

# VENDOR SELECTION MATRIX™ PARTNER RELATIONSHIP MANAGEMENT (PRM) SAAS AND SOFTWARE

## THE TOP GLOBAL VENDORS 2020

**Research In Action**

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**RESEARCH IN ACTION**  
independent research & consulting

# FOREWORD

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation where 60% of the evaluation is based on a survey of enterprise business decision makers. This is balanced by analyst subject matter expert input fed by intensive interviews with software or services vendors and their clients, plus an informed, independent point-of-view - all of which combine to make Research in Action Vendor Selection Matrix™ reports so unique. For this report, we interviewed 1,500 business managers with budget responsibility in enterprises globally. We selected those vendors that achieved the best evaluations scores from the buyers, but disregarded the ones with fewer than 15 evaluations.

There are over 100 vendors providing software to automate one of more channel processes, with total annual revenues well over \$ 1.2 billion. The vendor landscape is, however, highly fractured with deep specialization.

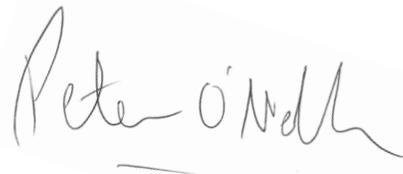
Our buyer-side research was about all aspects of channel marketing and enablement and this included asking the respondents to name and score the vendors they know in that context. Interestingly, the second most important priority for buyers considering Channel Marketing and Enablement solutions is “Coverage of all three components”, i.e. Marketing, Enablement, and Sales Enablement.

The landscape of the top 20 vendors which emerged from the survey shows, due to their product history, three distinct groupings: those servicing primarily marketing processes; those who focus primarily on enablement processes; and those who can support both. So we’ve produced three separate Vendor Selection Matrix™ reports for this family of processes. Check our website for the other reports.

This report provides you with a useful guide to important channel marketing and/or enablement trends and will help you make an informed decision regarding which vendor could best fit your specific requirements.

Always keeping you informed

Peter O’Neill



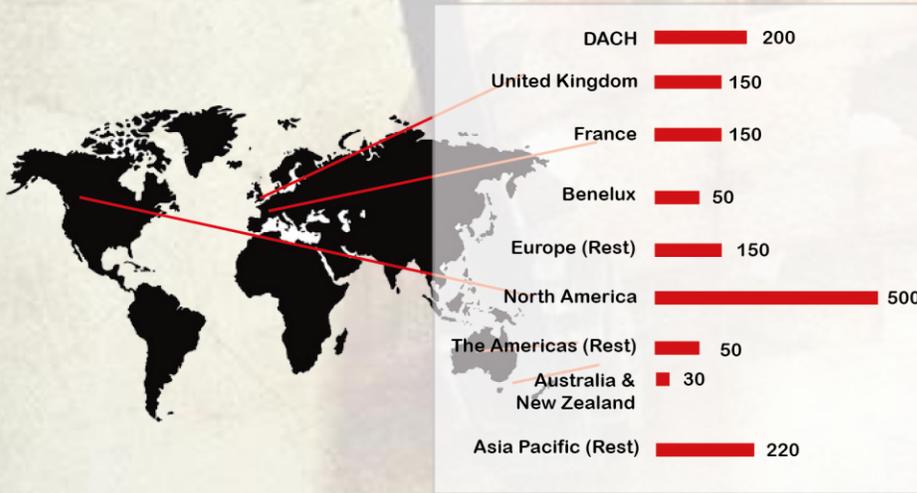
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# THE VENDOR SELECTION MATRIX™ METHODOLOGY

## COUNTRY BREAKDOWN



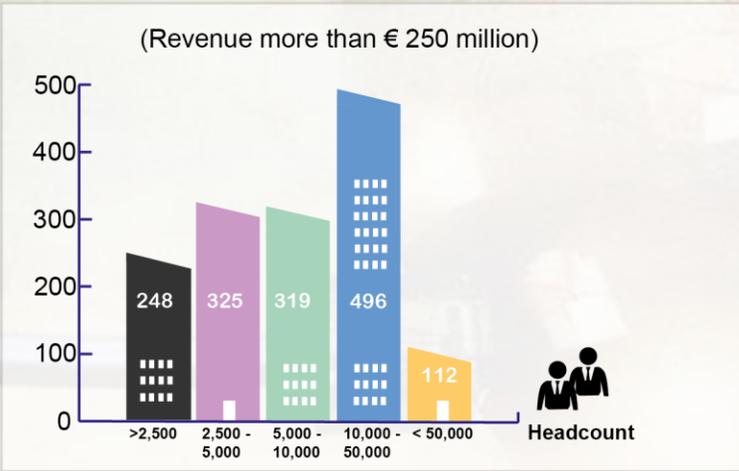
## INDUSTRY BREAKDOWN



## RESEARCH FACTS

- 100,000+ Data Points
- 1,500 Business Managers
- TOP 20 Vendors
- 20+ Reports in 2019
- 40% Analyst's Opinion
- 60% Survey Results

