

VENDOR SELECTION MATRIX™ MARKETING RESOURCE MANAGEMENT

**ABRIDGED VERSION
WITHOUT VENDOR SCORES
AND SCORECARDS**

THE TOP 15 GLOBAL VENDORS 2020

Research In Action

October 2020

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RESEARCH IN ACTION
independent research & consulting

FOREWORD

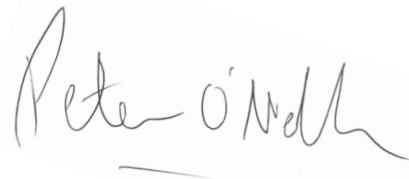
Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback 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.

By firstly describing a business process and asking business managers to name vendor(s) they associate with that process, we collect a list of those vendors most likely to be found by potential buyers seeking an automation solution to this business process. The resulting vendor landscape for Marketing Resource Management (MRM) is a mix of vendors managing some asset types, those that manage projects resources, plus those vendors who do manage the full range of digital assets, talent, budgets and projects.

There is a clear gradient of project maturity across the landscape. Many marketing departments are still only managing content and digital assets and operate as a cost center. Then we observe, over time, some marketing organizations maturing into fully accounted-for revenue centers where the CMO needs visibility into all project work and all types of resources deployed. This maturity model is reflected within the maturity S-Curve shown in this report: moving from PIM and DAM projects to a more "universal content management" system; then adding costs and talent to achieve MRM; before progressing further with a Customer Data Management project and, ultimately, being able to do full Marketing Performance Management.

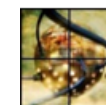
Always keeping you informed

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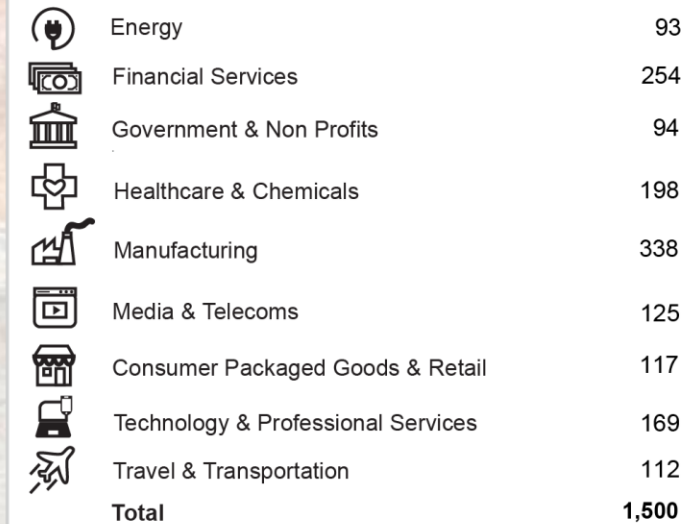
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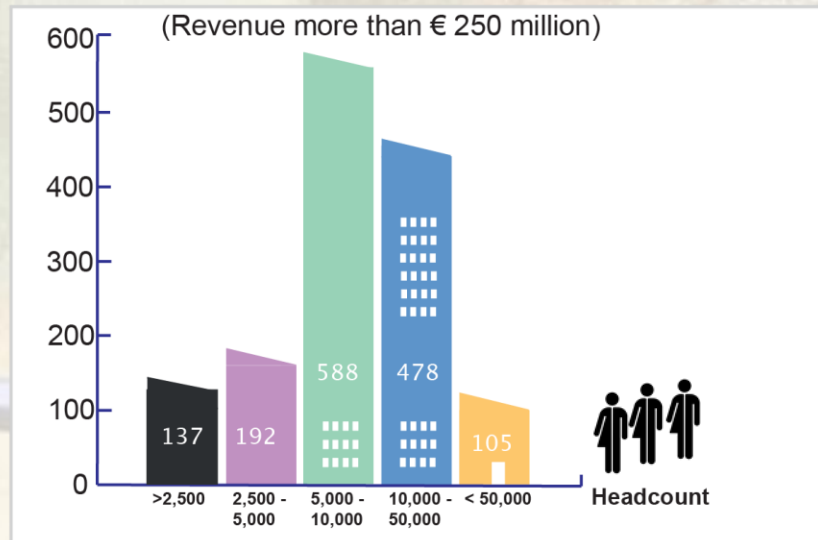
COUNTRY BREAKDOWN



