

The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016

The 15 Providers That Matter Most And How They Stack Up

by Rusty Warner

May 31, 2016

Why Read This Report

In our 26-criteria evaluation of cross-channel campaign management (CCCM) providers, we identified the 15 most significant ones — Adobe, Emarsys, Experian Marketing Services, IBM, Oracle, Pegasystems, Pitney Bowes, RedPoint Global, Salesforce, SAS, SDL, Selligent, SmartFocus, Teradata, and Teradata Marketing Applications — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals make the right choice.

Key Takeaways

Four Vendors Lead With Comprehensive CCCM Offerings

Forrester's research uncovered a market in which Adobe, Salesforce, SAS, and Oracle lead the pack. IBM, Pitney Bowes, SmartFocus, Pegasystems, RedPoint Global, Emarsys, Experian Marketing Services, and Selligent offer competitive options. Teradata, Teradata Marketing Applications, and SDL lag behind due to restructuring initiatives.

B2C Marketing Pros Rely On CCCM To Drive Customer Interactions

The CCCM market is evolving as more B2C marketing professionals build on their CCCM foundations to deliver contextually relevant customer interactions. Critical capabilities now include advanced analytics, real-time interaction management, and digital channel delivery versus traditional marketing automation tools.

Leading Solutions Combine Systems Of Insight And Engagement

As schedule-based CCCM workflows become outdated and less effective, improved capabilities for real-time interactions and digital marketing will dictate which providers lead the pack. Vendors that can underpin interactive capabilities with customer data management, advanced analytics, and agile optimization tools position themselves to successfully meet today's CCCM requirements.

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Forrester conducted product evaluations in February 2016 and evaluated 15 vendor companies: Adobe, Emarsys, Experian Marketing Services, IBM, Oracle, Pegasystems, Pitney Bowes, RedPoint Global, Salesforce, SAS, SDL, Selligent, SmartFocus, Teradata, and Teradata Marketing Applications.

Related Research Documents

[The Forrester Wave™: Cross-Channel Campaign Management, Q3 2014](#)

[The Forrester Wave™: Enterprise Marketing Software Suites, Q2 2016](#)

[The Forrester Wave™: Real-Time Interaction Management, Q3 2015](#)

The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016

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CCCM Sheds Its Direct Marketing Lineage

In the age of the customer, B2C marketers must assemble marketing technology ecosystems that drive contextually relevant customer experiences.¹ It's no longer good enough to simply send a one-off message or deliver inconsistent content: today's campaigns must spark continuous cycles of interaction that build a foundation for long-term loyalty and engagement.² But transforming traditional CCCM environments for real-time customer context is a challenge for B2C marketers, and they want solutions that facilitate greater customer understanding and more consistent cross-channel interactions.³ This means that CCCM vendors must now:

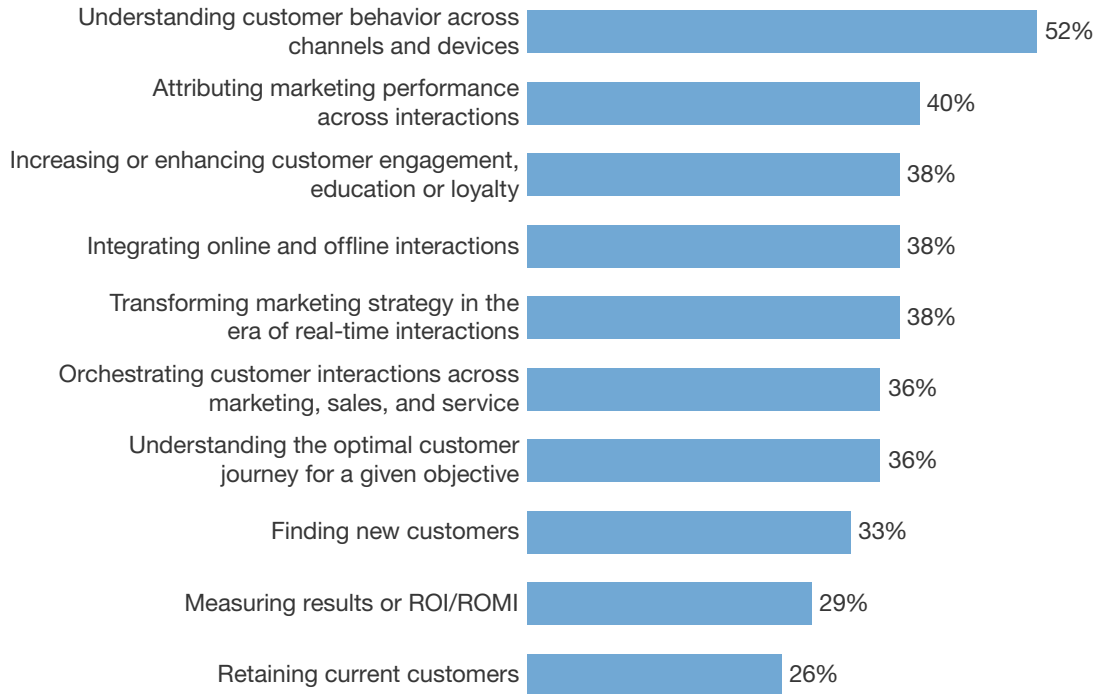
- › **Double down on customer data integration and advanced analytics.** Customer references for the CCCM vendors in this study told us that their number one challenge is understanding customer behavior across channels and devices (see Figure 1). They further struggle with attribution, marketing performance measurement, and understanding optimal customer journeys. These challenges underscore the top two areas where customers believe their vendors can improve: integration with third-party applications required for cross-channel orchestration and marketer-friendly predictive analytics and optimization capabilities.⁴
- › **Reconcile cross-channel interactions.** B2C marketers have proven their proficiency in executing email campaigns, and 95% of CCCM users have adopted email.⁵ But only around half have taken responsibility for web personalization or eCommerce offers, and even fewer have incorporated social, mobile, and online advertising into their CCCM environments. What's holding them back? Most CCCM vendors have incorporated email as core functionality, but integration with other channels has lagged behind. Thirty-one percent of customer references for this evaluation told us their vendors need to provide more functionality that supports cross-channel interactions.⁶
- › **Account for offline channels even outside marketing's purview.** As B2C marketers lead the charge for customer obsession across their firms, they need to integrate their CCCM tools with technologies that support all customer-facing staff. Nearly two-thirds of B2C marketers leverage print campaigns, but offline channels such as contact centers, agent desktops (or tablets or mobile devices), and networked devices such as kiosks, ATMs, or point-of-sale (POS) terminals typically belong to other operational functions.⁷ CCCM references told us that integrating online and offline interactions and orchestrating interactions across marketing, sales, and service, were among their key challenges.
- › **Address real-time, contextual marketing requirements.** The transition from CCCM to the era of real-time interactions is one of the top three challenges for CCCM users. This is as much an organizational issue as a technology issue, since B2C marketers must change their approaches to customer recognition, contextually relevant offers, cross-channel interactions, measurement, and optimization.⁸ As they revamp their customer interaction processes, they are looking for their CCCM vendors to support them with more real-time interaction capabilities.

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FIGURE 1 B2C Marketers Face Myriad CCCM Challenges**“What are the biggest marketing challenges you expect to face in the next two years?”**

Please select up to five challenges:



Source: Forrester's Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey

CCCM Requirements Evolve To Focus On Interactions

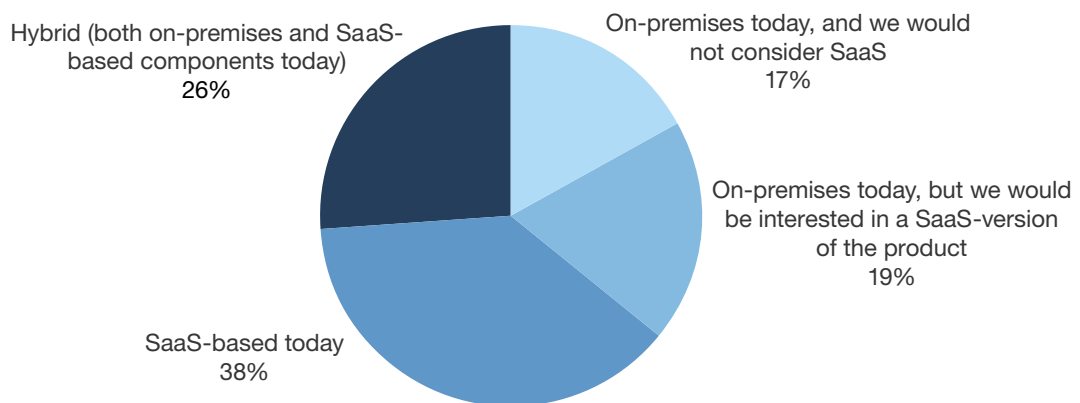
The lines between CCCM and real-time interaction management (RTIM) are blurring as B2C marketers transition from executing scheduled campaigns to orchestrating contextually relevant interactions with individual customers. CCCM buyers are pushing their vendors to provide more cross-channel interaction functionality, and the 15 vendors in this study operate in a CCCM market where:⁹

- › **B2C marketers focus on insights-driven customer interactions.** Effective CCCM solutions enable B2C marketers to quickly understand customer behavior and further empower them to take immediate action via marketing automation and channel delivery tools. That's why Forrester's vision for CCCM puts equal weighting on customer analytics and cross-channel campaign execution. Vendors that combine the requisite systems of insights and systems of engagement functionality in an integrated CCCM solution enjoy the highest traction with B2C marketing technology buyers.¹⁰

