

VENDOR SELECTION MATRIX™

ACCOUNT-BASED MARKETING SAAS AND SOFTWARE

THE TOP 20 GLOBAL VENDORS 2019

Research In Action

October 2019

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RESEARCH IN ACTION
independent research & consulting

FOREWORD

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation where 60% of the evaluation is based on a survey of enterprise IT or business decision makers. The rest is based on the analyst's opinion and is a combination of intensive conversations with the software or services vendors and their clients plus informed, independent points-of-view that make the reports so unique. For this Vendor Selection Matrix™, we interviewed 1,500 business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers, but disregarded the ones with fewer than 15 evaluations.

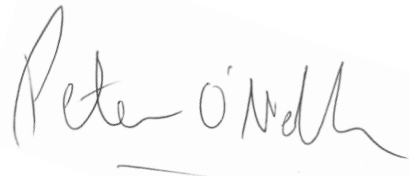
Account-Based Marketing (ABM) Software, energized by customer expectations, is in high demand across all industries. Business buyers, overwhelmed by a deluge of digital marketing messaging from trigger-happy B2B marketers, are protesting and unsubscribing everywhere possible. They want only communications relevant to their current business issues. So business marketers in every industry are seeking ABM functionality for their marketing tech stack – 57% of businesses plan to invest in ABM software in the next one to three years.

ABM is therefore currently the most-used promotional acronym by marketing software vendors, with well over 90 software vendors claiming to provide ABM-specific functionality. And there are probably several dozen more with no ABM claims but also being used by B2B companies to market to specific accounts with target-market segmentation and content personalization.

This report provides you with a useful guide to important ABM trends and will help you make an informed decision regarding which vendor could best fit your ABM requirements.

Always keeping you informed

Peter O'Neill



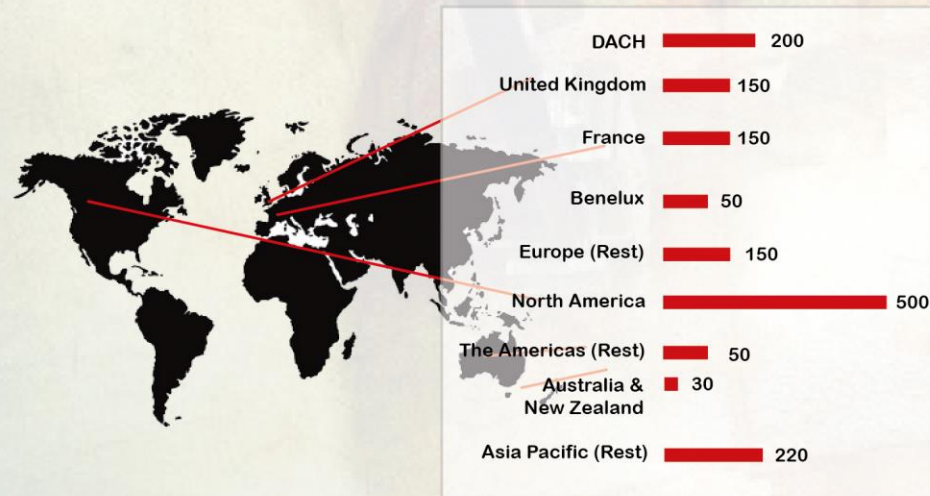
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THE VENDOR SELECTION MATRIX™ METHODOLOGY

