

VENDOR SELECTION MATRIX™ CUSTOMER DATA MANAGEMENT

The Top Vendors 2024

June 2024

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independent research & consulting

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MARKET IMPACT IN 2024

Members In Survey Panel	➤	125,000+ IT Automation 90,000+ Marketing Automation
Active Enterprise Survey Participants	➤	10,000+ IT or business decision makers All with budget responsibility
Research Published	➤	25+ Research reports published 350+ plus vendors evaluated
Research Views	➤	12,000+ views per report (average)
Press Releases	➤	20+ with 2,000 views+ per release (average)
Reprints published	➤	200+ reprints, both Marketing and IT Automation



FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers 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 this report we interviewed 1,000 business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations 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 other potential buyers. 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, even ABM predictive analytics this time. There are even some eCommerce platform vendors that do well to stress the dependence of great personalization on great customer data and so get associated with CDM.

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. The report is an update to our 2022 CDM research and we have found a greater than usual churn in the list of vendors named in the landscape (six vendors drop out while there are nine new entrants). This reflects the status of the market which is still emerging and relatively loosely defined.

This report provides you with a useful guide to important CDM trends, preferences and challenges; names the Top vendors as selected by 1,000 users and myself 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.

Enjoy reading it and reach out if you have questions. I know more than I wrote here.

Always keeping you informed! **Peter O'Neill**



Peter O'Neill

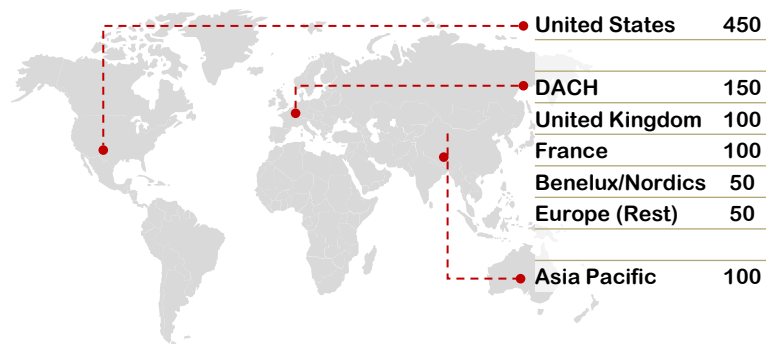
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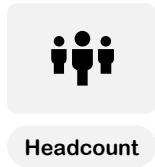
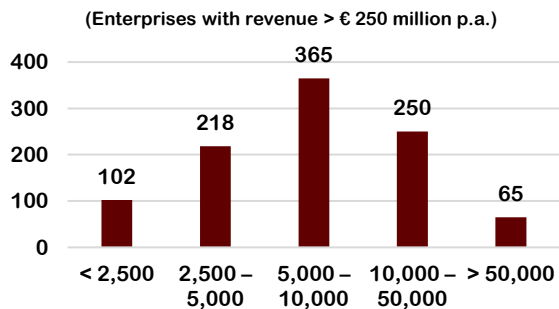


SURVEY DEMOGRAPHICS: MARKETING AUTOMATION IN GLOBAL ENTERPRISES

Country Breakdown



Company Size Breakdown



Industry Breakdown

Energy	100
Financial Services	175
Government & Non-Profit	50
Life Sciences	100
Manufacturing	250
Technology, Media & Telecoms	125
Consumer Packaged Goods & Retail	75
Professional Services	50
Travel & Transportation	75
Total	1,000

Job Title Breakdown

Business Unit Marketing Executive	120
Business Executive	110
VP/Director Sales	100
VP/Director Demand Generation	80
VP /Director Marketing Operations	75
Corporate Marketing Executive	75
Chief Digital Officer	75
CIO	75
VP/Director Marketing Technology	70
CTO	50
VP/Director Marketing Analytics	50
Sourcing/Vendor Management	25
COO	25
VP IT	20
Chief Sales Officer	20
CFO	15
Chief Sales Officer	15
Total	1,000



75,000+
Data Points



1,000
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.

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



WHAT IS CUSTOMER DATA MANAGEMENT?

