agency own, and what data does the advertiser own? Who owns content created within an agency large language model if advertiser data was used to populate it?
- ◆ How is advertiser data gated from the data of other agency clients? What happens to proprietary model learning if the advertiser changes agencies?
- ◆ What is genuinely proprietary versus assembled from third-party tools? What evidence exists that the platform delivers measurable outcomes independent of the people managing it?
- ◆ How does the agency ensure that generative AI capabilities are not producing hallucinated planning options, audience recommendations, or measurement decisions?

These are not theoretical questions. They are the minimum standard of diligence for any organization entering or renewing a proprietary platform engagement.

CORE FINDINGS

Five structural credibility gaps characterize the current state of agency platform marketing:

-  **Vocabulary without definition:** Every major platform deploys nearly identical language, but no industry-standard definitions exist for any of the terms being used. The value, the risk, and the true cost of what is being sold are not reliably assessable from the language alone.
-  **Performance claims that cannot be verified:** Platform capabilities are validated primarily through agency-authored case studies. Independently validated evidence that isolates platform and AI contribution from human talent remains scarce.
-  **Transparency is often promised where visibility is structurally limited.** The challenges of transparency in media buying are understood, however, the transparency in these newer AI-powered, end-to-end planning and buying platforms is not and requires a new focus of understanding.
-  **Agentic AI claims without proof standards:** Marketing, media, and creative platforms all seem to claim some form of AI and/or agentic workflow capability. These platforms are supposed to be superior to previous models, smarter, faster, more accurate, and capable of reducing the impact of human error. However, the evidence for autonomous, multi-step AI execution at scale, as opposed to assisted automation or workflow orchestration in a generative AI wrapper, remains largely unsubstantiated in a publicly verifiable form.
-  **Opaque platform and labor economics:** The shift from full-time-employee (FTE) -based billing to platform-fee models introduces new commercial complexity that is seldom fully explained during the agency review process. Advertisers may be paying both for platform capabilities and for the people required to operate the platforms with no meaningful differentiation and without a clear accounting of either.

What Advertisers Should Do

The full paper provides a six-dimension Benchmarking Framework with diagnostic questions for every agency review, RFP, and contract negotiation. Three actions are the minimum standard of diligence:

- ◆ **Contractualize the framework:** Data portability, AI attribution disclosure, fee transparency, and vendor relationship disclosures belong in contract language, not agency review presentations. Commitments made verbally during a review carry no enforceable weight.
- ◆ **Require a proof of concept:** A structured proof of concept under real conditions with the advertiser's actual data and workflow requirements is the most reliable mechanism for closing the gap between platform narrative and platform reality.



- ◆ **Audit existing engagements:** If your organization operates within a proprietary agency platform today, identify where written commitments on data ownership, portability, fee transparency, and AI governance do and do not exist before they become urgent.

Conclusion

Platform transparency is no longer solely a commercial question. Regulatory obligations under the FTC, the EU AI Act, and a growing body of national AI legislation across the United States, Europe, China, Brazil, and beyond are making it a legal one. The window for voluntary adoption of disclosure standards is narrowing.

Agency platforms should be held to the same evidentiary standards applied to any other significant technology investment: documented capability, independent validation, transparent commercial terms, and contractual accountability for stated outcomes. Anything less is not a platform. It is a marketing narrative.

THE PROBLEM: WHEN PLATFORM LANGUAGE DOES NOT CLARIFY

In 2024 and 2025, nearly every major agency holding company and a growing cohort of independent agencies launched, relaunched, or substantially rebranded core agency capability. The timing was not coincidental. Generative AI had entered the mainstream, advertiser demands for greater productivity and accountability were intensifying, and the traditional agency business model built on labor arbitrage, media markups, and proprietary media relationships needed a reprieve from increased price competition, margin compression, and talent quality complaints.

Whether net-new builds or the repositioning of existing technology stacks, these platforms implied scalability, replicability, and capital efficiency. To sell them to advertisers, agencies adopted platform language and positioning, akin to technology companies, not instead of human capital labor-based businesses, but in addition.

That shift in positioning had a predictable consequence. With these new capabilities and services came a high degree of convergence in terminology and value propositions, creating a marketplace defined more by shared rhetoric than clear differentiation. Agency marketing materials from 2023 to 2025 cite AI-powered decisioning, end-to-end workflow integration, transparent and open ecosystems, real-time activation, and most recently, agentic AI capabilities. The language is so uniform that, stripped of branding, it would be nearly impossible to attribute a platform description to its source agency.

Why This Matters for Advertisers

For advertisers, vocabulary convergence creates several risks:

- ◆ **Evaluation failure:** When agency marketing materials deploy identical language to describe materially different capabilities, advertisers lack the conceptual tools to distinguish between them. Platforms that sound functionally equivalent in an agency review can differ substantially in their underlying architecture, data rights structures, and operational dependencies.
- ◆ **Vaporware purchases:** Advertisers that select or retain agencies partly on the basis of platform claims may be paying for capabilities that do not exist at the stated level of maturity, or that exist only as roadmap aspirations rather than fully deployed functionality.