## COMPANY SIZE BREAKDOWN



## JOB TITLE BREAKDOWN



# WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



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

# WHAT IS CHANNEL MARKETING AND ENABLEMENT?

- The Channel Marketing and Enablement processes cover the tasks involved for a manufacturer or vendor distributing products and services through partner organizations as their indirect channel. The two categories most important to marketing professionals are channel marketing and channel enablement.
  - **Channel Marketing (TCMA)**. Channel marketing is brand and asset management; where programs, promotions and leads are managed both down and up the channel. Channel marketing is also known as Local or Distributed Marketing or Through Channel Marketing Automation (TCMA).
  - Often, the channel is closely linked to the vendor as geographic subsidiaries, or as exclusive distributors or agents.
  - **Channel Enablement (PRM)**. Vendors distributing via independent partners have more complex challenges. They must also manage processes around the partner relationship itself: recruitment, registration and classification, contractual details, information exchange, and more. This process family is known Partner Relationship Management (PRM), as it has many similarities with CRM.
  - Increasingly, channel marketers want to include marketing processes into their PRM project requirements so they can enable their marketing colleagues in the partner organizations to leverage the same content and programs that they use in their direct marketing.



# RESEARCH: WHAT IS YOUR NUMBER ONE INVESTMENT AREA IN THE CHANNEL MARKETING/ENABLEMENT SPACE FOR 2019?



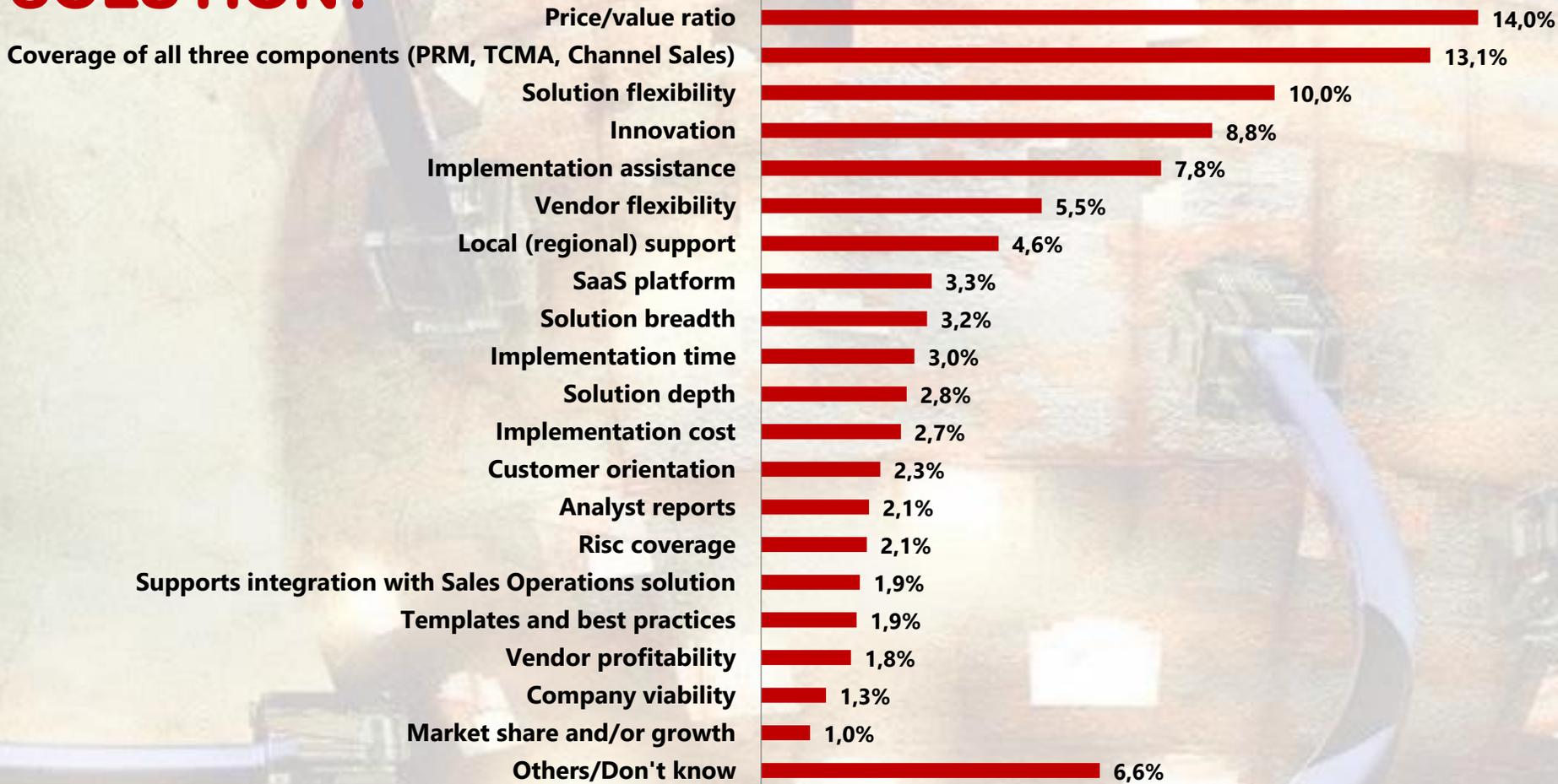
## Comments regarding Data:

- Almost equal focus on sales, marketing and business management
- SaaS migration is high

N = 1,500 Business Managers with budget responsibilities



# RESEARCH: WHAT ARE YOUR TOP 3 PRIORITIES WHEN CONSIDERING A CHANNEL MARKETING/ENABLEMENT SOLUTION?



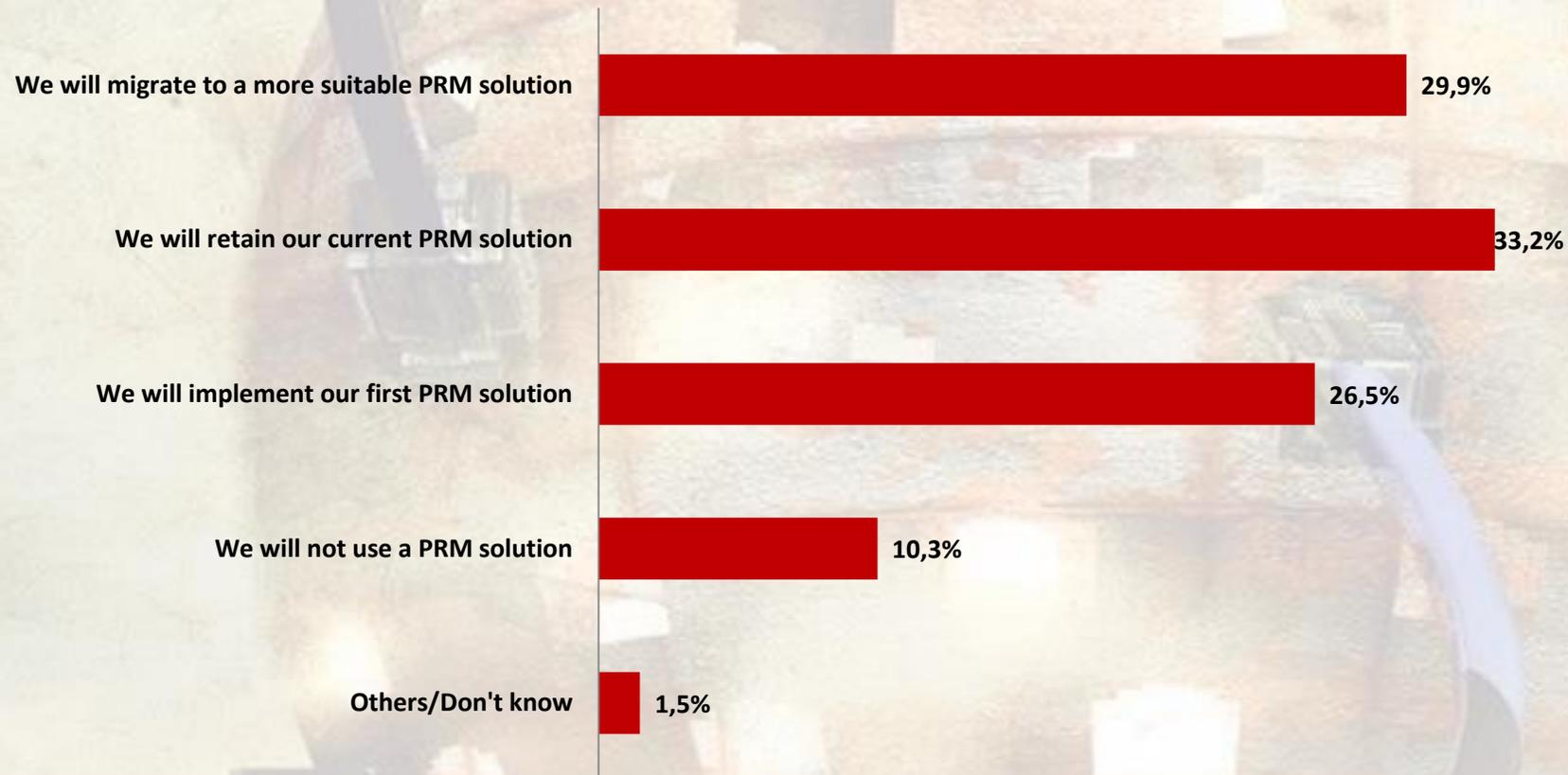
## Comments regarding Data:

- Price/value is the clear highest priority
- Buyers would like a consolidated solution
- Implementation (including operations) assistance is also high on the list

N = 1,500 Business Managers with budget responsibilities



# RESEARCH: Are you planning to implement/replace parts of your Channel Marketing/Enablement solutions in the next 1 to 3 years?



## Comments regarding Data:

- 56% of companies plan to invest in a new PRM solution
- More than half of those will migrate from an existing solution
- Only 10% of the respondents do not need PRM

N = 1,500 Business Managers with budget responsibilities



# INSIGHTS: TOP MARKET TRENDS 2019 AND BEYOND

- **Channel business dynamics move from push to pull.** The traditional vendor view of their channel is of registered, enabled and incented partners pushing their products to market. Today's world of empowered buyers, digital and as-a-service product delivery disrupts this view. New types of partners are emerging that pull business, when they need it, from a vendor with little interest in product margin compensation. That relationship is loosely-coupled only, which raises challenges both for channel marketing and channel enablement processes.
- **Channel marketing, enablement and sales processes extend to commerce.** Digital business is now the norm, so both end-buyers and channel partners will expect full process support from manufacturers; from initial awareness through to the purchase-to-order and billings transactions.
- **Channel partner communities rise and fall continually.** As their buyers' profile and preferences change over time, vendors are challenged to identify relevant channel partners, even new partner categories, for their business success. This includes influencers or advocates who do not transact directly with the vendor. Channel software platforms need to add functionality around social media linkages and community management to cover these fleeting relationships.
- **Vendor consolidation is inevitable.** The current channel software market is too fragmented. Buyers want to work with fewer vendors overall and expect their preferred channel software vendors to cover more function areas over time. Venture capital and other sources of merger and acquisition funding will support this transition and a shorter list of platform-like vendors will emerge.



# SEGMENTING THE VENDORS

- Our survey defined Channel Marketing and Enablement as: Marketing; enablement and channel sales enablement (training and certification, sales content). We asked the respondents to score the vendors they know in that overall context. The 20 vendors with highest ratings and sufficient mentions are profiled.
- Note that, as in all Vendor Selection Matrix results, the 20 vendors are not always direct competitors. Firstly, not all operate globally, so there is a clear geographic separation. Similarly, not all vendors address all industries or company-size segments. Additionally in this survey, some vendors still focus on one aspect of channel marketing and enablement only.
  - The TCMA vendors are used mostly by manufacturers with captive channels who do not generally need PRM functionalities. If they do, then often a separate PRM solution is installed.
  - Some of the PRM vendors have responded to client demand and extended their offering into marketing process automation.
- The vendor landscape which emerged from the survey has been therefore been split into three Vendor Selection Matrix™ reports for this research topic, profiling the vendors in their chosen categories:
  - **TCMA:** The vendors that have the heaviest focus, or focus solely, on channel marketing processes
  - **PRM:** The vendors that have the heaviest focus, or focus solely, on channel enablement processes
  - **CME:** Seven vendors servicing both channel enablement AND some marketing processes.



