

The Forrester Wave™: Enterprise Marketing Software Suites, Q1 2018

Tools And Technology: The Enterprise Marketing Technology Playbook

by Joe Stanhope
February 13, 2018

Why Read This Report

In our 40-criteria evaluation of enterprise marketing software suite (EMSS) providers, we identified the seven most significant ones — Adobe, IBM, Marketo, Oracle, Salesforce, SAP Hybris, and SAS — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals make the right choice.

Key Takeaways

Adobe And Salesforce Lead The Pack

Forrester's research uncovered a market in which Adobe and Salesforce lead the pack. IBM, Oracle, Salesforce, SAP Hybris, and SAS offer competitive options. Marketo lags but is still a contender.

B2C Marketing Pros Are Looking For Cross-Channel Customer Engagement

The EMSS market is growing because more B2C marketing professionals must assemble a marketing technology (martech) stack that helps them engage with customers across channels, devices, and interactions. This market growth is in large part due to the fact that B2C marketing pros increasingly trust EMSS providers to act as strategic partners, advising them on critical martech decisions.

Customer Data Management, Integration, And Artificial Intelligence Are Key Differentiators

As established marketing technologies become commoditized, the ability to handle customer data; integrate data, content, and functionality; and innovate marketing technology with artificial intelligence (AI) will dictate which providers will lead the pack. Vendors that can provide customer data management, integration, and AI-powered capabilities position themselves to successfully deliver solutions that support modern B2C marketing.

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February 13, 2018

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EMSS Matures Into Its Enterprise Namesake

B2C marketers depend heavily on technology to win, serve, and retain customers in an ever-expanding ecosystem of engagement opportunities. But martech is an intractable challenge that pits the inescapable need for technology against the overwhelming task of untangling the available options to select and deploy the right tools. Against this backdrop, the promise of EMSS — touting boosts in marketing efficiency and effectiveness — is an undeniably attractive solution. Forrester defines EMSS as:

An integrated portfolio of marketing technology products that provide analytics, orchestration, and execution of insight-driven customer interactions to support inbound and outbound marketing.

Historically, EMSS has been positioned at the opposite end of the spectrum from best-of-breed solutions, portrayed as a single solution that supersedes many disparate marketing technologies. But that value proposition is unrealistic. There is no single technology solution that can cover every B2C marketing requirement. Marketers' expectations for EMSS are maturing in tandem with the technology itself. Rather than driving toward a fantastical marketing technology singularity, the opportunities for EMSS are both more practical and sophisticated. EMSS:

- › **Mitigates, but won't eliminate, complexity.** EMSS drives benefits such as procuring multiple martech components from a single vendor, reducing data and content handoffs, linking systems of insight and engagement, and allowing integrated functionality to enable customer interactions across channels and devices. But there is still complexity within EMSS offerings related to data handling, developing workflows across applications, and integrating with other martech stack components.
- › **Forms the cornerstone of the martech stack.** An EMSS solution may not do everything that B2C marketers require, but it possesses the core systems to sit at the center of a firm's marketing technology stack. By coordinating data flows, analysis, targeting, and orchestration, EMSS is in position to create a consistent data layer for insights and engagement and drive customer engagement across delivery systems.
- › **Operates in the context of the business technology portfolio.** Ultimately, EMSS isn't just about marketing. Progressive B2C marketers and vendors see that EMSS isn't a standalone entity; it is part of a larger body of business technology. This starts with customer experience and the intersection of EMSS with sales, service, and commerce. In the longer term, EMSS incorporates back-office connectivity such as finance, supply chain, and security and risk.