COUNTRY BREAKDOWN



INDUSTRY BREAKDOWN



RESEARCH FACTS

100,000
Data Points

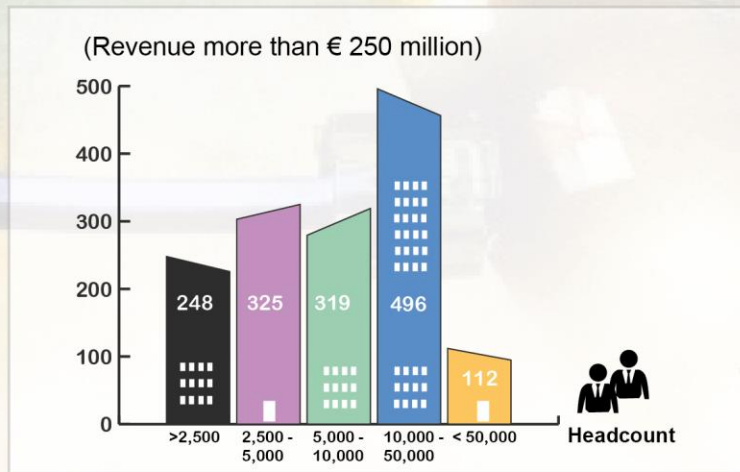
1,500
Business Managers

TOP 20
Vendors

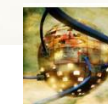
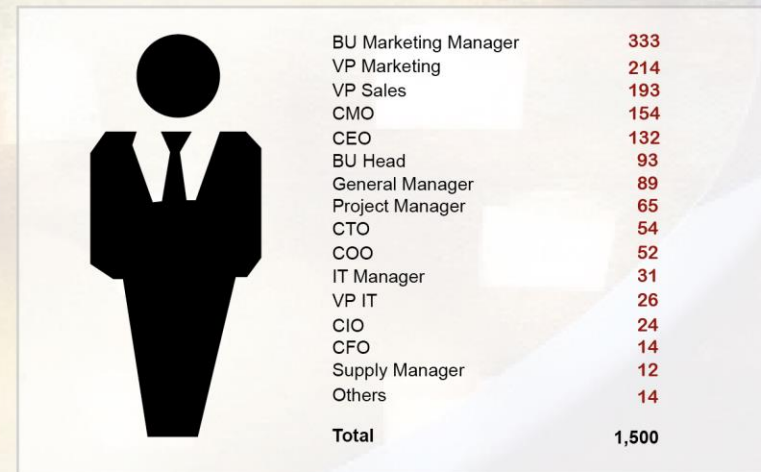
40%
Analyst's
Opinion

