RESEARCH IN ACTION CUSTOM SURVEYS INTRODUCTION

GLOBAL ENTERPRISE AND SMB SURVEY METHODOLOGY

Research In Action

January 2023

© 2023, Research In Action GmbH Reproduction Prohibited



RESEARCH IN ACTION independent research & consulting

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment.

The Vendor Selection Matrix[™] is a primarily survey-based methodology for vendor evaluation where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix[™] reports so unique. This approach is one of the key differentiators of Research In Action in market research.



For our Vendor Selection Matrix[™] reports we interview 1,500 IT or business decision makers with budget responsibility in enterprises globally or 750 in individual countries like Germany. The vendors featured in the reports are those vendors which achieved the best evaluations scores from the buyers but we disregard those with fewer than 15 evaluations.

The following slides will show you the importance of competitive vendor evaluations, our survey design, the evaluation criteria we use, how we interact with vendors and finally an example Vendor Selection Matrix[™] result.

To Infinity... and Beyond!

Dr. Thomas Mendel

Research In Action GmbH Alte Schule 56244 Hartenfels Germany

Dr. Thomas Mendel Managing Director +49 160 99492223 tmendel@researchinaction.eu





OUR MARKET IMPACT OVER 12 MONTHS

Members In Our Survey Panel

125,000 IT Automation 90,000 Marketing Automation

10,000+ Active Enterprise Survey Participants

all with budget responsibility



30 Research Reports Published

400+ vendors evaluated 14,000 views per report (average)

25 Press Releases

2,000 views per press release (average)

Vendor Selection Matrix[™]: The right mix makes all the difference 63% customer evaluations + 37% analyst's judgement = 100% success



RESEARCH IN ACTION CUSTOM SURVEYS: CAPABILITIES

• Purpose. Providing high-quality survey data for technology hard-, software/SaaS and services vendors. We only interview decision makers with budget responsibility, not technicians or individual contributors.

• Target use cases.

- Investment and implementation trends, market drivers and barriers.
- Strategy and investment validation.
- Generic market potential and market maturity analysis.

• End-to end survey lifecycle support.

- Survey design. 15+ years experience in supporting and coaching survey clients.
- Survey execution. 100% survey success rates. Survey duration varies between three weeks for smaller and six to eight week for larger ones.
- Impact generation. Wide variety of options ranging from simple co-branding to White Papers, Webinars, speeches and strategy sessions.

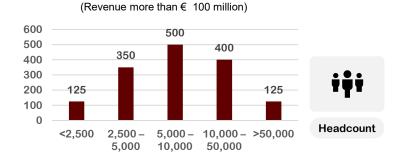
• Unparalleled breadth and depth.

- The right respondents. Our client database holds 300,000+ IT and business decision makers with budget responsibility.
- > The right companies. We can provide both enterprise and SMB data.
- The right industries. We cover all important industries with specific data cuts.
- True global reach. All major countries in North and South America and Europe are covered. Exceptional coverage of the Asia Pacific market place particularly China, Japan, Thailand and Australia.

OUR SURVEY DEMOGRAPHICS: IT AUTOMATION



Company Size Breakdown



Industry Breakdown

| (p) Energy | 90 |
|----------------------------------|-------|
| 🔯 Financial Services | 250 |
| 🗰 Government & Non Profit | 80 |
| E Life Sciences | 175 |
| ഷ്ക് Manufacturing | 385 |
| 🛅 Technology, Media & Telecoms | 200 |
| Consumer Packaged Goods & Retail | 100 |
| Professional Services | 120 |
| 🛱 Travel & Transportation | 100 |
| Total | 1,500 |
| | |

Job Title Breakdown

| VP IT Infrastructure | 150 | Chief Operations Officer | 60 |
|---------------------------|-----|--------------------------------|-------|
| IT Manager | 150 | VP Technology | 50 |
| VP IT | 150 | Business Executive | 40 |
| Chief Information Officer | 130 | Sourcing and Vendor Management | 30 |
| IT Operations Manager | 125 | VP IT Financial Management | 30 |
| VP Service Desk | 120 | VP Enterprise Architecture | 25 |
| Chief Digital Officer | 90 | Project Manager | 25 |
| Chief Technology Officer | 70 | VP Application Development | 20 |
| Project Management Office | 65 | VP DevOps | 20 |
| VP IT Shared Services | 65 | Chief Financial Officer | 15 |
| VP Operations | 60 | Chief Sales Officer | 10 |
| | | Total | 1,500 |

All Research in Action surveys are gender neutral and 100% confidential.

