

The Forrester Wave™: Enterprise Marketing Software Suites, Q3 2019

Tools And Technology: The Enterprise Marketing Technology Playbook

by Joe Stanhope
September 25, 2019

Why Read This Report

In our 40-criterion evaluation of enterprise marketing software suites (EMSSes), we identified the seven most significant ones — Acoustic, Adobe, Oracle, Salesforce, SAP, SAS, and Zeta — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals select the right one for their needs.

Key Takeaways

Adobe, SAS, And Salesforce Lead The Pack

Forrester's research uncovered a market in which Adobe, SAS, and Salesforce are Leaders; Acoustic, Oracle, and SAP are Strong Performers; and Zeta is a Contender.

Vision, Data And Intelligence Capabilities, And Integration Are Key Differentiators

EMSS vendors offer a neatly standardized menu of marketing functionality, but differences abound in the details. The scope and depth of vendors' visions for customer engagement; their ability to manage data and generate customer intelligence; and data, content, and technology integrations are the keys to successful EMSS evaluation.

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Related Research Documents

- [The Forrester Wave™: Cross-Channel Campaign Management \(EMSS Modules\), Q3 2019](#)
- [The Future Of Enterprise Marketing Technology](#)
- [The Moments-Based Evolution Of Enterprise Marketing Technology](#)



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EMSS Success Requires Balance Between Innovation And Complexity

The enterprise marketing software suite (EMSS) category continues to expand while it rides a wave of escalating solution requirements as B2C marketers adapt to the disruptions caused by demanding consumers, new touchpoints and technologies, and the specter of tightening data and privacy rules. This has led to a challenging, and often frustrating, conundrum for EMSS vendors and marketers alike as they strive to meet evolving market demands while keeping complexity in check. Marketers appreciate an EMSS for its ongoing commitment to new and enhanced marketing capabilities, extensive marketing ecosystem support, and alignment of marketing with customer experience (CX) initiatives.¹ Brands look to them as the cornerstone of their marketing technology (martech) stack — hoping to maximize functionality, streamline processes, and reduce overhead. In turn, EMSSes now extend beyond pure marketing functionality with forays into analytics and artificial intelligence, content management, data services, and CX; but they must also maintain and integrate legacy capabilities.

As a result of these trends, EMSS buyers should look for providers that:

- › **Share a vision for customer engagement.** EMSS vendors often sound similar, but they are actually diverse. Buyers should select EMSS solutions that match the breadth and depth of their own customer engagement priorities. Acoustic focuses primarily on marketing engagement, Adobe and Zeta support digital marketing and advertising, SAS leads with a strong analytics foundation, and Oracle, Salesforce, and SAP support marketing within a broader customer experience product range. Firms that fully align EMSS investments with engagement strategy will maximize the benefits of their vendor's product features, integrations, partner network, and support capabilities.
- › **Raise the bar for data and intelligence.** As channel execution capabilities commoditize, the real arbiter of marketing success is the ability to activate data and generate customer insights. Buyers must evaluate EMSS solutions' ability to ingest data from third-party and enterprise sources; provide data management, enhancement, and syndication services; and assemble robust, portable customer profiles. It's also critical to transform data into actionable analysis. EMSS solutions must support advanced measurement, real-time customer journey insights, optimization at the channel and journey levels, and productized artificial intelligence applications for personalization, campaign targeting, and content management.
- › **Demonstrate the ability to integrate efficiently.** Integration is the No. 1 driver of marketing technology success.² And it's exponentially more impactful to EMSS solutions that integrate both internally and with the external ecosystem. Buyers must define integration requirements and evaluate EMSS integration capabilities along multiple dimensions. EMSS solutions must first integrate their own application interfaces and functionality into productive workflows as well as disseminate data and content throughout the suite for efficiency, consistency, and reuse. EMSS solutions must also integrate with third-party applications to fill in solution gaps and work with additional martech stack components.

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Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape.

