VENDOR SELECTION MATRIX™ CUSTOMER DATA MANAGEMENT

THE TOP GLOBAL VENDORS 2022 /2023

Research In Action

November 2022

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research In Action Vendor Selection Matrix™ reports so unique. This approach is one of our key differentiators in market research. For this report we interviewed 1,500 marketing and business managers with budget responsibility in enterprises globally. We are profiling those vendors which achieved the best evaluations scores from the buyers after disregarding those with fewer than 15 evaluations.

Our method of describing a business process and asking business managers to name software vendor(s) they associate with it collates a list of those vendors most relevant for other potential buyers. The resulting vendor landscape for Customer Data Management (CDM) is a broad mix of vendors with a wide variety of claims: data consolidation, collecting entire clickstreams, creating a "golden record" through identity resolution, enabling intelligent engagement, and identity tagging, even ABM predictive analytics this time. The CDM challenge is different across the B2C and B2B spectrum.

It also varies according to whether you are a medium-sized company or a large international enterprise. Another important variable is whether the initiative is led by Marketing professionals, or the IT organization and we have investigated this further in the report. The report is an update to our 2020 CDM research and we have compared some of the results to reflect how the topic has changed in the last couple of years.

This report provides you with a useful guide to important Customer Data Management Trends, names the Top 15 vendors as selected by 1,500 users based upon product, company and service quality, and will help you make an informed decision regarding which vendors could best fit your requirements. This information can then be used for a more detailed evaluation.

Always keeping you informed!
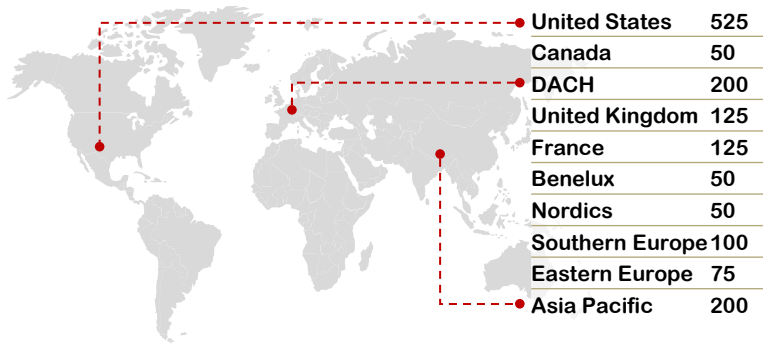
Peter O'Neill

Research In Action GmbH
Alte Schule
56244 Hartenfels
Germany

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

RESEARCH IN ACTION
vendor selection matrix®

OUR SURVEY DEMOGRAPHICS: MARKETING AUTOMATION

Country Breakdown

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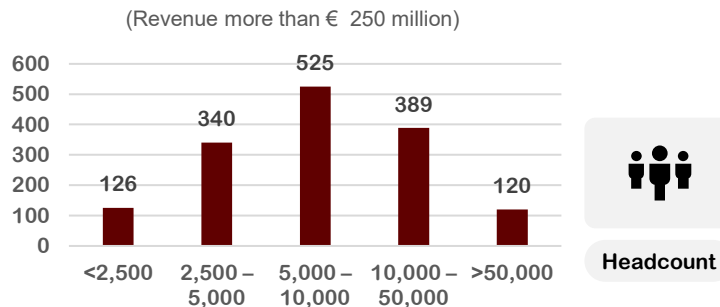
Industry Breakdown

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

Company Size Breakdown

(Revenue more than € 250 million)

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

Headcount

Job Title Breakdown

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

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

100,000+
Data Points

1,500
Marketing and Business Managers

37%
Analyst's Opinion

63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

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

RESEARCH IN ACTION
vendor selection matrix®

OUR MARKET IMPACT OVER 12 MONTHS

**Members In
Our Survey Panel**

125,000 IT Automation
90,000 Marketing Automation

**30 Research
Reports Published**

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

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

all with budget responsibility
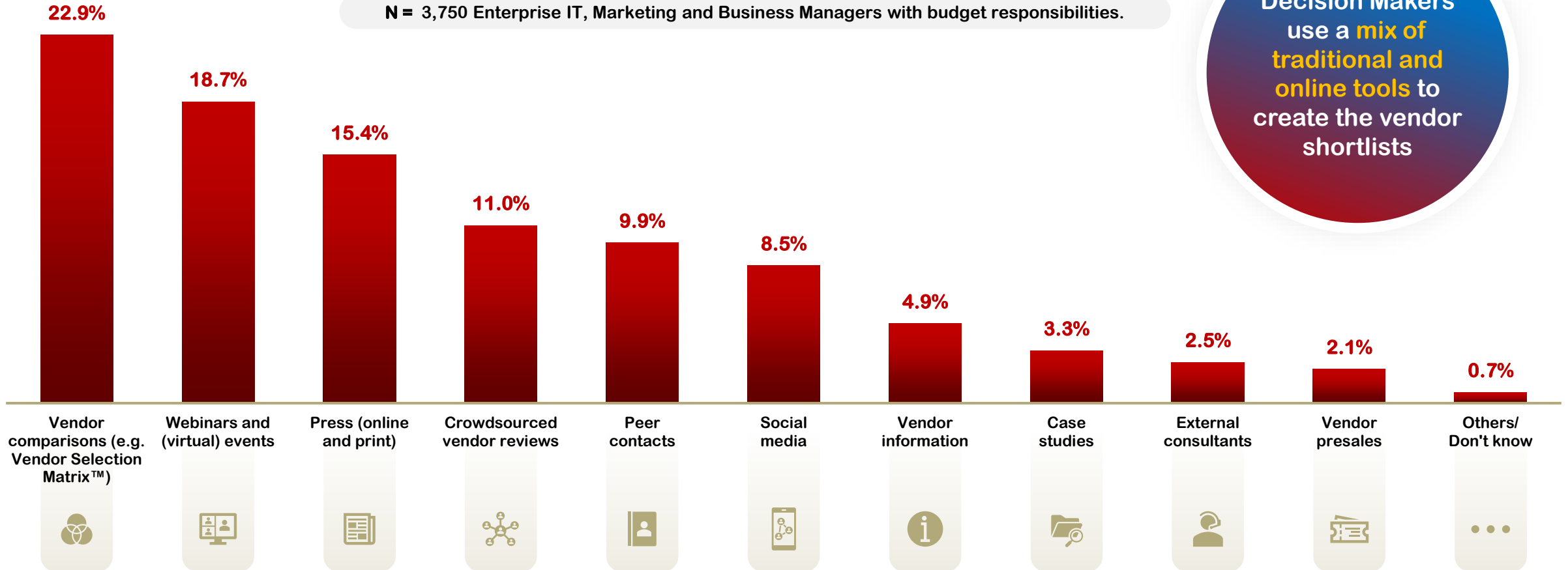
**25 Press
Releases**