- Providing an optimal customer experience is impossible without having a unified Customer Data Management (CDM) process in place: a process that consolidates and aggregates all customer data being collected in separate systems across the company.
- Often, when initiated by IT, the project is labelled a Customer Data Platform (CDP) with a focus on consolidating all data silos and a consistent system of record for each customer element. However, for Marketing, the goal is to establish a much more comprehensive/dynamic view of each customer by capturing data from multiple systems, linking data relating 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. The 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 CDP market size was some \$5.1 billion in 2023 and will grow from \$7.4 billion in 2024 to \$28.2 billion by 2028, at a compound annual growth rate (CAGR) of 39.9% during the forecast period (2024-2028), according to a report by MarketsandMarkets.
- 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
 - Consent and preference management
 - Target-account aggregation
 - Digital experience personalization
 - Business reporting and analytics
 - Machine-learning adoption
 - Customer profile resolution
 - Market segmentation
 - Marketing execution testing and optimization
 - Campaign and message orchestration and activation
 - Channel optimization analysis



➤ TYPES OF CDM PLATFORMS

The Customer Data Platform Institute*, a vendor-neutral organization dedicated to helping marketers manage customer data, defines these four types of CDP solutions and assigns just one type to each vendor's solution.

- **Data.** These systems gather customer data from source systems, link data to customer identities, and store the results in a database available to external systems. This is the minimum set of functions required to meet the definition of a CDP. In practice, these systems also can extract audience segments and send them to external systems. Systems in this category often employ specialized technologies for data management and access. Some began as tag management or Web analytics systems and retain considerable legacy business in those areas.
- **Analytics.** These systems provide data assembly plus analytical applications. The applications always include customer segmentation and sometimes extend to machine learning, predictive modeling, revenue attribution, and journey mapping. These systems often automate the distribution of data to other systems.
- **Campaign.** These systems provide data assembly, analytics, and customer treatments. What distinguishes them from segmentation is they can specify different treatments for different individuals within a segment. Treatments may be personalized messages, outbound marketing campaigns, real time interactions, or product or content recommendations. They often include orchestrating customer treatments across channels.
- **Delivery.** These systems provide data assembly, analytics, customer treatments, and message delivery. Delivery may be through email, Web site, mobile apps, CRM, advertising, or several of these. Products in this category often started as delivery systems and added CDP functions later.

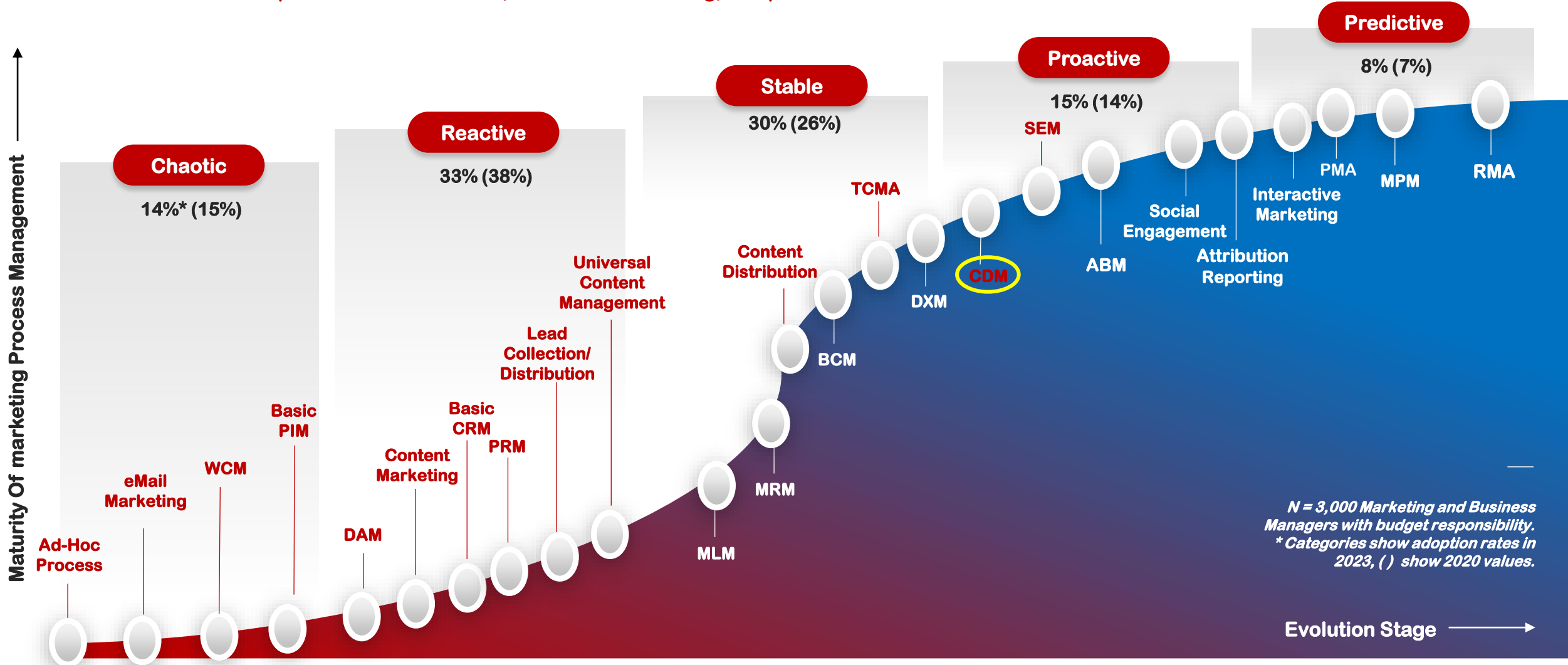
Other research reports are more creative. Forrester has Data Management, Orchestration, Automation and Measurement CDPs; while Gartner uses Marketing Cloud, Engines/Toolkits, Marketing Data-Integration and Smart Hub as groupings.