The EMSS Market Reaches Critical Mass And Tips Toward Consolidation

EMSS vendors deserve credit for pushing the category to the top of the martech heap. They have consistently directed substantial time and money — no mean feat in today's environment of challenging capital markets and activist investors — to extend their product suites, gain wallet share with their current customer bases, and pitch and market themselves to anyone who will listen. These efforts have paid off: 54% of global marketers at B2C enterprises report adopting EMSS offerings (see Figure 1). EMSS is an intensely competitive market: Established product suites, the resources to keep pace in an

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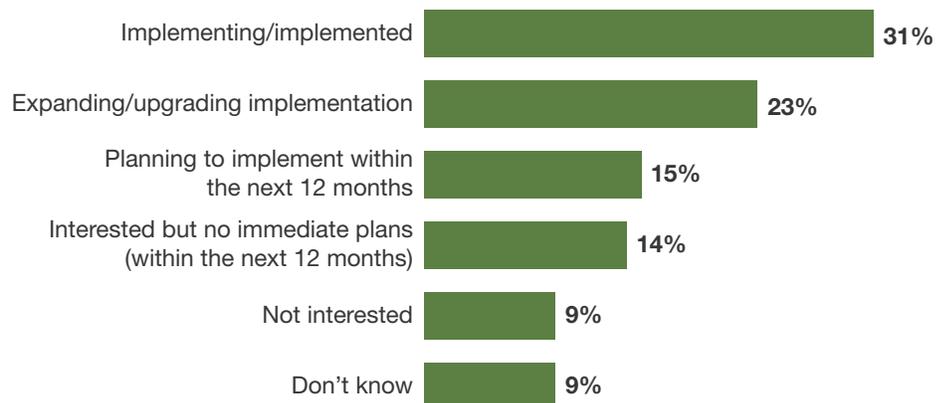
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ongoing arms race, and high-revenue customer bases create barriers to entry for new competitors and tip the category into a new stage of market development — consolidation. Since the previous Forrester Wave™ evaluation, the EMSS market has experienced:

- › **Thinning of the herd at the hands of private equity (PE) firms.** Multiple vendors have intentionally departed the EMSS market. Teradata divested its marketing applications unit in 2016 to Marlin Partners, and Experian divested its cross-channel marketing business in 2017 to Vector Capital.¹ The concentration of PE interest — Marketo was also sold to Vista Equity Partners in 2016 — as well as their general entry into advertising technology (adtech) and martech investing suggests the potential for new roll-up opportunities that bring EMSS capabilities to midmarket, B2B, and media-centric use cases.
- › **A dearth of new entrants.** Market conditions characterized by growth and innovation traditionally imply that new vendors will join the fray to participate in the market opportunity. While moats do exist, to the benefit of current EMSS vendors, there are other firms with the resources and technology to enter the market at will. Whether for lack of vision, intense focus, or skepticism about the upside, PE rollups, media companies, and major adtech vendors have opted out of the EMSS market. There may yet be some new entrants in specific markets, for example firms such as Alibaba may emerge to support regional EMSS needs in Asia Pacific (AP).²

FIGURE 1 More Than Half Of Global Marketers At B2C Enterprises Have Adopted EMSS

“Please tell us what your marketing organization’s plans are to adopt enterprise marketing software suites.”



Base: 364 global marketing decision makers at enterprises (1,000+ employees) that focus primarily on B2C

Note: Percentages do not total 100 because of rounding.

