VENDOR SELECTION MATRIX™ CUSTOMER DATA MANAGEMENT

ABRIDGED VERSION WITHOUT VENDOR SCORES AND SCORECARDS

THE TOP 15 GLOBAL VENDORS 2020

Research In Action

December 2020

RESEARCH IN ACTION
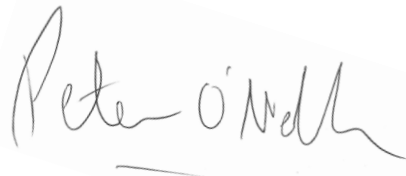independent research & consulting

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 62.5 % of the evaluation is based on a survey of enterprise IT or business decision makers and 37.5 % on the analyst's opinion. 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 this report we interviewed 1,500 business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best scores from the buyers but disregarded those with fewer than 15 evaluations.

Our method of describing a business process and asking business managers to name software vendor(s) they associate with it collates a list of those vendors most relevant for potential buyers of an automation solution. The resulting vendor landscape for Customer Data Management (CDM) is a broad mix of vendors with a wide variety of claims: data consolidation, collecting entire clickstreams, creating a "golden record" through identity resolution, enabling intelligent engagement, and identity tagging. The CDM challenge is different across the B2C and B2B spectrum.

It also varies according to whether you are a medium-sized company or a large international enterprise. Another important variable is whether the initiative is led by Marketing professionals or the IT organization and we have investigated this further in the report.

This report provides you with a useful guide to important Customer Data Management Trends, names the Top 15 vendors as selected by 1,500 users based upon product, company and service quality, and will help you make an informed decision regarding which vendors could best fit your requirements. This information can then be used for a more detailed evaluation.
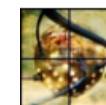
Always keeping you informed

Peter O'Neill

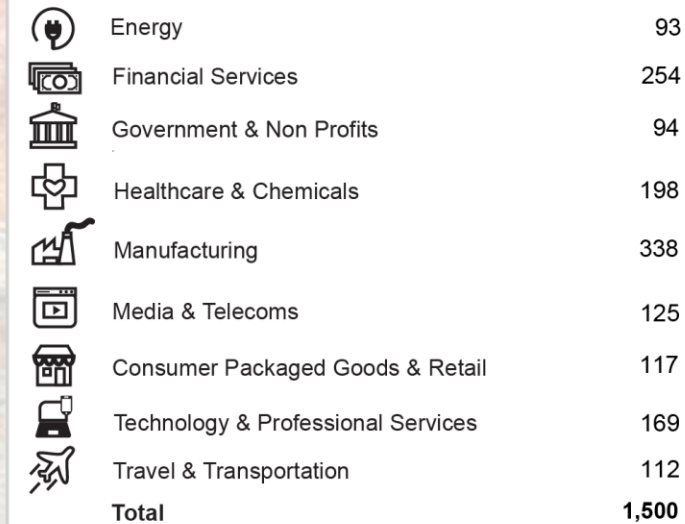**Research In Action GmbH**
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COUNTRY BREAKDOWN

Country	Value
United States	525
Canada	50
DACH	200
United Kingdom	125
France	125
Benelux	50
Nordics	50
Southern Europe	100
Eastern Europe	75
Asia Pacific	200

INDUSTRY BREAKDOWN

Industry	Value
Energy	93
Financial Services	254
Government & Non Profits	94
Healthcare & Chemicals	198
Manufacturing	338
Media & Telecoms	125
Consumer Packaged Goods & Retail	117
Technology & Professional Services	169
Travel & Transportation	112
Total	**1,500**

COMPANY SIZE BREAKDOWN

(Revenue more than € 250 million)

Headcount	Value
>2,500	137
2,500 - 5,000	192
5,000 - 10,000	588
10,000 - 50,000	478
< 50,000	105

Headcount

JOB TITLE BREAKDOWN

Job Title	Value
VP Marketing	268
VP Sales	252
General Manager	198
BU Marketing Manager	184
Project Manager	125
CMO	123
BU Head	99
VP IT	74
CEO	50
CIO	32
CTO	25
IT Manager	19
COO	16
CFO	15
Supply Manager	13
Others	7
Total	**1,500**

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

100,000+ Data Points

1,500 Marketing Managers

Leading Vendors

30+ Reports In 2020/21

**37.5 % Analyst's Opinion**

62.5 % Survey Results

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WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

Tool	Percentage
Vendor comparisons (e.g. Vendor Selection Matrix™)	22.9%
Webinars and (virtual) events	18.7%
Press (online and print)	15.4%
Crowdsourced vendor reviews	11.0%
Peer contacts	9.9%
Social media	8.5%
Vendor information	4.9%
Case studies	3.3%
External consultants	2.5%
Vendor presales	2.1%
Others/Don't know	0.7%

Decision Makers use a mix of traditional and online tools to create the vendor shortlists

N = 3,750 Business and IT Managers with budget responsibilities.