MARKETING PROCESS MATURITY S-CURVE 2024

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. **CDM projects are mostly executed by more mature companies, and we estimate that 45-55% of companies have automated, or will be automating, this process in 2024-25.**



*N = 3,000 Marketing and Business Managers with budget responsibility.
* Categories show adoption rates in 2023, () show 2020 values.*

All acronyms are defined in the report Appendix



RESEARCH IN ACTION
vendor selection matrix®



CDM ALONG THE MARKETING MATURITY S-CURVE

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. Doublets are removed and cleansed, qualified contacts are provided as 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.



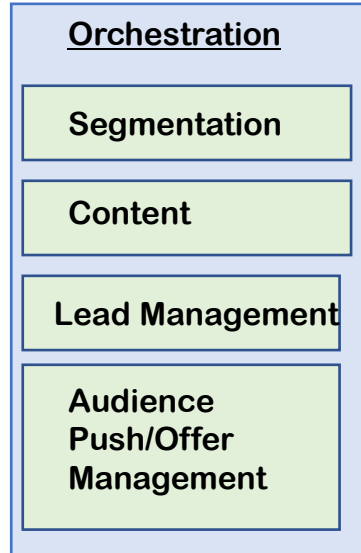


OVERALL MARKETECHTURE

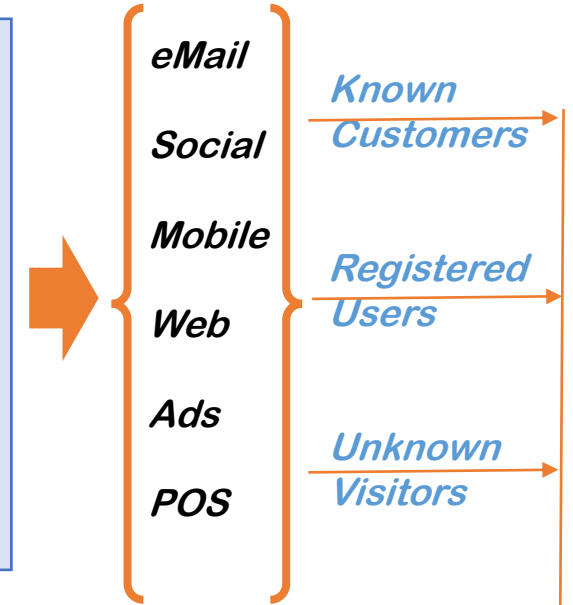
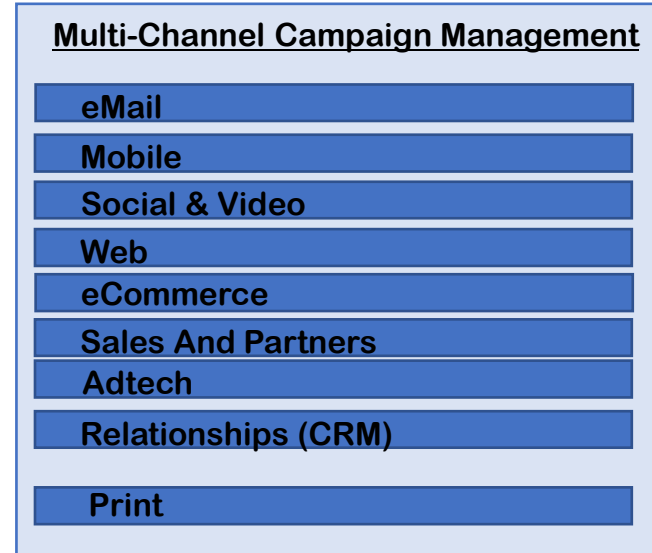
Plan & Manage