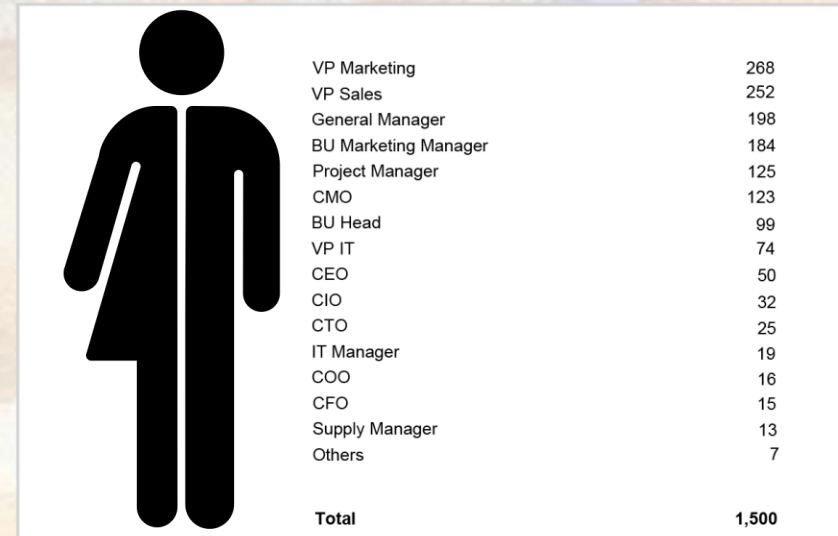
INDUSTRY BREAKDOWN



COMPANY SIZE BREAKDOWN



JOB TITLE BREAKDOWN



100,000+
Data
Points

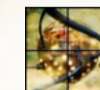
1,500
Marketing
Managers

Leading
Vendors

30+
Reports
In 2020/21

37.5 %
Analyst's
Opinion

62.5 %
Survey
Results

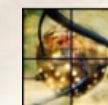


WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



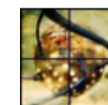
Decision Makers use a mix of traditional and online tools to create the vendor shortlists

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



WHAT IS MARKETING RESOURCE MANAGEMENT?

- Marketing executives, as with any business executive, should have full visibility for the planning and effectiveness of all the business resources they deploy. Some of them use a Marketing Resource Management (MRM) process to manage all marketing assets and better plan and budget for marketing initiatives.
- MRM systems are used to help to define marketing plans, collect and share marketing assets, execute on campaigns, and track marketing assets across print and digital channels. MRM also manages marketing budgets, tracks actual costs and supports offer the campaign planning process. It provides a single unified system for all marketing material, which in turn ensures consistency of branding and messaging. It also enables marketers to create workflows and processes to streamline marketing operations.
- MRM systems are used in conjunction with adjacent marketing software such as marketing lead management and marketing analytics and are also commonly integrated with CRM software. As an asset management system, it may also integrate to the company's Digital Asset Management (DAM) and/or Product Information Management (PIM) systems.
- An advanced MRM system would be tightly linked to the company's Human Resources and Finance systems to enable full resources planning and management by the Marketing executives.



COMPONENTS OF MARKETING RESOURCE MANAGEMENT

A project automates one or more of the following processes:

- Brand management
- Collaboration support
- Content management
- Digital asset management
- Financial management
- Marketing calendar management
- Marketing performance management
- Product information management
- Project management
- Promotions/MDF management
- Through-channel marketing
- Workflow management



Source: smartsheet.com

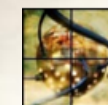
Marketing Resource Management Cycle Showing...



