VENDOR SELECTION MATRIX™
MARKETING AUTOMATION PLATFORMS

ABRIDGED VERSION WITHOUT VENDOR SCORES AND FULL SCORECARDS

BUY THE FULL REPORT NOW

THE TOP GLOBAL VENDORS 2022

Research In Action

March 2022

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix™ reports so unique. This approach is one of the key differentiators of Research In Action in market research. For this report we interviewed 1,500 marketing and 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.

More and more companies are now focusing on digital marketing programs as society and business reacts to the COVID-19 crisis. In parallel, the focus of digital marketing itself is moving from the simple realization of new business leads to a more engaging and relationship model. This has raised questions about the type of Marketing Automation Platform (MAP) that is needed, questions such as: is lead management or engagement management the main function required now?

So, it is no surprise that our survey found that 83% of the companies who have a MAP are actively reassessing the suitability of their current installation. Nearly three quarters of companies also confirmed they are using the MAP more than previously. Over half of those companies are leveraging it for more products and services than before and/or for greater market coverage.

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 vendor landscape discovered in this survey will surprise some people and vendor staff will see new competitors they had not yet considered. The survey results make it clear that expectations from marketing executives of MAP vendors have changed dramatically.

This report provides you with a useful guide to important MAP market trends, names the top 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 study can be used as a starting point before a more detailed evaluation of vendors which fits your requirements and market evolution.

Always keeping you informed! Peter O'Neill

Research In Action GmbH
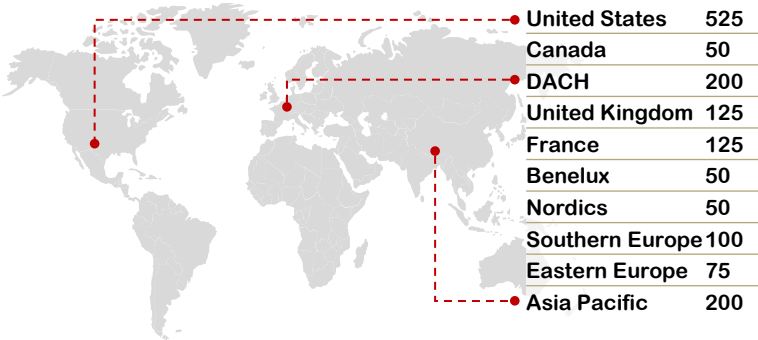**Alte Schule**
56244 Hartenfels
Germany

Peter O'Neill
Research Director
+49 174 3210020
poneill@researchinaction.eu

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OUR SURVEY DEMOGRAPHICS: MARKETING AUTOMATION

Country Breakdown

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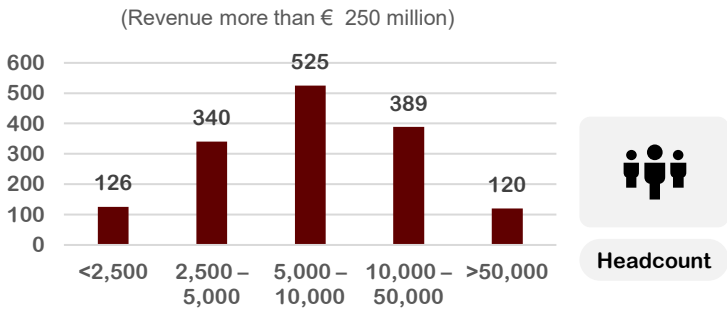
Industry Breakdown

Energy	97
Financial Services	256
Government & Non-Profit	92
Life Sciences	200
Manufacturing	350
Technology, Media & Telecoms	200
Consumer Packaged Goods & Retail	105
Professional Services	100
Travel & Transportation	100
Total	**1,500**

Company Size Breakdown

(Revenue more than € 250 million)

Headcount	Value
<2,500	126
2,500 – 5,000	340
5,000 – 10,000	525
10,000 – 50,000	389
>50,000	120

Job Title Breakdown

Business Unit Marketing Executive	179		
Corporate Marketing Executive	167	Chief Digital Office	62
VP /Director Marketing Operations	146	Sourcing/Vendor Management	87
VP/Director Demand Generation	135	COO	52
Business Executive	129	VP IT	39
VP/Director Sales	121	Chief Sales Officer	31
VP/Director Marketing Analytics	112	CFO	25
CIO	85	Chief Sales Officer	15
VP/Director Marketing Technology	66	Total	1,500
CTO	64		

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

100,000+
Data Points

1,500
Marketing and Business Managers

37%
Analyst's Opinion

63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.
We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.
The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.

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OUR MARKET IMPACT OVER 12 MONTHS

**Members In
Our Survey Panel**

125,000 IT Automation
90,000 Marketing Automation

**30 Research
Reports Published**

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

**10,000+ Active Enterprise
Survey Participants**

all with budget responsibility
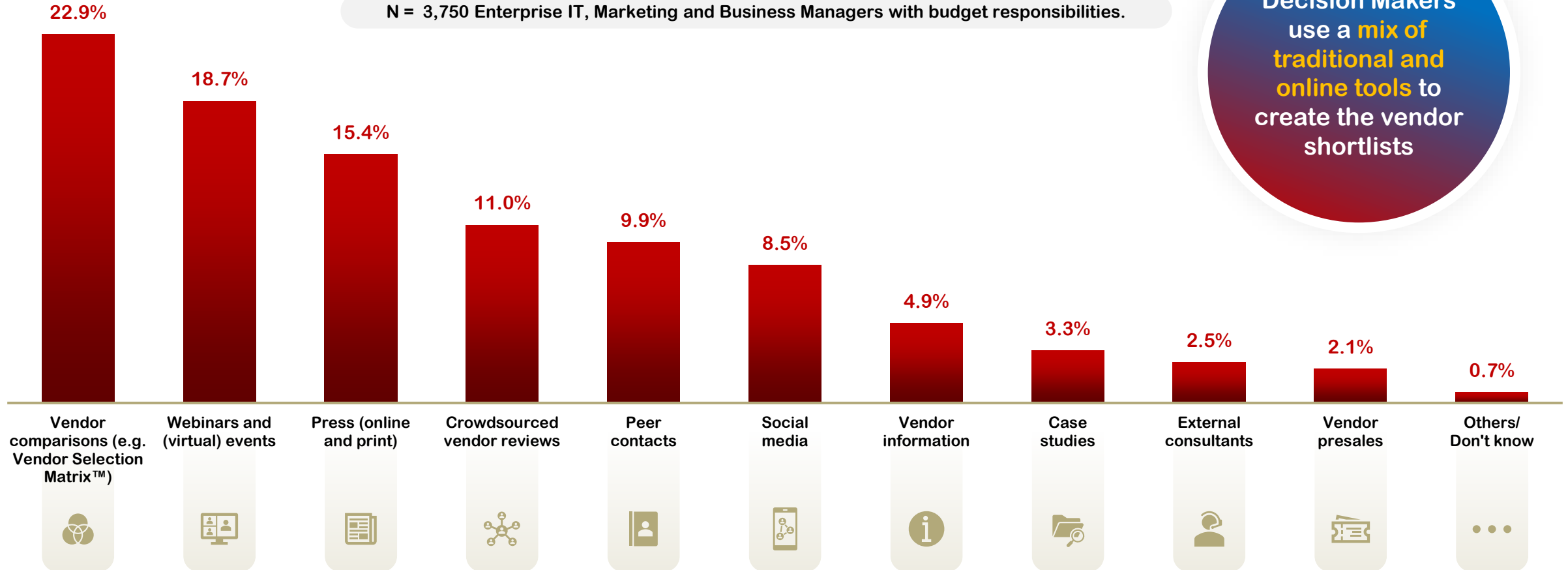
**15 Press
Releases**

2,000 views per press release (average)

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

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WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

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

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

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

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WHAT IS A MARKETING AUTOMATION PLATFORM?