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- › **CCCM buyers embrace more flexible deployment models.** When we conducted the 2014 Forrester Wave™ for CCCM, we focused on vendors that offered an on-premises deployment option, but 26% of their customer references were using software-as-a-service (SaaS) solutions, and 43% more said they would consider SaaS.¹¹ Today's B2C marketers are looking for more flexible deployment options to keep pace with customer interactions; 38% are using SaaS solutions, 26% have hybrid models, and more than half of the remainder have on-premises solutions but said they would consider SaaS alternatives (see Figure 2).
- › **Digital marketing vendors offer expanded cross-channel capabilities.** In the 2012 Forrester Wave for CCCM, we predicted that email service providers like Neolane, ExactTarget, and Responsys would shake up the traditional CCCM market.¹² Adobe, Salesforce, and Oracle have expanded the cross-channel digital interaction capabilities of these tools following their respective acquisitions. Similarly, IBM augments its CCCM solution (based on Unica) with digital tools from its Marketing Cloud (based on Silverpop), and Selligent is merging with StrongView. Both SDL and Teradata Marketing Applications offer fully integrated digital capabilities, based on acquired assets.
- › **Traditional CCCM vendors provide real-time interaction management.** Vendors like SAS, Pegasystems, Pitney Bowes, RedPoint Global, and Teradata capture real-time data feeds and offer real-time decision engines to complement their CCCM offerings. They address next-best-action requirements for both online and offline channels, though their online capabilities lag those of leading digital vendors. Vendors like SmartFocus, Emarsys, and Experian Marketing Services provide interactive customer life-cycle marketing for consumer-focused verticals, especially digital interactions in the retail sector.

FIGURE 2 CCCM Buyers Are Looking For More Flexible Deployment Options**“Which statement best describes the deployment of your marketing technology solution?”**

Source: Forrester's Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey

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Cross-Channel Campaign Management Evaluation Overview

To assess the state of the CCCM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top CCCM vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 26 criteria, which we grouped into three high-level buckets:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current CCCM offering. We looked at the strength of each vendor's functionality for customer data management and analytics, campaign design and execution, and measurement and optimization.
- › **Strategy.** A vendor's position on the horizontal axis indicates Forrester's assessment of its strategy and approach to the market. We compared the product strategies of each vendor in the context of Forrester's vision for the CCCM market to assess how well each vendor is serving current customer needs, as well as anticipating future needs through product investments and partnership strategies.
- › **Market presence.** To determine the size of each vendor's CCCM business, we evaluated the vendor's target market, total revenue for its CCCM solution, and the number of its current enterprise customers using its solution to address at least three channels.

Evaluated Vendors Focus On Enterprise CCCM Use Cases

Forrester included 15 vendors in the assessment: Adobe, Emarsys, Experian Marketing Services, IBM, Oracle, Pegasystems, Pitney Bowes, RedPoint Global, Salesforce, SAS, SDL, Selligent, SmartFocus, Teradata, and Teradata Marketing Applications. Each of these vendors (see Figure 3):

- › **Provides an enterprise CCCM solution.** Each vendor included in this Forrester Wave evaluation has a branded proprietary technology platform that enables B2C marketing professionals to manage customer data, perform customer analytics, design customer communications and campaigns, orchestrate cross-channel customer interactions, and measure marketing performance for ongoing optimization.
- › **Empowers B2C marketers with CCCM tools.** The vendors we included in this Forrester Wave evaluation deliver marketer-friendly tools that empower B2C marketers to better understand their customers and deploy consistent, relevant, and engaging campaigns across at least three online and/or offline channels.
- › **Serves large enterprises in multiple geographies and verticals.** Each vendor included in this Forrester Wave possesses a significant base of enterprise-class customers that are using its solution to support CCCM across at least two geographic regions and at least two vertical sectors.

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FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Date evaluated
Adobe	Adobe Campaign	Q1 2016
Emarsys	B2C Marketing Cloud	Q1 2016
Experian Marketing Services	Experian Marketing Suite	Q1 2016
IBM	IBM Marketing Solutions	Q1 2016
Oracle	Oracle Cross-Channel Orchestration	Q1 2016
Pegasystems	Pega Marketing	Q1 2016
Pitney Bowes	EngageOne Communications Suite	Q1 2016
RedPoint Global Inc.	RedPoint Convergent Marketing Platform	Q1 2016
Salesforce	Salesforce Marketing Cloud	Q1 2016
SAS	SAS Customer Intelligence	Q1 2016
SDL	SDL Campaigns	Q1 2016
Selligent	Selligent Campaign	Q1 2016
SmartFocus	The Message Cloud	Q1 2016
Teradata	Teradata Campaign Management	Q1 2016
Teradata Marketing Applications	Teradata Integrated Marketing Cloud	Q1 2016

Vendor selection criteria

1. The vendor offers enterprise marketing technology that supports customer data management, analytics, measurement, campaign design, and cross-channel offer delivery.
2. The vendor provides marketer-friendly tools that facilitate customer understanding and deployment of consistent, relevant, and engaging campaigns across at least 3 online and offline channels.
3. The vendor has a strong enterprise B2C and global focus, with at least \$25 million in revenue across at least two geographic regions and at least 25 enterprise B2C customers using the solution to support multiple channels.