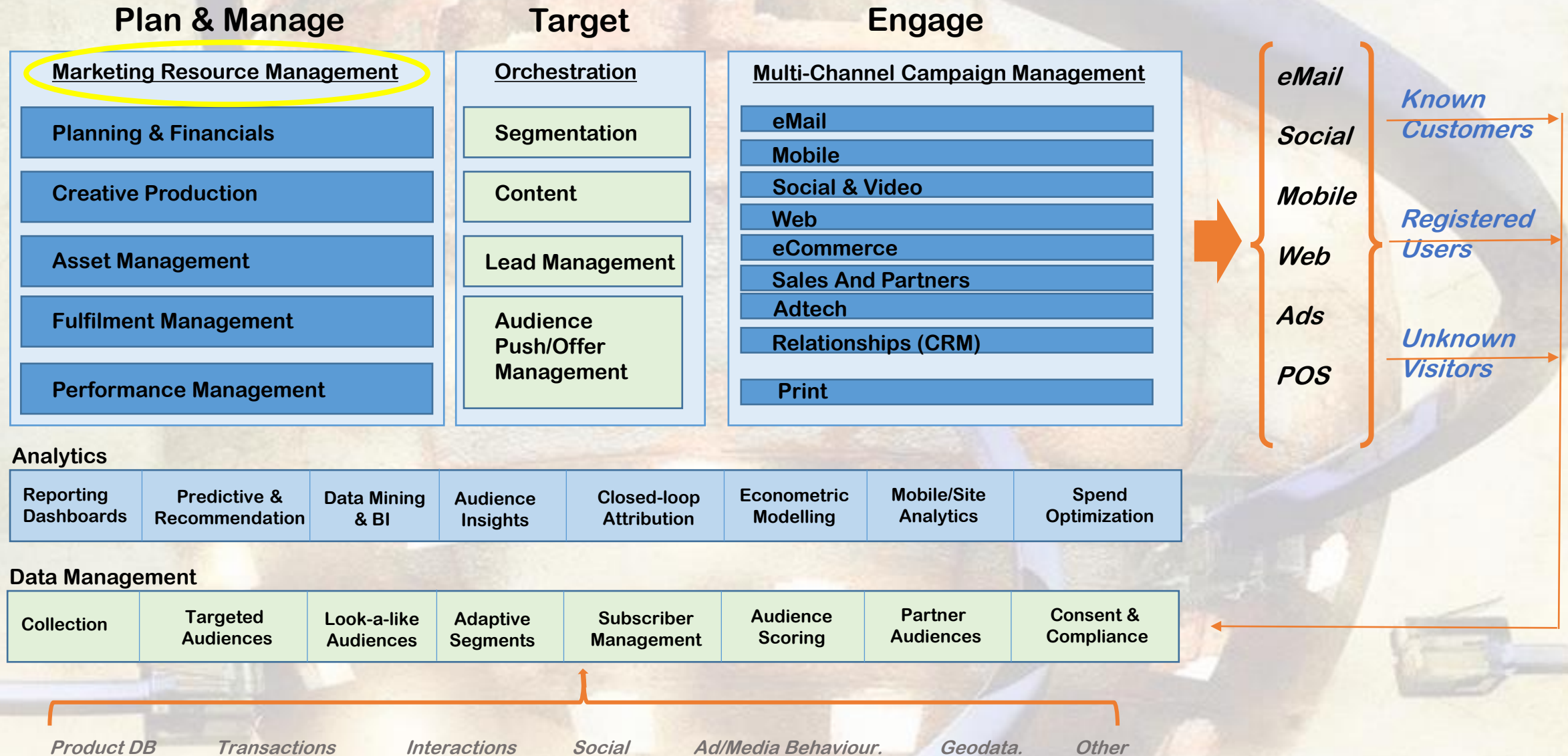
Source: slideteam.net



Source: marconomy.de

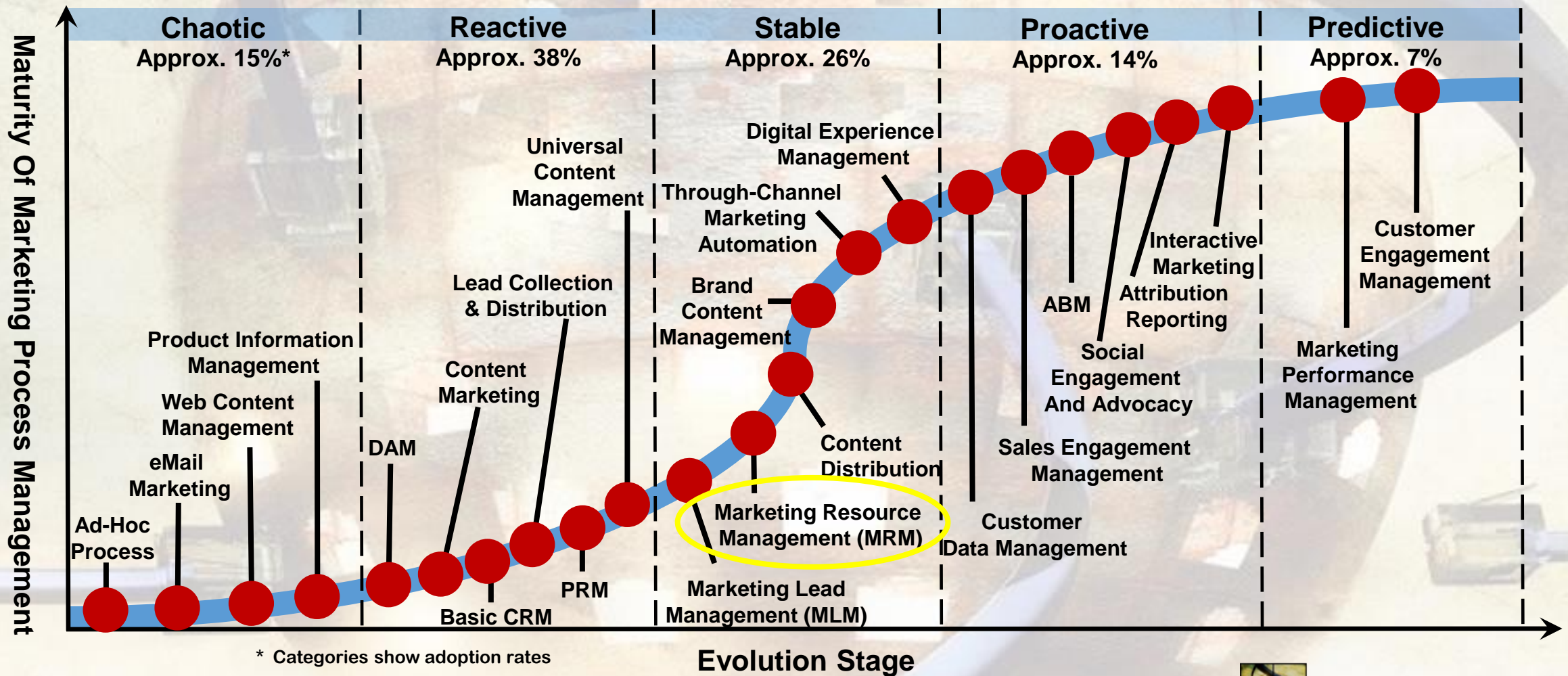


OVERALL MARKETING AUTOMATION MARKETECHTURE



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 – **MRM projects are mostly midway in the maturity progression and we estimate that 50-55% of companies have automated, or will be automating, this process in 2020.**