- ◆ **Unclear engineering costs:** Onboarding an advertiser into a proprietary agency platform in a meaningful way requires a distinct category of technical work, often labeled as setup, integration, or onboarding fees, that can carry significant price tags. The promise is that these costs are front-loaded and dissipate once the advertiser is fully configured within the platform environment. In practice, these costs are rarely surfaced during the agency review process, are not easily comparable across platforms, and require technical expertise that most marketing organizations do not have in-house to evaluate accurately. What appears to be a platform access fee is frequently accompanied by substantial and undisclosed engineering investment.
- ◆ **Hidden switching costs:** Platform narratives that emphasize openness and interoperability often obscure the degree to which the agency platforms create proprietary data environments, specifically, audience segments, identity graphs, and measurement baselines that are difficult to port to an alternative partner or even back to the advertiser.
- ◆ **Communication gap:** Using overly technical terminology with non-technical audiences can create confusion, reduce engagement, and obscure the intended message, especially when a non-technical cohort is selling a service to another non-technical cohort.
- ◆ **Governance exposure:** If advertisers do not understand which data their agency platform holds, how it is governed and manipulated, or who owns the work product contractually, they cannot meaningfully comply with evolving data privacy regulations or protect their first-party data assets. This is not a theoretical risk, but a live legal exposure for organizations subject to CCPA, GDPR, state-level privacy laws and dynamic country rules of engagement.

INDUSTRY CONTEXT: THE FORCES RESHAPING THE PLATFORM NARRATIVE

AI and Agentic Workflow Compression

The emergence of commercially viable large language models (LLMs) in 2022 and 2023¹ fundamentally altered the economics of marketing services delivery and reset advertiser expectations of what those services should cost. Tasks that previously required significant human effort, including brief development, copy variation, audience segmentation analysis, and performance reporting, could by 2024, in theory, be executed faster and with fewer dedicated personnel. Advertisers expected that acceleration and reduction in labor dependency to be reflected in what they paid. For agencies that built margin models across labor-related creative, media, and data functions, this represented not merely a technology shift but a structural threat to the agency business model. The agency response was twofold: accelerate AI integration to protect margin and reframe AI adoption as a platform capability rather than a cost-reduction exercise. That reframing redirected the conversation toward performance and value creation. The result is that virtually every major agency platform now claims some form of AI integration, ranging from LLM-assisted copywriting tools to varying levels of autonomous media execution. With little standardized disclosure of what AI-powered means in practice, that absence is precisely what this paper sets out to address commercially and contractually.

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They [the agency] over promised. They preferred to pitch their own solution.

- Senior Global Media Leader, large consumer brand

¹ ChatGPT launched in November 2022 and GPT-4 followed in March 2023, which is broadly accepted as the moment LLMs crossed into mainstream commercial availability.

FTE Labor Economics & Platform Fee Tension

The most commercially significant and least publicly discussed dimension of agency platform development is the relationship between platform revenue and the labor costs traditionally tied to FTE-based service delivery. As AI tools compress the human effort required to deliver services, the assumption that agencies will simply pass those efficiencies to advertisers in the form of reduced fees misreads how businesses operate. No commercially rational organization reduces its revenue base without a corresponding upside, whether that is a new revenue stream, an R&D return on platform investment, or a restructured commercial model that captures the efficiency gain rather than surrendering it.

The platform fee model is that mechanism. By charging advertisers a recurring platform access fee, often positioned as the cost of access to better tools that produce better work, agencies can maintain or grow revenue even as underlying labor costs fall. The narrative is that the platform amplifies the talent, making the work faster, smarter, and more effective. What is rarely disclosed is how the cost of building and maintaining those tools is being redistributed, and whether the talent costs that the platform is supposed to reduce are actually coming down or simply being reclassified. While this is economically rational from the agency's perspective, it creates a corresponding obligation to provide advertisers with transparency into how platform fees relate to the value delivered and the costs displaced.

As platform-based models evolve, questions naturally emerge around the relationship between platform access fees, human service costs, and the underlying economics of delivering advertiser outcomes. In interviews with more than ten advertisers regarding agency technology platform costs and fee structures, the majority indicated that their contracts and fee structures had not kept pace with the changes AI has introduced to service delivery. The question, "Is this platform fee replacing headcount or adding to it?" is one of the most direct a CMO can ask, and one of the hardest to get answered.



Not one of them is translating the increased efficiency that they get from AI into fee savings. It's a little bit of a behind-the-curtain thing.

- Senior Marketing Leader, major financial services brand.



They're [the agency] pretty cagey about what they're willing to share. You would think transparency would be top of mind. It's really not.