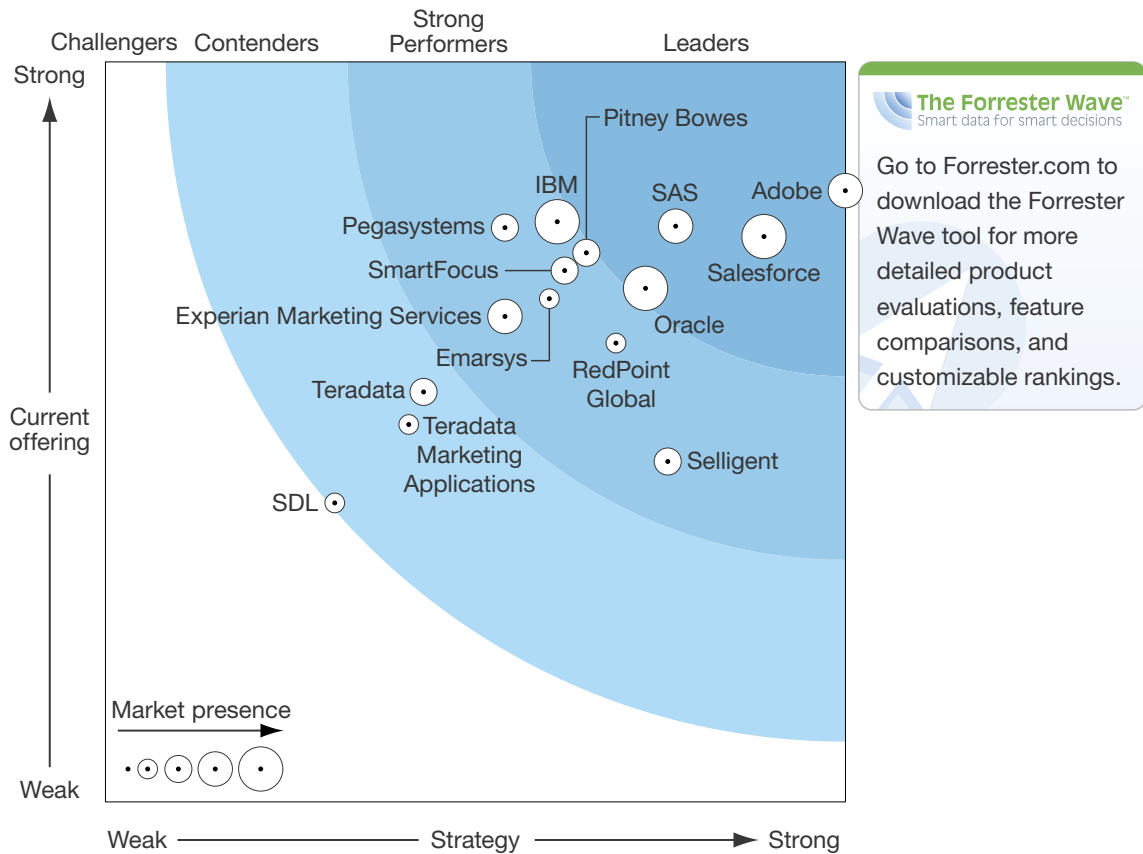
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Vendor Profiles

This evaluation of the CCCM market is intended to be a starting point only (see Figure 4). We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

FIGURE 4 The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016



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FIGURE 4 The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016 (Cont.)

	Forrester's Weighting	Adobe	Emarsys	Experian Marketing Services	IBM	Oracle	Pegasystems	Pitney Bowes	RedPoint Global
CURRENT OFFERING	50%	4.13	3.40	3.28	3.92	3.47	3.88	3.71	3.10
Customer data management	15%	5.00	3.00	3.35	3.30	4.35	4.30	4.65	4.30
Customer analytics	15%	3.00	2.65	1.95	4.00	1.60	5.00	5.00	3.60
Campaign design	15%	4.10	3.60	3.40	4.70	4.20	4.10	3.90	4.20
Campaign execution	30%	4.50	3.55	3.05	4.05	3.95	3.35	2.45	2.25
Measurement and optimization	15%	4.40	3.00	3.70	4.00	3.05	3.75	4.30	2.70
User experience	10%	3.00	5.00	5.00	3.00	3.00	3.00	3.00	2.00
STRATEGY	50%	5.00	3.00	2.70	3.05	3.65	2.70	3.25	3.45
Road map	45%	5.00	3.00	3.00	4.00	4.00	3.00	2.00	2.00
Performance	30%	5.00	3.00	2.00	0.00	3.00	3.00	5.00	5.00
Partner ecosystem	20%	5.00	3.00	3.00	5.00	4.00	1.00	3.00	4.00
Delivery models	5%	5.00	3.00	3.00	5.00	3.00	5.00	5.00	5.00
MARKET PRESENCE	0%	3.50	2.00	4.00	4.50	5.00	2.50	2.50	2.00
Revenue	50%	3.00	2.00	5.00	4.00	5.00	3.00	2.00	1.00
Customers	50%	4.00	2.00	3.00	5.00	5.00	2.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 4 The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016 (Cont.)