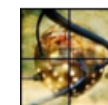


MRM MATURITY: FROM PRODUCT TO ENGAGEMENT

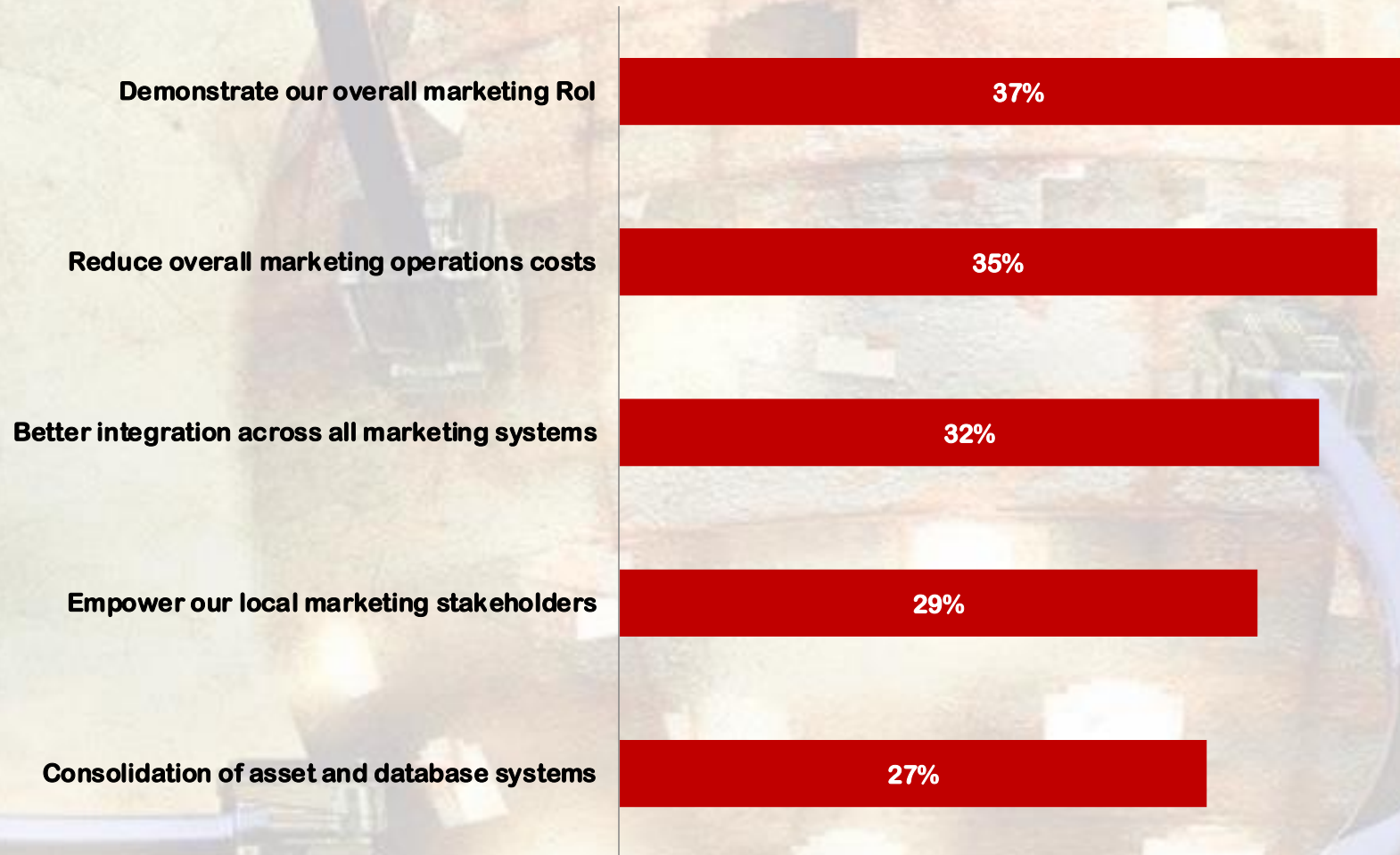
Our surveys and consulting work enables us to continually assess the maturity of marketing organizations (combination of organization, process and technology). We have identified these five phases for MRM and associated processes.

- **Chaotic.** Neophyte marketing organizations focus their efforts on promoting their offering and the first important system to be addressed is Product Information Management (PIM) and the Website.
- **Reactive.** The added complexity of digital marketing and multi-channel fulfillment programs require companies to then set up a Digital Asset Management (DAM) system. Many companies then combine their multiple content assets systems into a more comprehensive asset database. IT-centric projects tend to be named Marketing Data Management while marketers prefer the title Universal Content Management.
- **Stable.** The desire to manage all marketing assets and better plan and budget for marketing initiatives results in an operational MRM system. While some MRM solutions also manage projects and teams, some marketers prefer to, or must, deploy the company standard project/work management solution.
- **Proactive.** Marketing's role matures from supporting sales transactions to ensuring a full customer experience. Attention is paid to attribution: identifying exactly where and how marketing is contributing to revenue success.
- **Predictive.** Data managed in the MRM system is combined with other business data, including attribution, so that a CMO can monitor the performance of marketing programs and campaigns on an ongoing basis.

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, ultimately, going to be replaced by new relationship-based metrics of customer success.



RESEARCH: THE TOP BENEFITS ACHIEVED OR EXPECTED FROM USING MRM



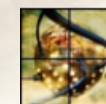
These are the Top 5 benefits named by enterprise marketing software buyers, all selected by a quarter or more of the respondents.

Financial considerations dictate the decision to invest in MRM. The #1 objective is to collect enough data showing the return on marketing investment, closely followed by wanting to identify cost saving opportunities.