60%
Survey
Results

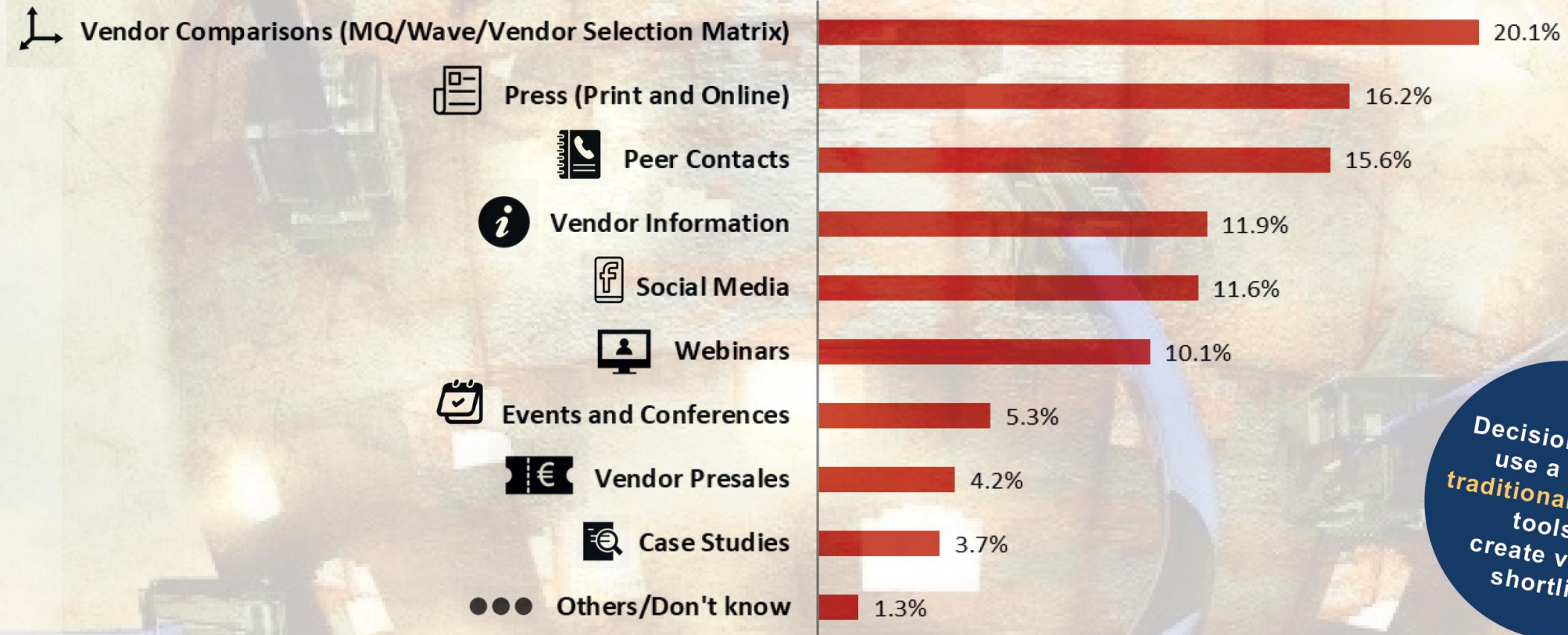
COMPANY SIZE BREAKDOWN



JOB TITLE BREAKDOWN

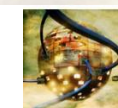


WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



Decision Makers use a mix of traditional & online tools to create vendor shortlists

N = 3,000 Business and IT Managers with budget responsibilities



WHAT IS ACCOUNT-BASED MARKETING?

- The Account-Based Marketing (ABM) process is actually a long-established marketing/sales methodology in business services companies, where success depends so much on personal empathy and the relationship. They research the interests and needs of their target audiences and publish this as thought leadership content. They also provide that “market intelligence” to their sellers or account managers.
- The advent of digital marketing, tooled by technology advances in website and general data analytics, now allows all B2B businesses to adopt an ABM strategy leveraging collected behavioral and profile data on companies (accounts) or even individual buying decision-makers (though the latter is limited through privacy regulations). ABM software can be used to support one or more of these processes:
 - Post localized and contextual content to profiled visitors on websites
 - Target online advertising at website visitors (in B2B, more for subliminal effect than click-through rates)
 - Send personalized/specific marketing content to individual prospects, digitally or other media
 - Capture prospects who may have left the website, for whatever reason, by re-targeting
 - Gather and model “propensity to buy” or intent data and provide this to sellers as alerts and/or briefings
 - Aggregate individual digital behavior across an account buying team.
- ABM is first and foremost a strategy. It first needs to be agreed as such across the company with the necessary organization and processes set up. And it is then implemented across all aspects of marketing and sales, including digital marketing where the technology described in this report can be applied.



ADTECH MEETS B2B MARTECH, MARKETING MEETS SALES

- There are three degrees of ABM as defined by the renowned IT Services Marketing Association* (ITSMA):
 1. **Strategic ABM**: Marketers work with sales to develop and execute highly customized programs for each target account.
 2. **ABM Lite**: Marketers execute less customized programs for clusters of accounts with similar needs or business attributes.
 3. **Programmatic ABM**: Marketers use machine learning to send highly targeted and personalized messages to individuals at hundreds (or thousands for enterprises) of key accounts.
- Several ABM vendors focus on helping to target online ads and website content. The significance of advertising in B2B is questionable, so a promise purely based upon click-through success should be treated cautiously. However, an effective online ad campaign probably does have a subliminal effect on even B2B buyers, especially those who only influence (or could veto) a buying decision.
- The term ABM is actually a misnomer, it should be Account-Based Marketing and Selling (ABMS). The ABM process will only succeed if marketing collaborates with its sales counterparts to select the target accounts; share the important contact data; coordinate content distribution and distribute intent alerts. Our survey found the second most important driver for ABM investment to be “enable sales to better understand their customers”. Some interview respondents pointed out that they have always done account-based selling but this is now supported better by marketing’s ABM project.

* See www.itsma.com



RESEARCH: WHAT IS YOUR NUMBER ONE INVESTMENT AREA IN THE ABM SPACE FOR 2019?