- Marketing Automation Platforms (MAPs) are deployed in marketing and/or sales operations departments to support the process of collecting unqualified contacts and opportunities from various sources such as:

  - ➢ Direct mail or email responses

  - ➢ Database marketing programs

  - ➢ Other multichannel marketing campaigns

  - ➢ Offline interactions such as seminars and tradeshows

  - ➢ Social media contacts

  - ➢ Increasingly, web pages

- These applications can de-duplicate or augment the lead information, perhaps with third-party data, to form a more complete lead profile. The leads can be scored or rated, sent through a nurturing workflow, and then qualified (prioritized) as sales opportunities and output to a sales team or an outbound contact center team. Most marketing automation systems can also support content and/or promotional campaigns to the maintained lists of contacts.

- Previous surveys had described Marketing Lead Management (MLM) systems, but many marketing organizations have now progressed from being a mere collector and appraiser of individual leads to a more holistic orchestrator of customer engagement. The MLM platforms, some of them, have expanded their functionality accordingly, so a more general title should now be used. There are also new entrants.

- The fundamental goal of marketing automation applications is to deliver higher-value qualified opportunities to the sales team, though more advanced users leverage the platforms to deepen engagement with customers through the complete customer lifecycle.

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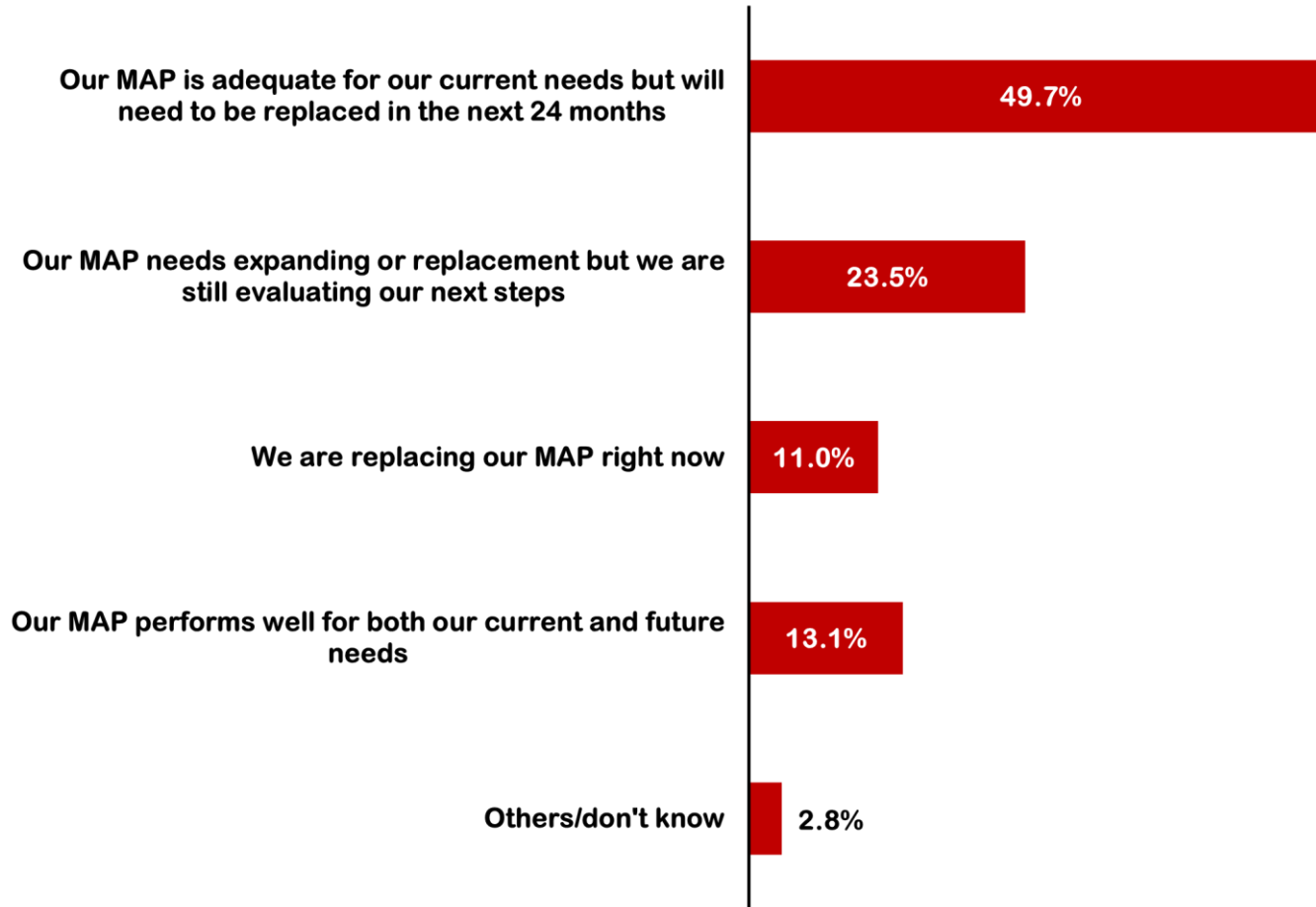
WHAT A MARKETING AUTOMATION PLATFORM DOES

MAPs are most suitable for organizations where the marketers are supporting a long, complex, highly considered, or relationship-sensitive buying process. Core functionality includes design and delivery of cross-channel multistage campaigns; capture of behavioral information that informs personalized and contextual engagement at the individual and buying group level; and assessment of lead quality and maturity at contact and/or account level. MAPs can streamline many critical business processes in the marketing organization, including:

➢ Creation/Management of web pages

➢ Personalization of website experience for visitors

➢ Segmentation analysis and list building

➢ Cross-channel campaign support

➢ Creation of content assets

➢ Analytics and reporting

➢ Engagement metrics

➢ Lead and account scoring and nurturing

➢ Integration to CRM system

➢ Customer and sales insights

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RESEARCH:

87% OF COMPANIES ARE RE-ASSESSING THEIR CURRENT MARKETING AUTOMATION PLATFORM

Our MAP is adequate for our current needs but will need to be replaced in the next 24 months	49.7%
Our MAP needs expanding or replacement but we are still evaluating our next steps	23.5%
We are replacing our MAP right now	11.0%
Our MAP performs well for both our current and future needs	13.1%
Others/don't know	2.8%

N = 902 Marketing and Business Managers with budget responsibilities who already use a MAP.