100,000+

Data Points

1,500 Enterprise Managers

37% Analyst's Opinion

63% Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.

We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.

The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.

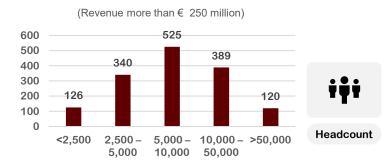


OUR SURVEY DEMOGRAPHICS: MARKETING AUTOMATION

Country Breakdown United States 525 Canada 50 DACH 200 United Kingdom 125 France 125 Benelux 50 Nordics 50 Southern Europe 100

Eastern Europe75----• Asia Pacific200

Company Size Breakdown



Industry Breakdown

| () Energy | 97 |
|----------------------------------|-------|
| C Financial Services | 255 |
| Government & Non Profit | 90 |
| 🔁 Life Sciences | 200 |
| 🔊 Manufacturing | 350 |
| 🛅 Technology, Media & Telecoms | 200 |
| Consumer Packaged Goods & Retail | 110 |
| Professional Services | 100 |
| 🛒 Travel & Transportation | 100 |
| Total | 1,500 |
| | |

Job Title Breakdown

| VP IT Infrastructure | 155 | Chief Operations Officer | 55 |
|---------------------------|-----|--------------------------------|-------|
| IT Manager | 150 | VP Technology | 50 |
| VP IT | 135 | Business Executive | 40 |
| Chief Information Officer | 125 | Sourcing and Vendor Management | 37 |
| IT Operations Manager | 121 | VP IT Financial Management | 35 |
| VP Service Desk | 107 | VP Enterprise Architecture | 34 |
| Chief Digital Officer | 85 | Project Manager | 32 |
| Chief Technology Officer | 66 | VP Application Development | 27 |
| Project Management Office | 64 | VP DevOps | 25 |
| VP IT Shared Services | 62 | Chief Financial Officer | 20 |
| VP Operations | 60 | Chief Sales Officer | 15 |
| | | Total | 1,500 |
| | | | |

All Research in Action surveys are gender neutral and 100% confidential.

100,000+

Data Points

1,500

Marketing and Business Managers

37% Analyst's Opinion

63% Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

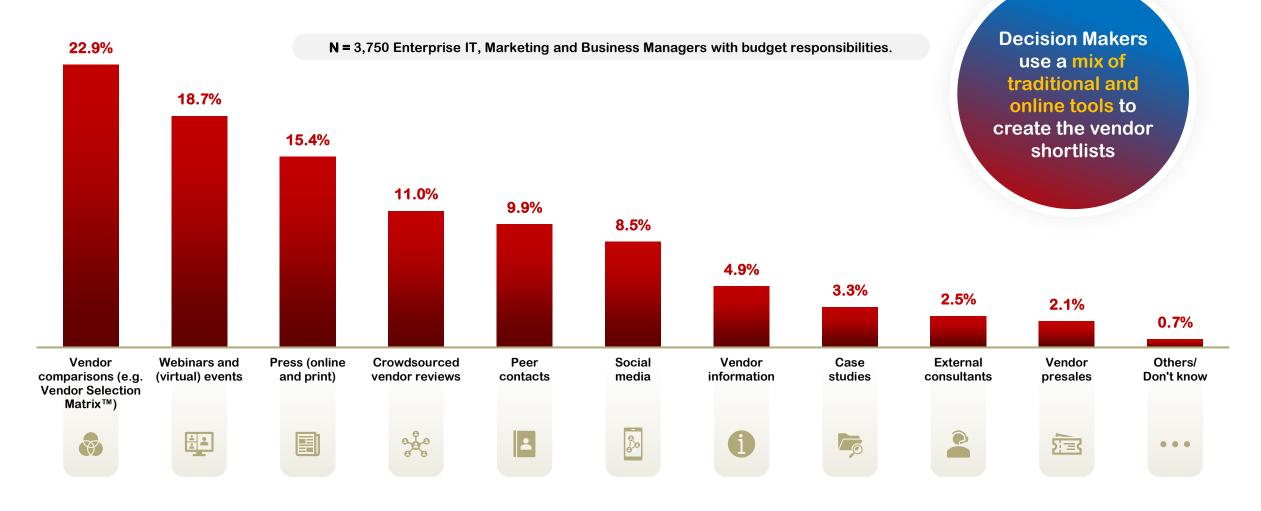
The basis of our competitive vendor evaluation reports is always an extensive buyer survey.