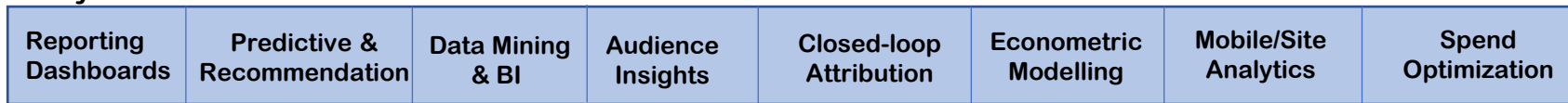
Target



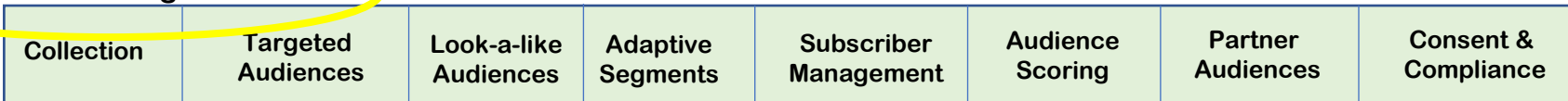
Engage



Analytics



Data Management

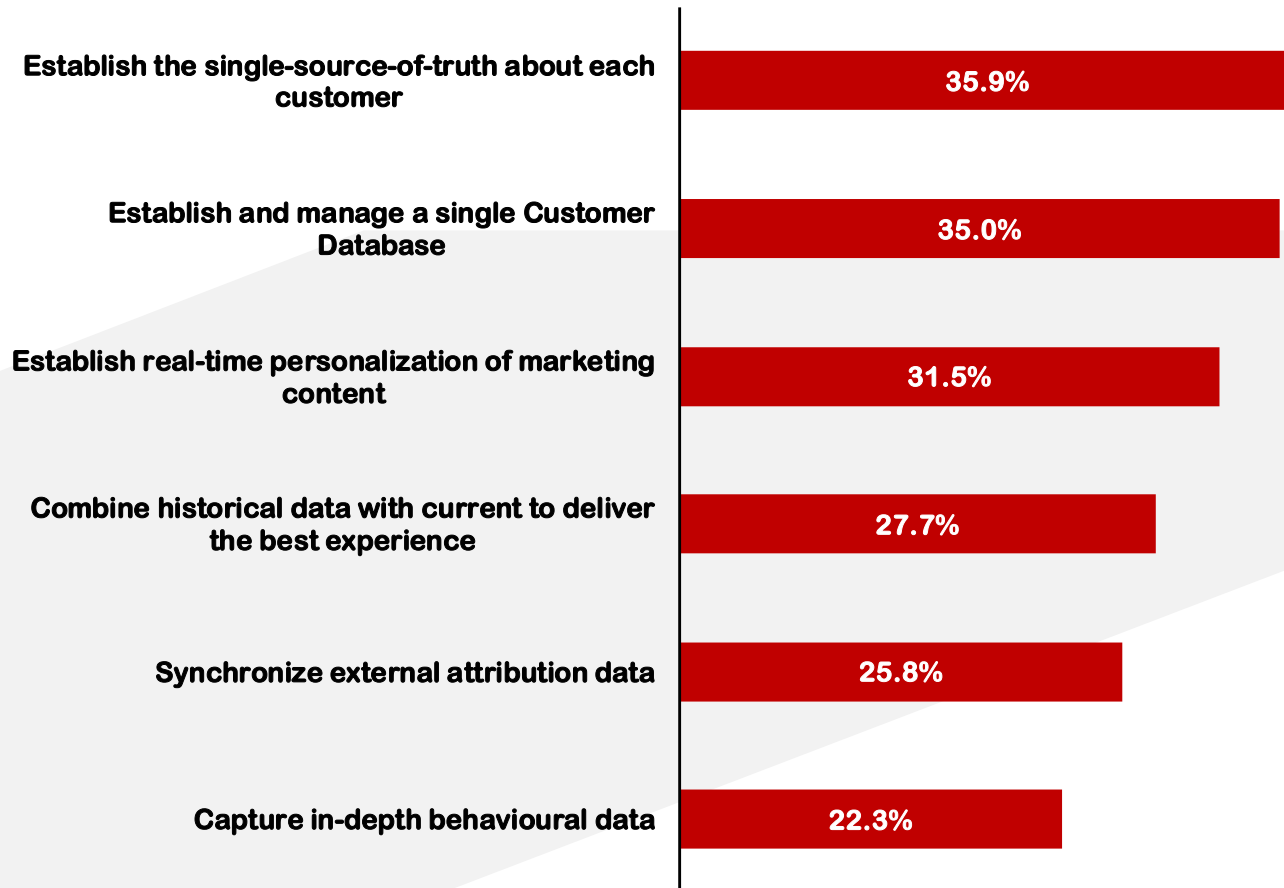


Product DB Transactions Interactions Social Ad/Media Behaviour. Geodata. Other



CDM GLOBAL PRIORITIES 2024

THE MAJOR DRIVERS FOR CDM INVESTMENTS



N = 991 Enterprise IT and Business Managers with budget responsibilities.

Question:
Which anticipated top 3 benefits are driving your investment in Customer Data Management in 2024?