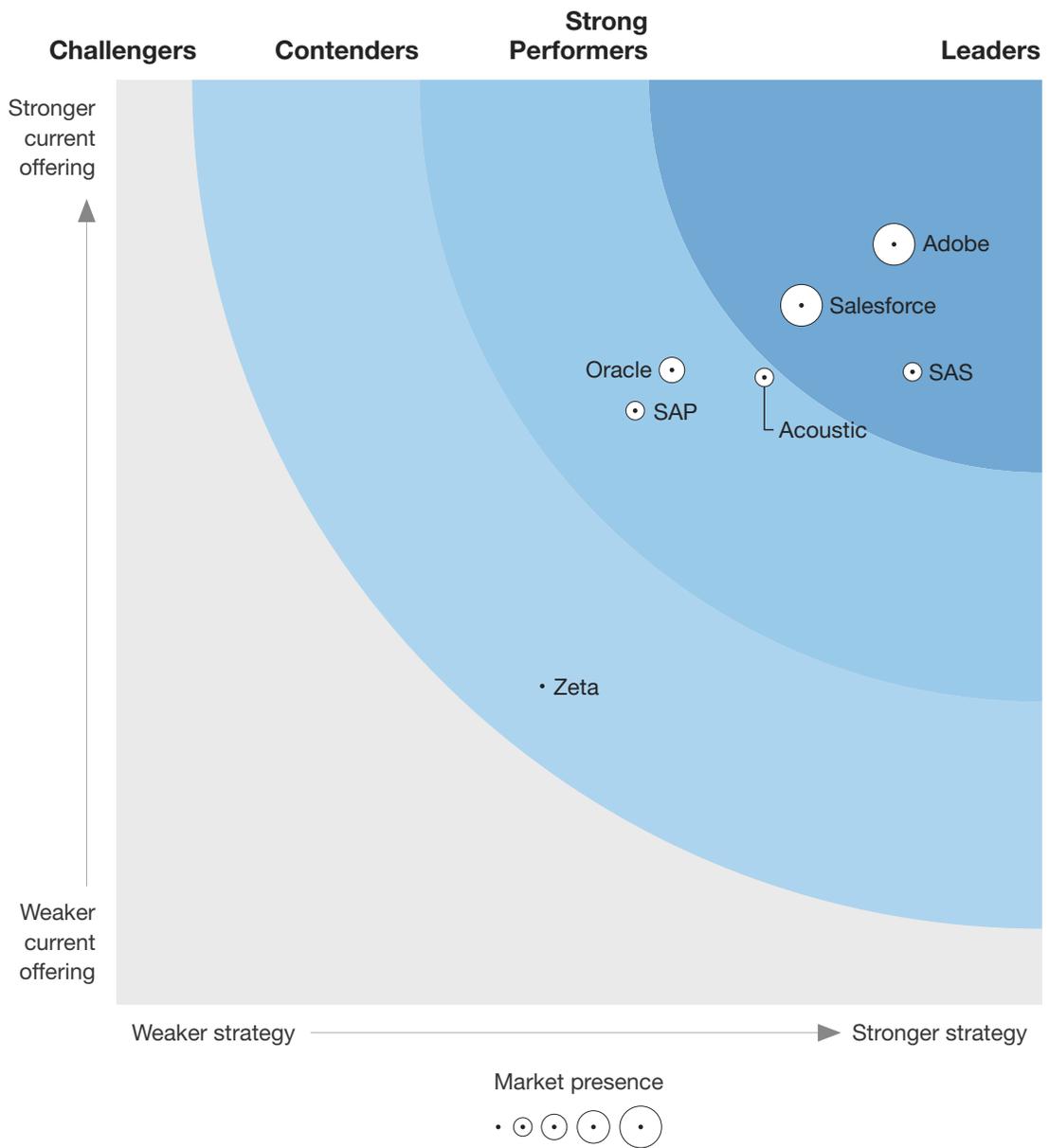
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 1 Forrester Wave™: Enterprise Marketing Software Suites, Q3 2019

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FIGURE 2 Forrester Wave™: Enterprise Marketing Software Suites Scorecard, Q3 2019