Source: Forrester Data Global Business Technographics® Marketing Survey, 2017

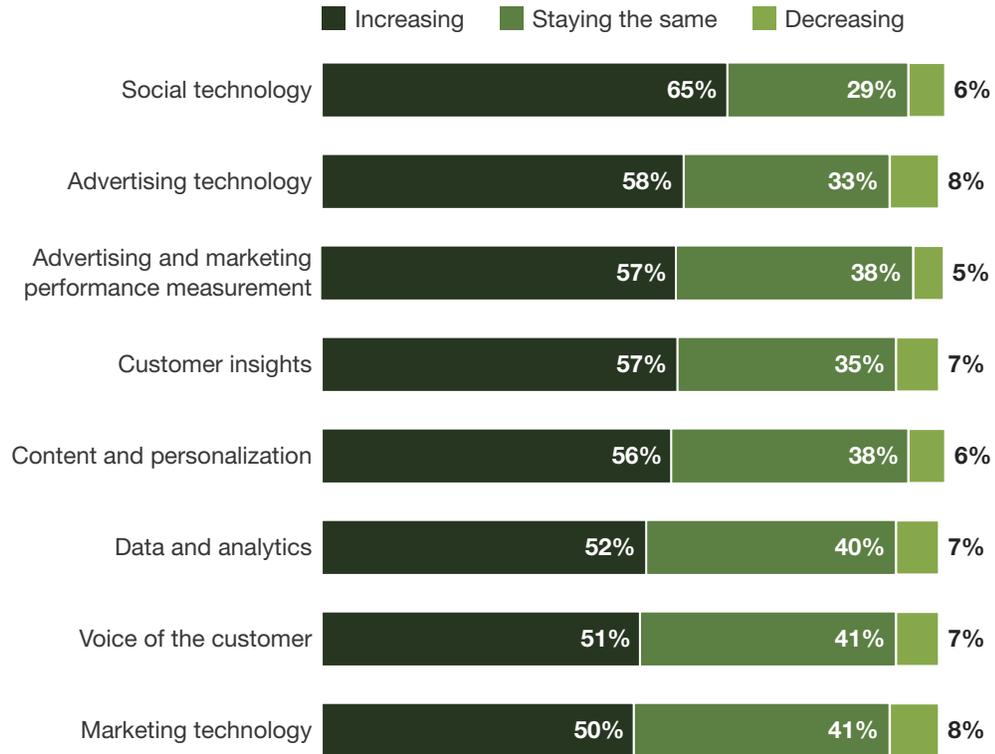
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EMSS Vendors Aggressively Pursue Breadth

EMSS is still a work in progress. EMSS products currently incorporate broad feature sets, but they are by no means all inclusive. The potential remains to expand EMSS to support the entire buy-side of B2C marketing, and it must continue to progress for the sake of incorporating the constant flow of new tactics, devices, touchpoints, and consumer trends. Only one trend is set in stone: EMSS will continue to build more capabilities in line with the constantly expanding responsibilities and budgetary priorities of B2C marketers (see Figure 2). EMSS vendors invest heavily in organic product development for new features as well as integrating their platforms and product modules, but mergers and acquisitions (M&A) is still the accelerant for functional expansion. In the last 18 months, EMSS vendors have expanded their purview by:

- › **Bringing adtech into the fold.** EMSS vendors continue to push adtech and martech convergence to the point where the data management platform (DMP) and social media advertising are standard issue functionality.³ The investments continue, such as the Krux acquisition by Salesforce and TubeMogul by Adobe. As the integrations settle in, these extensions set the groundwork for more extensive data, targeting, and cross-channel engagement features to come.
- › **Extending measurement.** EMSS is historically built on the strength of its engagement systems, but B2C marketers' need for transparency and enhanced targeting and personalization demands that systems of insight enter into the stable of features. Several EMSS vendors such as SAS and Adobe build on strong analytics legacies, and others have signaled that accelerated measurement investments are a priority, such as SAP Hybris acquiring attribution vendor Abakus and Oracle acquiring real-time analytics assets from web trends and digital measurement vendor Moat.
- › **Adding data services and identity.** In a nod to the white space surrounding marketing technology, EMSS vendors have extended their tech-oriented business models to embrace data-oriented products that reinforce the mission-critical nature of data and identity resolution.⁴ EMSS vendors are shoring up their data handling functionality and leveraging acquisitions and organic development to bring incremental data services and identity capabilities into their offerings, such as Adobe's Marketing Cloud Device Co-op, SAP Hybris's acquisition of Gigya, and Salesforce's data marketplace.
- › **Evangelizing artificial intelligence.** Artificial intelligence is virtually unavoidable in B2C marketing conversations. To be sure, AI is a critical enabler for marketing technology and will drive massive changes — and improvements — to customer engagement.⁵ And EMSS vendors are leading the charge, bringing their considerable resources to bear on AI development at the corporate level and within marketing products. Watson, Leonardo, Sensei, and Einstein raise B2C marketers' AI awareness, commence the process of establishing credibility, and make early-stage iterations of the technology readily available to early adopters.⁶

FIGURE 2 EMSS Expansion Follows Marketing Technology Budget Trends**“Do you plan to increase, decrease, or maintain spend on the following in 2017?”**

Base: 318 to 344 global B2C marketing decision makers whose companies have marketing budget for technology (base sizes vary by technology)

Note: Percentages do not total 100 because of rounding.