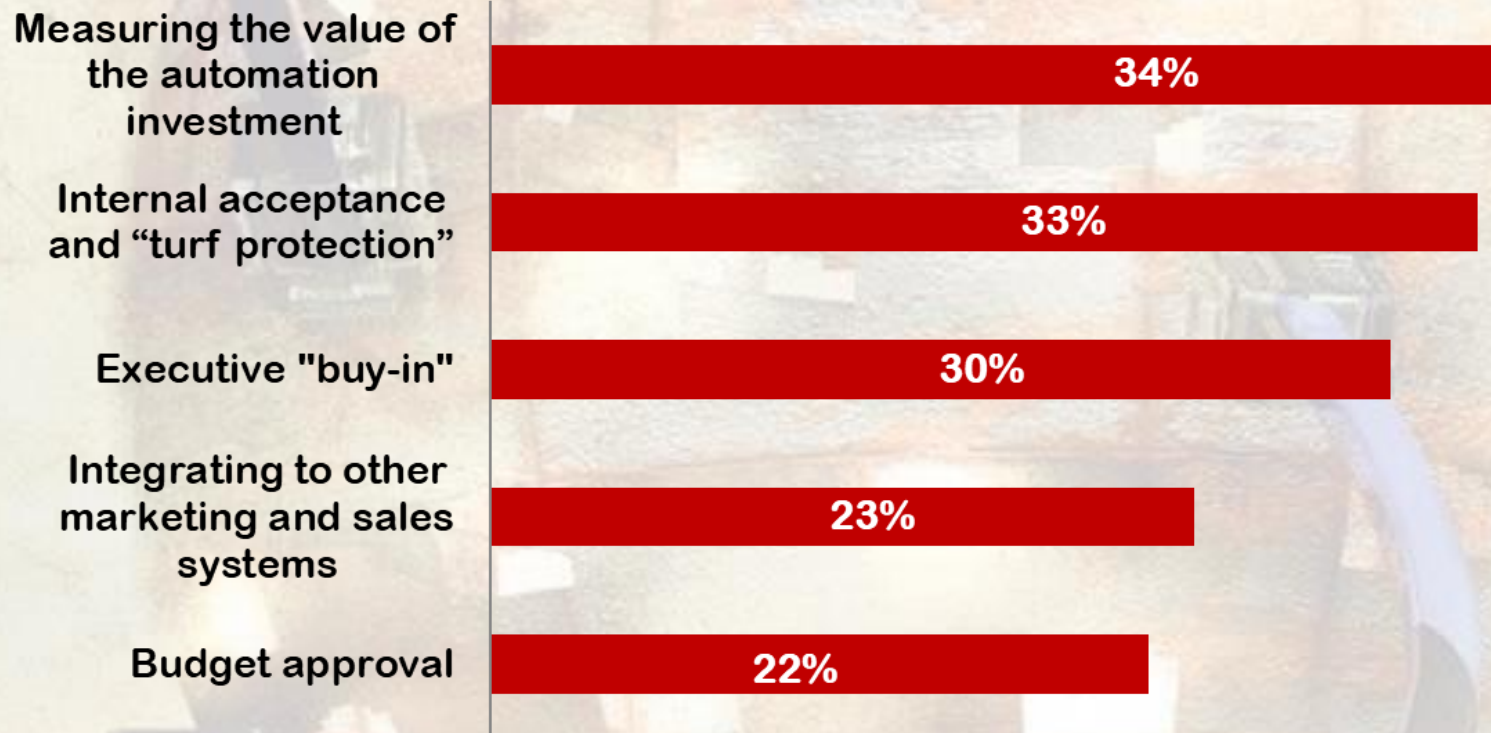
Integration and consolidation motivations are the second class of investment drivers.

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

N = 1,500 Enterprise Business Managers with budget responsibilities.



RESEARCH: THE MOST SIGNIFICANT BARRIERS FACED WHEN ADOPTING MRM SOLUTIONS

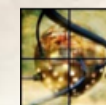


These enterprise marketing software buyers reported these project inhibitors (they could select up to two).

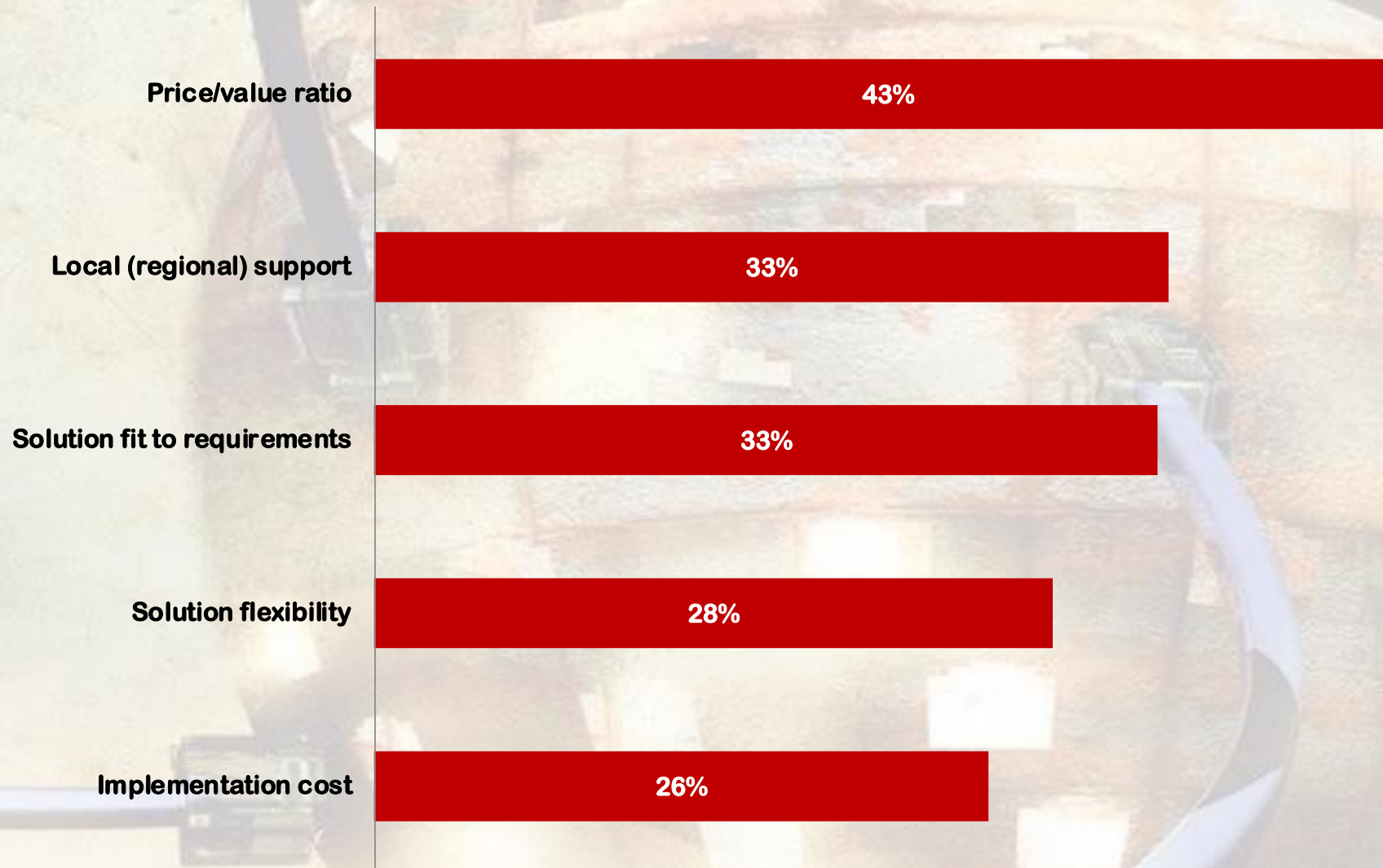
Value Management is their #1 challenge, as with many marketing technology projects. Issues of executive support or internal acceptance mark those firms that view Marketing as a support discipline only.