We asked, “Which anticipated top 3 benefits are driving your investment in customer data management automation in 2024?”

Well over **one third** of companies are focused on arriving at the “single source of truth” and having just one Customer Database. Next is real-time personalization.

The 2022 survey had personalization as the #1 driver at 36%.

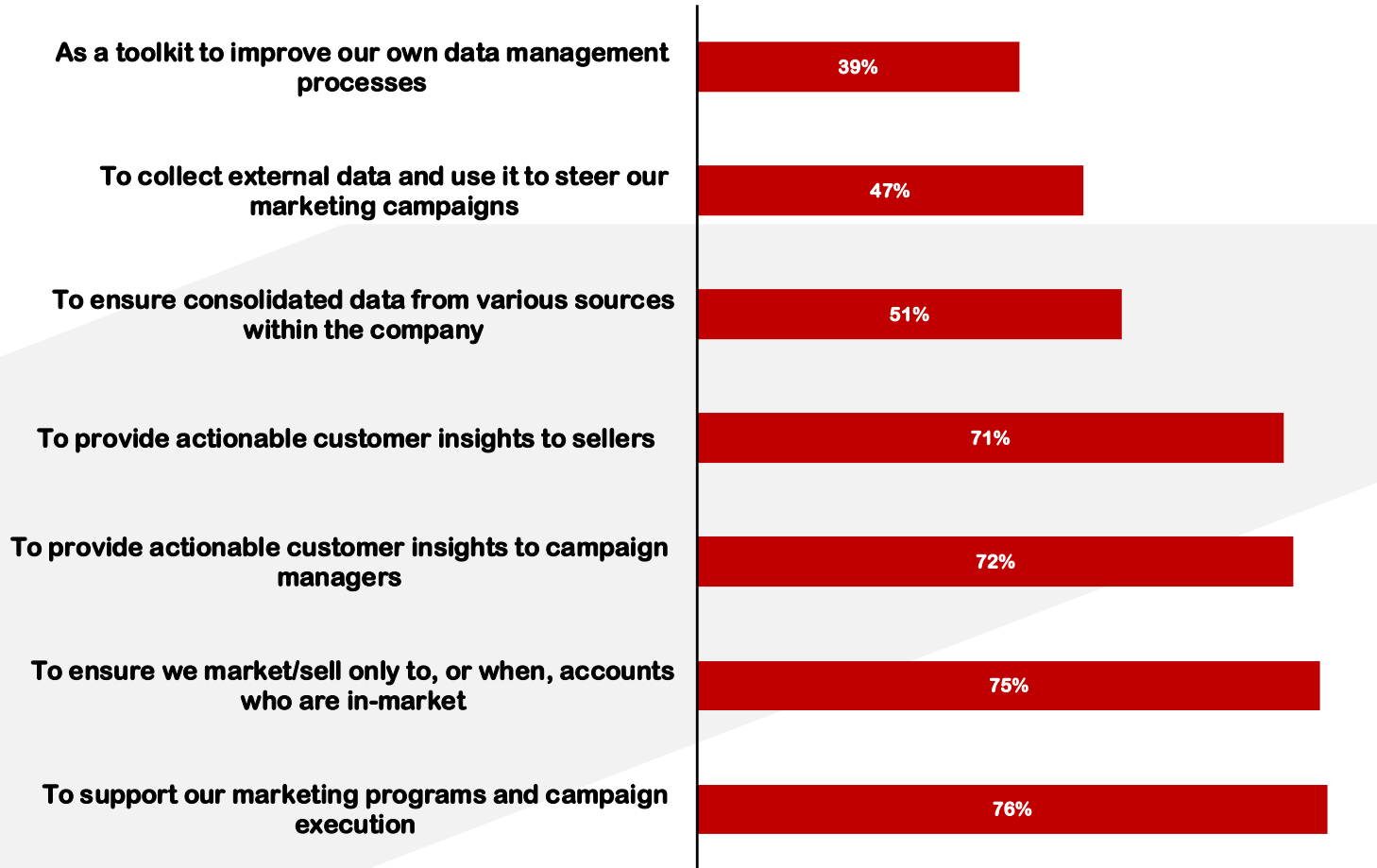
The prominence of external attribution data is new (it was just 12% in 2022).