	Forrester's Weighting	Salesforce	SAS	SDL	Selligent	SmartFocus	Teradata	Teradata Marketing Applications
CURRENT OFFERING	50%	3.82	3.89	2.02	2.30	3.59	2.77	2.55
Customer data management	15%	3.95	4.30	2.70	3.05	3.70	3.30	2.70
Customer analytics	15%	2.30	5.00	1.95	1.95	3.35	3.30	3.05
Campaign design	15%	4.70	4.30	2.30	3.00	4.00	3.20	2.60
Campaign execution	30%	3.75	2.65	1.90	2.30	3.45	2.00	2.35
Measurement and optimization	15%	3.70	5.00	2.05	2.05	2.65	3.30	3.30
User experience	10%	5.00	3.00	1.00	1.00	5.00	2.00	1.00
STRATEGY	50%	4.45	3.85	1.55	3.80	3.10	2.15	2.05
Road map	45%	4.00	4.00	1.00	3.00	3.00	2.00	1.00
Performance	30%	5.00	4.00	1.00	5.00	4.00	2.00	2.00
Partner ecosystem	20%	5.00	3.00	3.00	4.00	2.00	2.00	4.00
Delivery models	5%	3.00	5.00	4.00	3.00	3.00	5.00	4.00
MARKET PRESENCE	0%	5.00	4.00	1.50	2.50	3.00	2.50	2.00
Revenue	50%	5.00	4.00	1.00	2.00	2.00	2.00	2.00
Customers	50%	5.00	4.00	2.00	3.00	4.00	3.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders

- › **Consider Adobe for insights-driven, content-rich campaigns.** Adobe Campaign is a marketer-friendly CCCM solution in its own right, and integrations with Adobe Analytics and Experience Manager extend analytics and content capabilities. Further integrations with other Adobe Marketing Cloud components address social media, digital advertising, and real-time requirements. While its email capabilities are still gaining strength compared to those of larger email service providers, and the depth of its offline integration trails that of traditional CCCM vendors, Adobe provides a well-rounded solution for cross-channel marketers.

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Customer references described Adobe Campaign as “a real multichannel tool, with a lot of built-in functionality,” and they also gave Adobe high marks for “its speed of implementation.” While customers are using multiple Adobe Marketing Cloud solutions with their CCCM implementations, they did mention the need to improve integration with existing and third-party applications. Overall customer feedback was otherwise extremely positive. One reference noted, “We are convinced of Adobe’s strategy and we’ve had a good relationship since the very beginning — not always the case with vendors, so it’s very refreshing.”

- › **Consider Salesforce for SaaS-based marketing with an email backbone.** The Salesforce Marketing Cloud includes a CCCM package for email, mobile, and web marketing. Salesforce’s Audience Builder and Contact Builder provide marketer-friendly data management that is fully integrated with its Content Builder to empower digital marketers of various skill levels. Similarly, Salesforce Personalization Builder puts easy-to-use optimization tools directly in the hands of marketers — winning high marks for usability, though the underlying algorithms are not as robust as those from analytics leaders.

Critiques on pricing, current costs, and integration with third-party tools were the only areas for improvement from otherwise glowing customer references. In addition to the technology itself, customers highlighted self-help documentation as “the best in the industry” and lauded Salesforce for its company culture. One reference told us, “Software scalability is [Salesforce’s] greatest strength. We are pushing complex data based on millions of customer records into the platform.” Another added that Salesforce enables her small team to more effectively “continue down the automation path.”

- › **Consider SAS when only the most advanced marketing analytics will do.** Scoring top-tier marks for nearly every criterion in the data management, analytics and insights, and measurement and optimization categories of this study, SAS has established itself as the de facto leader for customer intelligence. That leadership extends to scheduling and automation for CCCM, but it trails other leaders when it comes to its native capabilities for managing digital marketing execution. SAS is refining its digital strategy and is also introducing a refreshed user experience (UX) as part of its next-generation Customer Intelligence 360 offering.

SAS customer references reiterated the importance of advanced analytics capabilities, and highlighted SAS’s international presence as a key differentiator. Extremely positive reference feedback contained only two areas for improvement: integration with third-party and legacy technologies, and a need for more functionality to support cross-channel interactions. One reference predicted that SAS might run into competitive issues if vendors that offer “better, fully integrated digital marketing tools catch up on data and analytics functionality.”