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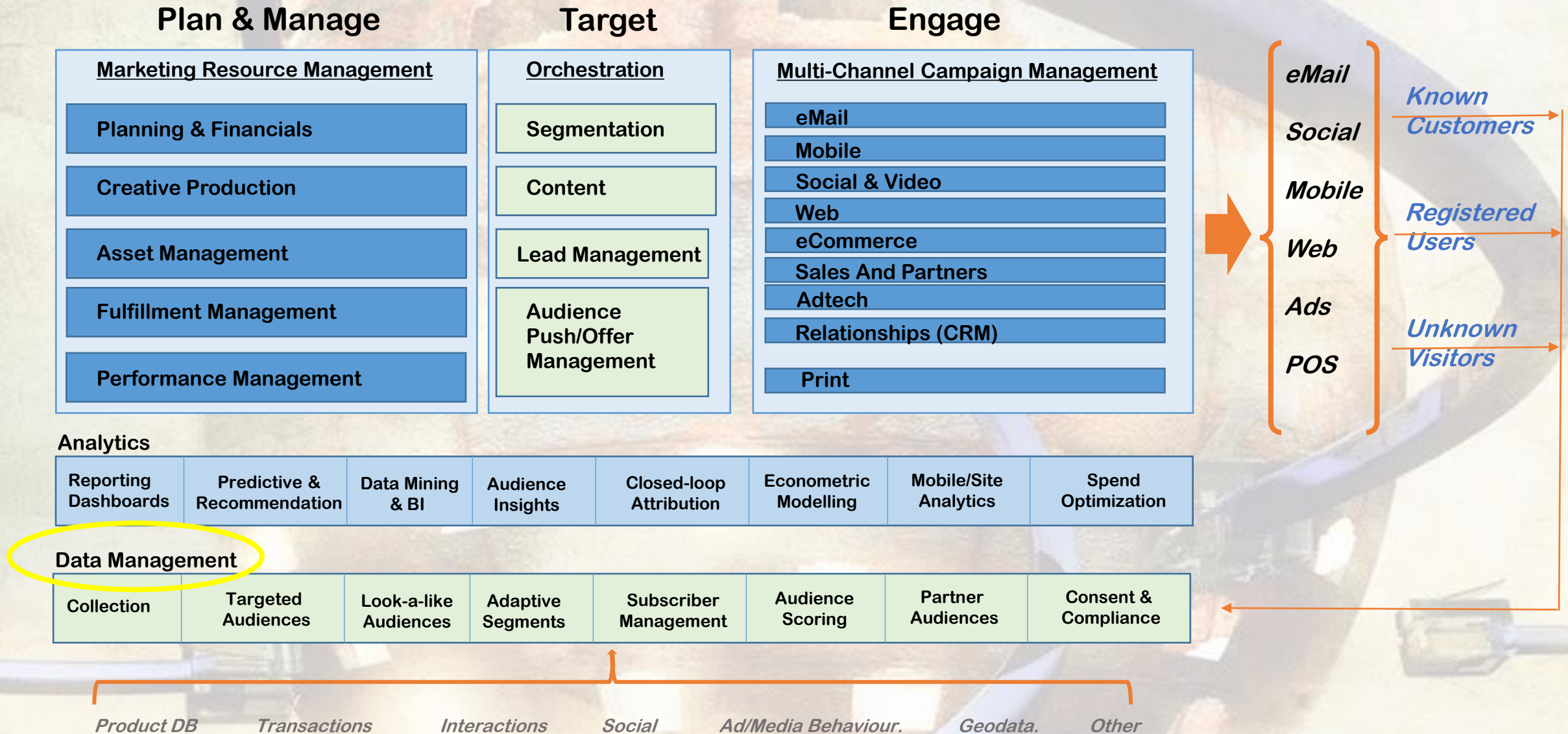RESEARCH IN ACTION
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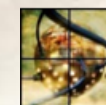
WHAT IS CUSTOMER DATA MANAGEMENT?

- Providing an optimal customer experience is impossible without having a unified Customer Data Management (CDM) process in place. The Customer Data Management process is the consolidation and aggregation of all data that is being collected in separate systems across the company. This is not an IT-centric data warehouse or data lakes approach, ideally it should be a Marketing-led CDM initiative, helping to ensure the data unification project is focused directly on marketing requirements.

- Often, when initiated by IT, the project is labelled a Customer Data Platform (CDP) project and the focus is to ensure that there is a consolidation of all data silos and that there is a consistent system of record for each customer element.

- For Marketing, the goal is to establish a comprehensive and dynamic view of each customer by capturing data from multiple systems, linking information related to the same customer, and storing the information to track behavior over time. The system contains personal identifiers used to target marketing messages and track individual-level marketing results and data stored in the CDM system (or CDP if you like) can be used by other systems for analysis and to manage customer interactions.

- The global market for customer data management platform software is expected to rise dramatically over the next few years. The Customer Data Platform Institute*, a vendor-neutral organization dedicated to helping marketers manage customer data, forecasted industry revenue for 2020 at $ 1.3 b, while the Research and Markets* organization predicts the market will grow from a much larger $ 2.4 b in 2020 to $ 10.3 b by 2025, expanding at an astounding compound annual growth rate (CAGR) of 34.0% during the forecast period.
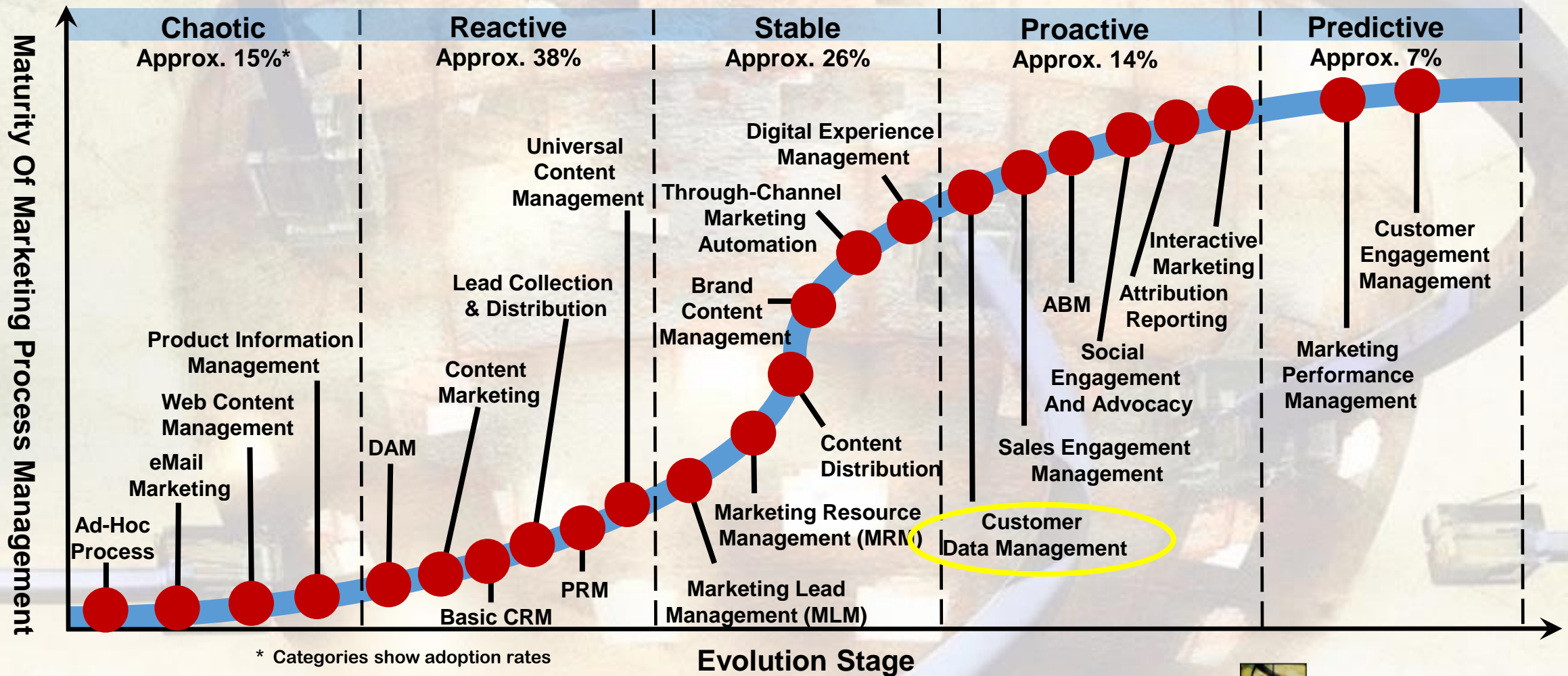
* See https://www.cdpinstitute.org/about and https://www.researchandmarkets.com