"Adequate support from vendor" scores lowest, but vendors can help more by providing value management support and better template and best practice support.

N = 1,500 Enterprise Business Managers with budget responsibilities.



RESEARCH: THE TOP PRIORITIES WHEN CONSIDERING A MRM VENDOR

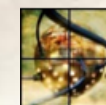


These were the most significant priorities, selected by more than one in five of the enterprise marketing software buyers (they could select up to three).

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. MRM 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 MRM vendors whose messaging addresses these priorities.

N = 1,500 Enterprise Business Managers with budget responsibilities.

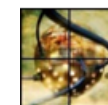


INSIGHTS: MRM PROJECTS ARE DIFFICULT TO DEFINE

- **MRM scale depend firstly on the marketing organization.** The concept of “resources” varies according to the complexity and maturity of the marketing work being done. One company’s DAM consolidation project may be another’s MPM project (see page 9). It may not even be called MRM: Titles like marketing project management, campaign management or even work management are becoming common within marketing organizations.
- **There is a myriad of MRM Use Cases.** A project may focus on a process automation; or be concerned with improved management of content assets; or focus on resource management or business performance. There are generally three broad types of MRM projects:
 - Resource management – managing resources like content assets, talent (internal and external people).
 - Spend management – building transparency in all aspects of marketing spend to enable budging and reporting.
 - Workflow management – Most marketing automation systems orchestrate campaigns but not internal workflows.
- **The four categories of marketing resources.** The relative importance of each resource category in a planned MRM project will often determine which solution fits best:
 - Cost – financial planning, allocation and attribution. MRM reports on marketing spend by source and project.
 - Talent – the work is complex, with internal plus external contributors requiring a project management platform.
 - Content – content creation and delivery processes require management for consistency, reusability and tracking.
 - Brand – distributed marketing and compliance challenges have elevated brand to a vital resource category.

INSIGHTS: MRM TRENDS 2020

- **Marketing's need for financial reporting is driving MRM investment.** As the survey shows, financial imperatives are driving MRM projects. CMOs need to collect data to demonstrate their contribution to the business and their accounting peers are encouraging them to oversee and optimize their spending plans.
- **MRM has been around for a decade but has changed.** The early MRM vendors had limited success because CMOs were not under enough pressure to watch their spend. This has changed and financial reporting has become important, but 2020 MRM must now also cover the complexity of marketing work and resources. The workflow element has become essential.
- **MRM in practice requires considered change management.** Marketing professionals are extremely sensitive to new IT systems after adopting digital marketing platforms in a (too) rapid manner in the last years. If MRM, which will disrupt their established working practices, is perceived as a time and motion reporting system, there will be resistance.
- **MRM success depends most on the integration sub-projects.** In an ideal world, CMOs would first set up the MRM system then add other marketing automation projects on top of it. The reality is more challenging where MRM must feed off existing systems in Marketing and other departments and provide reporting and insights compatible to according to other business systems. Each company has a different environment so project managers should evaluate and test the specific integration capabilities of its potential MRM vendors diligently.



VENDOR SELECTION MATRIX™: MARKETING RESOURCE MANAGEMENT: THE TOP GLOBAL VENDORS 2020

| VENDOR NAME | PRODUCT(S) |
|----------------------|--|
| ALLOCADIA | Allocadia |
| APRIMO | Aprimo Productivity Management, Aprimo DAM, Aprimo Plan & Spend, Aprimo Distributed Marketing |
| BIZIBLE (ADOBE) | Bizible Tier 1: Multi-touch attribution, Tier 2: Lead & account attribution, Tier 3: Complete attribution |
| BRANDMAKER | BrandMaker MRM |
| BRANDMASTER * | BrandMaster DAM, Brand HUB, Marketing Planner, |
| BRANDMUSCLE * | BrandMuscle Integrated Local Marketing Platform |
| CONTENTSERV | Contentserv |
| ELATERAL * | Brandgility |
| INFOR * | Infor Marketing Resource Management (MRM) |
| PERCOLATE BY SEISMIC | Percolate Development Platform, Percolate Relay, Percolate Proof, Percolate Insights, Allocadia for Percolate, Seismic for Percolate |
| SAP * | SAP Marketing Cloud |
| SAS * | SAS Marketing Automation, SAS Cost and Profitability Management, SAS 360 Plan |
| SITECORE * | Marketing Resource Management (MRM), part of Sitecore Content |
| WEDIA | Wedia |
| WORKFRONT | Workfront |

This listing is alphabetical and includes all relevant Marketing Resource Management solutions which were named by the survey respondents.