2,000 views per press release (average)

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

RESEARCH IN ACTION
vendor selection matrix®

WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

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

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

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

RESEARCH IN ACTION
vendor selection matrix®

WHAT IS CUSTOMER DATA MANAGEMENT?

- Providing an optimal customer experience is impossible without having a unified Customer Data Management (CDM) process in place: a process that includes the consolidation and aggregation of all data that is being collected in separate systems across the company. This is not an IT-centric data warehouse or data lakes approach, ideally it should be a Marketing-led CDM initiative, helping to ensure the data unification project is focused directly on marketing requirements.

- Often, when initiated by IT, the project is labelled a Customer Data Platform (CDP) project and the focus is to ensure that there is a consolidation of all data silos and that there is a consistent system of record for each customer element. However, for Marketing, the goal is to establish a much more comprehensive and dynamic view of each customer by capturing data from multiple systems, linking information related to the same customer, and storing the information to track behavior over time. The system contains personal identifiers used to target marketing messages and track individual-level marketing results and data stored in the CDM system (or CDP if you like) can be used by other systems for analysis and to manage customer interactions.

- The global market for customer data management platform software is rising dramatically as companies invest in their CDM process to ensure success in their digital marketing and digital selling. IDC has sized the CDP software market at $ 2.2 billion in 2021 with an annual growth of 62%. The vendor landscape is quite stable with several well-established independent CDP vendors who are now challenged not only by the expanded sales efforts of enterprise software vendors like Salesforce, Adobe, and Oracle, but also through increased competition from tools that enable in-house IT teams to build their own CDP equivalent.

- Depending on whether you are doing B2C or B2B marketing, and your organizational complexity, a CDM project would automate one or more of these processes:

  - Data collection and consolidation
  - Consent and preference management
  - Target-account aggregation
  - Digital experience personalization
  - Business reporting and analytics
  - Machine-learning adoption

  - Customer profile resolution
  - Market segmentation
  - Marketing execution testing and optimization
  - Campaign and message orchestration and activation
  - Channel optimization analysis

RESEARCH IN ACTION
vendor selection matrix®

TYPES OF CUSTOMER DATA MANAGEMENT PLATFORMS

The Customer Data Platform Institute*, a vendor-neutral organization dedicated to helping marketers manage customer data, defines these four types of CDP solutions and assigns just one type to each vendor's solution.
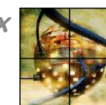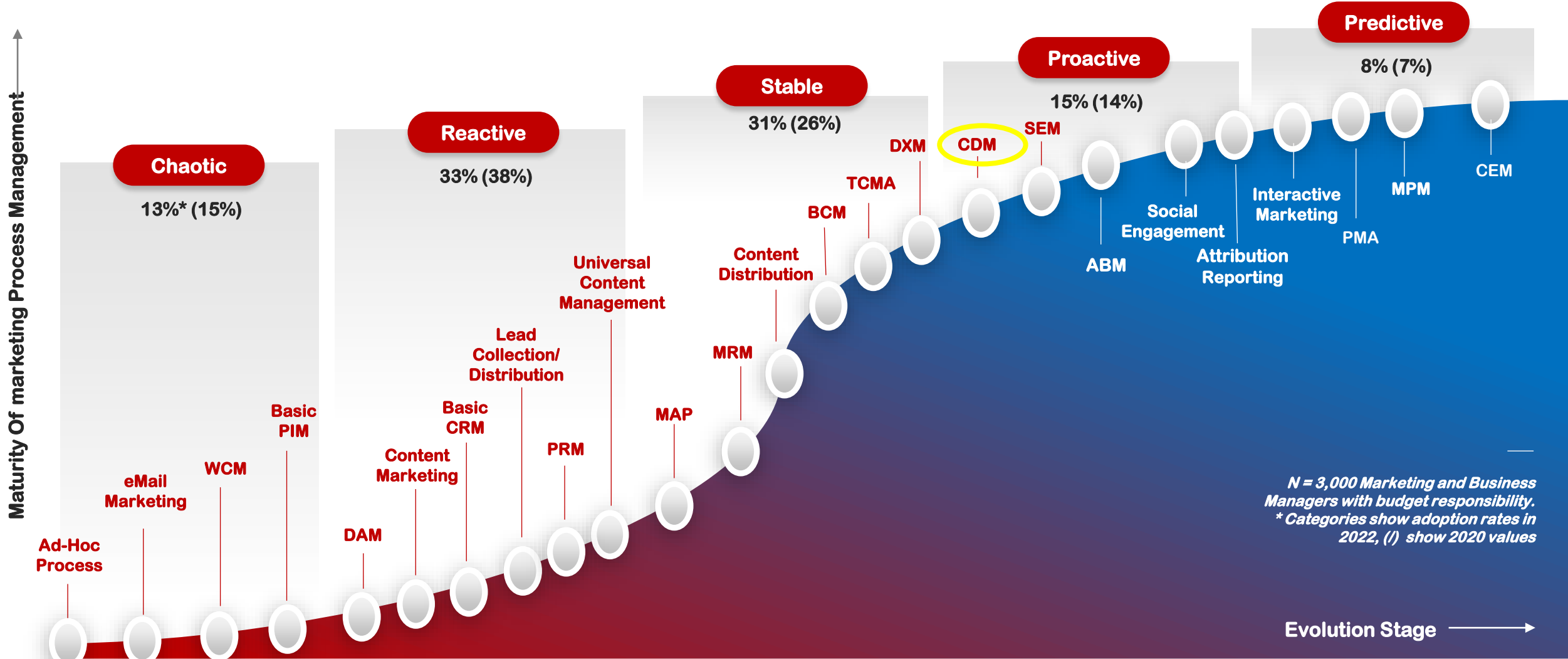
- **Data.** These systems gather customer data from source systems, link data to customer identities, and store the results in a database available to external systems. This is the minimum set of functions required to meet the definition of a CDP. In practice, these systems also can extract audience segments and send them to external systems. Systems in this category often employ specialized technologies for data management and access. Some began as tag management or Web analytics systems and retain considerable legacy business in those areas.