Vendors take note: you should reflect these customer priorities in your marketing messaging – if you have a solution for it.



CDM MARKETING PRIORITIES 2024

HOW CDM IS MOST VALUED BY MARKETING



N = 982 Enterprise IT and Business Managers with budget responsibilities.

Question:
How are you using (or planning to use) your CDM platform within the Marketing organization?

We asked, “How are you using (or planning to use) your CDM platform within the Marketing organization?”
The respondents could choose from:

- This is NOT planned
- This is current/planned
- This is planned as a PRIORITY.

The graph shows the objectives selected as a PRIORITY.

Three quarters of companies want their CDM system to ensure “we market and sell ONLY to those accounts who are in market.” Commonly, just 5% of potential customers are actively buying at any moment.

Vendors take note: you should reflect these customer priorities in your marketing messaging – if you have a solution for it.



INSIGHTS: TOP MARKET TRENDS 2024



The CDM process is more than CDP technology.

Marketers need a central system with customer data that also easily connects to supply chain data, inventory data, and other kinds of data that are important in forging the customer experience.

Most enterprises with ABM projects admit that their biggest success inhibitor is “lack of deep customer insights” and must rely on tactical predictive analytics vendors instead of addressing the fundamental CDM challenge. Some ABM vendors appear in this CDM landscape for that reason.



CDM projects are difficult to define and run 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.

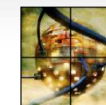
CDM also requires the creation of a marketing operations team. Every company already has many customer data silos, so a successful CDM deployment needs internal processing to mitigate conflicts arising from data management overlap. CDM requires shared IT and marketing ownership.



Consent Management is critical but often neglected in CDM projects.

Legislation like the CCPA and GDPR requires marketers to be completely transparent on how they use customer data. Marketers often assume that CDP vendors cover this, but they tend to assume the client has a separate Consent Management System.

As well as compliance pressure, another driver of transparency, for marketers, is establishing brand trust. Data ethics is now routine in the deployment of many marketing technologies, including CDM solutions.



WHAT THE DATA MEANS FOR VENDORS: CDM VENDORS NEED TO TALK MORE ABOUT BUSINESS AND MARKETING, AND LESS TECHNOLOGY



The CDM vendor landscape is bewildering.

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

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



Vendors tend to segment by their 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. agenda.



Specialist CDM/CDP vendors will prevail over the marketing clouds.

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.

There are several eCommerce platforms who can demonstrate they understand CDM and offer a viable alternative to specialist CDP vendors.





VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT - THE TOP VENDORS 2024



There are over 180 vendors in the Customer Data Platform Institute directory**. These are the Top vendors as selected by 1,000 users from buyer companies based upon product, company and service quality.