We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.

The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.



WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

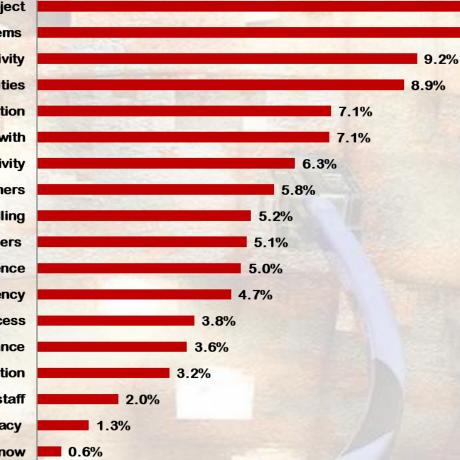




RESEARCH: WHAT ARE YOUR TOP THREE PRIORITIES WHEN CONSIDERING A MARKETING LEAD AUTOMATION VENDOR?

Positive Return on Investment for the project Integration with existing systems Increasing sales force productivity Improved accurate forecast capabilities Cost reduction Consolidating the number of vendors we work with Increasing marketing productivity Finding and selling to more new customers Improved social marketing and selling Increased business with existing customers **Optimising the customer experience** Ensuring brand and messaging consistency Improved transparency in Marketing's contribution to sales success **Data privacy compliance Data management consolidation** Ease of use for our own staff Improving customer advocacy Others/Don't know

N = 1,500 Business Managers with budget responsibilities



• ROI is #1 priority - vendors who can help here will win. First step: which "ROI" is meant: More leads? Faster processing? Better leads? Cost savings?

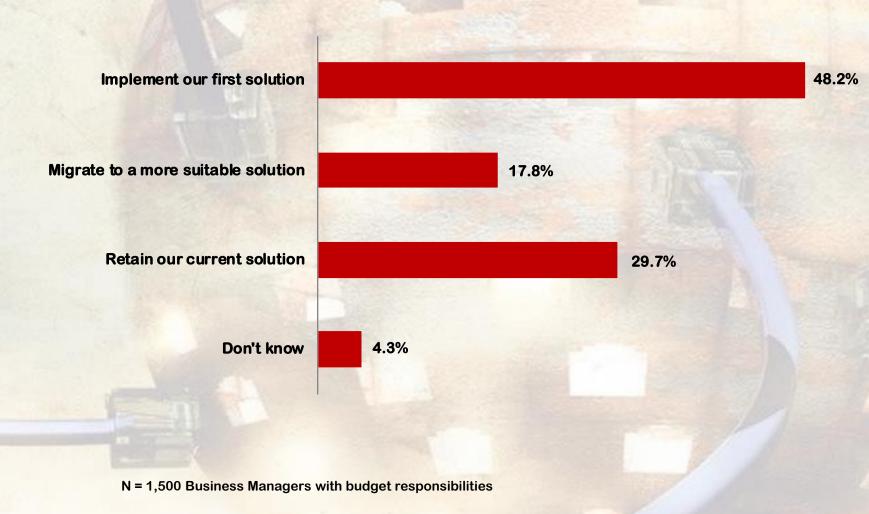
10.6%

10.5%

- Integration (probably to CRM, but also to web/ digital experience system) is key.
- The #3 and #4 priorities relate to the leads provided to sales
- Vendor consolidation is high on the priority list, so a best in class vendor will not always win against an encumbant suite supplier.



RESEARCH: ARE YOU PLANNING TO IMPLEMENT OR REPLACE YOUR SALES ENGAGEMENT MANAGEMENT SYSTEM IN THE NEXT 1-3 YEARS?