The crisis has accelerated the inevitable and the increased dependency on digital marketing has exposed weaknesses in many MAP installations. Now there is high interest in re-evaluating the contribution of installed Marketing Automation Platforms.

11% are already replacing their MAP. Another 24% of the respondents know they must migrate to something new and 50% know this will be the case for them soon.
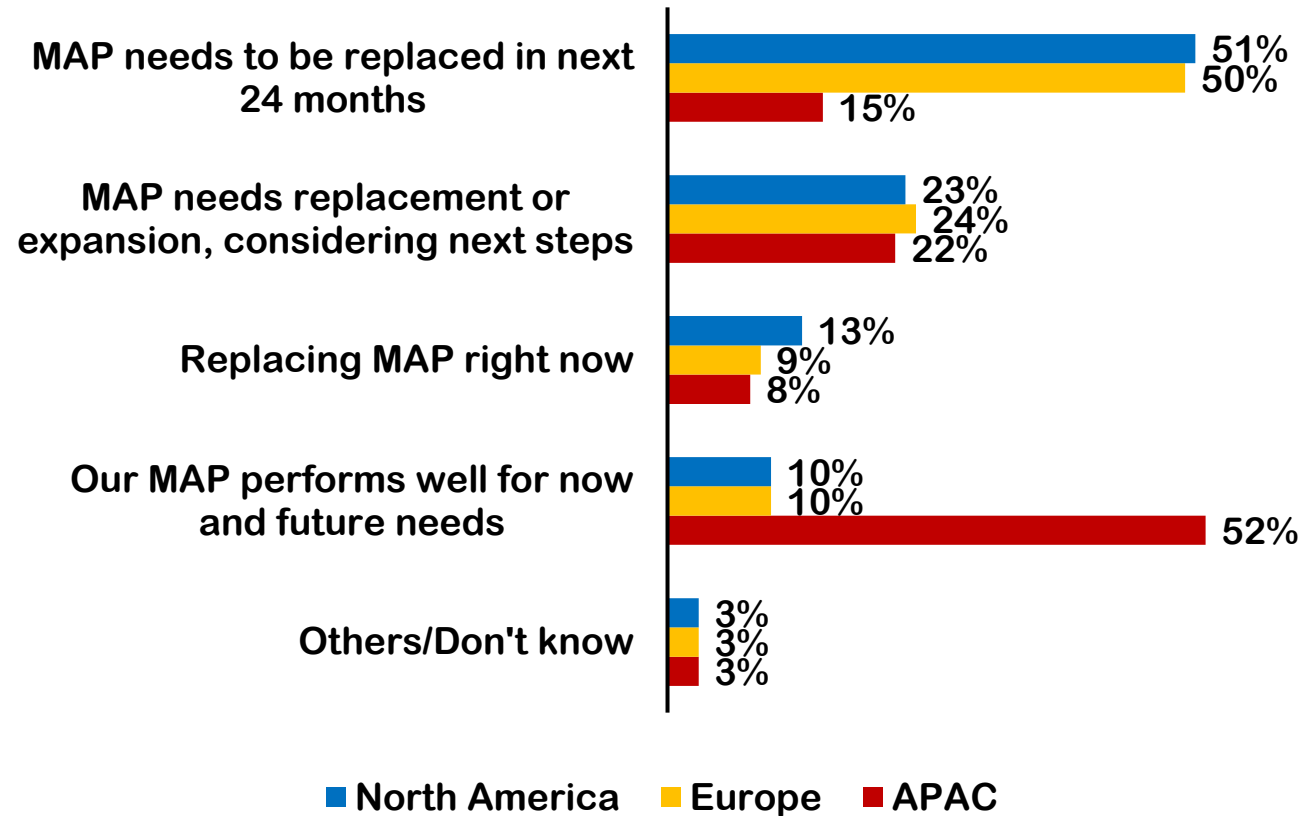
Although there are 12 market leaders, ONLY 13% of companies are satisfied with their current MAP functionality.

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RESEARCH:

REGIONS VARY IN THEIR RE-ASSESSMENT OF THE CURRENT MAP

MAP needs to be replaced in next 24 months
- North America: 51%
- Europe: 50%
- APAC: 15%

MAP needs replacement or expansion, considering next steps
- North America: 23%
- Europe: 24%
- APAC: 22%

Replacing MAP right now
- North America: 13%
- Europe: 9%
- APAC: 8%

Our MAP performs well for now and future needs
- North America: 10%
- Europe: 10%
- APAC: 52%

Others/Don't know
- North America: 3%
- Europe: 3%
- APAC: 3%

■ North America ■ Europe ■ APAC

N = 404/438/60 Marketing and Business Managers with budget responsibilities who already use a MAP in North America/Europe/APAC respectively

The re-assessment wave is a a differing status among the key regions of the world with North American enterprises already well into the replacement phase.