VENDOR NAME	SOLUTION(S)
ACTIONIQ	ActionIQ Composable CDP
ADOBE	Adobe Real-Time CDP
BLOOMREACH	Bloomreach Engagement
BLUECONIC	BlueConic Customer Data Platform
BLUESHIFT	Blueshift CDP
FIRST HIVE	FirstHive CDP
INSIDER	Insider CDP
KLAVIYO	Klaviyo CDP
LYTICS	Lytics CDP (Decision Engine, Cloud Connect)
MPARTICLE	mParticle CDP
NGDATA	Intelligent Engagement Platform
OPTIMOVE	Optimove Realtime CDP
QUAERO	Quaero CDP
SALESFORCE	Salesforce Customer 360
SAP	SAP Customer Data Platform
TEALIUM	Tealium Customer Data Hub
TERMINUS	Terminus CDP
TREASURE DATA	Customer Data Cloud, CDP for Marketing, for Service, for Sales, Trust for CDP
TWILIO	Twilio Segment (segment.com)

- List organized alphabetical and includes all relevant Customer Data Management solution vendors named by the survey respondents.
- Interview baseline for report are 1,000 enterprise IT and business managers with budget responsibility in enterprises globally.
- Research In Action selected those vendors which achieved the best evaluations scores from the buyers and disregarded those with fewer than 15 evaluations.

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

- ORACLE
- UBERMETRICS
- UPLAND SOFTWARE
- TOTANGO

Nine vendors are new to the list since 2020:

- TREASURE DATA
- BLOOMREACH
- BLUESHIFT LABS
- FIRST HIVE
- INSIDER
- OPTIMOVE
- KLAVIYO
- SAP
- MPARTICLE

** See <https://www.cdpinstitute.org/find-a-vendor/>. Some of the above vendors are not listed in the directory though.

NOTE: If a vendor does not respond, Research In Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.



VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT



Vendor Quick Facts

VENDOR NAME	Market Presence	Growth Rate	Customer Traction	GOOD TO KNOW
ACTIONIQ	Very Big	Very High	Strong	Aligning people, processes, and technology to deliver exceptional CX across every touchpoint at scale.
ADOBE	Very Big	Very High	Good	Real-Time CDP is a complete customer data management solution — with customer data capabilities and advanced tools built in.
BLOOMREACH	Medium	High	Good	We use real-time customer data to drive marketing efficiency, revenue, and ROI.
BLUECONIC	Very Big	Very High	Strong	Liberating data for more than 350 brands worldwide.
BLUESHIFT	Medium	High	Good	SmartHub CDP uses patented AI technology to unify, inform, and activate customer data across all channels and applications.
FIRST HIVE	Small	Medium	Medium	FirstHive is an Intelligent Customer Data Platform that builds Unique Customer Identities by extracting data from various sources.
INSIDER	Medium	High	Good	Connect data across channels, predict future behavior with AI, and automate cross-channel journeys, all from a single platform.
KLAVIYO	Small	Medium	Medium	Powers smarter digital relationships, making it easy for businesses to capture, store, analyze, and predictively use their own data.
LYTICS	Medium	Low	Good	Making behavioral and intent-based personalization simple and 100% data-driven.
MPARTICLE	Medium	Medium	Medium	mParticle makes it easy to holistically manage customer data along the entire product and customer lifecycle.
NGDATA	Big	Very High	Strong	Intelligent Engagement Platform builds multi-attribute customer data profiles to drive truly personalized customer experiences.
OPTIMOVE	Medium	High	Medium	A Customer-Led Marketing Platform, ensuring that marketing always starts with the customer instead of a campaign or product.
QUAERO	Medium	Medium	Medium	An exploration of the technology, data science and business process that power an enterprise-class Customer Data Platform.
SALESFORCE	Very Big	Medium	Good	A complete data view of your customer across marketing, commerce, sales and service.
SAP	Big	Medium	Medium	With first-party data at its core, SAP Customer Data Platform unifies customer data sources.
TEALIUM	Very Big	Very High	Strong	Leveraging customer data to fuel CX, create insights and analysis, and optimize the Martech stack.
TERMINUS	Medium	Medium	Medium	Deliver a sustainable growth advantage and revitalize the role of B2B marketing as a revenue growth engine for your business.
TREASURE DATA	Medium	High	Medium	A CDP that harmonizes an organization's data, insights, and engagement ecosystems to drive relevant, real-time CX.
TWILIO	Big	Medium	Good	Customer engagement platform to power personalized interactions and trusted global communications with customers.