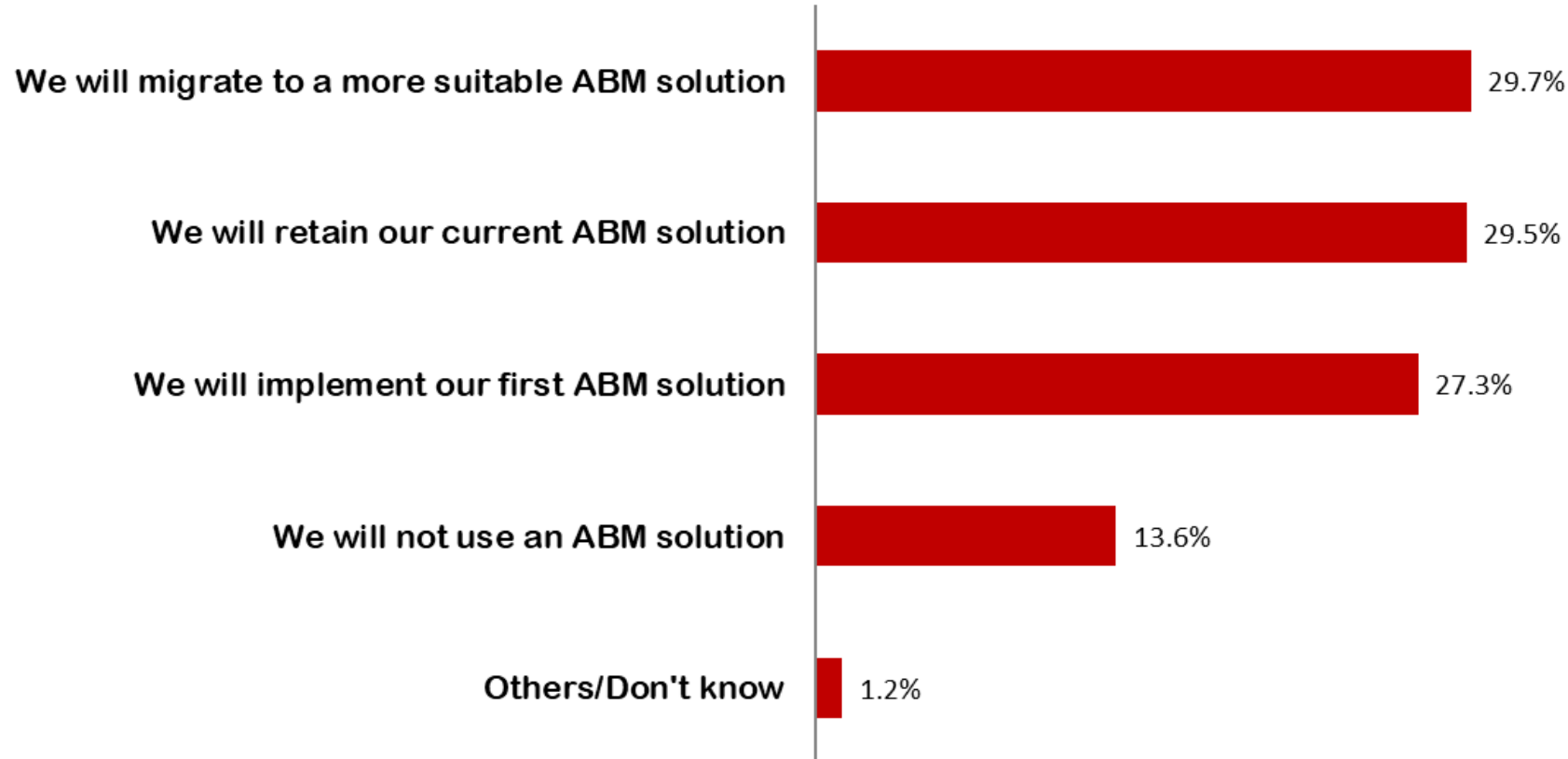
Comments:

- One in 5 of companies are focused on sales success
- System infrastructure and performance are next

N = 1,500 Business Managers with budget responsibilities



RESEARCH: ARE YOU PLANNING TO IMPLEMENT OR REPLACE YOUR ABM SOLUTION IN THE NEXT ONE TO THREE YEARS?