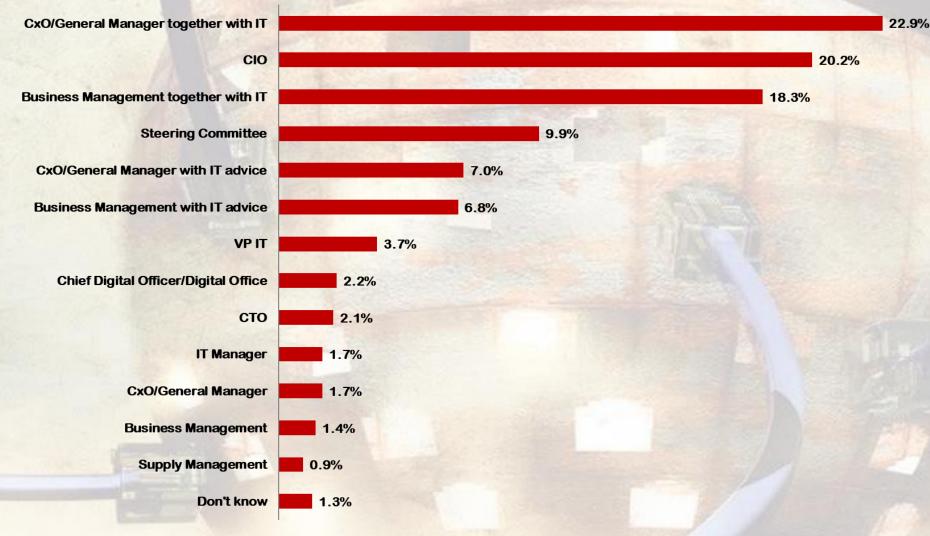


Comments:

- Close to half of the companies surveyed will begin their first project.
- This automation topic is still in the early-adopter phase and almost all vendors can enjoy market growth.
- A more exacting RFP process is only just starting to be applied by buyers. Many are buying the first product they see.
- The high close-rate means that marketing concepts like thought leadership or valuebased story telling have not yet taken hold.



RESEARCH: WHO IS THE KEY DECISION MAKER WHEN IT COMES TO ENTERPRISE SERVICE MANAGEMENT?

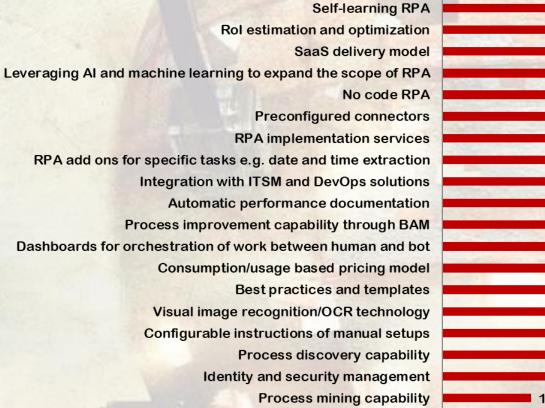


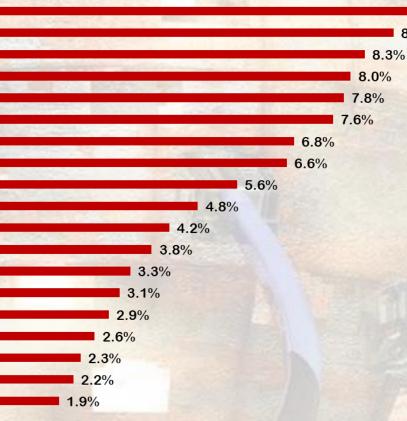
N = 1,500 Enterprise IT Managers with budget responsibilities

As enterprise organizations strive towards becoming a digital business, key processes outside the traditional IT ownership are being reviewed for automation and streamlining. This brings other leaders of the C-suite to the decision table for Enterprise Service Management solutions and will shape this market and its vendors in the future.



RESEARCH: WHAT IS YOUR NUMBER ONE INVESTMENT AREA RELATED TO ROBOTIC PROCESS AUTOMATION IN 2020?





Self-learning will improve the manual construction of robotic behavior and with it improve the speed of implementations.

9.5%

8.9%

The adoption of AI and machine learning will shift process driven RPA into data-driven automation and with it enable the thinking and analysis or intelligent aspect of robotic automation.

Return on investments and scalability are typically stated as challenges around the adoption of RPA. Rol estimations and SaaS delivery models might ease these issues.



N = 1,344 Enterprise IT Managers with budget responsibilities.

RESEARCH IN ACTION CUSTOM SURVEYS: CAPABILITIES KEY TAKEAWAYS •Experience: 15+ years. Execution: 100% survey success rates. •Breath and depth: >10,000+ enterprise IT and business decision makers surveyed annually. > All important industries covered globally. > All major countries in the Americas, Europe and Asia Pacific covered.



CONTACT





Dr. Thomas Mendel Ph.D., Managing Director +49 160 99492223 tmendel@researchinaction.de

© 2023, Research In Action GmbH Reproduction Prohibited



RESEARCH IN ACTION independent research & consulting