- Senior Media Leader, global pharmaceutical brand

Advertiser Pressure on Buying Transparency & Data Governance

The ANA's influential 2016 transparency report established a template for advertiser scrutiny that has intensified rather than abated. By 2024, transparency demands had expanded well beyond media rebates and principal-based buying to encompass data governance, technology stack disclosure, and the commercial relationships between agency platforms and the tech vendors integrated within them. The question shifted from “how are you marking up our media” to “what are you doing with our data, who are your technology partners, and are you being paid by them?” These are questions agencies are least prepared to respond to in writing, and the ones advertisers most need answered.

The scrutiny placed agency platforms in an uncomfortable position. The commercially rational response was to adopt transparency as language while controlling the specifics of what is disclosed. Agencies that could not articulate their data and buying practices faced client attrition, so the vocabulary of transparency became a commercial necessity. But genuine transparency regarding platform architecture, vendor relationships, and switching cost structures threatened the narrative value of a proprietary platform position. The result is a structural conflict: the same organizations selling transparency as a feature are the ones determining what transparency means in practice. Without independent standards or contractual disclosure requirements, that conflict becomes a material governance exposure.



The speed and transparency of data is the only thing that is going to separate the winners from the losers as we move forward over the next few years.

- Senior Executive, a global apparel retailer

Data Ownership & Platform Stickiness

Data is the most consequential long-term dimension of agency proprietary platforms. When agencies build advertiser data environments within proprietary platforms, ingesting first-party data, building custom audience segments, and establishing measurement baselines, they are creating switching costs that are difficult to quantify at engagement initiation but grow materially over time. An important question every advertiser should be asking: who owns the data, who can access it post-engagement, and what is lost upon agency transition?



We have our own CDP so we're holding onto a lot of our own data. That's probably some of the hesitation of going all in on an [agency] platform...we're always trying to protect ourselves in case the relationship goes in a different direction.

- Senior Marketing Leader, global spirits brand



Am I better off taking my agency fee to hire people and build a technology platform? I'm probably going to save money if I do that over a five- or ten-year period.
- Senior Executive, global apparel retailer

Advertiser-Owned Capabilities

The degree of in-housing varies considerably across the market. Some advertisers built hands-on-keyboard buying teams with direct platform access, managing execution while outsourcing strategy. Others retained their strategic and planning functions while outsourcing execution to agency partners. Many sit somewhere in between, operating hybrid models where the division of responsibility between internal teams and agency platforms is neither clean nor consistently defined. What is consistent across all of these models is that the boundaries of the agency relationship shifted, and proprietary platforms sit directly at that boundary.

That shift in the boundary of the agency relationship did not go unnoticed by agencies themselves. Some agencies responded by positioning their proprietary platforms as software-as-a-service (SaaS) products, available to advertisers on a licensing model separate from a full agency relationship, in tandem with consulting services. In doing so, agencies reframed from service provider to technology vendor, preserving platform revenue as traditional retainers continued to compress or disappear entirely.

The SaaS pivot raises two questions the market has yet to resolve: when an agency becomes a software vendor, what service obligations attach to the platform, and do licensing agreements carry the same data governance, portability, and transparency commitments that a full agency contract should?



The conversation is increasingly about bringing capabilities in-house. Maybe agencies can still own elements of planning and buying executions, but that should be it.
- Senior Global Media Leader, large consumer brand



Platform Language (Nomenclature) Sea of Sameness

When every major competitor uses the same language, individual platforms are challenged to create a differentiated position. They can choose to use more specific language, make measurable claims they may not meet, or stick with the industry's standard vocabulary and compete on relationships, reputation, and the quality of their work. The quality of the work is the ultimate determinant, but it is notoriously difficult to evaluate during a traditional agency review process. As such, the language has been commoditized beyond utility.

In a short period of time, terms such as AI-powered, end-to-end workflow, transparent and open ecosystem, agentic, decisioning, and interoperable have become industry shorthand that advertisers have come to expect. They have been so uniformly and indiscriminately applied to every possible tool and stage of the media ecosystem that they no longer indicate anything meaningful about what a platform actually does. They are the price of admission to the conversation, rather than evidence of capability.

For advertisers, this is not merely an aesthetic problem. When the vocabulary is indistinguishable, the evaluation burden shifts entirely to the buyer. There is no signal in the language, only in the evidence behind it.



It seems like a collection of white-labeled solutions. When I trade notes with peers, there's relatively low adoption by clients as users of this technology.

- Senior Marketing Leader, major financial services brand

THE VOCABULARY: DEFINING THE MOST COMMON TERMS

AI has long been present in marketing technology. What is new is that it moved from the background into the pitch deck, and brought an entirely new commercial language with it. As one senior industry executive observed: “Everything has been AI-powered for over a decade. It’s just been unsexy, windowless basement AI instead of shiny LLM stuff. So now the questions are, what have you done differently in the last two years and why should I care?”