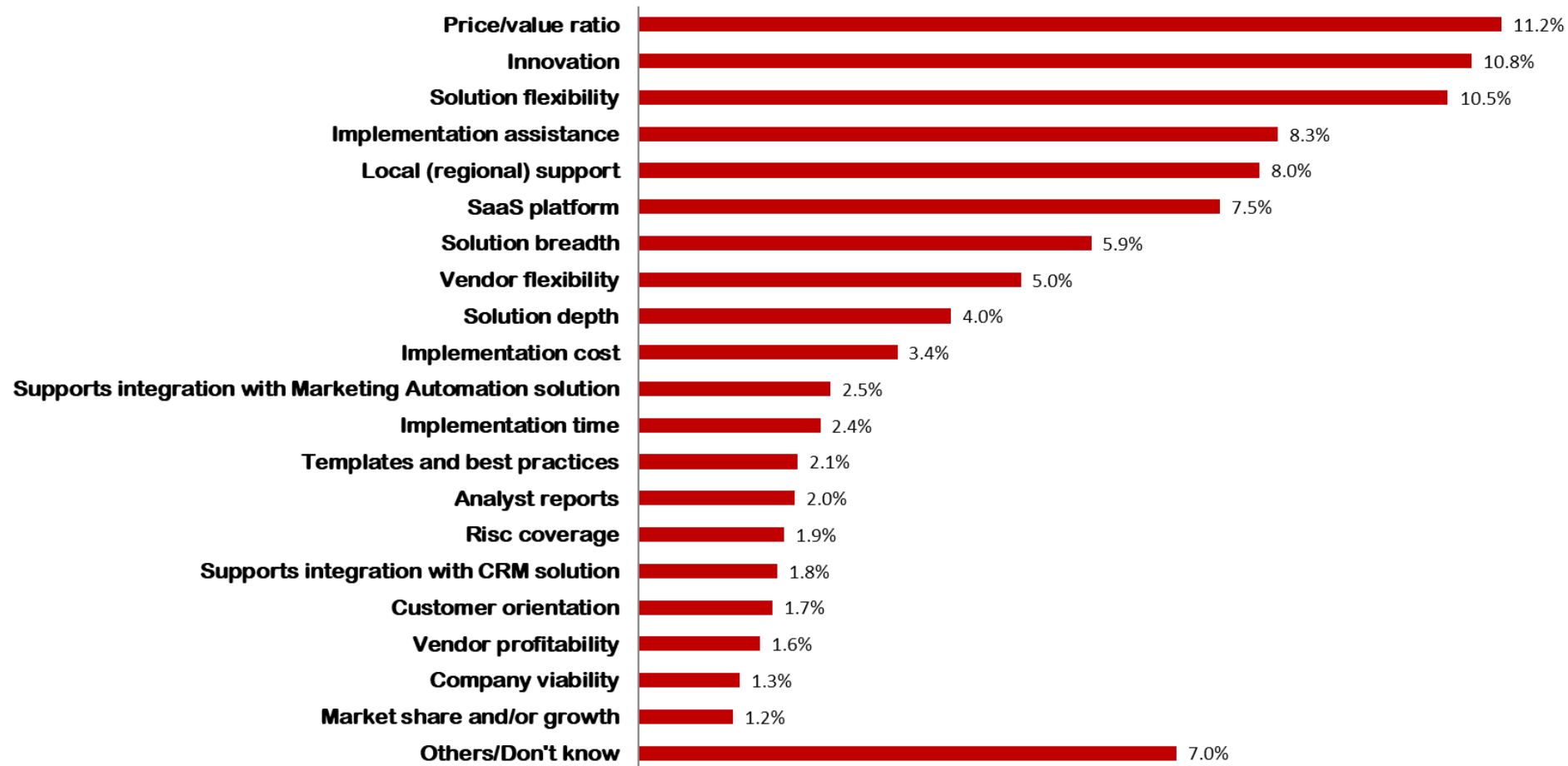
Comments:

- 57.3 % of companies plan to invest in a new ABM system
- Over half of these companies are migrating from another system.

N = 1,500 Business Managers with budget responsibilities



RESEARCH: WHAT ARE YOUR TOP THREE PRIORITIES WHEN CONSIDERING AN ABM SOLUTION (3 ANSWERS)?