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

NOTES:





- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™

EVALUATION CRITERIA

STRATEGY		
 Vision And Go-To-Market	30%	<ul style="list-style-type: none"> › 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%	<ul style="list-style-type: none"> › 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%	<ul style="list-style-type: none"> › 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%	<ul style="list-style-type: none"> › Would customers recommend this vendor in this market to their peers?

EXECUTION		
 Breadth And Depth Of Solution Offering	30%	<ul style="list-style-type: none"> › Does the solution cover all necessary capabilities expected by customers?
 Market Share And Growth	15%	<ul style="list-style-type: none"> › How big is the company's market share and is it growing above the market rate?
 Customer Satisfaction	25%	<ul style="list-style-type: none"> › How satisfied are customers with the solution and the vendor today?
 Price Versus Value Ratio	30%	<ul style="list-style-type: none"> › How do customers rate the relationship between the price and perceived value of the solution?

NOTES:

- 63% of the evaluation is based on the survey results, 37% 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: "Would you recommend this vendor in this market to your peers - Yes or No?".





VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT - THE TOP VENDORS 2024



- THE MARKET LEADERS**
- ACTIONIQ
 - ADOBE
 - BLOOMREACH
 - BLUECONIC
 - BLUESHIFT
 - FIRST HIVE
 - INSIDER
 - LYTICS
 - NGDATA
 - SALESFORCE
 - TEALIUM
 - TREASURE DATA
 - TWILIO

- THE OTHERS**
- KLAVIYO
 - MPARTICLE
 - OPTIMOVE
 - QUAERO
 - SAP
 - TERMINUS



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: MARKETING PROCESS DEFINITIONS

- **ABM (Account-Based Marketing).** A process of leveraging collected behavioral and profile data on target companies (accounts) or even individual buying decision-makers.
- **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.
- **BCM (Brand Content Management).** 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.
- **Content Distribution.** Process and systems that collate, manage and distribute marketing content both from internal and external sources.
- **Content Marketing.** Publishing digital content on the company website but also on other sites to generate additional web traffic.
- **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.
- **DAM (Digital Experience 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.
- **DXM (Digital Experience Management).** Creating and updating content, as personalized as possible to the consumer, and rendering it through all required digital communications channels (web, social, POS, etc).
- **eMail Marketing.** The process of setting up campaigns via eMail to purchased or built-up lists of contacts.
- **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.
- **MAP (Marketing Automation Platform).** Often called just “Marketing Automation”, especially in the US, this is the backbone process family to share content and run digital campaigns, nurturing and progressing leads through all digital channels.



APPENDIX: MARKETING PROCESS DEFINITIONS

- **MRM (Marketing Resource Management).** The budgeting and reporting processes consolidating management of all asset projects plus human and financial resources to support business analytics focused on the marketing organization.
- **MPM (Marketing Performance Management).** Dashboard and reporting that consolidates data from MRM, DAM and attribution reporting to list the financial return on individual and aggregated marketing investments.
- **Personalized Marketing.** Digital marketing programs that provide responsiveness and deep personalization.
- **PIM (Product Information Management).** Maintaining all product data on one system to optimize product presentation.
- **PRM (Partner Relational Management).** Processes around the channel partner (reseller, distributor, etc) relationship : recruitment, registration and classification, contractual details, information exchange, and more.
- **PMA (Partner Management Automation).** In an “as-a-service” business model based upon digital interactions channel partners are even more influential and advocational. As well as resellers/distributors, we have partners called affiliates, referrers, associations, commerce content providers, communities, groups, ambassadors, and more. PMA is the aggregation of PRM and TCMA.
- **RMA (Revenue Marketing Automation).** The full orchestration process of providing and supporting an ongoing digital relationship with individual customers, and/or customer accounts, across the full customer lifecycle and organization.
- **SEM (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.
- **Social Engagement and Advocacy.** Processes to manage and leverage interested parties within communities and on social media.
- **TCMA (Through-Channel Marketing Automation).** Management of brand content, plus programs and campaigns, promotions, and even leads, both down and up the distribution channel of business partners.
- **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.
- **WCM (Web Content Management).** The process of creating and updating content on the company website.



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