# VENDOR SELECTION MATRIX™ – CHANNEL MARKETING & ENABLEMENT SAAS AND SOFTWARE: THE TOP 20 GLOBAL VENDORS 2020

NAME (alphabetical)	PRODUCT(S)
ANSIRA	Ansira Edge Technology Suite™
BRANDMAKER	BrandMaker TCMA
BRANDMUSCLE	BrandBuilder Integrated Local Marketing Suite
BRIDGELINE DIGITAL	Unbound Product Suite
CHANNELKONNECT	ChannelKonnnect PRM
CHANNELTIVITY	Channeltivity PRM
CHANNELXPERS	ChannelPRM, ChannelIOS
ELATERAL	Elaterral
IMPARTNER	ImpartnerPRM, News and Social on Demand, Referral Automation Platform
MAGENTRIX	Magentrix PRM
NETSERTIVE	Distributed Marketing Platform
ORACLE	Oracle Peoplesoft Partner Relationship Management
SALESFORCE	Sales Cloud PRM
SPROUTLOUD	SproutLoud Distributed Marketing Platform
TIE KINETIX	Flow Partner Automation
WEBINFINITY	Webinfinity
ZIFT SOLUTIONS	ZiftONE, Zift PRM, Relayware

## Vendors servicing primarily channel marketing:

- BRANDMAKER
- BRANDMUSCLE
- BRIDGELINE DIGITAL
- ELATERAL
- NETSERTIVE
- SPROUTLOUD

## Vendors servicing primarily channel enablement:

- CHANNELKONNECT
- CHANNELTIVITY
- MAGENTRIX
- ORACLE
- SALESFORCE
- WEBFINITY

## Vendors servicing both channel marketing and enablement:

- ANSIRA
- CHANNELXPERS
- IMPARTNER
- TIE KINETIX
- ZIFT SOLUTIONS

Note: three of the top 20 vendors declined to be named and listed



# VENDOR SELECTION MATRIX™ – CHANNEL MARKETING & ENABLEMENT SAAS AND SOFTWARE: THE TOP 20 GLOBAL VENDORS 2020 - QUICK FACTS

NAME	STAFF	REVENUE (CM&E SW)	GROWTH (CM&E)	HEADLINE
ANSIRA	250	< \$ 50 m	30%	A century of experience in channel marketing/enablement now in software
BRANDMAKER	170	< \$ 50 m	50%	Budget/campaign/content management for complex marketing ecosystems
BRANDMUSCLE	800	< \$ 200 m	30%	Established US leader for local brand/content marketing scenarios
BRIDGELINE DIGITAL	80	< \$ 10 m	10%	Provides solutions that transform how brands interact with their customers
CHANNELKONNECT	100	< \$ 50 m	10%	Creating tomorrow's channel today
CHANNELTIVITY	20	< \$ 50 m	10%	A leading PRM Solution for tech companies
CHANNELXPERS	20	< \$ 10 m	70%	An operating system for cloud-based channel sales and marketing needs
ELATERAL	75	< \$ 10 m	10%	Allows field & partners to locally adapt content and win at the point of sale
IMPARTNER	200	< \$ 50 m	50%	The most complete CM&E platform around at the moment
MAGENTRIX	60	< \$ 10 m	40%	An alternative to Salesforce Community Cloud due to complexity and cost
NETSERTIVE	200	< \$ 100 m	10%	Delivers localized, multi-channel marketing and analytics at scale
ORACLE	137,000	< \$ 100 m	10%	Integrated PRM capabilities into every part of the CRM process
SALESFORCE	35,000	< \$ 100 m	10%	Provides an enhanced extension of its Community Cloud for PRM
SPROUTLOUD	200	< \$ 50 m	25%	Defining the future of through-channel marketing
TIE KINETIX	115	< \$ 50 m	50%	Removes boundaries for marketing, sales, and fulfillment through partners
WEBINFINITY	30	< \$ 10 m	50%	Channel project experience leveraged into a next-generation PRM platform
ZIFT SOLUTIONS	200	< \$ 50 m	30%	A comprehensive cloud solution for channel marketing, sales & operations