The terms below represent 3CV’s attempt to answer exactly that. Drawing on agency marketing materials, advertiser interviews, and industry analysis, this section documents the intended meanings of the most commonly used platform terms and establishes a standardized vocabulary framework for evaluating agency proprietary platforms

These definitions are intended to serve as a reference point for agency reviews, contract negotiations, and ongoing platform governance. 3CV recommends they be adopted as the minimum standard for evaluating platform claims in any agency review or contracting process

TERM	AGENCY USAGE How agencies typically deploy the term	ADVERTISER EXPECTATION What sophisticated advertisers and industry analysts understand it to mean	THE INTERPRETIVE DANCE Where interpretive ambiguity carries consequential commercial implications
AI-Powered	Some elements of the workflow use machine learning, LLMs, or automation scripts. Often applied to recommendations, reporting dashboards, or content tools.	The platform makes autonomous, intelligent decisions that materially improve outcomes—with measurable evidence of AI contribution versus human judgment.	AI-powered can describe anything from a rules-based recommendation engine to a fully autonomous execution system. Without evidence standards, the term is unfalsifiable.
End-to-End	The platform touches multiple stages of the marketing workflow. Integration depth varies widely.	A seamlessly integrated system where data, decisions, and outputs flow without manual handoffs or data reentry across the full campaign lifecycle.	Most platforms cover 2-3 workflow stages with genuine integration. Claiming end-to-end coverage for partially integrated stacks obscures significant manual intervention points, and raises questions of




			interoperability that are rarely answered in agency review materials: where does the platform's integration actually begin, where does it stop, what can be substituted or extracted mid-engagement, and what breaks when you try.
Transparent	Agencies provide some visibility into fees, media costs, or data usage, though these are often selective. Transparency is frequently cited as a principle rather than a defined disclosure standard.	Full visibility into media costs and margins, data governance and ownership, technology vendor relationships, fees, and algorithmic decision logic.	Transparency claims are rarely accompanied by specific disclosure commitments. What is disclosed versus withheld is typically at the agency's discretion unless contractually specified. This now extends beyond media buying to AI layers. Which LLMs are integrated, what commercial arrangements govern those relationships, and who captures the efficiency gains?
Open Ecosystem	The platform can integrate with third-party tools and does not require exclusive use of agency-selected vendors. Openness is often described architecturally but not tested operationally. (Hidden costs, work arounds, etc.)	Advertisers can bring their own technology stack, connect preferred vendors without penalty, and extract their data without friction when the relationship ends.	Open ecosystem often describes API availability rather than actual portability. The degree to which advertisers can substitute alternative tools without losing platform functionality varies dramatically.
Agentic Workflows	AI-assisted workflow steps that reduce human intervention in routine decisions such as creative trafficking, placement trafficking, bid adjustments, reporting. Often described as 'agentic' even for scripted automation.	Autonomous AI agents that independently execute complex, multi-step tasks—planning, creative development, media execution—with minimal human oversight, validated at scale. IAB Tech Lab's Agentic Advertising Management Protocols (AAMP) is the industry's first attempt at	The most deployed agentic capability is sophisticated automation rather than genuine autonomous agency. The distinction matters for staffing transparency, performance accountability, and commercial fairness. Who monitors the agents, where humans remain in the loop, and how efficiency gains from automation are



		building a standards framework to make genuine agentic execution transparent, trusted and verifiable.	passed back to the client are questions the category has not yet been required to answer.
Decisioning	The platform generates recommendations or outputs that humans review and approve. Used interchangeably with 'optimization' and 'AI decision-making.'	The platform makes binding, autonomous decisions within pre-defined parameters— budget allocation, audience targeting, creative selection—with auditable decision logic.	Decisioning as used in agency materials typically describes recommendation generation, not autonomous decisioning. The gap determines the actual role of human judgment in outcomes, and raises a more pointed question about incentives: when an agency holds principal inventory with guaranteed commitments alongside performance-based buying obligations, clients have no visibility into how those competing priorities shape the recommendations the platform surfaces.
Interoperability	The platform has documented APIs and can connect to major ad tech infrastructure (DSPs, DMPs, measurement vendors). Integration catalog is often cited as proof.	Advertiser data and decisions can move freely between the agency platform and other systems—without proprietary lock-in, data degradation, or commercial penalty for switching.	An API catalog does not equal true interoperability. The question is whether data migrates cleanly, completely, and without loss of segments, baselines, or attribution models built within the agency environment.

- ◆ **AI-Powered:** Any platform claiming AI-powered capability must disclose: the specific AI methods deployed, the workflow stages where AI makes decisions versus generates recommendations, and independently verifiable evidence of AI contribution to stated outcomes.
- ◆ **End-to-End:** A platform may claim end-to-end coverage only if it provides integrated data flow across all primary workflow stages without manual data re-entry, or undisclosed human intervention points. Where gaps exist, they must be disclosed.
- ◆ **Transparent:** Transparency requires a written commitment to disclose: all fees paid to the platform and its technology vendor partners, data ownership and portability terms, the decision logic behind



algorithmic recommendations upon advertiser request and the commercial relationships between the agency and technology vendors integrated within the platform.