- › **Consider Oracle for SaaS-based enterprise digital marketing.** Oracle’s CCCM solution centers on its digital execution and content management capabilities for email, mobile, web, eCommerce, and digital advertising. It further offers comprehensive data management for segmentation, audiences,

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and lists, leveraging its acquisitions of BlueKai, Datalogix, and AddThis. Support for offline channels is not a core strength (though Oracle can ingest data from offline interactions), and Oracle relies on partnerships for advanced analytics, including predictive models and real-time decisions.

Customer references we spoke to are all using Oracle for email today, though they have plans to add mobile messaging and digital advertising capabilities. All had high praise for Oracle as a strategic partner who understands their business requirements, but they raised integration as a threefold issue on the technology side — out-of-box functionality, co-existence with third-party tools, and consolidation of data sources. References credited Oracle for its willingness to address issues, with one expressing, “It’s truly the best vendor relationship we’ve had; we sit down, discuss requirements and then work together on them.”

Strong Performers

- › **Consider IBM for both traditional CCCM and digital marketing needs.** IBM Campaign (acquired Unica assets with IBM development) offers robust analytics, including top-notch predictive and real-time capabilities. Its UX falls short in enabling marketers to easily activate these insights, and IBM plans to address UX design in 2016. IBM complements CCCM capabilities with digital tools from its Marketing Cloud (acquired Silverpop assets with IBM development). It plans to rationalize overlaps in its dual portfolio with a common road map and shared components like Journey Designer, Customer Experience Analytics, and Universal Behavior Exchange.

We spoke to customer references who are pleased with IBM Campaign’s consistency for inbound and outbound interaction management. They have looked at the IBM Marketing Cloud, but they are using digital delivery tools from other vendors. They also expressed doubts about IBM as a strategic partner; one was “a bit concerned about Unica’s positioning within IBM’s bigger portfolio,” adding, “it may not get the love it deserves.” A reference who transitioned from working with a Unica partner to a direct relationship with IBM was disappointed by the lack of support provided with new features, such as integration with Coremetrics.

- › **Consider Pitney Bowes for marketing, sales, and services interactions.** The Pitney Bowes Customer Engagement Suite focuses beyond marketing to address the complete customer life cycle. While Pitney Bowes does not offer robust digital marketing capabilities, it stands out for its event processing and interaction management for offline channels, as well as its rich heritage in print and interactive documents. Its personalized interactive video solution could be a bigger differentiator if Pitney Bowes continues to expand its marketing functionality beyond sales and services use cases.

One customer reference acknowledged that Pitney Bowes is “not the best” for outbound marketing, but said “the solution is solid” for inbound interactions. Another told us, “We don’t use the Pitney Bowes campaign management tool, but we do use the interaction management service” for face-to-face interactions, with other tools for digital campaigns. References further cited the pricing structure and integration with other marketing and advertising technologies as areas for improvement.

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- › **Consider SmartFocus for consumer-focused interactions.** SmartFocus has expanded its European customer base to include the Americas and Asia. The Message Cloud enables brand marketers — especially in the retail, consumer goods, and hospitality sectors — to reach customers with relevant content via email, mobile, web, eCommerce, and social media. Both its channel capabilities and advanced analytics make SmartFocus a competitive digital marketing alternative to larger CCCM vendors. It further provides innovative proximity marketing technologies.

Customer references gave SmartFocus high marks for its UX and its abilities to manage content and channel delivery effectively. And, SmartFocus was the only vendor in this study with a perfect reference score for out-of-box integration. One reference credited SmartFocus with “the most integrated decision-making and campaign automation” of the vendors considered for her firm’s project. SmartFocus references were less enthusiastic about its technology road map and its partner ecosystem.

- › **Consider Pegasystems for real-time interaction management (RTIM).** Although its outbound capabilities do not rival its digital marketing competitors, Pegasystems leads in terms of RTIM — a critical CCCM requirement. Pegasystems provides personalized inbound interactions via mobile, web, and eCommerce, as well as offline recommendations via contact centers, networked devices, and customer-facing staff. It further offers solid integration with back-office business processes, which makes it a good choice for financial services, communications, and firms in regulated industries.

Customer references use Pegasystems to support a wide array of offline and inbound digital channels, but they articulated the need for better integration with their outbound marketing tools. According to one reference, a key Pega differentiator is its “centralized decision hub,” and his firm has its “own architect working on the decision and marketing channel convergence and integration.” Another is also looking to integrate inbound decision management with outbound channels, but added, “That’s the compromise because you cannot get everything from a single player.”

