

The Forrester Wave™: Cross-Channel Campaign Management, Q3 2014

by Jason McNellis, August 28, 2014

KEY TAKEAWAYS

The Cross-Channel Campaign Market Is Complex

The campaign management market is growing more complex as new channels and technologies emerge and marketers desire enhanced support for more complex campaigns. Vendors need to step up with improved interfaces and better analytics to meet this need.

Adobe, Infor, RedPoint Global, And SAS Institute Lead The Pack

Forrester's research uncovered a market in which Adobe, Infor, RedPoint Global, and SAS Institute lead the pack. IBM, Teradata, and SAP are Strong Performers that offer competitive options. Pitney Bowes and SDL contend on certain capabilities but lag overall.

Cross-Channel Integration And Interaction Management Are Key Differentiators

As CI pros struggle to consistently communicate with their customers across channels, they need improved abilities to connect inbound and outbound campaigns and make decisions in one channel based on intelligence in another. Cross-channel capabilities dictate which providers lead the pack.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the model to your specifications.



The Forrester Wave™: Cross-Channel Campaign Management, Q3 2014

The Nine Providers That Matter Most And How They Stack Up

by [Jason McNellis](#)

with [Shar VanBoskirk](#), [Cory Munchbach](#), [Rusty Warner](#), and [Samantha Ngo](#)

WHY READ THIS REPORT

In Forrester's 41-criteria evaluation of cross-channel campaign management (CCCM) vendors, we identified the nine most significant software providers in the category — Adobe, IBM, Infor, Pitney Bowes, RedPoint Global, SAP, SAS Institute, SDL, and Teradata — and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help customer insights (CI) professionals select the right partner for their campaign management needs.

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Notes & Resources

In March 2014, Forrester evaluated nine vendor companies: Adobe, IBM, Infor, Pitney Bowes, RedPoint Global, SAP, SAS Institute, SDL, and Teradata. To gain feedback on their products and the market, we conducted 27 client reference phone interviews and gathered online survey data from 96 campaign management client references.

Related Research Documents

[Let's Revisit The Enterprise Marketing Software Landscape \(Again\)](#)
June 13, 2014

[Measure The Strength Of The Marketing Technology Stack](#)
March 15, 2013

[The Forrester Wave™: Cross-Channel Campaign Management, Q1 2012](#)
January 31, 2012



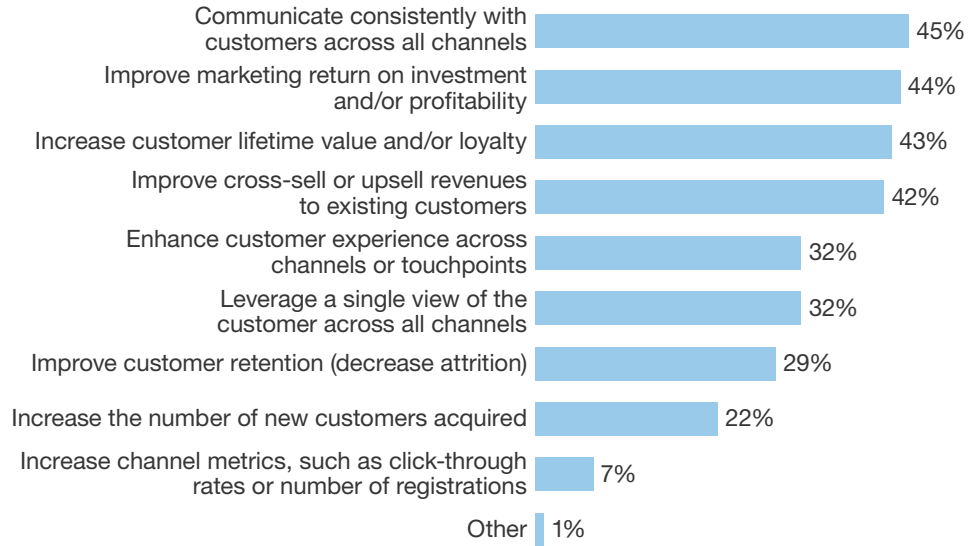
CROSS-CHANNEL CAMPAIGN MANAGEMENT SUPPORTS CUSTOMER OBSESSION

In this, our third Forrester Wave evaluation of cross-channel campaign management systems, we observe more vendors emphasizing integration as they realize they won't own all pieces of their client's cross-channel puzzle. But integration quality across channels, data sources, and interfaces still varies, as does support for emerging channels and more sophisticated analytics. Specifically, CCCM vendors today:

- **Enable cross-channel communication.** CI pros want to deliver the same message across channels and ensure a consistent experience — in fact, it's their top goal for campaign management (see Figure 1). CCCM tools support this through triggered campaigns and coordinating content across channels. And they do this well: 75% of CCCM references said they were very or completely satisfied with cross-channel delivery.¹
- **Are hard to use.** Most tools now apply segmentation trees or other graphical interfaces to simplify selecting campaign groups. But these interfaces fail when applied to more sophisticated multistep, triggered campaigns. The No. 1 desired vendor improvement according to client references was “usability.” As one marketing services manager we spoke to explained, “It is easy to set up a basic one-time campaign with simple segmentation, but more sophisticated campaigns are more difficult and require an experienced user.”
- **Support complexity across channels . . . sometimes.** Campaign management tools have improved since our Q1 2012 CCCM Forrester Wave evaluation.² For example, multiple vendors now support storage of complete interaction histories and retargeting through online advertising. But our client references find that vendors still struggle with multichannel intelligence, real-time velocity, and multistep measurement (see Figure 2).

Figure 1 Marketers Prioritize Message Consistency Above Other Cross-Channel Campaign Goals**“Which of the following are the top goals for your cross-channel campaign management efforts?”**

(Select top three)



Base: 96 vendor client references
(multiple responses accepted)

Source: Forrester's Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey

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Figure 2 Most Marketers Find That Personalization Challenges Vendors



Source: Forrester's Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey

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THE CROSS-CHANNEL CAMPAIGN MANAGEMENT EVALUATION EXPLAINED

Forrester evaluated nine vendors for this assessment: Adobe, IBM, Infor, Pitney Bowes, RedPoint Global, SAP, SAS Institute, SDL, and Teradata. Each of these vendors qualified for inclusion because it (see Figure 3):

- **Supports digital and at least three offline channels.** Cross-channel doesn't just mean digital. Your customers leverage multiple “connected” and “unconnected” sources to experience your brand. So we screened out vendors, such as StrongView Systems and Sitecore, that don't have data or workflow integrations for at least three offline channels, such as point of sale (POS) systems, direct mail, or call centers, in addition to digital channel support.
- **Offers an on-premises option.** A number of prospective buyers tell us that they can't buy a software-as-a-service (SaaS) CCCM solution because of security or cultural limitations.³ For this reason, we filtered out firms that do not offer on-premises installations, such as Silverpop, ExactTarget, Marketo, and Zeta Interactive.
- **Focuses on the enterprise.** We limited the study to vendors that focus on an enterprise audience — defined as companies with 1,000 or more employees. Only vendors with at least 50% enterprise customers were eligible.

Figure 3 Evaluated Vendors: Product And Vendor Information And Selection Criteria

Vendor	Product evaluated	Evaluated date
Adobe	Adobe Campaign	Q1 2014
IBM	Formerly Unica, formerly Coremetrics, Xtify as part of IBM ExperienceOne, Cognos OEM, and SPSS Modeler Advantage Marketing Edition	Q1 2014
Infor	Infor Marketing Management	Q1 2014
Pitney Bowes	Portrait Dialogue, Portrait Explorer, Portrait Miner, and Portrait Interaction Optimizer as part of Portrait Suite version 6	Q1 2014
RedPoint Global	Convergent Marketing Platform version 2.6	Q1 2014
SAP	SAP Marketing (includes Loyalty), hybris Commerce Suite, SAP Customer Engagement Intelligence, SAP Lumira, and SAP Infitelnsight (KXEN) as part of SAP Marketing Suite	Q1 2014
SAS Institute	SAS Customer Intelligence version 6.1	Q1 2014
SDL	SDL Email Manager, Data Manager, Campaign Manager, and Customer Analytics as part of SDL Campaigns	Q1 2014
Teradata	Teradata Customer Interaction Manager 7.0.1, Teradata Real-Time Interaction Manager 3.2.1, Teradata Customer Interaction Manager in the Cloud 7.0.1, Teradata Digital Messaging Center	Q1 2014