- **Analytics.** These systems provide data assembly plus analytical applications. The applications always include customer segmentation and sometimes extend to machine learning, predictive modeling, revenue attribution, and journey mapping. These systems often automate the distribution of data to other systems.

- **Campaign.** These systems provide data assembly, analytics, and customer treatments. What distinguishes them from segmentation is they can specify different treatments for different individuals within a segment. Treatments may be personalized messages, outbound marketing campaigns, real time interactions, or product or content recommendations. They often include orchestrating customer treatments across channels.

- **Delivery.** These systems provide data assembly, analytics, customer treatments, and message delivery. Delivery may be through email, Web site, mobile apps, CRM, advertising, or several of these. Products in this category often started as delivery systems and added CDP functions later.

Other research reports are more creative. Forrester has Data Management, Orchestration, Automation, and Measurement CDPs; while Gartner uses Marketing Cloud, Engines/Toolkits, Marketing Data-Integration and Smart Hub as groupings.

* See the CDP Insitute Website

RESEARCH IN ACTION
vendor selection matrix®

MARKETING PROCESS MANAGEMENT MATURITY S-CURVE 2022

Our surveys and consulting work enable us to continually assess the maturity of marketing organizations (combination of organization, process and technology) and we observe these five phases – CDM projects are mostly executed by more mature companies, and we estimate that 40-45% of companies have automated, or will be automating, this process in 2022-23.

Maturity Of marketing Process Management

Chaotic
13%* (15%)

Reactive
33% (38%)

Stable
31% (26%)

Proactive
15% (14%)

Predictive
8% (7%)

DXM   CDM   SEM

TCMA

BCM

Content
Distribution

Universal
Content
Management

MRM

Social
Engagement

Interactive
Marketing

ABM

Attribution
Reporting

PMA

MPM

CEM

Lead
Collection/
Distribution

MAP

Basic
CRM

PRM

Basic
PIM

Content
Marketing

eMail
Marketing

WCM

DAM

Ad-Hoc
Process

*N = 3,000 Marketing and Business Managers with budget responsibility. * Categories show adoption rates in 2022, (/) show 2020 values*

Evolution Stage →

All acronyms are defined in the report Appendix

RESEARCH IN ACTION
vendor selection matrix®

CDM MATURES FROM DATA CLEANSING TO ENGAGEMENT

Our surveys and consulting work enables us to continually assess the maturity of marketing organizations (combination of organization, process and technology). We have identified these five phases for CDM and associated processes.

- **Chaotic.** Marketing neophytes commonly first focus on eMail campaigning to purchased or built-up lists. Doublets are removed and cleansed, qualified contacts are provided as rudimentary leads to Sales.

- **Reactive.** Companies create/consolidate their customer data into a Customer Relationship Management (CRM) system usually shared with Sales. The data is mostly contact data and sales progress reporting.

- **Stable.** An operational Digital Experience Management system begins to collect behavioral data on customers and website visitors. Predictive Analytics are incorporated into the process.

- **Proactive.** Marketing's role matures from supporting sales transactions to ensuring a customer experience. The necessary functionality is found in a CDM project which creates a system with personal identifiers used to target marketing messages and track individual-level marketing results. The resulting system is used by other systems for analysis and to manage customer interactions.

- **Predictive.** Over time, the marketing goal process changes to a more holistic Customer Engagement Management process. Customer data is imperative to this process and the CDM system is likely to become the mission-critical key to success for both B2C and B2B companies. Data experts will become as essential as creative skills.