- ◆ **Open Ecosystem:** Openness requires demonstrated ability for the advertiser to connect preferred third-party technology, substitute agency-recommended vendors without functional degradation, and extract all advertiser data including derived segments and attribution models upon engagement termination.
- ◆ **Agentic Workflows:** Agentic workflow claims must specify: the tasks performed autonomously versus assisted, the human approval steps required, evidence of autonomous execution at the claimed scale and the methodology by which autonomous execution is monitored and audited.
- ◆ **Decisioning:** Decisioning claims must distinguish between recommendation generation (human-approved) and autonomous decision execution (platform initiated within defined parameters), with documented governance for each.
- ◆ **Interoperability:** Interoperability requires demonstrated data portability, including the ability to migrate advertiser-owned audience segments, measurement baselines, and attribution models to alternative platforms without data loss or commercial penalty.

WHERE AGENCY CLAIMS AND ADVERTISER REALITY DIVERGE

Across the platforms reviewed, five systematic credibility gaps emerge with sufficient consistency to be considered structural features of the agency platform category rather than isolated exceptions.

1. The AI Attribution Problem

Every platform reviewed claims AI-powered capability. As of Q1 2026, not a single platform has published independently verified evidence that isolates AI contribution to outcomes from the contribution of the human talent operating within the platform environment. This is not a minor disclosure gap; it is a fundamental measurement problem that prevents advertisers from understanding what they are purchasing.

When any major agency platform reports AI-driven efficiency gains or attributes campaign results to its “decisioning intelligence”, the outcomes described are platform-plus-people outcomes. The platform contribution cannot be disaggregated from the analyst, strategist, or team using it. This is precisely how the technology investment is sold, as an amplifier of human talent, but it means that platform performance claims are structurally unverifiable without controlled testing. The advertiser has no way to know whether the results came from the platform, the people, or the combination.

2. End-to-End Architecture

End-to-end workflow coverage is claimed by every platform reviewed. The actual depth of integration, measured by the number of workflow stages where data flows without manual re-entry, and the number of decisions made by the platform rather than the people on it, varies dramatically across platforms.



What they pitched to us was end-to-end data ingestion, data cleansing, visualization, optimization, and learning back into campaign planning. That never happened. And when we finally got there, we found out the platform wasn't actually a visualization tool, but an interface with Tableau.

— Senior Global Media Leader, major consumer brand

Holding company technology platforms tend to claim the broadest workflow coverage, while independent technology platforms may have narrower scopes or specialty products. In every case, end-to-end is presented as *un fait accompli* when it is, in reality, a spectrum. Most platforms are significantly less integrated than the term end-to-end implies. The manual handoff points are glossed over, including instances where human effort is quietly substituted for platform capabilities that are not yet fully operational. For advertisers paying platform fees, the gap between what is promised and what is operationally delivered is rarely surfaced until the engagement is underway.

3. Transparency in Principle vs. Transparency in Practice

Every platform reviewed cites transparency as a core value. As of Q2 2026, no platform reviewed provides a publicly documented, standardized transparency disclosure specifying what is disclosed to advertisers, at what cadence, and with what governance.

The gap is acute in three areas:

- ◆ **Technology vendor relationships:** most platforms integrate third-party data, measurement, and ad tech vendors, often with commercial arrangements that may create incentives to favor those vendors. The degree to which these relationships are disclosed to advertisers varies, and none of the platforms reviewed publishes a standard vendor disclosure framework.
- ◆ **Platform fees:** the relationship between agency platform fees, FTE labor costs, and advertiser-facing pricing is not publicly documented for any of the platforms reviewed. Advertisers paying platform access fees in addition to service fees may not have visibility into whether those fees represent platform investment recovery or margin substitution.

- ◆ **Data governance:** the specific terms under which advertiser data is ingested, processed, and retained within agency platforms and what happens to derived data assets (audience segments, attribution models) upon engagement termination are not standardized.

4. The Promise of an Open Ecosystem

The open ecosystem claim is one of the most commercially significant and least tested in the category. Every major platform claims some form of openness: API availability, third-party integration capability, and both the ability and willingness to connect to an advertiser's tech stack. As of Q2 2026, none of the platforms reviewed has published a standardized, advertiser-facing data portability commitment.

Operationally, the distinction between API availability and genuine openness matters enormously. An advertiser can theoretically connect a third-party measurement vendor to any of these platforms via API, but can they port the audience segments, identity resolution, and measurement baselines built within the agency platform to an alternative environment upon agency transition? For most platforms, the answer is unclear, and that ambiguity is itself a disclosure failure. Open should mean portable, and until advertisers have written portability commitments in their contracts, the term open does not carry weight.

5. Agentic AI Claims Without Proof Standards

Agentic AI was the future claim of 2024 and 2025. Every platform now describes some form of autonomous or semi-autonomous AI workflow capability. The evidence for genuine agentic execution (autonomous, multi-step AI operation, without human approval at scale) is effectively nonexistent in the public domain across all platforms reviewed.