Also named but considered not relevant were:

- Brandsystems
- IBM
- InMotionNow
- MarcomCentral
- NewsCred

Also named but with less than 15 mentions were:

- Attribute
- Bynder
- HCL
- Hive 9
- Workspan

* These vendors did not provide a direct briefing to the Research In Action analysts.

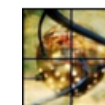
VENDOR SELECTION MATRIX™: MARKETING RESOURCE MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020 - QUICK FACTS

| VENDOR NAME | STAFF | REVENUE | GROWTH | RI ¹ | GOOD TO KNOW (Major first brand impression) |
|----------------------|-------|-----------|-----------|-----------------|---|
| ALLOCADIA | 100 | > \$ 10 m | 100% p.a. | 96% | Marketing performance management software, helping to plan, manage investments, and measure ROI |
| APRIMO | 500 | > \$ 50 m | 40% p.a. | 99% | Work management software and DAM to optimize marketing operations, brand and content resources |
| BIZIBLE (ADOBE) | 23k | > \$ 25 m | 50% p.a. | 93% | Part of Marketo, an attribution tool to enable enterprises to measure marketing performance in detail |
| BRANDMAKER | 175 | > \$ 15 m | 40% p.a. | 99% | Bridging strategy and execution, providing real-time transparency and control over all marketing work |
| BRANDMASTER | 70 | > \$ 10 m | 40% p.a. | 97% | Brandmaster supports brand management and provides marketing performance measurement |
| BRANDMUSCLE | 700 | > \$ 25 m | 40% p.a. | 91% | Established US leader for local or distributed brand marketing scenarios |
| CONTENTSERV | 375 | > \$ 25 m | 40% p.a. | 96% | Platform for product content marketing and creating personalized customer-centric product experiences |
| ELATERAL | 50 | > \$ 10 m | 40% p.a. | 95% | The powerful rules-based, brand-focused, dynamic templating platform |
| INFOR | 17k | > \$ 25 m | 40% p.a. | 95% | Cloud-based supply chain, ERP and financial management solutions including marketing management |
| PERCOLATE BY SEISMIC | 900 | > \$ 15 m | 50% p.a. | 99% | Marketing orchestration for enterprises with total marketing performance analytics |
| SAP | 100k | n.a. | n.a. | 93% | SAP accelerates buying processes and improves sales with better customer experiences |
| SAS | 14k | n.a. | n.a. | 94% | Activity-based analytics to model business processes and identify cost, profitability and drivers |
| SITECORE | 1,200 | n.a. | n.a. | 98% | SaaS-based platform providing content management and digital marketing solutions for enterprises |
| WEDIA | 150 | > \$ 10 m | 50% p.a. | 94% | Helps large organizations efficiently manage, customize and deliver marketing assets |
| WORKFRONT | 1,000 | > \$ 50 m | 20% p.a. | 98% | A cloud-based platform that offers work management solutions, including marketing, for enterprises |

Note: The Research In Action estimated revenue and growth rates are in the MRM market specifically (Staff is total company employees)

¹ 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?”.

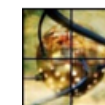


VENDOR SELECTION MATRIX™: MARKETING RESOURCE MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020 - QUICK PROFILES

| VENDOR NAME | RESOURCES MANAGED | | | | GLOBAL FOOTPRINT ¹ | | | TARGET INDUSTRIES |
|----------------------|-------------------|--------|---------|-------|-------------------------------|------|------|---|
| | Costs | Talent | Content | Brand | NA | EMEA | APAC | |
| ALLOCADIA | Yes | Some | Some | No | 80% | 15% | 5% | CPG, FSI, Manufacturing, Tech |
| APRIMO | Yes | Yes | Yes | Yes | 50% | 40% | 10% | FSI, CPG, Life Sciences, Retail, Manufacturing |
| BIZIBLE (ADOBE) | Some | No | No | No | 80% | 15% | 5% | CPG, FSI, Retail |
| BRANDMAKER | Yes | Yes | Yes | Yes | 35% | 60% | 5% | Automotive, CPG, FSI, Retail |
| BRANDMASTER | Some | No | Yes | Yes | 30% | 40% | 30% | CPG, Retail |
| BRANDMUSCLE | Yes | No | Yes | Yes | 60% | 30% | 10% | CPG, FSI, Retail |
| CONTENTSERV | No | Yes | Yes | Yes | 5% | 75% | 20% | CPG, Distribution, Manufacturing, Retail |
| ELATERAL | Some | No | Yes | Yes | 25% | 60% | 15% | CPG, FSI, Retail, Hospitality, Pharmaceutical |
| INFOR | Yes | Yes | Yes | Yes | 60% | 30% | 10% | CPG, Education, FSI, Retail |
| PERCOLATE BY SEISMIC | No | Yes | Yes | Yes | 70% | 25% | 5% | FSI, Tech, Manufacturing |
| SAP | Yes | Yes | Some | No | 45% | 45% | 10% | CPG, Tech, Retail |
| SAS | Yes | Yes | Some | Some | 50% | 45% | 5% | CPG, FSI, Retail, Telco |
| SITECORE | Some | No | Yes | Some | 50% | 50% | 0% | Manufacturing, CPG |
| WEDIA | No | Yes | Yes | Yes | 10% | 90% | 0% | Life Sciences, Manufacturing, Retail, Utilities |
| WORKFRONT | Some | Yes | Some | Some | 88% | 10% | 2% | FSI, Tech, Manufacturing |

Industries:
 CPG: Consumer
 Packaged Goods
 FSI: Financial Services
 Institutes
 Tech: Technology

¹ The Research In Action estimated revenues for each vendor by global region in the MRM market specifically



VENDOR SELECTION MATRIX™: MARKETING RESOURCE MANAGEMENT: 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.