Whether you are trying to win over consumers to be active in communities and social media, or if you are trying to recruit a business buyer to be a loyal user and advocate, the classical lead generation paradigm for all marketers is going to be replaced by new relationship-based metrics of customer success.
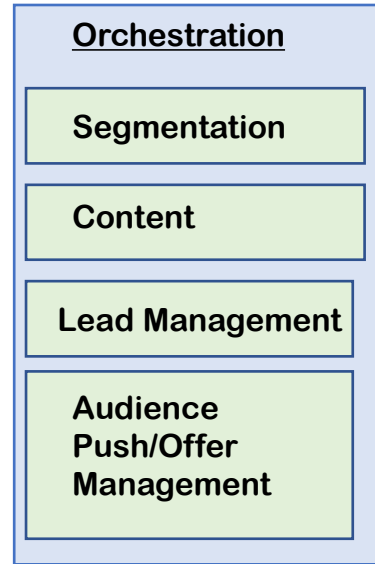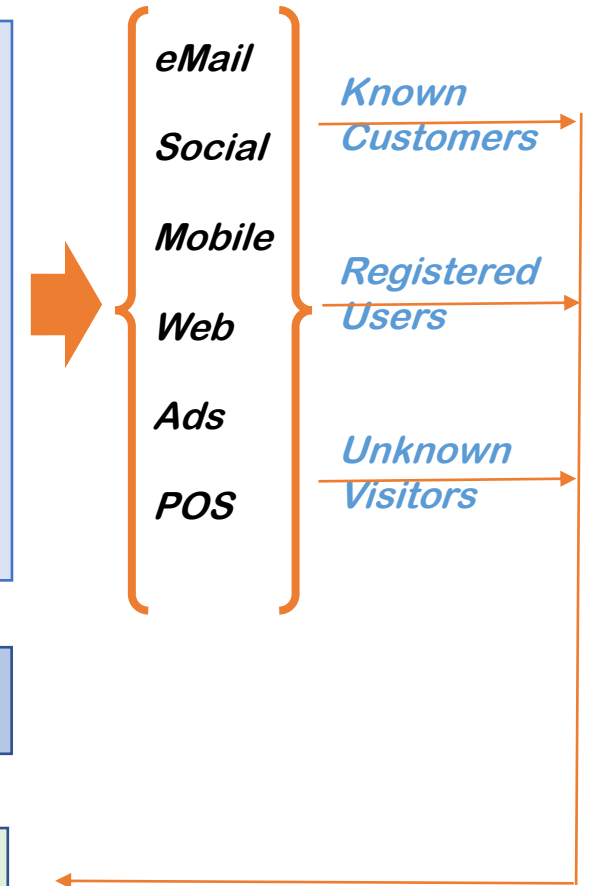
RESEARCH IN ACTION
vendor selection matrix®

OVERALL MARKETING AUTOMATION MARKETECHTURE

Plan & Manage

Marketing Resource Management

- Planning & Financials
- Creative Production
- Asset Management
- Fulfilment Management
- Performance Management

Target

Orchestration

- Segmentation
- Content
- Lead Management
- Audience Push/Offer Management

Engage

Multi-Channel Campaign Management

- eMail
- Mobile
- Social & Video
- Web
- eCommerce
- Sales And Partners
- Adtech
- Relationships (CRM)
- Print

eMail
Social
Mobile
Web
Ads
POS

Known Customers
Registered Users
Unknown Visitors

Analytics

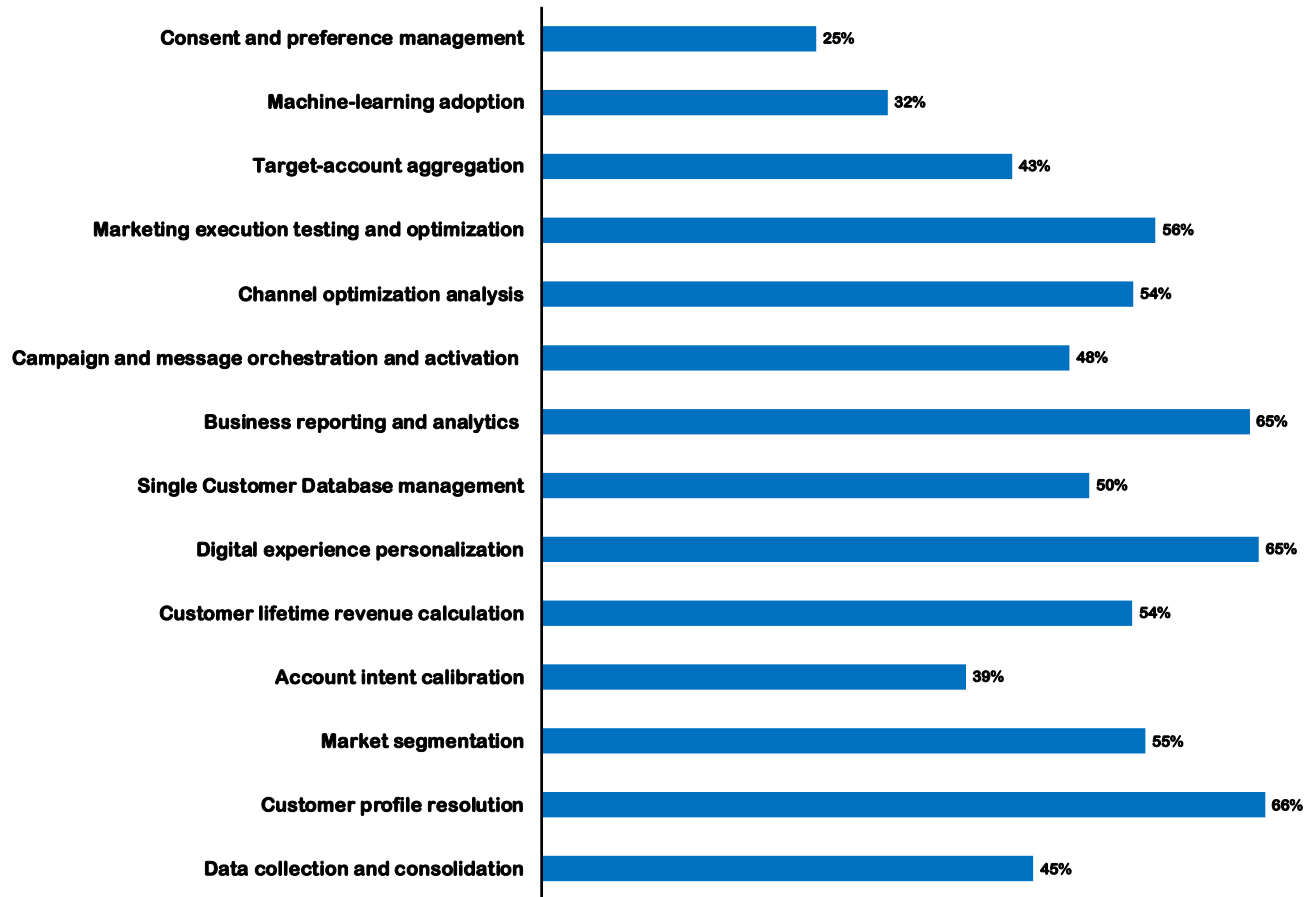| Reporting Dashboards	Predictive & Recommendation	Data Mining & BI	Audience Insights	Closed-loop Attribution	Econometric Modelling	Mobile/Site Analytics	Spend Optimization