Source: Forrester Data Global Business Technographics® Marketing Survey, 2017

Enterprise Marketing Software Suites Evaluation Overview

To assess the state of the EMSS market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top EMSS vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 40 criteria, which we grouped into three high-level buckets:

- › **Current offering.** Each vendor’s position on the vertical axis of the Forrester Wave graphic indicates the strength of its current EMSS offering. We looked at the breadth and depth of each vendor’s functionality for customer data management, customer analytics, artificial intelligence,

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campaign and interaction management, digital advertising, marketing resource management, content and asset management, customer experience capabilities, measurement and optimization, user experience, integration, consumer privacy, and services.

- › **Strategy.** A vendor's position on the horizontal axis indicates Forrester's assessment of its strategy and approach to the market. We compared the company and product strategies of each vendor in the context of Forrester's vision for the EMSS market to assess how well each vendor is serving current customer needs, as well as anticipating future needs, through product vision, planned enhancements, performance, partner ecosystem, delivery models, and global support and deployments.
- › **Market presence.** To determine the size of each vendor's EMSS business, we evaluated the vendor's total revenue for its EMSS offering and the number of current B2C customers and customers using at least three components of its EMSS portfolio.

Evaluated Vendors And Inclusion Criteria

Forrester included seven vendors in the assessment: Adobe, IBM, Marketo, Oracle, Salesforce, SAP Hybris, and SAS. Each of these vendors (see Figure 3):

- › **Provides a broad EMSS portfolio.** Each vendor invited to participate in this Forrester Wave evaluation has a suite of branded proprietary technologies that enable B2C marketing professionals to: manage customer data; perform customer analytics; orchestrate and deliver campaigns, advertising, and interactions; manage marketing resources and content; and measure marketing performance for ongoing optimization.
- › **Enables contextually relevant customer interactions.** The vendors we are including in this Forrester Wave evaluation deliver technologies and services to help marketers assemble their own enterprise marketing technology ecosystems. Each one integrates its own software, partner solutions, customer data, and content to support customer-obsessed, contextual marketing strategies.
- › **Serves B2C marketers at large companies.** Each vendor invited to participate has an EMSS customer base that is comprised of: over 20% B2C firms, 10% or more enterprise-sized firms (revenues of \$1B or more), and 25% or more customers using three or more modules of the vendor's EMSS portfolio.
- › **Has a significant market presence.** Each vendor invited to participate has at least \$200 million (USD) in annual revenue from its EMSS business. Additionally, each vendor's customer base must be distributed in two or more geographic regions containing 10% or more of its total customer base each.

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FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated
Adobe	Adobe Experience Cloud
IBM	IBM Watson Marketing
Marketo	Marketo Engagement Platform
Oracle	Oracle Marketing Cloud
Salesforce	Salesforce Marketing Cloud
SAP Hybris	SAP Hybris Marketing
SAS	SAS Customer Intelligence

Vendor inclusion criteria

1. The vendor has an extensive portfolio of enterprise marketing technology that spans requirements for customer data management; customer analytics; campaign, advertising, and interaction orchestration and delivery; marketing resource and content management; and marketing performance measurement.
2. The vendor offers the ability to integrate customer data, content, and both native and partner technologies to help marketers assemble an enterprise marketing technology ecosystem.
3. The vendor has a strong enterprise B2C focus, with a client base of at least 20% B2C firms and 10% or more enterprise-sized firms, and 25% or more customers using three or more modules of the vendor's EMSS portfolio.
4. The vendor has a significant market presence and global focus, with at least \$200 million in annual revenue across two or more geographic regions containing 10% or more of its total customer base each.