Asia Pacific enterprises are generally satisfied with their MAP, though 45% are repacing or re-assessing.
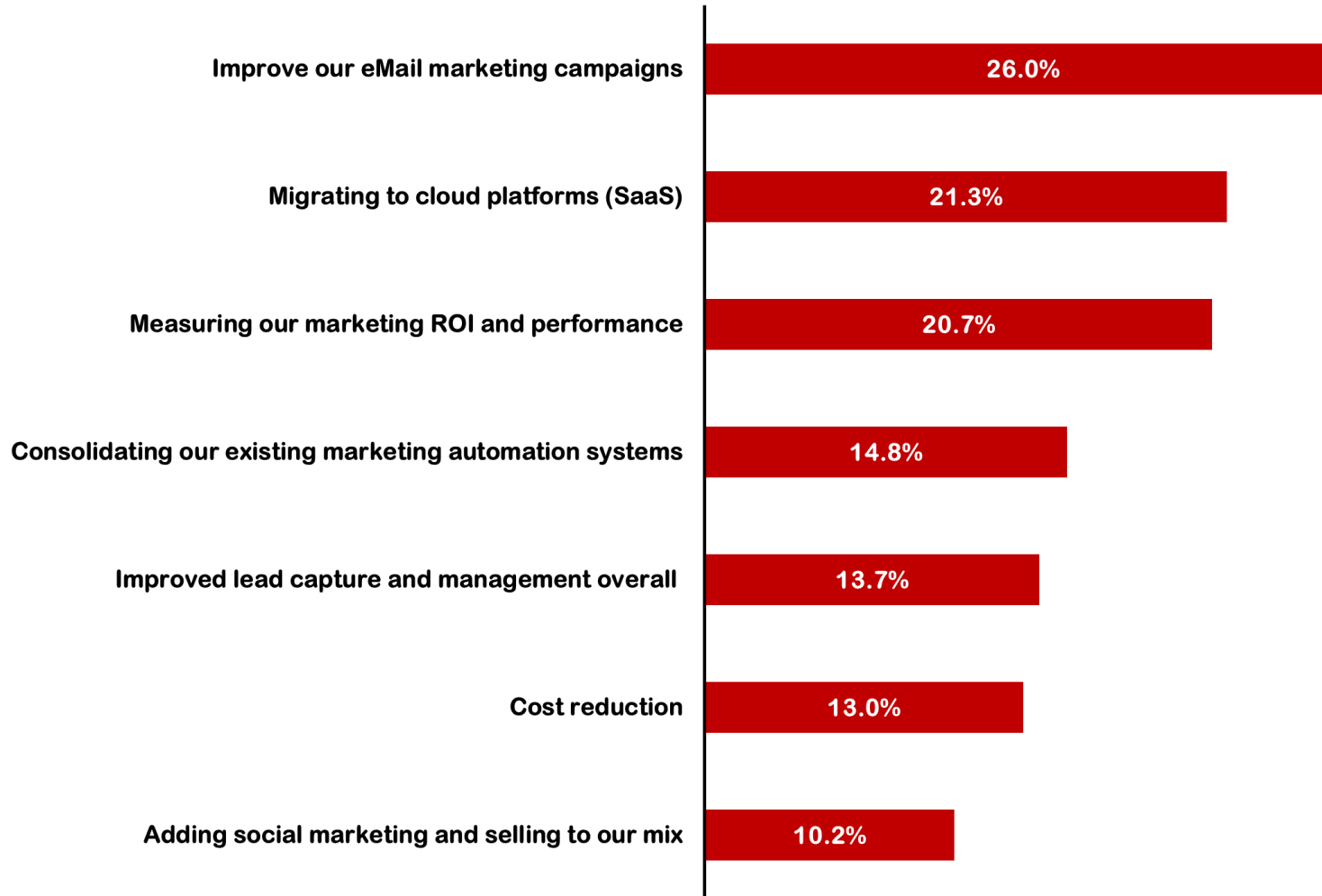
European enterprises are either already replacing their MAP (8%), know they must do so short-term (24%) or know that they must do so within 2 years (50%).

North American enterprises are either already replacing their MAP (13%), know they must do so short-term (23%) or know that they must do so within 2 years (51%).

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RESEARCH:

THE MAJOR DRIVERS FOR USING A MAP

Driver	Percentage
Improve our eMail marketing campaigns	26.0%
Migrating to cloud platforms (SaaS)	21.3%
Measuring our marketing ROI and performance	20.7%
Consolidating our existing marketing automation systems	14.8%
Improved lead capture and management overall	13.7%
Cost reduction	13.0%
Adding social marketing and selling to our mix	10.2%

N = 879 Marketing and Business Managers with budget responsibilities (Respondents could select up to three drivers)

We asked, "Which topics are driving your use of the Marketing Automation Platform? (select up to three)"

Over **one quarter** of companies are still focused on eMail campaigns. Nearly a quarter are migrating to SaaS providers. One in five is now paying more attention to marketing ROI. A significant 15% are in consolidation mode while 13% cite cost savings are an important driver for investment in MAP.
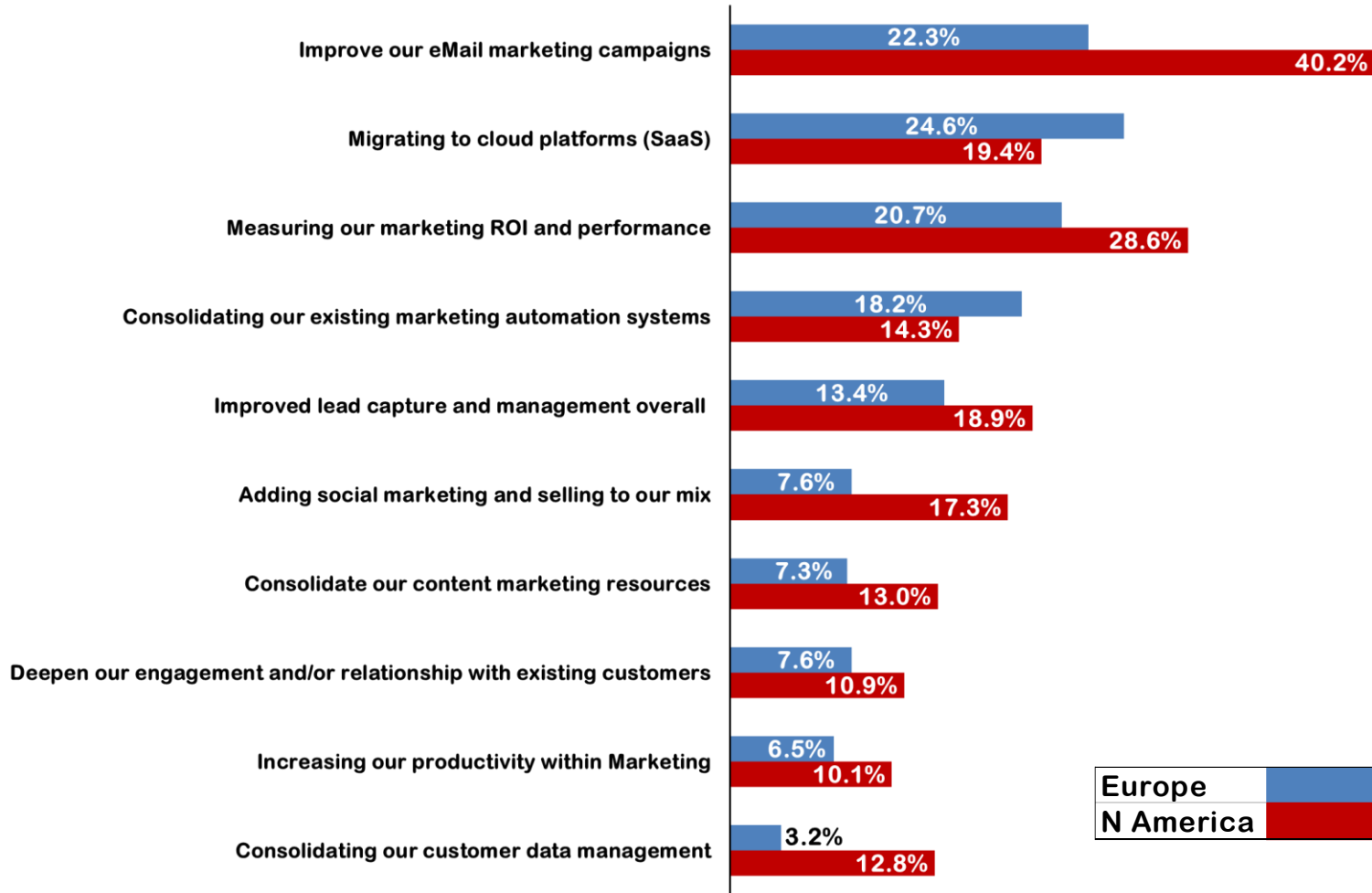
The leading topics are most likely to be important for neophyte MAP users. More mature, or even replacement, MAP buyers will focus on topics like ROI, process improvements and data management consolidation.