Data Management

Collection	Targeted Audiences	Look-a-like Audiences	Adaptive Segments	Subscriber Management	Audience Scoring	Partner Audiences	Consent & Compliance

Product DB   Transactions   Interactions   Social   Ad/Media Behaviour.   Geodata.   Other

RESEARCH IN ACTION
vendor selection matrix®

MARKETERS PLAN TO AUTOMATE MULTIPLE PROCESSES WITH CDM PLATFORMS

Process	Percentage
Consent and preference management	25%
Machine-learning adoption	32%
Target-account aggregation	43%
Marketing execution testing and optimization	56%
Channel optimization analysis	54%
Campaign and message orchestration and activation	48%
Business reporting and analytics	65%
Single Customer Database management	50%
Digital experience personalization	65%
Customer lifetime revenue calculation	54%
Account intent calibration	39%
Market segmentation	55%
Customer profile resolution	66%
Data collection and consolidation	45%

N = 1275 Marketing and Business Managers with budget responsibilities for CDM.

We asked, "Which of the following processes do you automate, or plan to, with your CDM platform?" and collected this full list of planning priorities from the respondents.

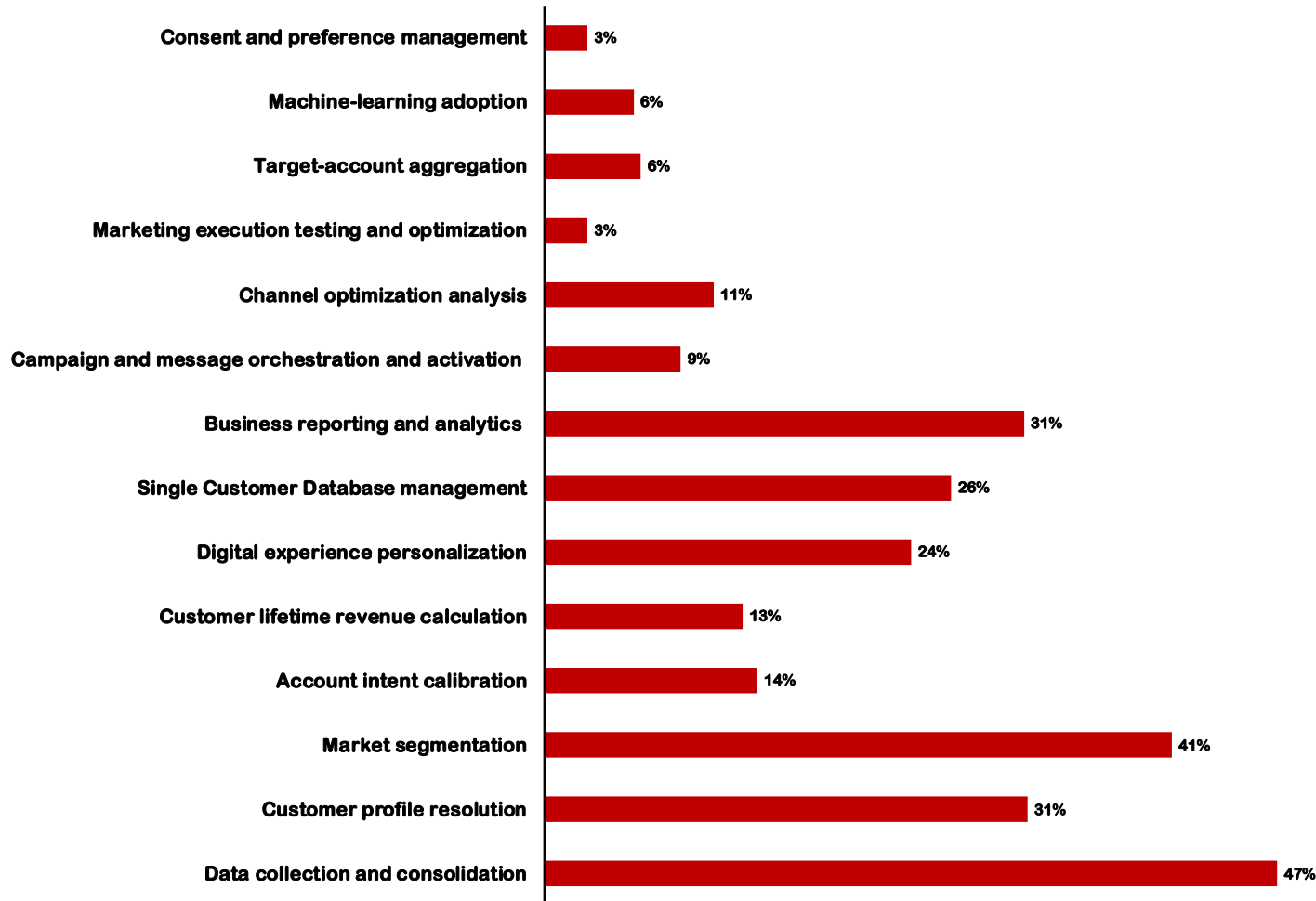The top six processes (over 50%) planned are:

* Customer profile resolution
* Digital experience personalization
* Business reporting and analytics
* Mkt. execution testing/optimization
* Market segmentation
* Cust. lifetime revenue calculation
* Channel optimization analysis

Buyers are most likely to engage with those CDM vendors whose messaging addresses the above priorities.