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THE MARKETING AUTOMATION MARCHITECTURE

Plan & Manage

Marketing Resource Management

- Planning & Financials
- Creative Production
- Asset Management
- Fulfillment Management
- Performance Management

Target

Orchestration

- Segmentation
- Content
- Lead Management
- Audience Push/Offer Management

Engage

Multi-Channel Campaign Management

- eMail
- Mobile
- Social & Video
- Web
- eCommerce
- Sales And Partners
- Adtech
- Relationships (CRM)
- Print

eMail
Social
Mobile
Web
Ads
POS

Known Customers

Registered Users

Unknown Visitors

Analytics

Reporting Dashboards	Predictive & Recommendation	Data Mining & BI	Audience Insights	Closed-loop Attribution	Econometric Modelling	Mobile/Site Analytics	Spend Optimization

Data Management

Collection	Targeted Audiences	Look-a-like Audiences	Adaptive Segments	Subscriber Management	Audience Scoring	Partner Audiences	Consent & Compliance

Product DB   Transactions   Interactions   Social   Ad/Media Behaviour.   Geodata.   Other

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MATURITY S-CURVE FOR MARKETING MANAGEMENT

Our surveys and consulting work enable us to continually assess the maturity of marketing organizations (combination of organization, process and technology) and we observe these five phases – Customer Data Management projects mostly occur later in the maturity progression.


Maturity Of Marketing Process Management (vertical axis)

Evolution Stage (horizontal axis)

Chaotic	Reactive	Stable	Proactive	Predictive
Approx. 15%*	Approx. 38%	Approx. 26%	Approx. 14%	Approx. 7%

Chaotic phase labels:
- Ad-Hoc Process
- eMail Marketing
- Web Content Management
- Product Information Management

Reactive phase labels:
- DAM
- Basic CRM
- Content Marketing
- Lead Collection & Distribution
- PRM
- Universal Content Management

Stable phase labels:
- Marketing Lead Management (MLM)
- Marketing Resource Management (MRM)
- Content Distribution
- Brand Content Management
- Through-Channel Marketing Automation
- Digital Experience Management

Proactive phase labels:
- Customer Data Management
- Sales Engagement Management
- ABM
- Social Engagement And Advocacy
- Attribution Reporting
- Interactive Marketing

Predictive phase labels:
- Marketing Performance Management
- Customer Engagement Management

* Categories show adoption rates

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CDM MATURITY MOVES FROM EMAIL TO ENGAGEMENT

Our surveys and consulting work enables us to continually assess the maturity of marketing organizations (combination of organization, process and technology). We have identified these five phases for CDM and associated processes.

- **Chaotic.** Marketing neophytes commonly first focus on eMail campaigning to purchased or built-up lists. The goal is to distribute content to qualified contacts and provide rudimentary leads to Sales.

- **Reactive.** Companies create/consolidate their customer data into a Customer Relationship Management (CRM) system usually shared with Sales. The data is mostly contact data and sales progress reporting.

- **Stable.** An operational Digital Experience Management system begins to collect behavioral data on customers and website visitors. Predictive Analytics are incorporated into the process.

- **Proactive. Marketing's role matures from supporting sales transactions to ensuring a customer experience. The necessary functionality is found in a CDM project which creates a system with personal identifiers used to target marketing messages and track individual-level marketing results. The resulting system is used by other systems for analysis and to manage customer interactions.**

- **Predictive.** Over time, the marketing goal process changes to a more holistic Customer Engagement Management process. Customer data is imperative to this process and the CDM system is likely to become the mission-critical key to success for both B2C and B2B companies. Data experts will become as essential as creative skills.

Whether you are trying to win over consumers to be active in communities and social media, or if you are trying to recruit a business buyer to be a loyal user and advocate, the classical lead generation paradigm for all marketers is going to be replaced by new relationship-based metrics of customer success.
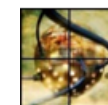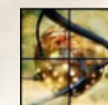
COMPONENTS OF CUSTOMER DATA MANAGEMENT

Depending on whether you are doing B2C or B2B marketing, and your organizational complexity, a CDM project would automate one or more of these processes:

- Data collection and consolidation
- Customer profile resolution
- Consent and preference management
- Market segmentation
- Target-account aggregation
- Marketing execution testing and optimization
- Digital experience personalization
- Campaign and message orchestration and activation
- Business reporting and analytics
- Channel optimization analysis
- Machine-learning adoption

* See https://www.cdpinstitute.org/about and https://www.researchandmarkets.com

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CUSTOMER DATA MANAGEMENT IN MID-SIZED COMPANIES

Mid-sized companies need:

- **Broader scope of requirements**
- **Experience delivery**
- **Prebuilt/templated reporting and analytics**

And do not need:

- **Massive computing scale**
- **Custom analytics**
- **Customization options**

Due to:

- **Smaller customer volumes**
- **Lack of analytics resources**
- **Less technical staff**

Preferred Stack for B2C Mid-Market: Do-Everything CDP w/ Fewer Spokes

ACTIONIQ

DATA TYPES: Customer Profiles, Clickstream, Purchases, Channel Engagement, Product Info, Promotion Info, Call Logs, Survey Responses, Store Info

Native CDP Integrations

DO-EVERYTHING CUSTOMER DATA PLATFORM: 360 Degree View, Personalization Engine, Customer Analytics, Segmentation, Campaign Creation, Experience Orchestration

DATA SCIENCE ENVIRONMENT: Modeling Tool, Attribution Tool, BI Tool

MARKETING CHANNELS: ESP, Text / Push

IT DATA REPOSITORY: EDW

CONTENT MANAGEMENT: Content Tool

SITE OPTIMIZATION: Testing & Optimization

OTHER MARKETING CHANNELS: Direct Mail, Social, DSP/DMP, Search

SALES & SERVICE CHANNELS: Call Center, CRM

COMMERCE CHANNELS: Website, Mobile Apps, POS, Website Survey

Ingestion Layer → Processing & Orchestration Layer → Delivery Layer

ActionIQ Inc., Confidential & Proprietary

Source: ActionIQ

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CUSTOMER DATA MANAGEMENT IN ENTERPRISES

Enterprise companies need:

- **Ability to orchestrate**
- **Scalability**
- **Solution flexibility**
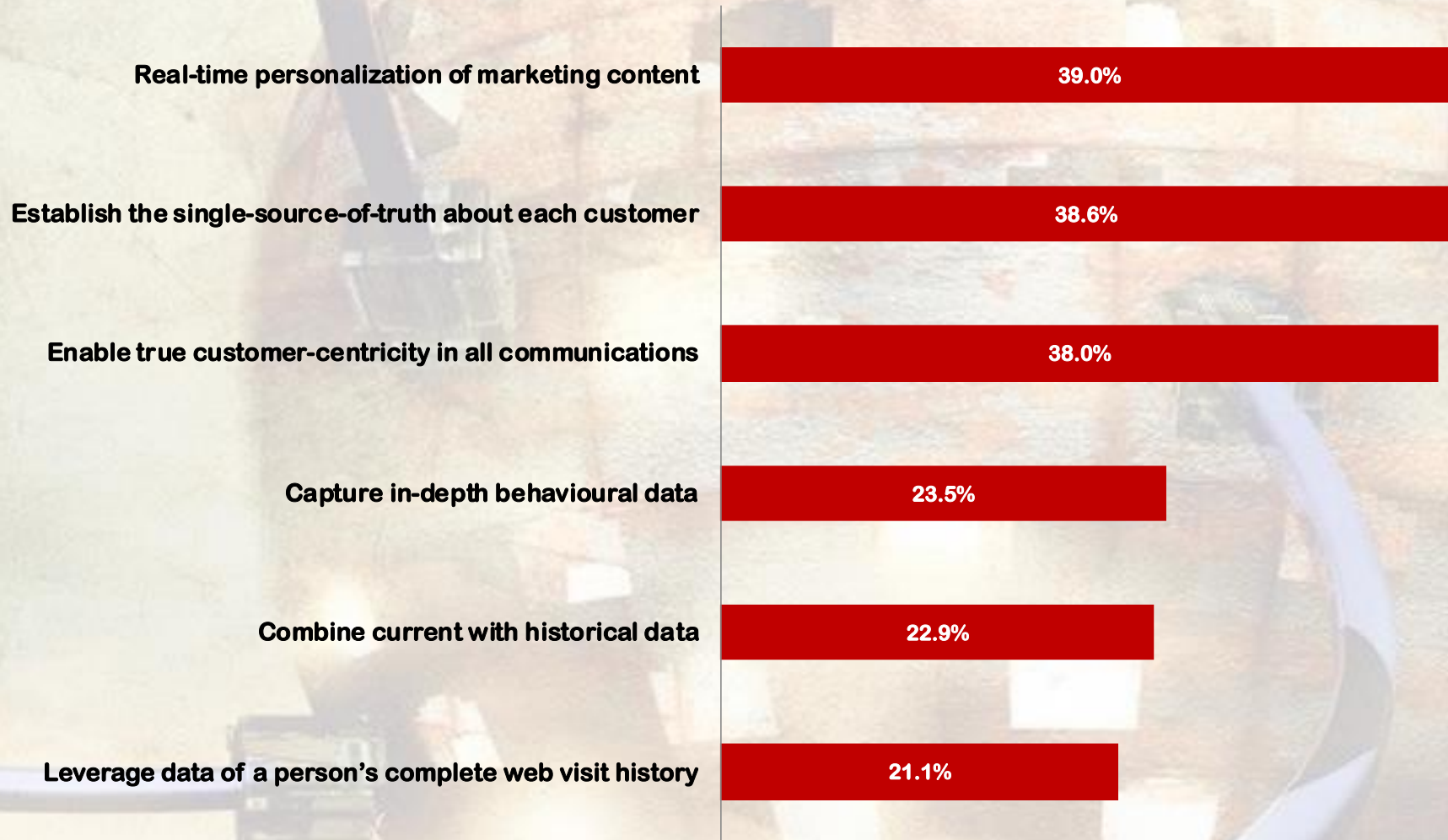- **Integration capabilities**

And do not need:

- **Experience delivery**
- **Reporting and analytics**
- **Data science workbench**

Due to:

- **More complex tech strategy**
- **Number of incumbent systems**
- **Requirement for specialized tools**

Preferred Stack for B2C Enterprises: Smart-Hub CDP w/ Best-of-Breed Spokes

ACTIONIQ

ActionIQ Inc., Confidential & Proprietary

Source: ActionIQ

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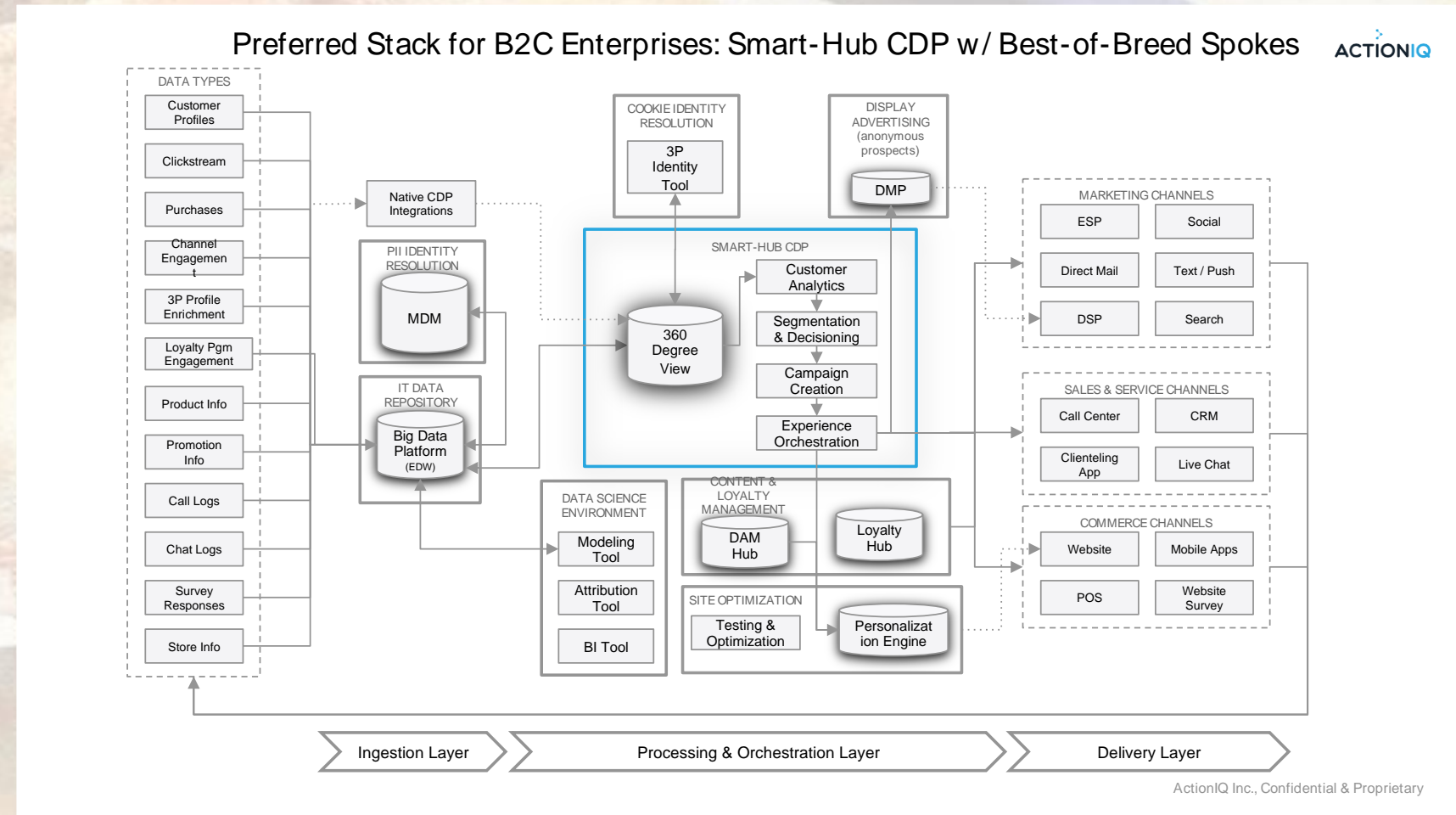
RESEARCH: The top key benefits achieved, or planned, by using Customer Data Management solutions?