This does not mean agentic capability does not exist within these platforms. It means that the evidence standards applied to agentic claims are materially lower than the evidence standards applied to any other performance metric in the industry. A media agency cannot claim that its programmatic trading generated a notable efficiency gain without audit-trail evidence, but it can claim agentic AI workflow capability without any comparable evidence requirement. It reflects the industry's willingness to extend good faith before the credibility was earned.

Agentic workflow claims are the highest impact, lowest-evidence category in agency platform marketing. Until independent validation standards are established and implemented, these claims should be treated as aspirational roadmap statements rather than actual capabilities. The IAB Tech Lab's Agentic Advertising Management Protocols (AAMP) initiative has started to build an evaluation framework built on agentic foundations and protocols, as well as trust and transparency. The fact that they're still building an agentic "rulebook" and infrastructure indicates genuine agentic advertising doesn't exist at scale yet, and agencies claiming full agentic capabilities are claiming something the industry's infrastructure is not yet equipped to support or validate.



Everyone says they can do AI, but no one's actually doing it at scale.
- Senior Marketing Leader, major automotive brand

These gaps are not the product of bad faith. They are the predictable result of an industry that moved faster than its accountability infrastructure could follow. AI capabilities developed faster than measurement standards, and the vocabulary converged even faster.

A CMO'S BENCHMARKING FRAMEWORK

The following framework provides marketing leaders with a structured, platform-agnostic model for evaluating agency proprietary platforms. It is organized around six dimensions, each with observable indicators and diagnostic questions that can be deployed in agency reviews, RFP processes, and ongoing governance conversations.

This framework is deliberately designed to generate specific, documentable responses, not qualitative assurances. Its purpose is to shift the evaluation dynamic from narrative acceptance to evidence-based accountability.

Dimension 1: Build Architecture



**What is actually proprietary versus assembled from third-party components?
How was the platform built, and what does that architecture imply for capability, maintenance, and roadmap?**

Indicator	Diagnostic Question
Proprietary Core	Which specific components are proprietary builds versus licensed third-party tools? Ask for a technology stack disclosure?
Development Investment	What has been the investment in platform development over the past three years, and how is that investment reflected in current pricing? Can you document the engineering team size and investment history?
Roadmap Transparency	What is currently deployed vs. in development? Which capabilities are currently deployed and which are planned? What is the expected timeline for roadmap features?
Vendor Dependency	Which platform capabilities depend on specific third-party vendor relationships? What happens to those capabilities if vendor relationships change?


Dimension 2: Capability Proof Standards



What evidence exists for platform capability claims? Who authored it, under what conditions, and with what attribution methodology?

- ◆ Require case studies that isolate platform contribution from human contributions, with methodology disclosed.
- ◆ Ask for controlled experiment results or A/B test results where platform recommendations are compared to a defined baseline
- ◆ Request disclosure of the data sources, time periods, and advertiser categories represented in any cited performance evidence and the original campaign objectives.
- ◆ Ask whether any platform capabilities have been independently audited by a third party (auditor firm, research organization, or advertiser-side team with no commercial relationship to the platform).
- ◆ Request advertiser references who can speak specifically to platform functionality, not overall agency relationship quality.

Dimension 3: Commercial Transparency



Are the commercial terms of the platform relationship fully disclosed, including the relationship between platform fees, labor costs, and vendor economics?

- ◆ Require an itemized disclosure of platform fees, service fees, and media fees, and the relationship between them.
- ◆ Ask whether platform access fees increase, terminate, or carry penalties upon agency transition.

- ◆ Request disclosure of all technology vendor relationships embedded in the platform and any commercial arrangements between the agency and those vendors, including revenue sharing, data licensing, and preferential inventory access.
- ◆ Ask whether the agency receives any economic benefit (volume discounts, data access, attribution modeling advantages) from technology vendors integrated in the platform.
- ◆ Require disclosure of how the efficiency gains are passed to the advertiser, retained by the agency, or shared under a disclosed formula.

Dimension 4: Interoperability and Portability



- ◆ Require a written data portability commitment specifying exactly what data the advertiser can extract upon engagement termination.
- ◆ Ask for documented evidence that third-party technology substitutions (advertiser-preferred DSP, measurement vendor, identity solution) can be made without functional platform degradation.
- ◆ Ask explicitly: can audience segments, attribution models, and measurement baselines built within the platform be exported to an alternative environment without data loss or commercial penalty?
- ◆ Request a disclosure of which platform capabilities are contingent on specific vendor relationships that the advertiser cannot substitute.
- ◆ Evaluate API documentation, not as proof of openness, but as a starting point for understanding what openness actually covers.