Although each respondent could select up to three drivers, most selected one or two only. The percentages are % of respondents.

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RESEARCH:

MAP DRIVERS DIFFER ACROSS THE REGIONS

Driver	Europe	N America
Improve our eMail marketing campaigns	22.3%	40.2%
Migrating to cloud platforms (SaaS)	24.6%	19.4%
Measuring our marketing ROI and performance	20.7%	28.6%
Consolidating our existing marketing automation systems	18.2%	14.3%
Improved lead capture and management overall	13.4%	18.9%
Adding social marketing and selling to our mix	7.6%	17.3%
Consolidate our content marketing resources	7.3%	13.0%
Deepen our engagement and/or relationship with existing customers	7.6%	10.9%
Increasing our productivity within Marketing	6.5%	10.1%
Consolidating our customer data management	3.2%	12.8%

N = 879 Marketing and Business Managers with budget responsibilities. (Respondents could select up to three drivers)

When we compare answers in North America to those in Europe, we find many differences in emphasis.

eMail campaigns are much more important to North American companies than Europeans. Similarly with the wish for ROI performance measurement.

Migration to SaaS is a bigger priority in Europe.

Adding social marketing/selling to the MAP is less important in Europe.

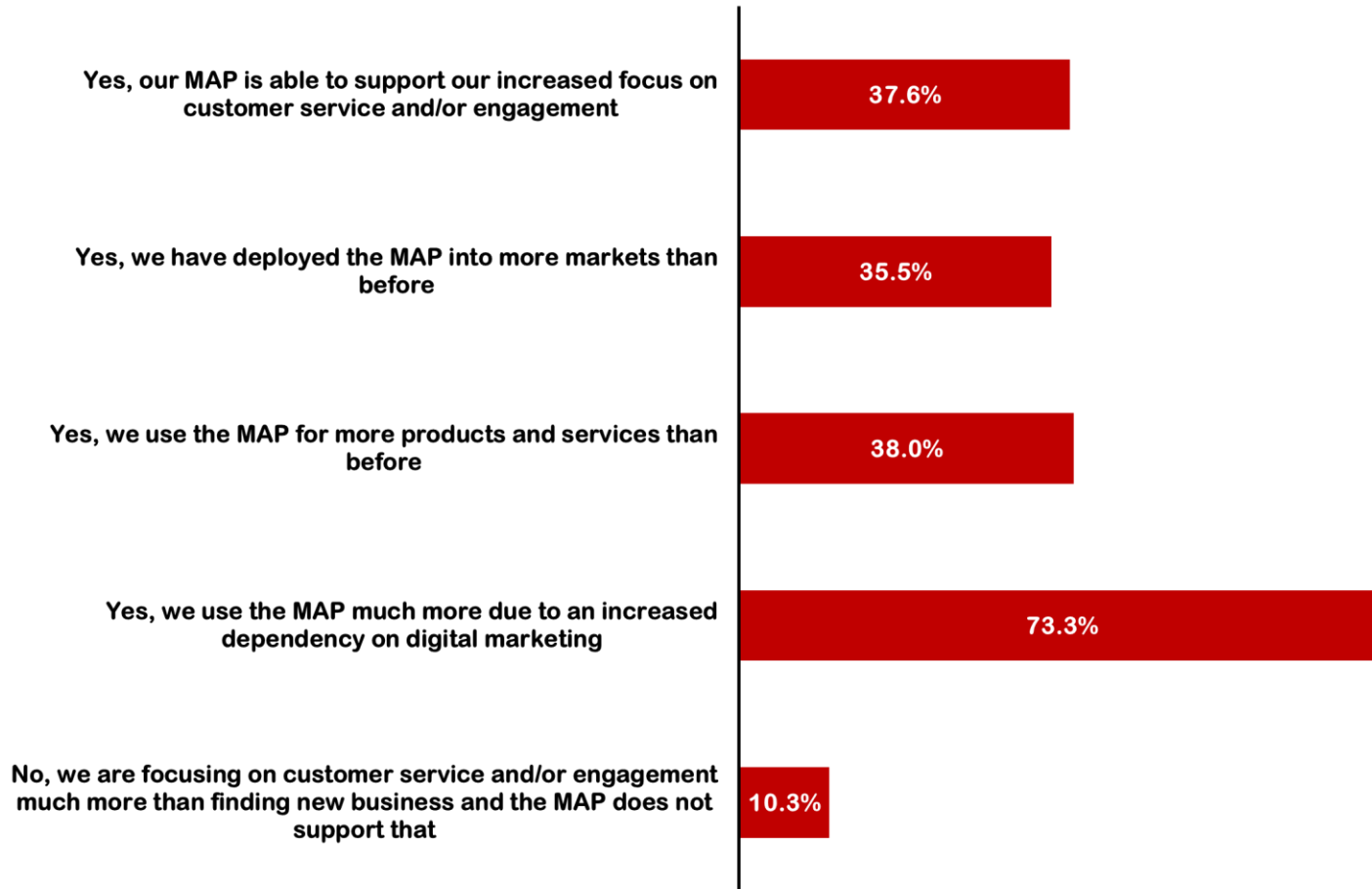Drivers that scored less than 10% in both Europe and NA have been omitted here:

- Ensuring brand and messaging consistency across the company
- Dissatisfaction with our existing marketing automation vendor
- Finding and selling to more new customers
- Better use of predictive analytics

Although each respondent could select up to three drivers, most selected one or two only. The percentages are % of respondents.

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RESEARCH:

THE IMPORTANCE AND CRITICALITY OF THE MAP HAS INCREASED

Yes, our MAP is able to support our increased focus on customer service and/or engagement — **37.6%**

Yes, we have deployed the MAP into more markets than before — **35.5%**

Yes, we use the MAP for more products and services than before — **38.0%**

Yes, we use the MAP much more due to an increased dependency on digital marketing — **73.3%**

No, we are focusing on customer service and/or engagement much more than finding new business and the MAP does not support that — **10.3%**

N = 1021 Marketing and Business Managers with budget responsibilities. (Respondents could select up to three drivers)

We asked: "Are you using your current Marketing Automation Platform (MAP) more in 2021 compared to 2019 (pre-COVID-19), and if so, how? (please select all that apply)".

Nearly **three quarters** of companies confirmed they are using the MAP more than previously. Over half of those companies are leveraging it for more products and services than before and about half for more market coverage.

While 38% can support an increased focus on customer service and engagement using the MAP, one in ten of companies **have issues** doing that.

Vendors should reflect these pain points in their marketing messaging – if they have solution for it.