Real-time personalization of marketing content — **39.0%**

Establish the single-source-of-truth about each customer — **38.6%**

Enable true customer-centricity in all communications — **38.0%**

Capture in-depth behavioural data — **23.5%**

Combine current with historical data — **22.9%**

Leverage data of a person's complete web visit history — **21.1%**

These are the Top Six benefits named by enterprise marketing software buyers, all selected by 20% or more of the respondents.

CX considerations dictate the decision to invest in CDM. Marketers strive to be great at personalization and provide outside-in content to each customer.

Collection of preferences based upon behavior and web history are the next priority.

Buyers are most likely to engage with those CDM vendors whose messaging addresses these motivations.

N = 1,500 Enterprise Business Managers with budget responsibilities. Respondents could select three benefits.

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RESEARCH: How Customer Data Management projects are organized (select the option from each pair that fits closest to your use case.)

This is a top-down project that serves the entire enterprise — **68.7%**

This is a bottom-up initiative to get a single view of the customer — **31.3%**

This is a Marketing-led project, IT support us in topics like security and technology — **78.7%**

This is an IT-led project to consolidate customer databases — **21.3%**

Nearly one third of companies are running a limited CDM project inside the enterprise.

Nearly 80% of CDM initiatives are marketing-led projects.

Most CDM vendors should therefore focus on presenting and describing marketing-oriented use cases in their messaging.

N = 1,500 Enterprise Business Managers with budget responsibilities. Respondents selected the option closest to their use case in each pair.

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RESEARCH: The top priorities when considering a Customer Data Management vendor

Priority	Percentage
Price/value ratio	43.1%
Local (regional) support	33.3%
Solution fit to requirements	32.8%
Solution flexibility	28.4%
Implementation cost	25.7%
Vendor flexibility	22.8%
Implementation assistance	21.5%
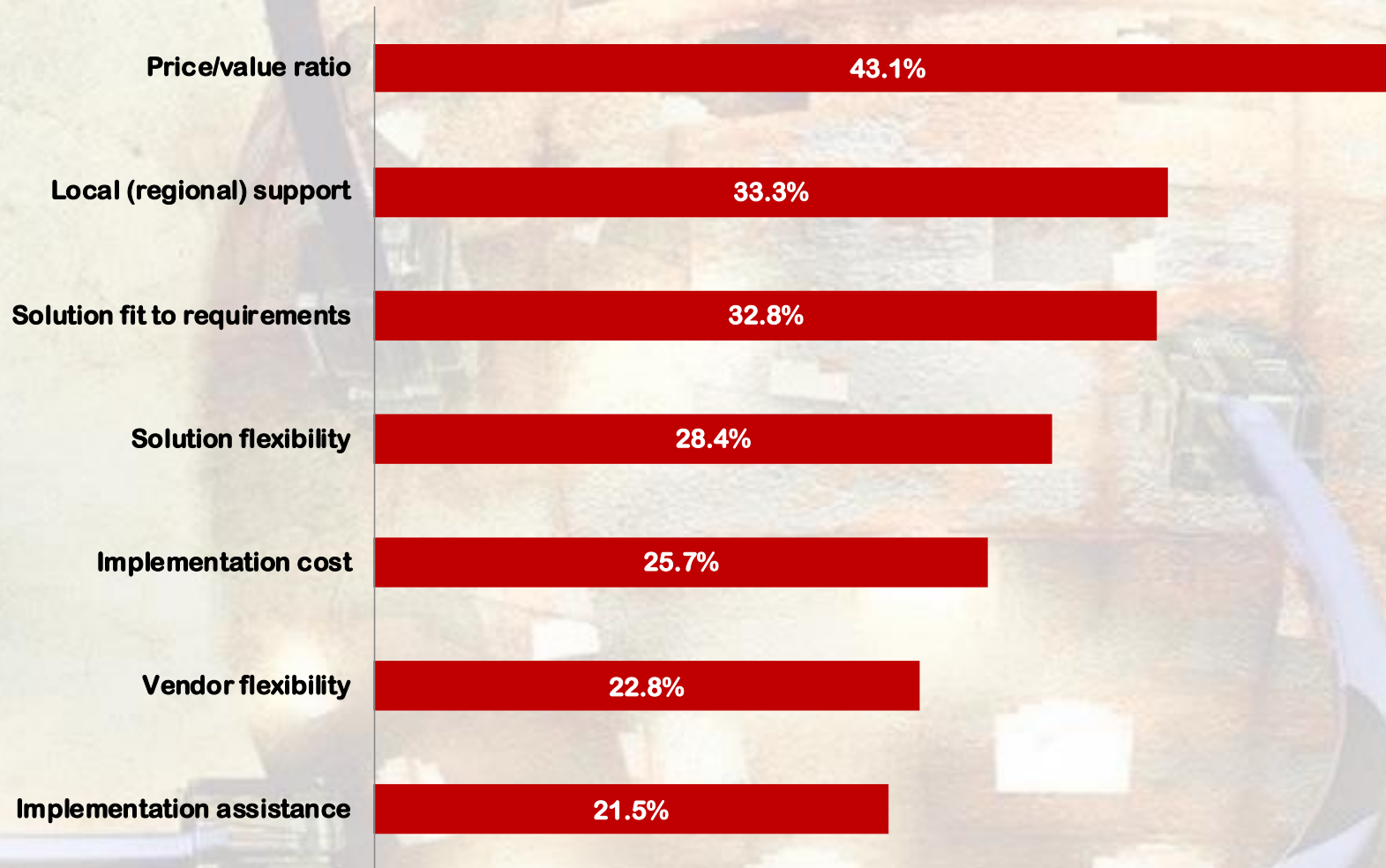
These were the most significant priorities, selected by more than one in five of the enterprise marketing software buyers (they could select up to three).