RESEARCH IN ACTION
vendor selection matrix®

RESEARCH:

MANY PROCESSES ARE ALREADY AUTOMATED

Chart — percentage of respondents reporting each process as "already automated":

- Consent and preference management: 3%
- Machine-learning adoption: 6%
- Target-account aggregation: 6%
- Marketing execution testing and optimization: 3%
- Channel optimization analysis: 11%
- Campaign and message orchestration and activation: 9%
- Business reporting and analytics: 31%
- Single Customer Database management: 26%
- Digital experience personalization: 24%
- Customer lifetime revenue calculation: 13%
- Account intent calibration: 14%
- Market segmentation: 41%
- Customer profile resolution: 31%
- Data collection and consolidation: 47%

N = 1275 Marketing and Business Managers with budget responsibilities for CDM.

For completeness, this is the full list of processes, along with the number of respondents reporting it as "already automated".

The top four processes (over 30%) named as already automated are:

* Data collection and resolution
* Market segmentation
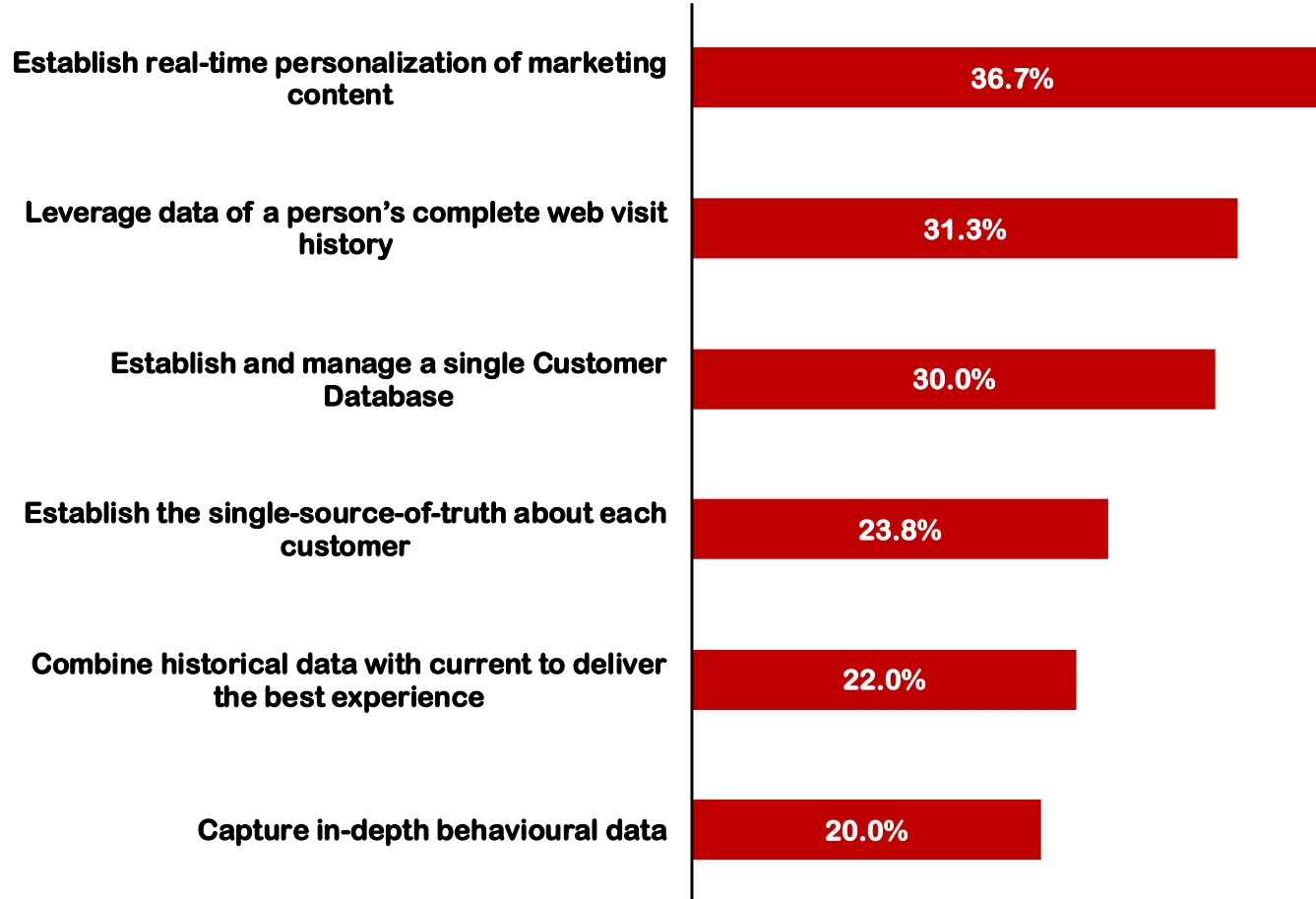* Business reporting and analytics
* Customer profile resolution

PROCESSES NOT NEEDED

There is also an interesting list of processes which a significant number of respondents noted as "not needed". 64% of the respondents believe they do not need to have Consent and preference management while 54% are doubtful about Machine-learning adoption.

RESEARCH IN ACTION
vendor selection matrix®

RESEARCH:

THE MAJOR DRIVERS FOR DOING CDM

Driver	Percentage
Establish real-time personalization of marketing content	36.7%
Leverage data of a person's complete web visit history	31.3%
Establish and manage a single Customer Database	30.0%
Establish the single-source-of-truth about each customer	23.8%
Combine historical data with current to deliver the best experience	22.0%
Capture in-depth behavioural data	20.0%

N = 1275 Marketing and Business Managers with budget responsibilities (Respondents could select up to three drivers).