Note: three of the top 20 vendors declined to be named and listed



# VENDOR SELECTION MATRIX™ – SAAS AND SOFTWARE: EVALUATION CRITERIA

## STRATEGY

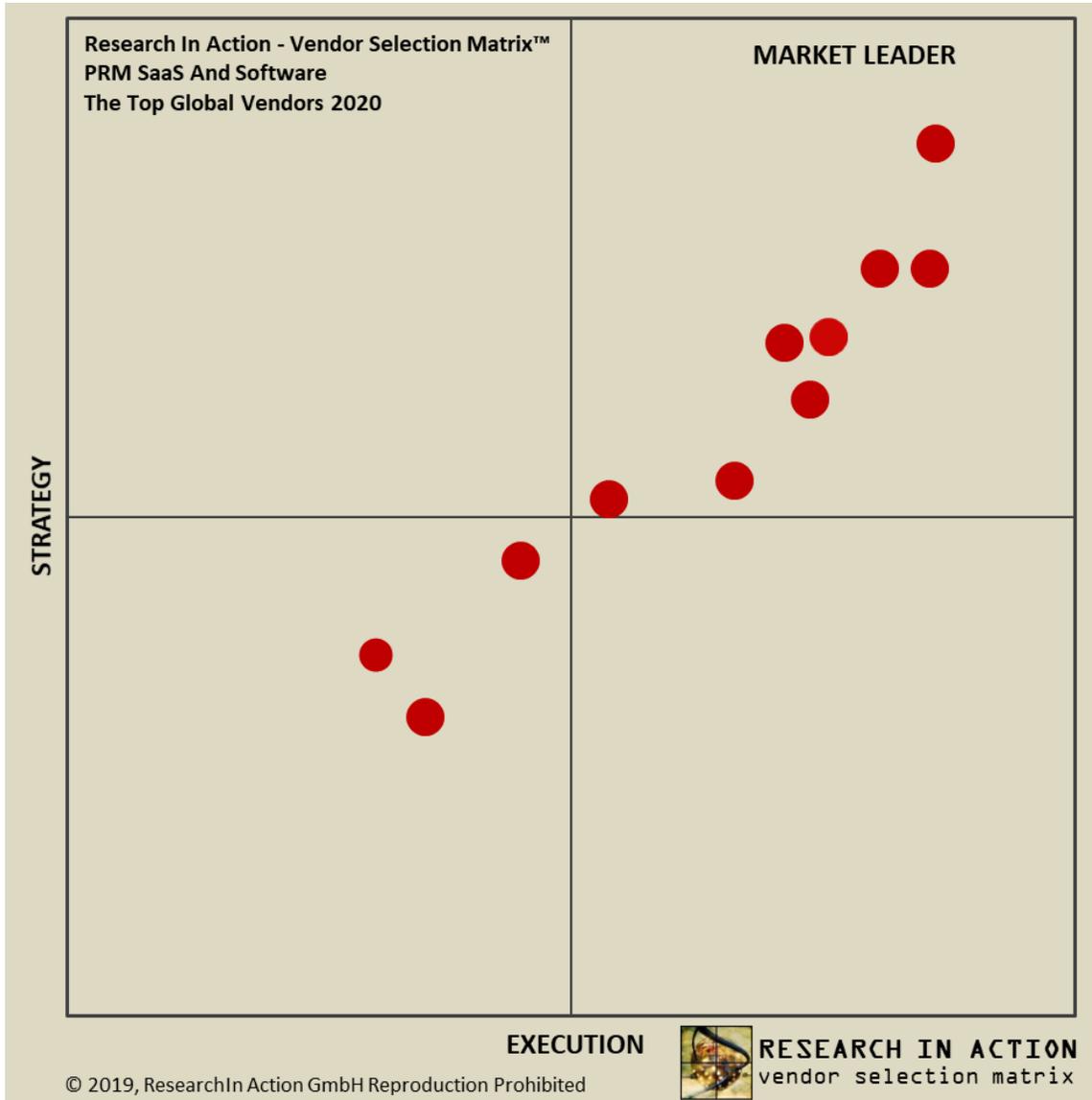
Vision & Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target markets and customers?
Innovation & Partner Ecosystem	20%	How innovative is the company? How is the partner ecosystem organized and how effective is the partner management?
Viability & 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?
Differentiation & USP	35%	Does the solution have a Unique Selling Proposition (USP) and clear differentiators?

## EXECUTION

Breadth & Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by the customers?
Market Share & Growth	15%	How big is the market share and is it growing above 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?



# VENDOR SELECTION MATRIX™ – PARTNER RELATIONSHIP MANAGEMENT (PRM) SAAS AND SOFTWARE



**Top Five (alphabetical order)**

CHANNELTIVITY  
CHANNELXPERS  
IMPARTNER  
TIE KINETIX  
ZIFT SOLUTIONS

**Top Six to Eleven  
(alphabetical  
order)**

ANSIRA  
CHANNELKONNECT  
MAGENTRIX  
ORACLE  
SALESFORCE  
WEBINFINITY



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.

## 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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