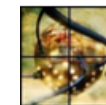
- 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.

- 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.

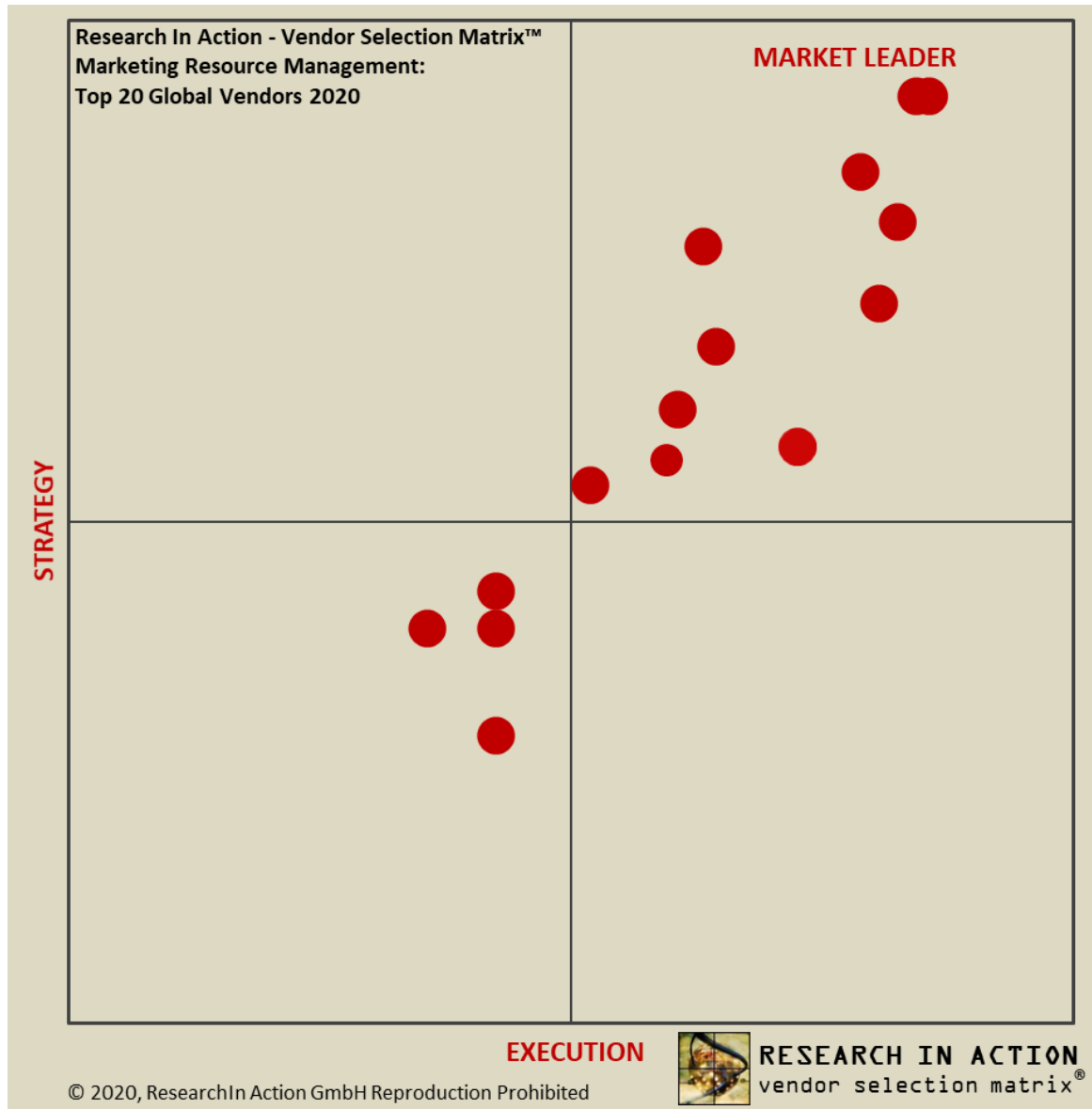
- 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.

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?".



VENDOR SELECTION MATRIX™: MARKETING RESOURCE MANAGEMENT



The Top 10 Vendors:

ALLOCADIA

APRIMO

BRANDMAKER

BRANDMASTER

CONTENTSERV

ELATERAL

PERCOLATE BY SEISMIC

SITECORE

WEDIA

WORKFRONT

The Other Vendors:

INFOR

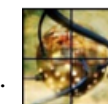
SAS

BIZIBLE

SAP

BRANDMUSCLE

Note: Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

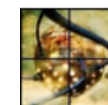
The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

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.

APPENDIX: CHAOTIC AND REACTIVE PHASES DEFINITIONS

- **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.
- **Marketing Lead Management (MLM).** 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: STABLE AND PROACTIVE PHASES DEFINITIONS

- **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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