- › **Consider RedPoint Global for insight-driven marketing automation.** RedPoint Global’s rapid growth is testament to its focus on customer data management and analytics. It appeals to firms looking for a dedicated data layer to underpin marketing automation, as it connects to multiple channel delivery solutions (such as email and mobile), but does not provide these capabilities natively. RedPoint Global partners with marketing service providers like Acxiom and Merkle (as well as others in specific verticals and geographies) who integrate its data management with execution tools or provide service offerings to minimize end user integration efforts.

RedPoint Global’s references praised its capabilities as a “marketing automation hub” and its people as “the easiest to work with and the most eager to satisfy.” They awarded RedPoint Global perfect scores for data management, but listed real-time and predictive analytics as areas for improvement. References also cited its value for money, though acknowledged the “ROI isn’t just with RedPoint, since we use other tools with it.” One told us that a complex implementation took

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only six months, “and after that, it took another six months to train users.” A second reference stated that the UX “took some getting used to” for campaign managers, who achieved proficiency a year after migrating from a traditional CCCM solution.

- › **Consider Emarsys for mid-market life-cycle marketing.** Emarsys has steadily expanded its CCCM business from Europe to address larger mid-market organizations globally. More than half its customers are retailers, and it connects in-store and online shopping experiences with consistent product content across email, mobile, web, and eCommerce. Emarsys owes its rapid growth to an easy-to-use and intuitive UX for brand marketers who want to design both interactive and long-term campaign strategies, with predictability into which customers, products, and channels provide the highest conversion opportunities.

Emarsys sells to both mid-market firms and regional divisions of global enterprises. A consumer packaged goods (CPG) customer in Asia described how Emarsys enables them to apply customer data to “brand equity and enhancement” versus transactions, which is “a critical differentiator in a mobile-driven market.” References agree that Emarsys will need to add resources as it grows, but they appreciate its current dedication as a partner that maintains a “good relationship and synergy with the team, both on the business side and the technical side.”

- › **Consider Selligent for sophisticated mid-market campaign needs.** HGGC acquired both Selligent and StrongView in 2015, and together they operate as Selligent. The merger of Selligent’s largely mid-market European CCCM business with StrongView’s largely North American email business creates a compelling alternative for non-enterprise buyers. Selligent provides solid data management, campaign automation, personalization, and channel delivery capabilities, though not as robust as those of enterprise vendors in this study.

Selligent’s customer references reported “business as usual” following the merger, but they are looking forward to a road map that leverages the “best of both worlds,” such as StrongView’s HTML editor for email content. They rated Selligent highly for its CCCM functionality, with the exceptions of predictive and real-time analytics, reporting, and performance measurement. References also highlighted the solution’s “value for money” and their “excellent personal and professional” relationships with both Selligent and its marketing service provider partners.

- › **Consider Experian Marketing Services in consumer-focused sectors.** The Experian Marketing Suite is fueling the marketing service provider’s transformation to a technology vendor. Retail and hospitality customers in particular leverage Experian’s vast consumer data repository to execute more targeted digital and offline campaigns. While advanced analytics remain a work-in-progress, the Experian UX enables marketers — including distributed users — to easily manipulate and visualize data for segmentation, with audiences available for immediate deployment.

Customer references primarily use Experian for email campaigns, and they would like to see additional cross-channel functionality with simplified pricing. Experian is building on its legacy for “excellent service and operational delivery” with technology capabilities that “support high-volume,

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high-complexity, and high-performance” requirements. One marketer said, “We’ve been doing segmentation and personalization since 2001, but with Experian we can do things more quickly and be more responsive.”

Contenders

- › **Consider Teradata for enterprise CCCM and RTIM.** Teradata announced in Q4 2015 that it would sell its marketing applications business. It will retain Customer Interaction Manager (the evolution of Teradata Relationship Manager) and Teradata Real-Time Interaction Manager (based on its acquisition of Helm Interaction Management). These two assets provide Teradata with campaign workflow and real-time decision tools, but it will rely on partnerships and integration for channel delivery capabilities. And, without its marketing-focused field organization, it will primarily appeal to its data warehousing customer base.

Teradata’s announcement had an obvious impact on its customer references, who gave it the lowest scores in this study for its technology road map and cast doubt on plans to maintain or increase investments with the vendor. We spoke to customer references with long-term relationships — all using the solution for more than five years — and they acknowledged “synergy with the data warehousing environment” and custom development as reasons to stick with Teradata. All of these references were using other vendors for digital marketing, so Teradata will need to convince them of its continued value as the data and analytics layer.

- › **Consider Teradata Marketing Applications for mid-market digital requirements.** Teradata’s Q4 2015 decision to keep its Customer Interaction Manager when selling its marketing applications business means the “new” organization must leverage its digital marketing strengths (based on eCircle and other acquisitions) or dust off the former Aprimo Marketing Studio as its campaign workflow tool. Given its largely mid-market European customer base, it will need to up its game to compete with enterprise CCCM vendors.