Value Management features again as #1 challenge, with implementation cost also high. Marketing software buyers expect to have access to local resources for implementation and support. CDM is a complex system which cannot be installed out-of-the-box because it integrates to many other systems.

Buyers are most likely to engage with those CDM vendors whose messaging addresses these priorities.

N = 1,500 Enterprise Business Managers with budget responsibilities. Respondents could select three priorities

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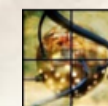
INSIGHTS: TOP CDM MARKET TRENDS 2020-2021

- **Consent Management becomes critical.** Legislation like the CCPA and GDPR will require marketers to be completely transparent on how they use customer data. As well as compliance pressure, another driver of transparency, for marketers, is establishing brand trust. Data ethics processes will become routine in the deployment of many marketing technologies, including CDM solutions.

- **Account-Based Marketing drives CDM adoption in B2B.** Even large enterprises with ABM projects admit that their biggest success inhibitor is "lack of deep customer insights"*. Often, they rely on tactical predictive analytics vendors instead of addressing the fundamental CDM challenge. Capable CDM vendors can win more B2B customers with effective thought leadership programs on this topic.

- **CDM projects are difficult to define and plan for marketers.** Marketers know that customer data is an issue but struggle to define goals and actions to address this. They see inefficiencies in data management but cannot list their needs regarding data activation and campaign execution. Many use cases for CDM are not yet routine in their current digital marketing.

- **CDM requires a marketing operations team.** Every company already has its customer data silos. So a successful CDM deployment needs internal processing to mitigate conflicts arising from data management overlap. CDM requires shared IT and marketing ownership.

* In a Sept 2020 survey of 132 B2B Marketers, 56% said their customer data insights are not good enough for them to make decisions. See https://www.b2bmarketing.net/en-gb/member-resources/abm-diving-deeper-data-and-insight-remain-main-challenge-abm

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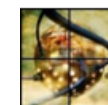
INSIGHTS: TOP CDM VENDOR TRENDS 2020-2021

- **The CDM vendor landscape is bewildering.** The over 100 CDM vendors have a variety of roots. Some have just repackaged their traditional offering through new product positioning and sales strategies. Others are CDM pure-plays that are expert on data management but not necessarily marketing.

- **Marketing suite vendors are taking ownership but …** Initially slow to address CDM challenges, the larger vendors have been busy in the last 6 months announcing CDM strategies. Often though, the focus is only on consolidating their own data sources.

- **Specialist CDM/CDP vendors will prevail.** These vendors are both extremely capable and knowledgeable about data consolidation and identity management principles and the vendor landscape is richly venture-funded. Some are challenged, however, to communicate the benefits of their technologies to business-oriented marketers.

- **CDM vendors talk technology, not business or even marketing.** Despite the relative immaturity of the topic, CDM vendors struggle to differentiate themselves. Tending to debate about their own competing technologies, they do not help marketers to understand what is being offered.

- **Vendors segment by functionality focus.** Reflecting their history, an evaluation of the functionality mix offered by each vendor may help buyers to fit the most suitable vendors to their CDM project. Some vendors are focused on marketing orchestration, some providing a hub for data analytics, others are integrators of data silos. Some are more IT-centric tools.

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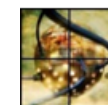
VENDOR SELECTION MATRIX™: CUSTOMER DATA MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020

There are 123 vendors in the Customer Data Platform Institute directory****. These are the Top 15 vendors as selected by 1,500 users based upon product, company and service quality.**

VENDOR NAME	PRODUCT(S)
ACQUIA	Acquia Customer Data Platform
ACTIONIQ	ActionIQ Enterprise Customer Data Platform
ADOBE	Adobe Experience Platform, Real-Time Customer Data Platform
BLUECONIC	BlueConic Customer Data Platform
COMMANDERS ACT*	Commanders Act Customer Data Platform
CXENSE*	Cxense Platform
EULERIAN*	Eulerian for Marketers
EVERGAGE	Evergage Interaction Studio
NGDATA	Intelligent Engagement Platform
ORACLE	Oracle Unity - Customer Intelligence Platform, Oracle CDM
QUAERO	Enterprise Customer Data Platform
REDPOINT GLOBAL	Redpoint rgONE
SALESFORCE	Salesforce Customer 360
SITECORE*	Sitecore Experience Platform - Sitcore Experience Database
TEALIUM	Tealium Customer Data Hub

This listing is alphabetical and includes all relevant Customer Data Management solutions named by the survey respondents. Also named but considered not relevant were:

- CROSSENGAGE
- MIXPANEL
- REDEYE
- UBERMETRICS
- LEMNISK

in Oct 2019, CXENSE was absorbed by the media audience management company Piano. In Feb 2020, Evergage was acquired by Salesforce.

Additonal vendors that were cited but did not list in the Top 20, or had less than 15 ratings were:

- GALE
- LEADSPACE
- LYTICS
- MPARTICLE
- GOOGLE

*   These vendors did not provide a direct briefing to the Research In Action analysts.
** See https://www.cdpinstitute.org/directory

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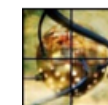
VENDOR SELECTION MATRIX™: CUSTOMER DATA MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020 - QUICK FACTS