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RESEARCH:

BUYERS SEE MANY CHALLENGES IN DEPLOYING A MAP

	A BIG challenge 🟦
	One of our challenges 🟥

Customer Experience is high on your company agenda but the MAP does not help
- 8%
- 33%

We are aiming for high growth and to scale at speed using the best tech
- 63%
- 30%

Marketing is reliant on data in CRM but it is not suitable for marketing purposes
- 27%
- 38%

We have got lots of data sitting in different siloed systems and struggle to get a single customer view
- 41%
- 52%

We have invested in a MAP but are not getting the promised return
- 46%
- 17%

We made a poor choice of technology in several categories
- 5%
- 34%

Integrating our MAP and data with other business systems in the company
- 42%
- 49%

Integrating our marketing processes and data across disparate marketing platforms
- 43%
- 46%

Lack of time/resources to use the technologies effectively
- 25%
- 41%

Lack of support from the technology vendors as well as over-promising
- 40%
- 20%

Staff changes (need for continuous training)
- 34%
- 39%

N = 876 Marketing and Business Managers with budget responsibilities.
(Respondents could select "not a challenge", "one of our challenges" or "a BIG challenge")

We asked: "How significant are these challenges in deploying the MAP in your organization?".

Nearly **every** company is struggling with data consolidation. 63% claim that they are not getting the promised return from their MAP (46% citing that as a BIG problem). 91% have issues integrating the MAP to other systems with, again, the share citing these issues as BIG challenges well over 40%.

Two thirds of companies lack the time/resources to use their MAP effectively while a similar proportion complain about lack of support, or over-promising, from the vendors (40% say this is a BIG challenge).

Vendors should reflect these pain points in their marketing messaging – if they have solution for it.

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INSIGHTS: TOP MARKET TRENDS 2021

- **COVID accelerated the already-inevitable move to digital and puts new demands on a MAP.** Marketers are now fully aware of the potential of chat systems, chatbots and artificial intelligence. They are seeking conversational artificial intelligence to automate more of the lead-nurturing process itself; reducing cost of sale, allowing companies to create a greater reach, and sellers to focus on the most qualified leads. Technology adoption is underway, but marketers prefer solutions that enable them to communicate with prospects and customers without appearing "creepy" or robotic..

- **AI, KM, and predictive analytics hype irritates.** The software industry preens itself on offering these technologies, even branding their code (*Einstein, Leonardo, Sensei, Watson*, etc). Business buyers do not care – it is assumed that is what modern software does. They care much more about the outcomes.

- **MAPs will become a platform across all touchpoints of customer experience.** The functions provided by MAPs are also of increasing importance to other departments and programs in a business: internal communications, customer satisfaction initiatives, customer service or support, and channel management. This will increase the installed footprint for MAP providers but also expand the user profiles that they are selling and working with.

- **Lead Management will become Engagement Management.** Over time, the prospect/lead process will change to a more holistic customer engagement process in many companies. Every industry is morphing to an "as-a-service" business model and digital channels will increasingly be used to engage with customers throughout their lifecycle: from initial research through to product use or service consumption. 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.

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INSIGHTS: TOP VENDOR CHALLENGES 2021

- **Marketing maturity defines the MAP project.** Around 40% of firms are about to invest in MLM for the first time while 83% of installed MAPs are under re-evaluation. There is an implicit ranking of marketing maturity across these projects. Lead management neophytes tend to first focus on Email campaigning and inbound lead capture. Traditional or standalone MAPs vendors will still focus on this need and use case.

  More mature teams, prompted by industry or professional experience, recognize that marketing's role must move from supporting transactions to managing relationships with prospects, and with customers; this functionality is found in more mature MAP solutions or from vendors coming from adjacent markets, such as Account-Based Marketing, where these needs are also important.

- **Buyers expect their MAP to automate their major process of marketing.** For some, that's lead generation through eMail campaigns and inbound, others care most about supporting experiences. The challenge is to recognize the appropriate scenario and match that use case in the messaging. Some vendors now prefer to present a Marketing Cloud to cover this, which is often less of a platform and more a suite of components and the components are integrated and unified over a significant period of time.

- **The Engagement Management Landscape is emerging.** The naming of *Demandbase* as a (highly) suitable MAP by many respondents is an example of the merging of MAP for demandgen and ABM. *Right On Interactive's* concept of "Customer Lifecycle Marketing" was less understood a few years ago but is now being found by marketing professional researching on their own terms. *Marketo*'s solution is now called *Engage* and continues to be marketed separately from Adobe's other solutions while still enjoying the advantages of being part of a large software corporation (an interesting contrast to *Eloqua* within *Oracle*).

- **Satisfied but ……** 12 out of the 15 vendors score as market leaders which implies high satisfaction. But 87% of MAP users are re-assessing their current MAP installation because needs have changed.

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VENDOR SELECTION MATRIX™

MARKETING AUTOMATION PLATFORMS

These are the top vendors as selected by 1,500 buyer companies based upon product, company and service quality.

VENDOR NAME	SOLUTION
ACT-ON SOFTWARE	Act-On Marketing Automation Platform
ADOBE	Adobe Marketo Engage, Adobe Campaign, Adobe Marketing Cloud
CREATIO	Marketing Creatio
DEMANDBASE	Demandbase One. ABX Cloud, Data Cloud, Sales Intelligence Cloud
EMARSYS (SAP)	Emarsys. SAP C/4HANA Lead Management, SAP Marketing Cloud
HUBSPOT	Marketing Hub
INFOR	Marketing Resource Management, Omni-Channel Campaign Management
ORACLE	Oracle Eloqua, Oracle Responsys, Oracle Marketing Cloud
PEGASYSTEMS	Pega Marketing, Customer Decision Hub
RIGHT ON INTERACTIVE	ROI Customer Lifecycle Marketing
SALESFORCE	Pardot, Salesforce Marketing Cloud
SAS INSTITUTE	SAS Marketing Products & Solutions
SELLIGENT	Selligent Marketing Cloud
SUGAR CRM	Sugar Market

This list is alphabetical and includes the Top Marketing Automation Platforms vendors and solutions named and scored by the survey respondents.

Additional vendors that were cited but did not list in the Top 14, or had less than 15 ratings:

- ACTITO
- ACTIVECAMPAIGN
- ADESTA
- KEAP
- MAILCHIMP
- UPLAND SOFTWARE
- ZOHO

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 vendor scorecard will not be written.