	Forrester's weighting	Acoustic	Adobe	Oracle	Salesforce	SAP	SAS	Zeta
Current offering	50%	3.39	4.11	3.43	3.78	3.21	3.42	1.72
Customer data management	10%	2.60	4.60	4.20	3.00	4.20	4.20	2.60
Customer analytics	5%	4.60	4.60	3.00	3.80	3.40	4.20	1.80
Artificial intelligence	5%	5.00	5.00	3.00	5.00	3.00	3.00	1.00
Campaign and interaction management	10%	3.70	3.30	3.60	4.30	3.00	4.40	2.60
Digital advertising	10%	2.40	5.00	3.00	4.10	2.40	1.40	3.40
Marketing resource management (MRM)	5%	3.00	1.00	2.00	3.00	4.00	5.00	1.00
Content and asset management	10%	3.00	5.00	3.00	3.00	2.20	3.80	1.00
Customer experience capabilities	10%	3.00	3.00	5.00	5.00	5.00	1.00	1.00
Measurement and optimization	5%	3.40	4.20	3.00	2.60	2.20	5.00	1.40
User experience	5%	5.00	5.00	3.00	3.00	1.00	3.00	3.00
Integration	10%	4.20	3.80	3.00	4.20	2.00	3.80	1.00
Consumer preference management	5%	3.00	3.00	3.00	3.00	5.00	3.00	1.00
Consumer privacy	5%	3.00	5.00	5.00	5.00	3.00	5.00	1.00
Localization and global access	5%	3.00	5.00	3.00	3.00	5.00	3.00	1.00
Strategy	50%	3.50	4.20	3.00	3.70	2.80	4.30	2.30
Product vision	25%	3.00	5.00	3.00	5.00	3.00	3.00	3.00
Planned enhancements	25%	5.00	5.00	3.00	3.00	3.00	5.00	1.00
Performance	20%	3.00	3.00	3.00	3.00	1.00	5.00	3.00
Partner ecosystem	10%	3.00	5.00	5.00	5.00	3.00	3.00	1.00
Delivery models	10%	3.00	3.00	1.00	1.00	5.00	5.00	3.00
Services and support	10%	3.00	3.00	3.00	5.00	3.00	5.00	3.00
Market presence	0%	1.50	4.50	3.00	4.50	2.00	2.00	1.00
Revenue	50%	1.00	5.00	3.00	4.00	3.00	2.00	1.00
Customers	50%	2.00	4.00	3.00	5.00	1.00	2.00	1.00

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

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Vendor Offerings

Forrester included seven vendors in this assessment: Acoustic, Adobe, Oracle, Salesforce, SAP, SAS, and Zeta (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Official company name	Product evaluated
Acoustic	Acoustic Campaign Acoustic Personalization Acoustic Content Acoustic Exchange Acoustic Analytics
Adobe	Adobe Experience Cloud Adobe Experience Platform
Oracle	Oracle Marketing Cloud
Salesforce	Salesforce Marketing Cloud
SAP	SAP Marketing Cloud
SAS	SAS Customer Intelligence 360
Zeta	Zeta Marketing Platform

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Adobe wants to make marketers' digital dreams come true.** Adobe's aspirational pursuit of customer experience management continues unabated. Historically, the company maintained a marketing-centric view of customer experience compared to its tech titan rivals. But since our previous evaluation, Adobe has built on its considerable content, marketing, advertising, and analytics capabilities with a reimagined core data architecture called the Adobe Experience Platform and the acquisition of eCommerce leader Magento in June 2019. Adobe has also demonstrated a major commitment to its partnership with Microsoft featuring product integrations, infrastructure support on Microsoft Azure, and collaboration on the Open Data Initiative. Adobe's steady growth in all dimensions of revenue, customers, and solutions are leading indicators that its strategy to power all digital customer experiences resonates with buyers.

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Adobe clients appreciate its breadth of capabilities and give high marks for overall features and functionality. Additionally, clients are highly vested in the product road map, appreciate the deep partner program, and note that they are getting positive business value for their investments in Adobe. Client concerns are remarkably consistent, citing the need for improvement in product integrations, difficulties with implementations that require customization and significant onboarding support, and declining quality of account management. Adobe's EMSS offering will appeal to firms that prioritize customer engagement in digital touchpoints and require a balance of capabilities spanning omnichannel execution, analytics, and content management.

- › **SAS places analytics at the heart of marketing.** SAS offers Customer Intelligence 360, a broad and consistently solid suite of marketing tools for engagement across offline and digital channels, planning, customer analysis, and optimization. But make no mistake, the strength and differentiation of SAS's marketing solutions is based on its analytics capacity. SAS offers unparalleled reporting, analytics, predictive modeling, and optimization via dedicated functionality for power users and through features embedded in applications for marketers. SAS's vision for marketing is unique in its thesis that fusing marketing and data science at all stages of customer intelligence and engagement will improve customer engagement and marketing performance.