Vendor selection criteria

Incorporate at least three offline channels (commonly point of sale, direct mail, and call center).

Offered on-premises installation.

At least 50% enterprise-level clients.

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Our Evaluation Considers Three Dimensions

After examining past research, user need assessments, and vendor and expert interviews, we developed 41 evaluation criteria, which we grouped into three high-level buckets:

- **Current offering.** We evaluated vendor current capabilities for campaign design, campaign execution, cross-channel integration, interaction management, optimization, analytics and reporting, and architecture.
- **Strategy.** We also reviewed the product and corporate strategies of each vendor against marketer needs and Forrester's vision for the market.
- **Market presence.** To determine the size and clout of each vendor's campaign management business, we evaluated firms' financial strength and installed bases.

LEADING VENDORS OFFER STRONG CROSS-CHANNEL INTEGRATION

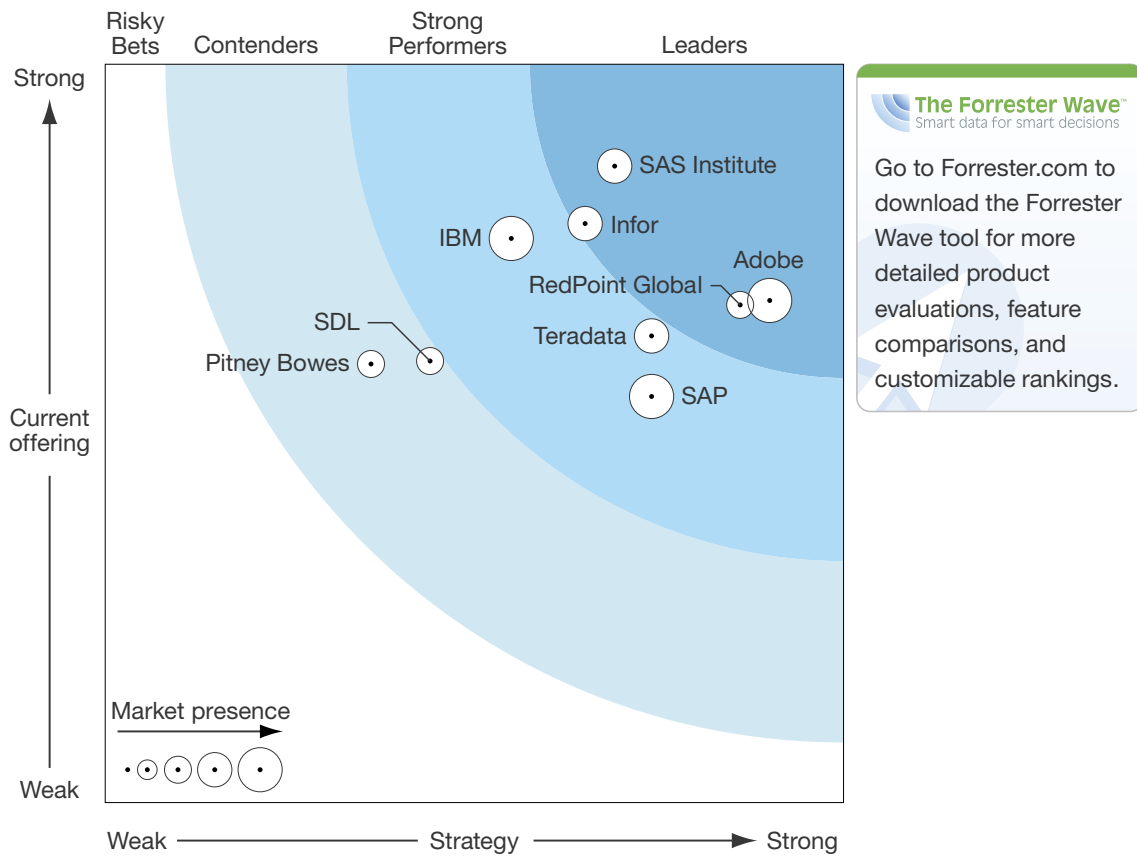
The evaluation uncovered a market in which (see Figure 4):