VENDOR NAME	STAFF	REVENUE	GROWTH	RI*	GOOD TO KNOW
ACQUIA	1,000	> $ 25 m	100% p.a.	98%	Acquia unlocks data and opens up personalized journeys.
ACTIONIQ	100	> $ 15 m	200% p.a.	96%	Authentic customer experiences are built on all your data.
ADOBE	21,000	> $ 50 m	20% p.a.	95%	Meeting the challenge to accomplish real-time experiences.
BLUECONIC	100	> $ 25 m	100% p.a.	92%	BlueConic liberates data for more than 300 brands worldwide.
COMMANDERS ACT	60	> $ 5 m	30% p.a.	97%	Take control of your data, from collection to activation
CXENSE	100	> $ 10 m	10% p.a.	98%	Cxense was acquired by Piano. Integration is ongoing.
EULERIAN	80	> $ 5 m	30% p.a.	97%	The alternative data technology that helps you to become independent in your decisions and actions.
EVERGAGE	90	> $ 50 m	20% p.a.	98%	Evergage is now part of the Salesforce organisation.
NGDATA	100	> $ 25 m	80% p.a.	93%	A marketer-managed system that creates a persistent, unified customer database.
ORACLE	135,000	> $ 50 m	20% p.a.	94%	A customer intelligence platform collecting the entire clickstream not just triggers.
QUAERO	100	> $ 10 m	50% p.a.	96%	Empowers enterprises to integrate, discover and democratize customer data.
REDPOINT GLOBAL	160	> $ 25 m	80% p.a.	96%	We help innovative companies to transform the customer experience they offer.
SALESFORCE	35,000	> $ 50 m	40% p.a.	95%	See and understand your data; any data, from any system, anytime.
SITECORE	1,300	> $ 50 m	20% p.a.	98%	Sitecore xDB consolidates omnichannel data to power personalization, testing, and optimization.
TEALIUM	550	> $ 50 m	80% p.a.	98%	Own your customer data to fuel CX, generate insights and analysis, and better manage the tech stack.

* The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants (see page three)
   "Would you recommend this vendor in this market to your peers - Yes or No?".
NOTE: Revenue numbers (and growth) are specifically for CDM software and services estimated by Research in Action and d0 not reflect overall
        company revenue numbers (and growth).

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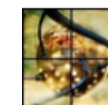
VENDOR SELECTION MATRIX™: CUSTOMER DATA MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020 - MORE FACTS

VENDOR NAME	FUNCTIONALITY FOCUS[1]				GLOBAL FOOTPRINT[2]			TARGET INDUSTRIES
	Marketing Execution	Analytics Hub	Data Integration	Engine/ Toolkit	NA	EMEA	APAC	
ACQUIA	Medium	Strong	Medium	No	70%	25%	5%	*Apparal, CPG, Pharma*
ACTIONIQ	Strong	Strong	Strong	No	90%	5%	5%	*All*
ADOBE	Strong	Medium	Medium	No	70%	20%	10%	*All*
BLUECONIC	Medium	Strong	Medium	No	35%	65%	0%	*Apparel, CPG, Retail, Media, Travel/ Hospitality/ Entertainment*
COMMANDERS ACT	No	No	Strong	Yes	20%	70%	10%	*Apparal, CPG, FSI, Media, Retail, Travel, Utilities*
CXENSE	No	No	Strong	Yes	not available			*not available*
EULERIAN	No	No	Strong	Yes	20%	75%	5%	*CPG, Distribution, Retail*
EVERGAGE	Strong	Medium	No	No	70%	20%	10%	*not available*
NGDATA	Strong	Strong	Medium	No	20%	50%	30%	*Hospitality, Retail, Telco, Travel, Utilities*
ORACLE	Strong	Medium	Medium	No	60%	25%	15%	*All*
QUAERO	Medium	Strong	Strong	Yes	65%	10%	25%	*CPG, Tech, Retail*
REDPOINT GLOBAL	Strong	Strong	Strong	No	65%	30%	5%	*CPG, FSI, Retail, Telco*
SALESFORCE	Strong	Medium	Medium	No	60%	25%	15%	*All*
SITECORE	Strong	Medium	Medium	No	50%	35%	15%	*Life Sciences, Manufacturing, Retail, Utilities*
TEALIUM	Medium	Medium	Strong	Yes	55%	30%	15%	*FSI, Healthcare Insurance, Hospitality, Media, Tech, Retail*

[1] This analysis reflects the vendor's product history and current solution emphasis. The engine/toolkit solutions are most likely to be deployed by IT organizations.
[2] The Research In Action estimated revenues for each vendor by global region in the CDM market specifically.

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VENDOR SELECTION MATRIX™: EVALUATION CRITERIA

STRATEGY		
Vision And Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios?
		Does the go-to-market and sales strategy fit the target market and customers?
Innovation And Differentiation	30%	How innovative is the company in this market?
		Does the solution have a unique selling proposition and clear market differentiators?
Viability And Execution Capabilities	15%	How likely is the long-term survival of the company in this market?
		Does the company have the necessary resources to execute the strategy?
Recommendation Index	25%	Would customers recommend this vendor in this market to their peers?

EXECUTION		
Breadth And Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by customers?
Market Share And Growth	15%	How big is the company's market share and is it growing above the market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor?
Price Versus Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?