In addition to its considerable analytics firepower, SAS offers tightly integrated cross-channel campaign management and marketing resource management features that stand on their own. SAS has a well-defined product road map that enjoys strong support from clients. SAS's clients rave about excellent account management and report that product implementations, particularly the new SaaS product versions, are successful and well supported. Clients continue to look forward to availability of all SAS products in the cloud, and frequently cite the need for more third-party API integrations. SAS's EMSS offering will appeal to firms that require deep marketing operations capabilities and possess the data, skills, and processes to fully leverage the analytics and optimization functionality in line with marketing features.

- › **Salesforce takes on CX to connect customer journeys.** Salesforce appears to succeed with a "go big or go home" ethos, as evidenced by arguably the broadest CX solution, the most clients, and outsized market positioning. But the true strength of its vision isn't pure scale; quite the opposite. It's the imperative to go small by supporting granular customer journeys for individual customers. Since our last evaluation, Salesforce has built on its core messaging, social, and advertising capabilities with expansions into real-time engagement with the release of Interaction Studio; analytics with the acquisition of Datorama; and data handling with the initial release of Customer360 and acquisition of MuleSoft.

The relentless pace at which Salesforce acquires companies and releases products is dizzying. Rapid-fire innovation benefits marketers, but Salesforce must continuously reconcile and assimilate numerous new and overlapping technologies, putting clients in the precarious position of deciphering vague product announcements, interpreting a complex product road map, and determining how to adopt new offerings. Strategically, Salesforce is making smart investments to fill gaps and integrate customer journeys, particularly in measurement and creating intersections

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between marketing and advertising, which has delighted clients. The company also commits significant resources to cultivating, training, and supporting its client community to the degree that Salesforce is often cited by users as a career enabler as much as it is a technology. Salesforce's EMSS offering will appeal to clients who are committed to the broader range of Salesforce customer experience solutions and require balanced functionality incorporating inbound, direct, and digital marketing.

Strong Performers

- › **Acoustic gives IBM's martech a new lease on life.** Centerbridge Partners acquired IBM's core marketing technology assets — primarily comprised of the multitenant SaaS products such as IBM Watson Marketing (Silverpop) — in June 2019 and immediately formed a private, independent company named Acoustic. The name and brand are new, but the company hit the ground running with an established stable of products — Acoustic Campaign, Acoustic Personalization, Acoustic Content, Acoustic Exchange, and Acoustic Analytics — as well as nearly 1,000 employees and 1,200 enterprise clients. Now liberated from IBM's bureaucracy and priorities, Acoustic is pursuing an elegant strategy: Focus exclusively on marketing technology, and build that technology for marketers first.

Separating from IBM is a dramatic change that has been well received by clients who have high expectations that Acoustic can dramatically accelerate product delivery, expand partnerships and ecosystem integration, and expand support resources. The product suite has strong data and content integrations, and investments in analytics and advertising capabilities are starting to pay off. Acoustic remains committed to leveraging artificial intelligence across its products, and reference clients recognize the potential of progressive applications such as the AI-powered Marketing Assistant, although they concede that it isn't quite ready for prime time today. Acoustic's EMSS offering will appeal to buyers with a laser focus on marketing execution for a range of online and offline channels who require campaign-focused analytics and optimization.

- › **Oracle views marketing with a CX lens.** Oracle Marketing Cloud continues to revolve around Oracle's core Responsys solution, with an expanding roster of companion tools for optimization, real-time data ingestion, social media marketing, audience development, and advertising data and activation. Since our last evaluation, Oracle wisely adopted a revised vision for martech that plays to the company's strengths: The marketing cloud is now rolled into a broader customer experience solution alongside the company's extensive sales, service, and eCommerce capabilities. To support comprehensive customer experiences, ongoing marketing cloud development is set in a CX context, prioritizing data unification, integration and partnerships, and injecting intelligence into data for insights and execution.

Oracle Marketing Cloud remains first and foremost an email marketing power tool. Advanced users appreciate the steadily improving application usability and flexibility and cite Oracle's professional services teams' breadth for deployment, technical development, and strategic tasks. Clients have a good handle on day-to-day operations but voiced concerns about Oracle's limited development

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of embedded AI features for marketing and lack of consistency in analytics and personalization capabilities across products. Oracle's EMSS offering will appeal to firms that lead customer engagement with messaging, expect marketing to operate as a spoke within a larger customer experience strategy, and require scalability for large data and execution volumes.