Comments:

- The price sensitivity is because buyers are cautious about pricing which can be variable
- Companies recognize they need help to succeed with their ABM strategy

N = 1,500 Business Managers with budget responsibilities



INSIGHTS: ACCOUNT-BASED MARKETING MARKET PREDICTIONS

- **ABM software is not a mature market.** ABM is currently the most-used promotional acronym by marketing software vendors with well over 90 software vendors claiming to provide ABM-specific functionality. There are probably several dozen more with no ABM claims but also being used by B2B companies to market to specific accounts with target-market segmentation and content personalization. The software market is estimated at around \$ 750 million in 2019 with a current annual growth rate of some 12%.
- **Customer expectations drives demand for ABM across all industries.** Business buyers, overwhelmed by the deluge of digital marketing messaging, are protesting to their suppliers, unsubscribing where possible or even creating “insider” email addresses. They will demand that all suppliers’ communications should be relevant to their current business issues. Business marketers in every industry will therefore seek ABM functionality in their marketing tech stack.
- **The emergence of ABM platforms.** The current mire of confusingly-positioned vendors will converge to a couple of dozen platform providers supporting all, or most, of the ABM-related processes such as account and contacts selection; analytics and insights, content personalization, customer engagement orchestration, and performance assessment. Many survey respondents reported deploying two, three or even four ABM vendors, with integration an issue. 30% plan to migrate to a more suitable system, an unusually large proportion compared to other vendor selection matrix surveys.
- **The convergence of ABM and B2B Marketing Automation.** Currently, most users connect their ABM systems to the incumbent marketing lead management (MLM) platform to deliver content to lead-contacts. As MLM vendors enrich their products with ABM functions (Marketo is already in this survey), expect an industry-consolidation between ABM and MLM vendors.
- **ABM solutions will add sales engagement features.** Some ABM systems already include functions that can be embedded into the resident CRM system to display information and advise to sellers. As businesses invest in sales engagement management (SEM) software and relegate their CRM database to a system of record, the need will increase to link ABM to SEM in a similar manner.



VENDOR SELECTION MATRIX™ – ACCOUNT-BASED MARKETING SAAS AND SOFTWARE: THE TOP 20 GLOBAL VENDORS 2019

NAME	PRODUCT(S)
6SENSE	6sense Account Based Orchestration Platform, ZenIQ
AGENT3	Agent3 Intent, Agent3 Spotlight
D&B DATAVISION	D&B DataVision
DEMANDBASE	DemandBase ABM Platform
ENGAGIO	Engagio Account Based Marketing Platform
INSIDEVIEW	InsideView Targeting Intelligence Platform
JABMO	Jabmo Account Based Marketing Platform
KWANZOO	Adaptive Account Based Marketing
LATTICE ENGINES	Lattice Atlas, (Lattice for Marekto, Oracle/Eloqua, Salesforce)
LINKEDIN	LinkedIn Business Solutions
MADISON LOGIC	ActivateABM
MARKETO	Marketo ABM, Bizible Discover
MRP	MRP Prelytix
RADIUS	RADIUS Discover, RADIUS Unify
ROLLWORKS	Rollworks Account-Based Platform
TECHTARGET	TechTarget Priority Engine
TERMINUS	Terminus Account-Based Platform
TRIBLIO	Triblio Account Based Marketing Platform
TRUE INFLUENCE	InsightBase, ActiveBase
ZOOMINFO	ZoomInfo Growth Acceleration Platform

Comments

- Radius was acquired by Kabbage in September 2019
- Lattice Engines was acquired by D&B in June 2019