We asked, "Which anticipated top 3 benefits are driving your investment in customer data management automation in 2022? (select up to three)"

Well over **one third** of companies are focused on content personalization. A group of various customer data collection improvement drivers are the next important.

However, these priorities vary across the regions, as shown on the next page.

Vendors take note: you should reflect these customer priorities in your marketing messaging – if you have a solution for it.

RESEARCH IN ACTION
vendor selection matrix®

RESEARCH:

CDM DRIVERS DIFFER ACROSS THE REGIONS

Driver	Europe	N America
Establish real-time personalization of marketing content	28%	48%
Leverage data of a person's complete web visit history	30%	29%
Establish and manage a single Customer Database	34%	17%
Establish the single-source-of-truth about each customer	30%	16%
Combine historical data with current to deliver the best..	17%	29%
Capture in-depth behavioural data	15%	25%
Present personalized messages, content and experiences	24%	9%
Synchronize external attribution data	21%	14%
Measure the true intent of your visitors, users and accounts	9%	27%
Display individualized product and content recommendations	14%	17%
Leverage behavioral and external data to segment..	10%	18%
More efficient targeting and more precise analysis	19%	8%
Enable true customer-centricity in all communications	15%	8%
Unify each customer journey: mobile, app, website, call..	11%	12%
Empower business users with powerful self-service..	6%	12%
Compliance with GDPR and IAB	12%	3%
Identify each interaction for an optimized view of all..	5%	9%

N = 653 European and 503 North American Marketing and Business Managers with budget responsibilities
(Respondents could select up to three drivers).

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

Real-time personalization and measurement of intent seems to be much more important in North America. Similarly with leveraging historical data and segmentation.

European respondents are still focused on getting to a single customer database and/or single source of truth, a more basic CDM initiative. The benefit of more efficient targeting and customer-centricity is also recognized by twice as many European executives compared to North American.

Vendors take note: you should reflect these customer priorities in your international marketing messaging – if you have a solution for it.
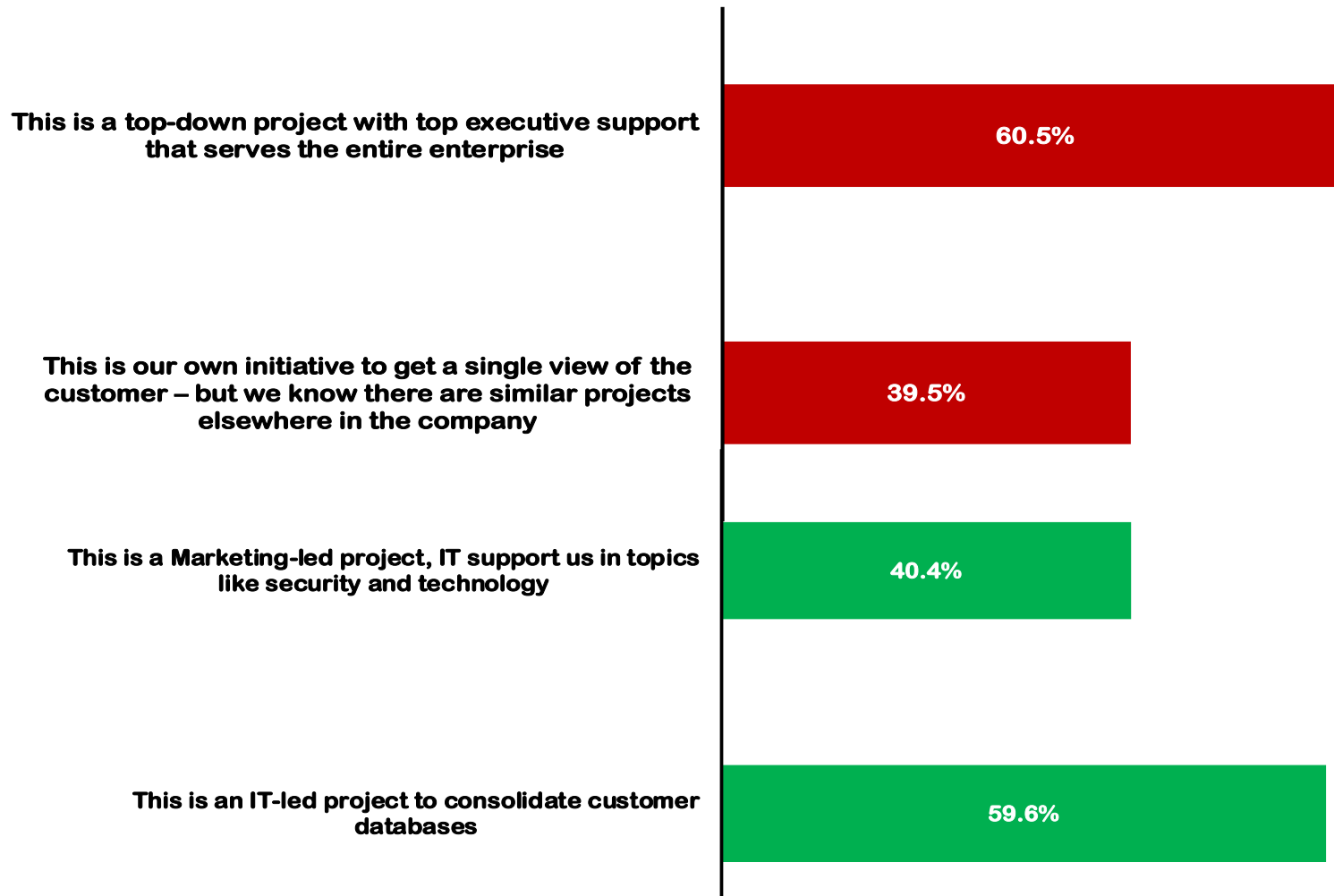
RESEARCH IN ACTION
vendor selection matrix®