- **Adobe, Infor, RedPoint Global, and SAS Institute lead the pack.** These four vendors are differentiated by their advanced cross-channel integration and interaction management capabilities. In addition, Adobe expresses a customer-centric corporate strategy that calls for sharing objects across its proprietary cloud and simplified pricing. Infor's real-time content and personalization capabilities make its channel delivery capabilities stronger than others. RedPoint Global enables advanced data integration through a drag-and-drop interface that allows a database analyst to leverage "big data" performance in Hadoop without needing to know MapReduce. And SAS optimizes analytics related to contact frequency, budgets, or channel constraints, across multiple business units with competing goals.
- **IBM, SAP, and Teradata offer competitive options.** IBM presents strong current capabilities across its products, including advanced and real-time analytics. But its corporate strategy did not proactively address how its solution would expand data capabilities needed to support real-time and contextual campaigns. SAP's corporate strategy was leader-level because it centers on building a campaign management tool powered by SAP HANA and built on top of its hybrid commerce platform.⁴ But SAP's current offering lacked the workflow and interface integration needed to facilitate cross-channel triggers, contact rule management, and offer optimization. Teradata has a strong vision to further develop its new campaign management platform in the areas of offer modeling and real-time interactions, but current gaps including distributed marketing, web forms, and predictive modeling kept it out of the Leader band.

- Pitney Bowes and SDL contend in specific areas.** Pitney Bowes has strong optimization and advanced analytic features. But its architecture and interaction management capabilities are limited compared with others. SDL's interface simplifies segmentation creation compared with other vendors. And it delivers solid campaign design and insight generating features. But its campaign execution and optimization capabilities hold it back.

This evaluation of the cross-channel campaign management market is intended to be a starting point only. 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 Forrester Wave™: Cross Channel Campaign Management, Q3 '14



Source: Forrester Research, Inc. Unauthorized reproduction or distribution prohibited.

Figure 4 Forrester Wave™: Cross Channel Campaign Management, Q3 '14 (Cont.)

	Forrester's Weighting	Adobe	IBM	Infor	Pitney Bowes	RedPoint Global	SAP	SAS Institute	SDL	Teradata
CURRENT OFFERING	50%	3.40	3.82	3.92	2.97	3.37	2.75	4.31	2.99	3.16
Campaign design	15%	3.10	4.10	3.00	2.95	4.05	2.80	4.00	3.85	3.15
Campaign execution	15%	4.40	4.30	4.80	3.65	2.70	3.10	4.40	2.15	3.60
Cross-channel integration	15%	3.75	4.00	4.00	2.50	4.75	2.00	4.00	3.00	3.00
Interaction management	15%	3.80	3.00	4.30	1.90	4.10	3.00	4.40	2.80	4.30
Optimization	15%	3.20	3.60	3.20	3.90	2.80	2.50	4.60	2.20	2.60
Analytics and reporting	20%	2.55	4.05	4.00	3.40	2.00	2.65	4.40	3.35	2.40
Architecture	5%	3.00	3.20	4.40	1.00	4.20	4.20	4.40	4.40	3.60
STRATEGY	50%	4.50	2.75	3.25	1.80	4.30	3.70	3.45	2.20	3.70
Cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Corporate strategy	35%	5.00	3.00	3.00	1.00	3.00	5.00	5.00	3.00	5.00
Product road map	40%	5.00	3.00	3.00	3.00	5.00	3.00	3.00	1.00	3.00
Customer satisfaction	25%	3.00	2.00	4.00	1.00	5.00	3.00	2.00	3.00	3.00
MARKET PRESENCE	0%	4.10	4.32	3.48	2.76	2.06	4.26	4.00	3.00	3.16
Installed base	60%	4.30	4.40	3.00	3.00	1.70	4.30	4.40	3.00	3.00
Financials	40%	3.80	4.20	4.20	2.40	2.60	4.20	3.40	3.00	3.40