NOTES:
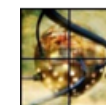62.5% of the evaluation is based on the survey results, 37.5% is based on the analysts' assessment.
• 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
• 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
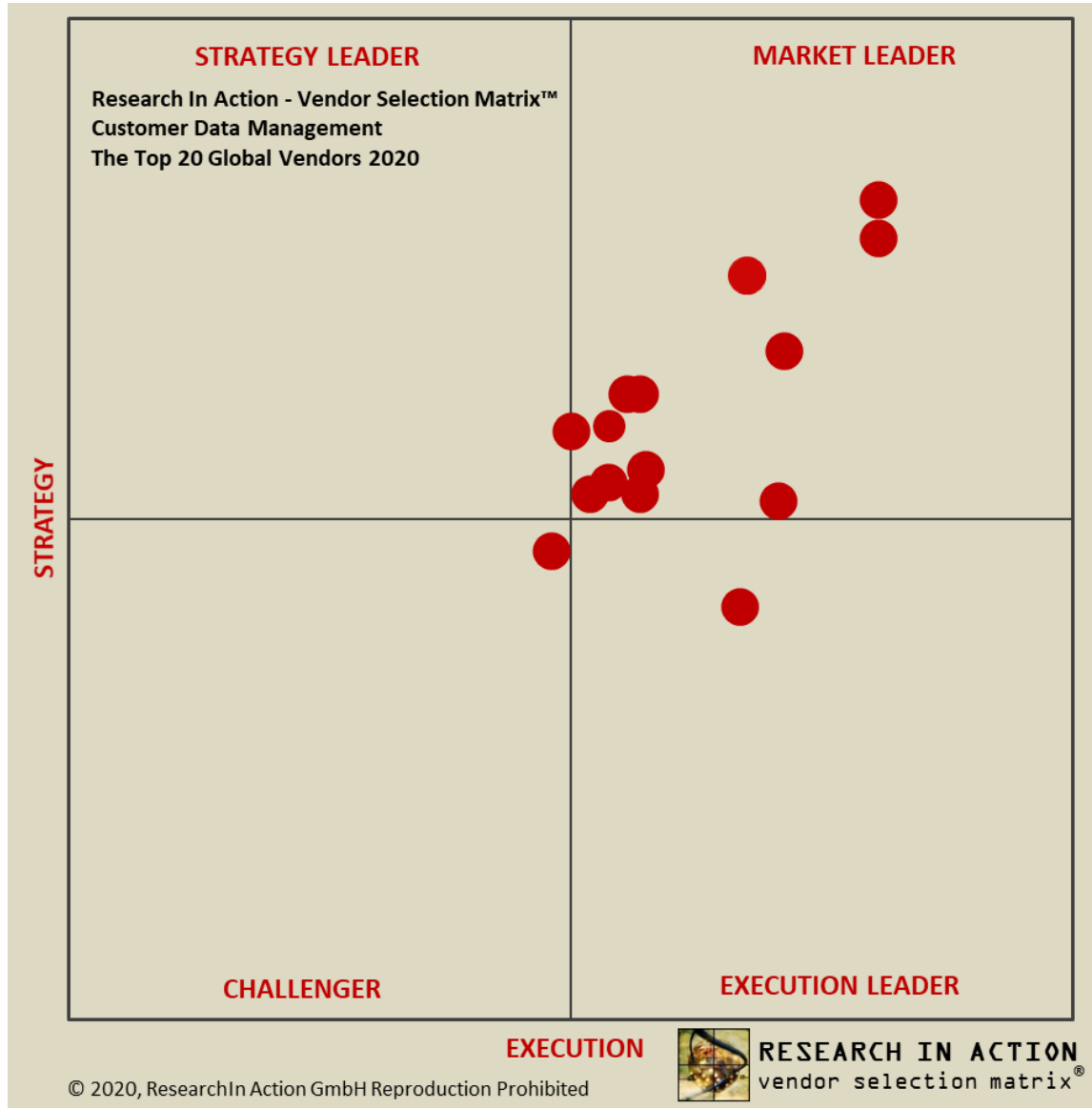• 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.
The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants (see page three)
"Would you recommend this vendor in this market to your peers - Yes or No?".

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VENDOR SELECTION MATRIX™: CUSTOMER DATA MANAGEMENT

Research In Action - Vendor Selection Matrix™
Customer Data Management
The Top 20 Global Vendors 2020

STRATEGY LEADER · MARKET LEADER · CHALLENGER · EXECUTION LEADER

STRATEGY · EXECUTION

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The Top Five:

- ACQUIA
- CXSENSE
- EVERGAGE
- SITECORE
- TEALIUM

The Top Six through 15

- ACTIONIQ
- ADOBE
- BLUECONIC
- COMMANDERS ACT
- EULERIAN
- NGDATA
- ORACLE
- QUAERO
- REDPOINT GLOBAL
- SALESFORCE

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Note: Potential numerical deviations due to rounding

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

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About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.
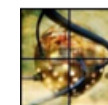
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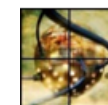
APPENDIX: MARKETING PROCESS DEFINITIONS - 1

- **eMail Marketing**. The process of setting up campaigns via eMail to purchased or built-up lists of contacts.

- **Web Content Management**. The process of creating and updating content on the company website.

- **Product Information Management**. Maintaining all product data on one system to optimize product presentation across sales and marketing channels.

- **DAM (Digital Asset Management)**. The storage and management of all digital files, particularly media files. Allowing marketing and other users to find, access and deploy the assets in their content.

- **Content Marketing**. Publishing digital content on the company website but also on other sites to generate additional web traffic.

- **Basic CRM (Customer Relationship Management)**. In most companies, CRM was set by Sales Ops and/IT and has little marketing value. But integration to the CRM database is necessary for marketing/sales alignment.

- **Lead Collection and Distribution**. The process of collecting and qualifying inbound marketing leads from the increased web traffic generated by content marketing. Distribution of appropriately leads to Sales.

- **PRM (Partner Relationship Management)**. Processes around the channel partner (reseller, distributor, etc) relationship : recruitment, registration and classification, contractual details, information exchange, and more.

- **Universal Content Management**. Combination of content management, DAM and PIM into one common system of record and management. It-centric organizations call this Master Data Management.

- **Customer Data Management (CDM)**. Often called Marketing Automation, the backbone process family to share content and run digital campaigns, nurturing and progressing leads through all digital channels.

- **Marketing Resource Management (MRM)**.The budgeting and reporting processes for marketing executives consolidate management of all asset projects plus human and financial resources to support business analytics focused on the marketing organization.
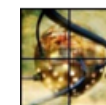
APPENDIX: MARKETING PROCESS DEFINITIONS - 2

- **Content Distribution.** Process and systems that collate, manage and distribute marketing content both from internal and external sources.

- **Brand Content Management (BCM).** Process to control the brand messaging, from corporate brand to individual messaging statements around products. Companies in a more distributed (or local) marketing environment use BCM systems to manage content across internal organizations, subsidiaries, and/or all business partners.

- **Through-Channel Marketing Automation (TCMA).** Management of brand content, plus programs and campaigns, promotions, and even leads, both down and up the distribution channel of business partners.

- **Digital Experience Management (DXP).** Creating and updating content, as personalized as possible to the consumer, and rendering it through all required digital communications channels (web, social, POS, etc).

- **Customer Data Management.** The process of consolidating and aggregation of all data from disparate systems in the company about customers - a Marketing-led initiative to ensure the data unification project is focused directly on marketing requirements.

- **Sales Engagement Management.** A process where marketers provide relevant digital assets to a salesperson to support their customer interactions, supported by training and coaching delivered on-demand.

- **ABM (Account based marketing).** A process of leveraging collected behavioral and profile data on target companies (accounts) or even individual buying decision-makers.

- **Social Engagement and Advocacy.** Processes to manage and leverage interested parties within communities and on social media.

- **Attribution Reporting.** The ability to recognize the contribution of individual pieces of marketing investment (campaigns, events, specific content assets) to business success. The success factors include metrics like deal progression through the funnel, deal value increase, deal velocity increase and deal closure.

- **Interactive Management.** Digital marketing programs that provide responsiveness and deep personalization.

- **Marketing Performance Management.** Dashboard and reporting that consolidates data from MRM, CDM and attribution reporting to list the financial return on individual and aggregated marketing investments.

- **Customer Engagement Management.** The full orchestration process, support by personalization, of providing and supporting an ongoing digital relationship with individual customers across the full customer lifecycle and organization.

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REAL ROI
Costs: € 431k
Benefits: € 606k
ROI: 41%
Payback: 8 months

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