- › **SAP takes a relentlessly pragmatic approach to marketing.** SAP Marketing Cloud is a component of the SAP C/4HANA suite supporting a range of CX capabilities for commerce, sales, and service. Since our last evaluation, SAP has built the SAP Customer Data Cloud — based on its Gigya acquisition — to form the nexus of preference management and customer identity supporting all products; caught up to the market-at-large in productizing AI features with the SAP Leonardo series of machine learning features; and expanded partnerships with Google, Adform, and Microsoft. SAP exhibits a global customer base with the support and infrastructure to match, and its vision to leverage both experience and operational data for customer engagement is consistent with the company's enterprisewide presence and capabilities.

SAP is at its best handling unheralded but critically important marketing operations capabilities such as customer data management, customer preference management and privacy, marketing resource management, deployment options, and localization. Clients noted accelerating product road map delivery, but there are lingering concerns that SAP is over-indexing on development for technical users and B2B marketing use cases rather than prioritizing development for B2C marketers. Clients cite significant concerns about product usability, indicating that the user interface is not intuitive and is difficult to master. SAP's EMSS offering will appeal to enterprises already dedicated to the SAP ecosystem and to marketing organizations that prioritize customer data management, enterprise-class customer preference and access management features, and global support.

Contenders

- › **Zeta is a work in progress with a unique data foundation.** Highly acquisitive Zeta Global spent years assembling a patchwork of marketing technology assets but has finally turned the corner to consolidate its offerings and advance into the EMSS market. This is thanks to a corporate strategy built on strengths in data and services that support the full customer lifecycle, bolstered by effective additions such as Boomtrain and Sizmek that have brought in technology assets and talent. The Zeta marketing platform starts with extensive proprietary data assets to support targeting and customer insights, coupled with broad orchestration and activation across mobile, messaging, social media, and advertising.

Zeta is a rarity in terms of overall capabilities; most notably it offers one of the most complete combinations of data and advertising technology (adtech) available within an EMSS solution, giving it the important ability to cross the entire customer lifecycle from acquisition to customer marketing. Clients are most appreciative of Zeta's well-established services capabilities and collaborative approach to client input and feedback. Clients concede that Zeta is still integrating its products and backfilling standard functionality as it onboards acquisitions and pivots from

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services-oriented delivery to fully actualized products. Zeta Global's EMSS offering will appeal to firms looking to build up their customer profiles, audience targeting options, and customer intelligence with expanded data and identity capabilities, and to integrate acquisition and customer marketing across the customer lifecycle from a single solution.

Evaluation Overview

We evaluated vendors against 40 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include customer data management, customer analytics, artificial intelligence, campaign and interaction management, digital advertising, marketing resource management, content and asset management, customer experience capabilities, measurement and optimization, user experience, integration, consumer preference management, consumer privacy, and localization and global access.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, planned enhancements, performance, partner ecosystem, delivery models, and services and support.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue and customers.

Vendor Inclusion Criteria

Forrester included seven vendors in the assessment: Acoustic, Adobe, Oracle, Salesforce, SAP, SAS, and Zeta. Each of these vendors:

- › **Provides a broad EMSS portfolio.** Each vendor invited to participate in this Forrester Wave evaluation has a suite of branded proprietary technologies and a partner ecosystem that enables B2C marketing professionals to: manage customer data; perform customer analytics; orchestrate and deliver campaigns, advertising, and interactions; manage marketing resources and content; and measure and optimize marketing performance.
- › **Serves B2C marketers at large companies.** Each vendor invited to participate has an EMSS customer base that is comprised of: 25% or more B2C firms, 25% or more enterprise-sized firms (revenues of \$1B or more), and at least 20 enterprise-sized clients.
- › **Has a significant market presence.** Each vendor invited to participate has at least \$200 million (USD) in annual marketing technology revenue from its EMSS business.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by July 10, 2019 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

- ¹ The convergence of customer expectations regarding brands, devices and touchpoints, and marketing capabilities makes the upshot clear: Marketing and customer experience aren't independent after all. As marketers' responsibilities expand to influence and help to support CX, they'll need upgraded tools, processes, and structures to align with the broader enterprise customer engagement framework. See the Forrester report "[The Future Of Enterprise Marketing Technology](#)."
- ² If a customer data management strategy is the starting point, then integration is where data becomes actionable. See the Forrester report "[The Future Of Enterprise Marketing Technology](#)."

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