Dimension 5: Data Governance



**Who owns the data?
How is it governed?
What happens to derived data assets?**


- ◆ Require a written data ownership declaration, specifying which data elements belong to the advertiser versus the agency versus third-party vendors.
- ◆ Ask for disclosure of all data sharing arrangements including data syndication, comingling of advertiser and other advertiser data, and use of advertiser data to train agency AI models.
- ◆ Request clarity on data retention practices: what advertiser informed agency data survives engagement termination, and for how long?
- ◆ Ask whether the agency platform is compliant with applicable privacy regulations (CCPA, GDPR, state privacy laws, and the soon-to-be EU AI Act(8/26)) and request documentation of compliance frameworks.
- ◆ Require disclosure of whether advertiser first-party data is used to inform non-advertiser campaigns, improve platform-wide AI models, or generate insights shared across the agency network, or with third-party data partners.

Dimension 6: AI Maturity



**What does AI-powered actually mean on this platform?
Where does AI make decisions, and where does it only generate recommendations?**

- ◆ Require a specific disclosure of which workflow stages deploy AI, what type of AI (rules-based, predictive analytics, ML, LLM, autonomous agent), and whether AI is making decisions or generating recommendations for human review.

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- ◆ Ask for documented evidence of AI contribution to outcomes, with methodology disclosed for how AI contribution was isolated from human contribution.
 - ◆ For agentic AI claims specifically: require a demonstration of autonomous multi-step task execution, disclosure of the human approval points required, and evidence of deployment at the claimed scale.
 - ◆ Ask whether the agency's AI models are trained on advertiser data, and if so, whether that data use is disclosed in the contract and whether the advertiser retains the right to opt out of model training without loss of platform functionality.
 - ◆ Require clarity on the agency's AI governance framework: how are algorithmic decisions audited, and what recourse exists for advertisers who dispute AI-generated outcomes?
 - ◆ Require a written definition of how the agency applies the terms AI-powered and agentic within the context of its platform, with specific reference to where autonomous execution occurs versus human-assisted workflows.

IMPLICATIONS AND RECOMMENDATIONS

For Advertiser Marketing Leaders and CMOs

The most immediately actionable implication of this analysis is also the simplest: require written, specific, verifiable responses to the diagnostic questions in the Benchmarking Framework as part of any agency review or platform evaluation. Do not accept qualitative assurances in place of evidence.

- ◆ **Contractualize the framework:** The six dimensions of the Benchmarking Framework should inform contract language, not just RFP evaluation. Data portability, AI attribution disclosure, commercial transparency, and vendor relationship disclosure should be explicit in contractual commitments rather than agency review assurances.
- ◆ **Audit existing platform commitments:** If your organization is currently engaged with an agency that operates a proprietary platform, apply the framework to your existing relationship. Identify where you do and do not have written commitments on data ownership, portability, fee transparency, and AI governance.
- ◆ **Separate platform evaluation from relationship evaluation:** Platform capability and agency relationship quality are both legitimate evaluation criteria, but they should not be conflated. A strong agency relationship with a weak or overclaimed platform is a different risk profile than a strong platform with undisclosed commercial complexity.
- ◆ **Demand independently validated performance evidence:** For any platform claiming AI-powered performance improvement, require methodology disclosure for how platform contribution is isolated from human talent contribution. If this cannot be provided, the performance claim cannot be treated as platform evidence.
- ◆ **Build platform switching costs into contract terms:** If data portability and technology substitutability are not contractually guaranteed at engagement initiation, they are unlikely to be honored at engagement termination. Negotiate data portability provisions before they become urgent.
- ◆ **Proof of Concept Before Commitment:** Require a structured proof of concept before full engagement. It is the most reliable mechanism available for closing the gap between platform narrative and platform reality.

For Agencies and Platform Owners

The convergence of vocabulary around identical platform claims is a collective credibility problem that ultimately disadvantages well-invested platforms as much as superficial ones. When every platform claims AI-powered, end-to-end, transparent, and open, no platform benefits from those claims; they become tablestakes rather than differentiation.

Adopt evidence standards proactively: Agencies that move first to publish methodology-disclosed platform performance evidence with transparent attribution of AI versus human contribution will benefit disproportionately as advertiser scrutiny intensifies. Agencies should not grade their own homework and should seek third-party validation.

- ◆ **Publish data portability commitments:** A standardized, publicly available data portability commitment would differentiate any platform in the current environment. The absence of such commitments is increasingly interpreted as evidence of intentional lock-in.
- ◆ **Distinguish deployed capability from roadmap:** Advertisers and trade press are sophisticated enough to distinguish between current functionality and development roadmap if agencies are explicit about the distinction. Conflating them in agency review materials creates credibility risk when capability claims are tested against operational reality.
- ◆ **Create independent validation mechanisms:** Agency-authored case studies, however well-constructed, cannot substitute for independent audit. Agencies serious about platform credibility should invest in third-party audit arrangements that can validate core claims.