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VENDOR SELECTION MATRIX™
MARKETING AUTOMATION PLATFORMS

Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
ACT-ON SOFTWARE	Big	Medium	Strong	Harness behavioural data to tailor every customer experience.
ADOBE	Very Big	Medium	Good	See the whole customer journey on a single system.
CREATIO	Medium	High	Good	Multichannel marketing platform to orchestrate customer journeys and accelerate lead-to-revenue.
DEMANDBASE	Big	Very High	Good	An omnichannel customer engagement platform built to accelerate business outcomes.
EMARSYS (SAP)	Medium	High	Good	An omnichannel customer engagement platform built to accelerate business outcomes.
HUBSPOT	Very Big	Medium	Medium	Marketing software to grow traffic, convert more visitors, and run marketing campaigns at scale.
INFOR	Medium	Medium	Medium	Manage your marketing programs from one solution.
ORACLE	Big	Low	Low	Campaign design, advanced lead scoring, real-time firmographic data, and integrated sales tools.
PEGASYSTEMS	Medium	Low	Good	Hyper-personalize every interaction to stay timely and relevant – no matter what happens next.
RIGHT ON INTERACTIVE	Medium	High	Good	Engage at every stage of the journey with Customer Lifecycle Marketing (CLM).
SALESFORCE	Very Big	Medium	Low	Get to know your customer, humanize every moment, and optimize your impact from anywhere.
SAS INSTITUTE	Medium	Medium	Low	Reimagine marketing with trusted analytics and powerful decisioning.
SELLIGENT	Small	Medium	Medium	Deliver unique, highly relevant experiences at every interaction, across all channels and devices.
SUGAR CRM	Small	Low	Medium	Get busy being less busy with a clear picture of each customer.

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?".

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MARKETING AUTOMATION PLATFORMS

More Vendor Quick Facts

VENDOR NAME	Business Focus		Target Industries	Global Footprint		
	B2B	B2C		NA	EMEA	APAC
ACT-ON SOFTWARE	80%	20%	Manufacturing, Business Services, FSI	70%	20%	10%
ADOBE	70%	30%	Technology, Manufacturing, FSI, CPG, Retail, Business Services	60%	30%	10%
CREATIO	60%	40%	Business Services, FSI, Manufacturing	60%	30%	10%
DEMANDBASE	100%	0%	Technology, Business Services, Manufacturing, FSI	80%	15%	5%
EMARSYS (SAP)	10%	90%	Apparal, eCommerce, CPG, Travel & Transportation	19%	65%	16%
HUBSPOT	90%	10%	Technology, Business Services, FSI	60%	30%	10%
INFOR	60%	40%	CPG, Manufacturing, Energy, Hospitality	60%	30%	10%
ORACLE	95%	5%	Technology, FSI, Manufacturing	70%	20%	10%
PEGASYSTEMS	60%	40%	FSI, Healthcare & Life Sciences,Telco, Manufacturing, Tech.	70%	20%	10%
RIGHT ON INTERACTIVE	60%	40%	Manufacturing, CPG, FSI	90%	5%	5%
SALESFORCE	85%	15%	Technology, FSI, Healthcare & Life Sciences	65%	25%	10%
SAS INSTITUTE	60%	40%	CPG, FSI, Retail, Telco	50%	45%	5%
SELLIGENT	60%	40%	CPG, Retail, Business Services	80%	15%	5%
SUGAR CRM	60%	40%	Technology, FSI, Healthcare & Life Sciences	80%	15%	5%

Business Focus:
• The Research in Action estimated split between Business-to-Business and Business-to-Consumer revenues

Target Industries abbreviations :
• CPG – Consumer Product Goods
• FSI - Financial Service Institutes (including Insurance)
• Telco – Communications Service Providers

Global Footprint
The Research in Action estimated revenue split across geographic regions is MAP specific.

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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 today?
✔	**Price Versus Value Ratio**	**30%**	› 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?".

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VENDOR SELECTION MATRIX™

MARKETING AUTOMATION PLATFORMS

STRATEGY LEADER

Marketing Automation Platforms
The Top Global Vendors 2022

MARKET LEADER

STRATEGY

CHALLENGER

EXECUTION LEADER

EXECUTION

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Market Leaders
ACT-ON
ADOBE
CREATIO
DEMANDBASE
EMARSYS(SAP)
HUBSPOT
ORACLE
PEGASYSTEMS
RIGHT ON INTERACTIVE
SELLIGENT
SUGAR CRM

Strategy Leader
SALESFORCE

Execution Leader
INFOR

Challenger
SAS INSTITUTE

Public version shown on the Research in Action website

Note: Vendors are listed alphabetically.

VENDOR SELECTION MATRIX™

MARKETING AUTOMATION PLATFORMS

Act-On is a market leader for Marketing Automation Platforms, harnessing behavioural data to tailor every customer experience.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

AVAILABLE IN THE FULL REPORT VERSION

GENERAL:

Founded in 2008 and based in Portland, OR, USA, Act-On has more than 4,000 customers globally. It continues to be a favored vendor to replace failed first-generation lead management projects.

In 2019, it re-architected its SaaS solution, modernizing the user interface, as well as improving scalability and performance to become even more interesting to larger enterprises.

Act-On focuses its messaging on the insurance and financial services, business services, manufacturing, and high-tech sectors, with industry-specific packaging and accelerators (templates) for rapid onboarding and time to value.

STRATEGY:

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EXECUTION:

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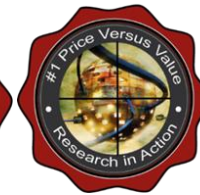
Notes:
- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.

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MARKETING AUTOMATION PLATFORMS

Adobe is a market leader for Marketing Automation Platforms, enabling clients to see the whole customer journey on a single system.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
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AVAILABLE IN THE FULL REPORT VERSION

GENERAL:

Adobe is the largest vendor focused on marketing software in the world, headquartered in California, and its MAP functions are offered within the Experience Cloud: the separately-branded Marketo Engage for pure B2B organizations and Adobe Campaign, based on its older Neolane acquisition for B2C and B2B2C organizations.

Marketo Engage is profiled separately in this report.

Adobe deployments can be relatively expensive and implementation complexity often means hiring professional services teams to support an implementation and further raising costs.

STRATEGY:

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EXECUTION:

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MARKETING AUTOMATION PLATFORMS

Creatio is a market leader for Marketing Automation Platforms, with a multichannel platform to orchestrate customer journeys and accelerate lead-to-revenue.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

GENERAL:

The Marketing Creatio solution is designed to work with Creatio's sales and service-oriented applications, all of which are integrated on a single platform. As a low-code platform, most clients modify and extend the application to their specific needs.

Its operations are mostly focused in EMEA and North America.

Creatio has recently enhanced its channel marketing attribution models for organizations with complex partner structures and AI-based look-alike audience creation functionality to identify audiences most likely to convert.

STRATEGY:

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VENDOR SELECTION MATRIX™
MARKETING AUTOMATION PLATFORMS

Demandbase is a market leader for Marketing Automation Platforms with a GTM engagement platform using account intelligence to orchestrate all stages of a buying journey.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation	AVAILABLE IN THE FULL REPORT VERSION	Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

GENERAL:

Founded in 2006 in San Francisco, Demandbase is already a leading ABM platform that helps B2B marketers identify, engage, close and measure progress against best-fit accounts.

The vendor acquired Engagio in 2020 and followed that with DemandMatrix and InsideView in 2021. The new Demandbase now has 750+ employees and nearly 1500 customers ranging from mid-sized companies to enterprises such as Accenture, Adobe, DocuSign, GE, and Salesforce, with 20% of its customer base being outside of the US.