VENDOR SELECTION MATRIX™ – ACCOUNT-BASED MARKETING SAAS AND SOFTWARE: EVALUATION CRITERIA

STRATEGY

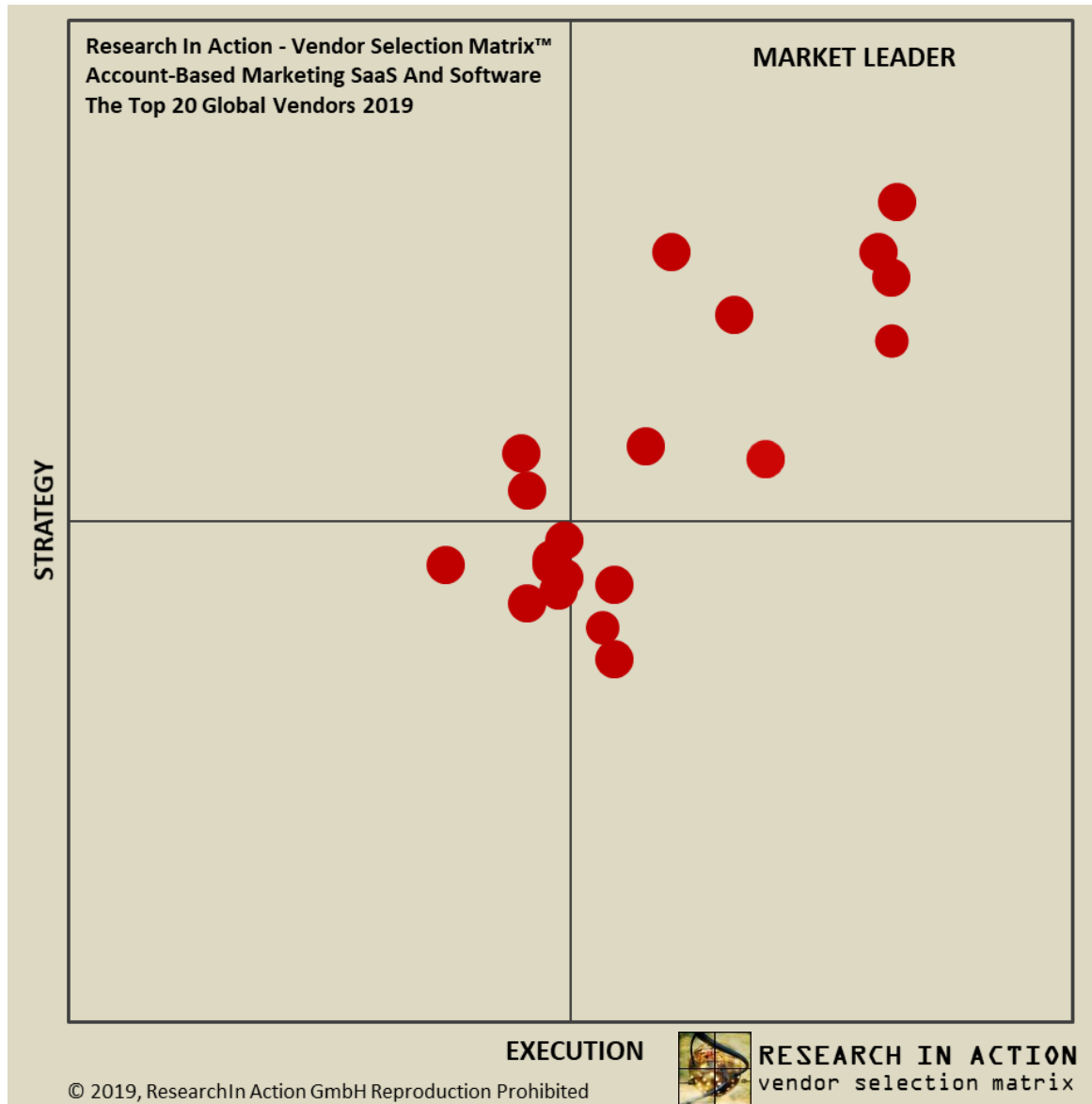
Vision & Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target markets and customers?
Innovation & Partner Ecosystem	20%	How innovative is the company? How is the partner ecosystem organized and how effective is the partner management?
Viability & Execution Capabilities	15%	How likely is the long-term survival of the company in this market? Does the company have the necessary resources to execute the strategy?
Differentiation & USP	35%	Does the solution have a Unique Selling Proposition (USP) and clear differentiators?

EXECUTION

Breadth & Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by the customers?
Market Share & Growth	15%	How big is the market share and is it growing above market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor?
Price Versus Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?



VENDOR SELECTION MATRIX™ – ACCOUNT-BASED MARKETING SAAS AND SOFTWARE



Top Five (alphabetical order)

6sense
Engagio
InsideView
Jabmo
MRP

Top Six to Ten (alphabetical order)

Demandbase
Kwanzoo
Madison Logic
Marketo
Zoominfo

Top 11 to 20 (alphabetical order)

Agent3
D&B Datavision
Lattice Engine
LinkedIn
Radius
RollWorks
TechTarget
Terminus
Triblio
True Influence

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

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Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



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