For Ad Tech Partners and Industry Organizations

- ◆ **Establish category-level proof standards:** Industry organizations including the ANA, WFA, 4A's, and IAB are well-positioned to establish voluntary disclosure standards for agency proprietary platforms, particularly around AI attribution, data governance, and portability, and work in this area has begun. The challenge is velocity. The pace at which agency platform capabilities are being deployed and marketed is outrunning the pace at which standards are being developed. That gap is itself a market failure, and closing it requires urgency commensurate with the rate of change.
- ◆ **Develop independent platform auditing capacity:** The industry lacks an independent auditing mechanism for agency platform claims comparable to the financial audit function or the media auditing infrastructure that emerged post-2016. Developing this capacity would benefit buyers and credible platform builders equally.

The Broader Regulatory Imperative

The question of platform transparency is no longer solely a commercial and reputational one. It is a live legal compliance obligation.

- ◆ **In the United States**, the FTC's authority over unfair and deceptive practices extends explicitly to unsubstantiated AI capability claims, and state Attorneys General in New York and California have been active in enforcement.
- ◆ **In the European Union**, the EU AI Act's transparency obligations for AI systems take effect in August 2026, with direct implications for any agency platform making automated decisioning claims to European clients.
- ◆ **In the United Kingdom**, the ICO is developing a statutory code of practice on AI and automated decision-making, and the CMA holds direct enforcement powers over digital market practices under recently enacted legislation.
- ◆ **In China**, the Cyberspace Administration of China's Generative AI Service Management Provisions, in effect since August 2023, impose algorithmic transparency requirements, data provenance disclosure obligations, and content labeling mandates on any platform operating in or processing data from the Chinese market.
- ◆ **In Brazil**, the Lei Geral de Proteção de Dados establishes the regional data governance benchmark, and a draft AI regulatory framework is advancing through the legislature with direct implications for automated decisioning and data transparency.
- ◆ **Across Asia-Pacific and Latin American** markets more broadly, data protection groups are increasingly imposing governance obligations on automated systems, and the trajectory is toward greater specificity and enforcement rather than less.

The window for voluntary adoption of disclosure standards is narrowing. The pace at which agency platform capabilities are being deployed and marketed is outrunning the pace at which regulatory frameworks are being finalized. Agencies that treat platform transparency as a commercial preference rather than a compliance obligation are assuming a risk that is no longer theoretical.

CONCLUSION: ACCOUNTABILITY FOR AGENCY PLATFORMS

The agency proprietary platform is one of the most consequential commercial developments in the marketing services industry in the past decade. It has restructured how agencies pitch their value, how advertisers evaluate agency relationships, and how the economics of marketing services delivery are negotiated. Its influence will grow, not diminish, as AI compresses traditional labor-intensive services and platforms become the primary commercial rationale for agency relationships.

But the current state of agency platform marketing is not sustainable. When every platform claims the same capabilities in the same language, when proof standards vary from rigorous to absent, and when transparency is deployed as vocabulary rather than practice, the inevitable result is an advertiser crisis of confidence. That crisis is already visible in the intensifying questions from about platform economics, data ownership, and AI accountability.

The response to this moment cannot be more sophisticated narrative. It must be more rigorous evidence. The agencies that will build durable platform advantage in the next five years are those that adopt evidence standards before they are required to, publish methodology-disclosed performance evidence, contractualize the framework, disclose vendor economics, and apply the same proof standards to their own AI claims as they would demand from any other vendor claiming transformative capabilities.

For advertiser marketing leaders, the Benchmarking Framework is a tool for requesting the specificity, evidence, and contractual commitment that transforms platform marketing into platform governance.

The question is no longer whether agencies have built platforms. At some point over the last five years, they all have. The question is whether those platforms do what they claim, for whom, under what conditions, with what evidence, and with what recourse when they do not. Those questions are answerable. And until they are answered, with specificity and evidence, the gap between agency platform narrative and advertiser platform reality will remain the industry's most consequential credibility problem.

Agency platforms should be evaluated on the same evidentiary standards applied to any other technology investment: documented capability, independent validation, transparent commercial terms, and contractual accountability for stated outcomes. Anything less is not a platform; it is a marketing narrative.



Methodology Note

This analysis draws on two primary sources: proprietary interviews conducted with senior marketing leaders across global brands, and publicly available information including agency press releases, earnings call transcripts, trade press coverage (Ad Age, Adweek, Campaign, Digiday, The Drum), executive interviews, platform marketing materials and public case study libraries. Interview participants are identified by role and industry only to protect confidentiality. Platform capability assessments reflect publicly documented evidence as of Q2 2026. Where specific claims cannot be independently verified, this is explicitly stated. Additional research was provided through academic papers.

All assessments represent the analytical judgment of 3CV's authors based on documented evidence and should be evaluated accordingly.

ABOUT 3CV

Founded by Advertising Hall of Fame inductee Michael E. Kassan, 3C Ventures redefines traditional advisory services through its three core pillars: Consulting, Convening, and Co-investing.

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Contributors: Jane Lacher, Partner, 3C Ventures; Rachael Podbielak, Principal, 3C Ventures; & Keith Weisberg, Strategic Advisor, 3C Ventures Federated Expert Network