In February 2022, the vendor announced a new branding and vision of transforming how B2B companies go to market by injecting Account Intelligence into every step of the B2B buyer journey.

STRATEGY:

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MARKETING AUTOMATION PLATFORMS

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

AVAILABLE IN THE FULL REPORT VERSION

Emarsys is a market leader for Marketing Automation Platforms, with an omnichannel customer engagement platform built to accelerate business outcomes.

GENERAL:

This cross-channel campaign management vendor was acquired by SAP in November 2020. However, the respondents in this survey called out and scored Emarsys specifically.

Emarsys has over 800 employees in 13 offices around the world. Working with a network of over 300 partners, it has over 1700 customers.

The vendor is actively focused on aligning the outstanding Emarsys personalization technology with the existing SAP Marketing Cloud, integrating marketing apps with SAP Commerce Cloud, as well as fully rolling out the SAP Customer Data Platform.

SAP packages its solutions based on industry-specific use cases and marketing maturity to maximize adoption and benefits realization.

STRATEGY:

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MARKETING AUTOMATION PLATFORMS

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
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AVAILABLE IN THE FULL REPORT VERSION

Hubspot is a market leader for Marketing Automation Platforms, providing software to grow traffic, convert more visitors, and run marketing campaigns at scale.

GENERAL:

Still managed by the founders, Hubspot is the most successful provider of marketing software software to small-medium businesses (10-2,000 employees) with close to 130,000 customers in 120 countries.

Originally providing a feature-rich Marketing hub solution, Hubspot now offers Marketing, Service and Sales software suites plus a content management system and an operations center. It has expanded its product and sales coverage to all company sizes – Hubspot now has over 8,000 enterprise customers.

Already, 25% of its revenue is from Sales and Service.

STRATEGY:

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EXECUTION:

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VENDOR SELECTION MATRIX™
MARKETING AUTOMATION PLATFORMS

Oracle is a market leader for Marketing Automation Platforms, with campaign design, advanced lead scoring, real-time firmographic data, and integrated sales tools.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

AVAILABLE IN THE FULL REPORT VERSION

GENERAL:

Oracle is one of the largest software providers in the world, headquartered in California, and its marketing software is used by many enterprises who have large contact databases and moderate-to-sophisticated requirements.

Oracle's Cloud-based Eloqua solution has a wide range of B2B multichannel lead management capabilities. Now well integrated with Oracle's Marketing Cloud Suite, Eloqua can also work with other CRM systems, such as Salesforce.

Oracle presents a visionary marketing Cloud concept for the modern marketer with a clear focus on the enterprise market, but it is also presented often by Oracle generalist salespeople who are not so well versed in the details of marketing automation.

STRATEGY:

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EXECUTION:

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VENDOR SELECTION MATRIX™
MARKETING AUTOMATION PLATFORMS

Pegasystems is a market leader for Marketing Automation Platforms, helping to hyper-personalize every interaction to stay timely and relevant.

STRATEGY	RESULT
Vision And Go-To-Market	
Innovation And Differentiation	AVAILABLE IN THE FULL
Viability And Execution Capabilities	REPORT VERSION
Recommendation Index	

EXECUTION	RESULT
Breadth And Depth Of Solution Offering	
Market Share And Growth	
Customer Satisfaction	
Price Versus Value Ratio	

GENERAL:

The website says "we're Pegasystems. But you can call us Pega"

Pega's marketing automation technology is Customer Decision Hub, a part of the Pega Infinity product suite.

Pega Scenario Planner is used by marketers to simulate next-best-action scenarios by testing which products or product mix provide the best sales opportunities.

Pegasystems targets large organizations across a global footprint, with its own strong presence in EMEA and North America. Pega clients are mostly in high-consideration B2C verticals such as telecommunications, financial services and insurance.

STRATEGY:

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EXECUTION:

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VENDOR SELECTION MATRIX™

MARKETING AUTOMATION PLATFORMS

Right on Interactive is a market leader for Marketing Automation Platforms, helping clients to engage at every stage of the journey with Customer Lifecycle Marketing.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

AVAILABLE IN THE FULL REPORT VERSION

GENERAL:

Right On Interactive (ROI) first released its MLM solution as a "customer life-cycle marketing system" in 2013, promising to help clients win, retain, and grow their customers for maximum lifetime value.

Demonstrating remarkable foresight, the vendor already talked about data integration, deep segmentation, and even customer experience nearly a decade ago The offering resonates with companies having a more sophisticated understanding of marketing, typically companies with an ongoing subscription-based business model.

ROI is headquartered in the US, has several hundred clients and its SaaS-based business is now growing at around 50%.

STRATEGY:

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VENDOR SELECTION MATRIX™
MARKETING AUTOMATION PLATFORM

Selligent is a market leader for Marketing Automation Platforms, delivering unique, highly relevant experiences at every interaction, across all channels and devices.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

AVAILABLE IN THE FULL REPORT VERSION

GENERAL:

Selligent Marketing Cloud (Selligent) has changed considerably in recent yers. In 2016, HGGC acquired Selligent and merged it with StrongView. CM Group then bought Selligent from HGGC in 2020 to make it part of the group's family of martech solutions.

Over 80% of Selligent's 700 customers are in Europe, with the rest mostly in North America: predominantly midmarket companies in the retail, consumer goods, media and entertainment, travel and hospitality, and financial services sectors.

STRATEGY:

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MARKETING AUTOMATION PLATFORMS

SugarCRM is a market leader for Marketing Automation Platforms, helping clients to get busy being less busy with a clear picture of each customer.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market		Breadth And Depth Of Solution Offering	
Innovation And Differentiation		Market Share And Growth	
Viability And Execution Capabilities		Customer Satisfaction	
Recommendation Index		Price Versus Value Ratio	

AVAILABLE IN THE FULL REPORT VERSION

GENERAL:

The Sugar Market solution, based originally on the 2019 acquisition of Salesfusion, enables marketers to develop, execute and refine multichannel lead management campaigns in conjunction with the company's Sugar Sell and Sugar Serve modules.

Sugar acquired Node.io in 2020 to add AI analytics and predictions to Sugar Market and its other offerings. This month, it announced the acquisition of Danish vendor AddOptify to support guided selling and customer journey orchestration

Sugar's operations and customers are mainly in North America. It focuses on SMBs and midsize organizations in the technology, manufacturing and life sciences sectors.

STRATEGY:

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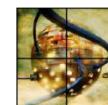**RESEARCH IN ACTION**
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THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

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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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CONTACT

Peter O'Neill, Research Director
+49 174 3210020
poneill@researchinaction.eu

RESEARCH IN ACTION
independent research & consulting

Research In Action GmbH
Alte Schule
56244 Hartenfels
Germany

Office: +49 2626 291251
Fax: +49 2626 2248904
Email: info@researchinaction.eu

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