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

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VENDOR PROFILES

Leaders

- Adobe.** Adobe Campaign's unified platform, simplified consumer-based pricing model, and growing integrations with the Adobe Marketing Cloud makes it a compelling choice for advanced digital marketers who want to further unify their contact strategy to include outbound marketing capabilities or nondigital channels. You may need to look to other tools for customer insights and predictive modeling, as these capabilities lag peers and were identified by references as areas of improvement.
- SAS Institute.** SAS Customer Intelligence secured the highest score for current offering in this evaluation, distancing itself from other Leaders with its analytics and optimization capabilities.⁵ SAS is especially suited for less-budget conscious buyers with: 1) complex campaign requirements like multiple selection and suppression criteria across many levels of a contact hierarchy; or 2) advanced analytics needs, such as making in-house targeting models from a broad ensemble of predictive algorithms.

- **RedPoint Global.** Strong data capabilities combined with the most satisfied references in the study helped place RedPoint Global as a Leader in its first appearance in the CCCM Forrester Wave evaluation. The vendor's Convergent Marketing Platform supports hybrid data environments and uses an extract-transform-load (ETL) process that is data-structure agnostic. Buyers will like that it is easy to add and subtract channels under management by the RedPoint platform. But analytics wonks will need third-party support for customer insights and predictive models. Client references indicate the vendor could improve in these areas.
- **Infor.** The Infor Marketing Management suite is a strong choice for CI pros who need to integrate data and coordinate offers and execution across several (five or more) channels; Infor's clients manage more channels than any other vendor in this evaluation.⁶ Channel execution is enhanced by real-time, self-learning offer management capabilities that utilize information across channels. References were strong overall but highlighted the quality of Infor's consulting services.

Strong Performers

- **Teradata.** Customer Interaction Manager (CIM), announced in January 2014, has particular strengths related to email and SMS authoring and deployment, as well as support for cross-channel decisions and progressive identification. Its social, data integration, and real-time offer capabilities lag today, but they stand to improve based on Teradata's planned developments and its acquisition of Argyle Social in June 2014.⁷ Historically, this vendor has been slow to integrate with external sources, so we recommend it primarily for clients already using other Teradata products, or for those also in the market for marketing resource management (MRM) capabilities.
- **IBM.** The IBM ExperienceOne suite offers strong capabilities in campaign design and execution and stands out for its analytics, especially those features that allow marketers to build advanced models without being data scientists. Users give the core product high marks for interface, but overall satisfaction was below average for data management, message delivery across channels, and professional services. The IBM ExperienceOne suite requires a detail-oriented marketer who can sleuth through myriad products to piece together the right solution.
- **SAP.** SAP has a strong vision — addressing cross-channel, real-time, and context-driven intelligence — which also leverages Hybris, the vendor's beefy commerce engine. However, the offline/online execution and external list management capabilities of the SAP Marketing Suite are unsatisfying based on our review and client reference feedback. In its current rendition, SAP might be an effective choice for marketers who want to tie campaign management together with a strong commerce engine (SAP Hybris) or integrate with other back-office SAP products.