Vendor Profiles

This evaluation of the enterprise marketing software suite market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4 and see Figure 5). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 4 Forrester Wave™: Enterprise Marketing Software Suites, Q1 2018

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FIGURE 5 Forrester Wave™: Enterprise Marketing Software Suites Scorecard, Q1 2018

	Forrester's weighting	Adobe	IBM	Marketo	Oracle	Salesforce	SAP Hybris	SAS
Current Offering	50%	4.27	4.09	2.35	3.35	3.84	2.88	2.92
Customer data management	10%	4.20	3.80	1.80	5.00	4.60	3.40	3.40
Customer analytics	5%	4.60	5.00	2.60	2.60	3.40	2.20	4.20
Artificial intelligence (AI)	10%	5.00	5.00	1.00	1.00	5.00	3.00	3.00
Campaign and interaction management	10%	3.90	4.60	2.50	3.40	3.60	2.30	4.20
Digital advertising	10%	5.00	3.50	2.40	3.60	3.60	2.00	2.00
Marketing resource management	5%	1.00	4.00	2.00	2.00	3.00	5.00	4.00
Content and asset management	5%	5.00	4.00	2.00	3.00	3.00	2.00	4.00
Customer experience capabilities	10%	3.00	3.00	1.00	5.00	5.00	5.00	1.00
Measurement and optimization	5%	5.00	4.20	3.00	3.00	2.20	3.00	5.00
User experience	10%	5.00	5.00	3.00	5.00	3.00	1.00	1.00
Integration	10%	3.80	3.40	4.00	2.20	4.80	2.00	3.00
Consumer privacy	5%	5.00	3.00	3.00	3.00	5.00	5.00	5.00
Services	5%	5.00	5.00	3.00	3.00	1.00	3.00	1.00
Strategy	50%	4.70	3.00	1.70	3.40	3.40	3.10	2.60
Product vision	25%	5.00	3.00	1.00	5.00	5.00	3.00	3.00
Planned enhancements	30%	5.00	3.00	1.00	3.00	3.00	3.00	3.00
Performance	30%	5.00	3.00	3.00	3.00	3.00	3.00	1.00
Partner ecosystem	5%	3.00	3.00	3.00	3.00	3.00	1.00	3.00
Delivery models	5%	3.00	3.00	1.00	1.00	1.00	5.00	5.00
Global support and deployments	5%	3.00	3.00	1.00	3.00	3.00	5.00	5.00
Market Presence	0%	4.00	4.00	1.00	3.00	4.00	2.00	1.00
Revenue	50%	5.00	3.00	1.00	3.00	3.00	3.00	1.00
Customers	50%	3.00	5.00	1.00	3.00	5.00	1.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Leaders

- › **Adobe sits at the nexus of content, media, and marketing.** Adobe, based in San Jose, California, provides an EMSS offering spanning marketing, advertising, analytics, and content management capabilities. Of the vendors included this study, Adobe maintains the highest degree of overall strategic focus on marketing and consumer engagement. Adobe is investing heavily in its platform's core services to unify data, content, and shared functionality across products. Adobe stands out for its digital intelligence, content handling, and aggressive rollout of AI features. Reference clients praise Adobe for its application usability and account management.

Adobe defines customer experience more narrowly than other EMSS providers, and lacks native eCommerce, sales, and service offerings. In pure EMSS terms, Adobe is below average in marketing resource management and data services capabilities, and making the most of Adobe's EMSS solution requires using a large number of individual product modules. Clients consistently emphasize the need for continued improvement in integration capabilities to fully leverage Adobe's substantial capabilities. Adobe is a good fit for firms looking to consolidate media into the martech stack and those that require analytics power tools and web content management that are tightly bound to marketing orchestration and execution.

- › **Salesforce acquires and innovates its way to CX-led EMSS.** Salesforce, based in San Francisco, California, puts EMSS into the context of its Customer Success Platform, which places marketing alongside enterprise solutions such as sales, service, commerce, and communities. Since the last Forrester Wave, Salesforce has made substantial investments in AI, partner integrations, the acquisition of Krux, and the launch of the Data Studio offering for data sharing. Salesforce is pursuing technology solutions and innovating the commercial models for how data and technology are consumed. Clients give Salesforce high marks for efficient implementations.

Salesforce has been aggressive in developing its platform on many fronts, and its future success depends on how well it can manage major platform expansions such as Salesforce DMP and Commerce Cloud as well as organic integrations and AI development. Clients voice frustration over lags in the availability and effectiveness of cross-cloud integrations, which is particularly critical for data transit between its Sales Cloud and Marketing Cloud. Reference clients also cite issues with Salesforce professional services in terms of staff knowledge and the availability of training programs to help clients get the most from the tools. Salesforce EMSS is a strong fit for firms that are committed to the Salesforce ecosystem; support customer relationships across sales, service, commerce, and marketing; and emphasize digital customer engagement.