We spoke to customer references that use Teradata Marketing Applications for email, mobile messaging, and eCommerce. Their feedback was lukewarm across the board for UX, technology features, and integration capabilities. Despite concerns about the planned divestiture, customers said they were willing to “wait and see” how things go. One reference who had purchased eCircle prior to its acquisition told us that “things slowed down” with Teradata, and he is “hoping the new buyer puts in some investment.” (Marlin Equity Partners purchased Teradata Marketing Applications for \$90 million in April 2016.)

- › **Consider SDL for mid-market, service-provider-led engagements.** SDL announced in January 2016, that it plans to sell its CCCM business (acquired from Alterian in 2012). Doing so creates one of the smallest vendors in this study, with a focus on larger mid-market organizations. SDL provides solid CCCM capabilities, but it lacks the enterprise-class functionality of larger vendors. Partnerships with marketing service providers in the Americas, Europe, and Asia, strengthen its abilities to address the CCCM market.

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The 15 Providers That Matter Most And How They Stack Up

SDL's customer references understandably expressed concern due to the planned divestiture. In one case, neither SDL nor the service provider had conveyed any information beyond the press release. The eventual buyer will obtain a global customer base and partner network, but will need to reassure both on its continued investment plans. In addition to feedback on strategy, customer references indicated the need to focus on predictive analytics, optimization, and better integration with third-party technologies.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by February 22, 2016.

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- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls and surveys with 3 of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Endnotes

- ¹ As firms move beyond traditional campaign execution, they integrate technologies that enable them to manage real-time interactions, based on recognizing customers across channels and understanding current contextual requirements. See the "[How To Build A Contextual Marketing Engine](#)" Forrester report.

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- ² Campaigns are far less effective at winning and retaining customers than they once were. To achieve sustainable competitive advantage now, B2C marketing pros must deliver self-perpetuating cycles of real-time, two-way, insight-driven interactions with individual customers. See the [“The Power Of Customer Context”](#) Forrester report.
- ³ When asked to identify the most important factors for choosing their CCCM vendors, 45% of customer references said “the ability to manage cross-channel interactions” and 43% said “the ease of integration with other data sources and systems.” Source: Forrester’s Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.
- ⁴ Thirty-six percent of customer references identified “integration with on-premises, third party, and/or legacy applications” as the number one area where their vendors could improve, and 33% selected “predictive analytics and optimization,” making it the second-highest response. Source: Forrester’s Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.
- ⁵ Ninety-five percent of customer references said they use their CCCM solution to support email marketing today, while the remaining 5% have no plans to support email with their CCCM tools. In addition, customer references support websites (51%), mobile messaging (48%), eCommerce (41%), online advertising (37%), mobile apps (21%), and social media (16%). The two largest areas for growth are social media and mobile apps, with 51% and 46%, respectively, planning to add these channels in the next two years. Source: Forrester’s Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.
- ⁶ Thirty-one percent of customer references told us that their vendors need to “offer more functionality that supports cross-channel interactions,” making it the third-highest response for areas where vendors can improve. Source: Forrester’s Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.
- ⁷ Sixty-one percent of customer references use their CCCM solutions to support print campaigns, but figures are considerably lower for other offline channels: inbound contact center (46%), face-to-face sales or service (32%), outbound contact center (29%), agent desktop (26%), and POS devices, ATMs, or kiosks (19%). Source: Forrester’s Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.
- ⁸ Real-time interaction management depends on recognizing customers across channels and devices; understanding the current context merged with detailed customer history; determining the appropriate decision, offer, or message; orchestrating delivery of content across multiple digital and offline channels; and capturing interaction data for measurement and optimization. See the [“The Forrester Wave™: Real-Time Interaction Management, Q3 2015”](#) Forrester report.
- ⁹ Customer references told Forrester in 2014 that they were looking to build the foundation for contextual marketing with their CCCM tools, and they continue to push their vendors for more cross-channel interaction functionality today. See the [“Advance Campaign Automation With Personalization And Real-Time Context”](#) Forrester report.
- ¹⁰ Enterprise marketing technology comes in two flavors: Marketers must collaborate with their business technology (BT) counterparts to implement technologies that align systems of insight and engagement to deliver contextual marketing. See the [“Combine Systems Of Insight And Engagement For Contextual Marketing”](#) Forrester report.
- ¹¹ Forrester’s 2014 CCCM evaluation included nine vendors with enterprise solutions that supported digital and at least three offline channels and offered an on-premises deployment option. See the [“The Forrester Wave™: Cross-Channel Campaign Management, Q3 2014”](#) Forrester report.
- ¹² Forrester’s 2102 CCCM evaluation identified three “interactive marketing specialists” poised to disrupt the campaign management market by delivering integrated campaign execution focused on interactive customer dialogues, and we further predicted an increase in the number of vendors offering these capabilities. See the [“The Forrester Wave™: Cross-Channel Campaign Management, Q1 2012”](#) Forrester report.

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