Contenders

- **SDL.** Now part of SDL's Customer Experience Cloud, this vendor's cross-channel platform, SDL Campaigns, has an intuitive graphical interface for selecting campaign segments and reports from any chart or table generated in the product. Less advanced areas include: 1) channel execution, due to high reliance on external partners for delivery; 2) real-time analytics, where more capabilities are needed outside of digital marketing; and 3) data integration, where satisfaction was low and references would like to see more support for emerging channels. SDL campaigns might suit marketers who desire a lower-cost solution or those who can leverage the translation or web content capabilities from the vendor's cloud.
- **Pitney Bowes.** Portrait Suite, Pitney Bowes' CCCM product, has several compelling analytics and optimization tools, like its Portrait Explorer module, which uses "customer playing cards" to make analytics and look-alike modeling more accessible to general users.⁸ But the suite's usability, scalability, message delivery, integration of online and offline programs, and support for response and program measurement all fall short in satisfying customers. Pitney Bowes' customer satisfaction indexed at a 75, compared with the study average of 100.⁹ Portrait Suite suits a buyer seeking lower-cost support for analytics and real-time interaction management over more advanced cross-channel capabilities like asset management, in-app message delivery, ad hoc reporting, or contact rule management.

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 three data sources to assess the strengths and weaknesses of each solution:

- **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 product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls and online survey.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers and required at least 10 of the vendor's customers to fill out an online survey about their experiences and satisfaction.

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 document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we 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>.

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METHODOLOGY

Forrester fielded its Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey to 96 individuals who are current clients of the vendors included in our Forrester Wave evaluation. Each vendor was asked to supply a minimum of 10 customers. For quality assurance, panelists are required to provide contact information and answer basic questions about their firms' revenue and budgets.

Forrester fielded the survey from March to April 2014. Respondent incentives included a copy of the published research.

ENDNOTES

- ¹ As part of this evaluation, Forrester interviewed 96 client references. Source: Forrester's Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey.
- ² In the 2012 evaluation, we evaluated 11 CCCM vendors across 81 criteria. See the January 31, 2012, "The Forrester Wave™: Cross-Channel Campaign Management, Q1 2012" report.
- ³ We also explored attitudes towards to SaaS hosting of CCCM solutions as part of this research. Of the 96 campaign management clients surveyed, 60% of on-premises users said they would not even consider a SaaS solution if they had to change CCCM vendors. Source: Forrester's Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey.
- ⁴ SAP HANA is SAP's in-memory database technology. In-memory databases allow for faster processing and can enhance campaign management tools real-time scoring of customers and generation of complex campaign selections. SAP hybris is an eCommerce platform with multichannel commerce and master data management capabilities, which SAP believes can be further developed into a leading CCCM platform. For a more detailed review of Forrester's take on SAP hybris, see the October 7, 2013, "[The Forrester Wave™: B2B Commerce Suites, Q4 2013](#)" report.
- ⁵ SAS earned a weighted score of 4.3 on its current offering in this evaluation, higher than any other vendor evaluated. For more details of the current offering criteria, check the Forrester Wave model tool in the online version of Figure 4.
- ⁶ As part of this study, we surveyed 96 campaign management clients and asked them to indicate which channels were coordinated and supported by their cross-channel campaign management solution. Infor clients selected 5.7 channels on average, 27% over the average and more than clients from any other vendor. Source: Forrester's Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey.
- ⁷ Argyle Social is social media management platform that provides tools for monitoring and responding to social audiences across Facebook, Twitter, Google+, and LinkedIn. These features, along with reporting, will be integrated into Teradata's Digital Messaging Center for beta testing in late 2014. Campaign inclusion and execution based on a real-time social activity feed will be available in Customer Interaction Manager in 2015.
- ⁸ Look-alike modeling is a customer analytics technique often used to support customer acquisition. The technique allows CI professionals to identify prospects or customers that have similar characteristics to a group of interest, such as best customers or converted prospects. For more information about customer look-alike targeting, see the February 25, 2014, "[TechRadar™: Customer Analytics Methods, Q1 2014](#)" report.
- ⁹ Forrester gathered satisfaction measures across 12 areas and measured the percentage of responses that selected "very" or "completely" satisfied. The overall average across all respondents (71% of total respondents) equates to an index of 100. Source: Forrester's Q1 2014 Global Cross-Channel Campaign Management Forrester Wave™ Customer Online Survey.

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