Strong Performers

- › **IBM defines EMSS with a single word: Watson.** IBM, based in Armonk, New York, sets EMSS under the umbrella of the Watson Marketing product line within the Watson Customer Engagement division that spans marketing, commerce, and supply chain. IBM makes every effort to emphasize the eponymous Watson cognitive computing capabilities at all turns. IBM builds on its legacy

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strengths in cross-channel campaign management (CCCM) and real-time interaction management (RTIM) with the Universal Behavior Exchange for data integration and syndication. Additionally, IBM's product road map focuses on appropriate AI, integration, and usability enhancements. Reference customers cite IBM strengths in overall features, functionality, and professional services.

IBM is still working to bring integration to its EMSS solution, which varies widely in functionality, usability, and deployment options. Clients note that the lack of consistency can lead to obstacles and complexity in implementation and use over the long term. And despite IBM's vast investment in Watson, benefits have been slow to trickle down to IBM's marketing products, where AI-powered capabilities began showing up in earnest in just the last year. IBM's EMSS offering will appeal to firms who require flexible data and infrastructure options, consistently solid features across all major solution components, and AI features designed to guide marketers.

- › **Oracle supports the intersection of advertising and marketing.** Oracle, based in Redwood Shores, California, delivers EMSS within its twin visions for customer experience and enterprise technology. Oracle continues to build on the classic CCCM and enterprise B2C marketing capabilities of Oracle Marketing Cloud but distinguishes itself with balanced marketing, advertising, and data capabilities. Oracle's ongoing investment plans are sound and align with market needs, particularly enhanced integration between Responsys and BlueKai, the upcoming Infinity feature for real-time digital intelligence, artificial intelligence, and increased emphasis on mobile marketing.

Oracle's biggest functional gap relative to competitors remains its measurement and analytics capabilities. References indicate that they would like to have more input into the product road map. They also noted concerns about Oracle's technical support, particularly related to delayed issue resolution and declining service levels over time. Oracle is a good match for firms looking to leverage consolidated data and orchestration to coordinate large scale, sophisticated messaging and digital advertising programs.

- › **SAP Hybris reaffirms its commitment to EMSS.** SAP Hybris, based in Walldorf, Germany, offers its EMSS as SAP Hybris Marketing, itself a component of an experience management offering that also incorporates sales, service, revenue, and commerce. SAP Hybris is rapidly escalating its EMSS capabilities through acquisitions such as Abakus and Gigya, and accelerating AI development and efforts to unify data, customer profile, and identity management within the portfolio. SAP Hybris is truly global, with the broadest support for product localization, global infrastructure, and solid references from non-US clients. Reference clients give SAP Hybris the highest marks in this study for technical support.

To continue the momentum, SAP Hybris must execute on its road map, maintain focus on shoring up core functionality, and integrate many individual components into a cohesive solution. SAP Hybris's digital advertising capability, SAP Exchange Media, is currently completely separate from SAP Hybris Marketing. Reference clients note that product usability is cumbersome and detracts

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from productivity. SAP Hybris Marketing meets the needs of firms that use SAP Hybris across the enterprise, prioritize strong marketing resource management (MRM) and collaboration capabilities, and require marketing coupled with best-in-class commerce.

- › **SAS is an EMSS iconoclast that leads with customer insights.** SAS, based in Cary, North Carolina, considers analytics as an equal partner to customer experience and constructs its EMSS offering on the foundation of its considerable enterprise analytics capabilities. SAS extends its insights backbone to power the orchestration and optimization of customer engagement with modeling, decisioning, RTIM, and MRM. SAS also offers an unrivaled range of deployment options and licensing models. Reference clients are positive about the progress of SAS's cloud EMSS offerings and the scalability of RTIM for cross-channel customer engagement.

SAS's highly technical approach to martech pays off for users who appreciate flexibility and insights-driven marketing, but it also introduces the risk of diverging from the general needs of enterprise marketers. SAS performs best as a self-contained EMSS solution that relies on the integrations across its own products. Clients note that SAS implementation is complex and takes time to optimize. References also shared that getting the most from SAS requires power users who are comfortable with data. SAS is a good fit for firms looking to extend their analytics ecosystem and insights into customer engagement and have a technically savvy user base.

Contenders

- › **Marketo focuses on niche EMSS markets.** Marketo, based in San Mateo, California, provides EMSS solutions for marketing and sales in the B2B and B2C considered purchase segments. Marketo's primarily organic development path has led to a highly unified and consistent offering, and its target markets give it a strong perspective on serving the full customer life cycle. Marketo also offers unique capabilities, such as event management, that support offline customer engagement. Clients are enthusiastic about Marketo's cultivation of its global user community and the strength of the offering's integration capabilities.

Marketo is settling into a new phase of stability and refined market focus following a period of shifting ownership and leadership. Marketo's general hub technology strategy necessarily means that clients must rely on third-party, best-of-breed solutions in key categories such as data services and advertising technology. Clients express concerns about inconsistent account management and the need to utilize professional services to ensure successful adoption of new product and complex features. Marketo's sweet spot lies in supporting brands marketing in low- to midvolume, high-touch, high-complexity buying journeys scenarios.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by November 17, 2017.

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

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- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Survey Methodology

The Forrester Data Global Business Technographics® Marketing Survey, 2017 was fielded in June and July 2017. This online survey included 1,138 respondents in Brazil, Canada, China, France, Germany, India, the UK, and the US from companies with either 500 or more employees (the US, Canada, Germany, France, the UK, India, and China) or 100 or more employees (Brazil).

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Forrester Data Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Research Now fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester Data Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

- ¹ Source: “Marlin completes acquisition of the Marketing Applications Business from Teradata,” Marlin Equity press release, July 1, 2016 (<http://www.marlinequity.com/marlin-completes-acquisition-marketing-applications-business-teradata/>) and “Vector Capital Announces Agreement to Acquire Experian’s Cross-Channel Marketing Business,” Business Wire press release, April 3, 2017 (<http://www.businesswire.com/news/home/20170403005447/en/Vector-Capital-Announces-Agreement-Acquire-Experian%E2%80%99s-Cross-Channel>).
- ² Alternatives include EMSS on-premises services — Adobe and SAS mostly implement on-premises in China — and local solutions like Alibaba’s Uni Marketing Suite. See the Forrester report “[Vendor Landscape: Enterprise Marketing Software Suites In Asia Pacific](#).”
- ³ Large martech vendors have the financial resources, track record, and corporate development expertise to support expansion through acquisitions. Several — notably Adobe, Oracle, and Salesforce — have already dipped their toes into the adtech waters with data management platforms, and they will continue to acquire category leaders that fill out the convergence road map. See the Forrester report “[A More Perfect Union: Adtech And Martech Convergence Will Revolutionize Marketing](#).”
- ⁴ The ability to accurately identify a customer is the most basic assumption made at every step of the marketing process — whether it is deliberately considered or not — making accurate identity resolution the literal foundation for all marketing activities. As B2C marketers pursue contextual marketing and contend with its inherent complexity, identity resolution is more important than ever, as connecting the dots between customer interactions is a critical success factor. See the Forrester report “[The Strategic Role Of Identity Resolution](#).”
- ⁵ AI provides the cognitive scale brands need to keep pace with escalating customer demands, the deluge of data and content, and almost limitless customer journey permutations. AI also aligns with B2C marketers’ fundamental priorities to make customer engagement more timely, personalized, and results driven. AI will transform marketing over the next five years, leaving few facets of customer engagement untouched. See the Forrester report “[AI Must Learn The Basics Before It Can Transform Marketing](#).”
- ⁶ Some 54% of global marketing decision makers at enterprises that focus on B2C and who are implementing, have implemented, or are expanding/upgrading EMSS implementations are also implementing, have implemented, or are expanding/upgrading artificial intelligence. Source: Forrester Data Global Business Technographics Marketing Survey, 2017.

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