COMPARING CDM DRIVERS 2020 TO 2022

Establish real-time personalization of marketing content
- 2020: 39.0%
- 2022: 17.0%

Leverage data of a person's complete web visit history
- 2020: 21.1%
- 2022: 18.9%

Establish and manage a single Customer Database
- 2020: 7.7%
- 2022: 22.6%

Establish the single-source-of-truth about each customer
- 2020: 38.6%
- 2022: 16.8%

Combine historical data with current to deliver the best experience
- 2020: 22.9%
- 2022: 10.3%

Capture in-depth behavioural data
- 2020: 23.5%
- 2022: 9.9%

Present personalized messages, content and experiences
- 2020: 9.2%
- 2022: 13.2%

Synchronize external attribution data
- 2020: 9.5%
- 2022: 10.7%

Legend:
- 2020
- 2022

N = 1,309 (2022) and 1,377 (2020) Marketing and Business Managers with budget responsibilities for SEM.

We asked the same question in our 2020 survey and there has been significant change in the prioritization. Some of the 2020 options were not listed in 2022, and vice versa.

Overall, there is a much more even spread across several reasons for investment in CDM solutions. This reflects the rising sense of urgency in many companies around their data management programs, a clear impact of digital marketing and selling.

RESEARCH IN ACTION
vendor selection matrix®

RESEARCH: How Customer Data Management projects are organized (select the option from each pair that fits closest to your use case.)

This is a top-down project with top executive support that serves the entire enterprise — 60.5%

This is our own initiative to get a single view of the customer – but we know there are similar projects elsewhere in the company — 39.5%

This is a Marketing-led project, IT support us in topics like security and technology — 40.4%

This is an IT-led project to consolidate customer databases — 59.6%

Overall, nearly 40% of respondents are running their own CDM project, with other projects running elsewhere in their enterprise. This varies by region; it applies for 65% of North American respondents compared to just 24% and 14% in Europe and APAc respectively.

Nearly 60% of CDM initiatives are IT-led projects, but that also varies by region; it applies for 63% of North American respondents compared to just 54% and 79% in Europe and APAc respectively.

Most CDM vendors should therefore focus on presenting and describing more marketing-oriented use cases in their messaging for Europe and APAC.

N = 1,275 Enterprise Business Managers with budget responsibilities. Respondents selected the option closest to their use case in each pair.

RESEARCH IN ACTION
vendor selection matrix®
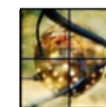
INSIGHTS: TOP CDM MARKET TRENDS 2023

- **Account-Based Marketing drives CDM adoption in B2B.** Most enterprises with ABM projects admit that their biggest success inhibitor is "lack of deep customer insights" and must rely on tactical predictive analytics vendors instead of addressing the fundamental CDM challenge. Several ABM vendors are now appearing in this CDM landscape.

- **CDM projects are difficult to define and plan for marketers.** Marketers know that customer data is an issue but struggle to define goals and actions to address this. They see inefficiencies in data management but cannot list their needs regarding data activation and campaign execution. Many use cases for CDM are not yet routine in their current digital marketing.

- **CDM requires a marketing operations team.** Every company already has its customer data silos. So a successful CDM deployment needs internal processing to mitigate conflicts arising from data management overlap. CDM requires shared IT and marketing ownership.

- **Consent Management remains critical.** Legislation like the CCPA and GDPR requires marketers to be completely transparent on how they use customer data. As well as compliance pressure, another driver of transparency, for marketers, is establishing brand trust. Data ethics is now routine in the deployment of many marketing technologies, including CDM solutions.

- **The CDM process is more than CDP technology.** Marketers need a central system with customer data that also easily connects to supply chain data, inventory data, and other kinds of data that are important in forging the customer experience.

RESEARCH IN ACTION
vendor selection matrix®

INSIGHTS: TOP CDM VENDOR TRENDS 2023

- **The CDM vendor landscape is bewildering.** CDM vendors have a variety of roots. Some have just repackaged their traditional offering through new product positioning and sales strategies. Others are CDP pure-plays that are expert on data management but not necessarily marketing.

- **Marketing suite vendors are taking ownership but …** Initially slow to address CDM challenges, the larger vendors have been busy in the last years announcing CDM strategies. Often though, the focus is only on consolidating their own data sources.

- **Specialist CDM/CDP vendors will prevail.** These vendors are both extremely capable and knowledgeable about data consolidation and identity management principles and the vendor landscape is richly venture-funded. Some are challenged, however, to communicate the benefits of their technologies to business-oriented marketers.

- **CDM vendors talk technology, not business or even marketing.** Despite the relative immaturity of the topic, CDM vendors struggle to differentiate themselves. Tending to debate about their own competing technologies, they do not help marketers to understand what is being offered.

- **Vendors segment by functionality focus.** Reflecting their history, an evaluation of the functionality mix offered by each vendor may help buyers to fit the most suitable vendors to their CDM project. Some vendors are focused on marketing orchestration, some providing a hub for data analytics, others are integrators of data silos. Some are more IT-centric tools.

RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT

There are over 140 vendors in the Customer Data Platform Institute directory**. These are the top vendors in 2022/23 as selected by 1,500 buyer companies based upon product, company and service quality.

VENDOR NAME	PRODUCT(S)
ACTIONIQ	AIQ CX Hub powered by a CDP
BLUECONIC	BlueConic Customer Data Platform
CALIBER MIND	CaliberMind
CROSSENGAGE	CrossEngage Customer Data & Prediction Platform
EULERIAN	Eulerian for Marketers
EVERGAGE	Salesforce Evergage Interaction Studio
LEADSPACE	Leadspace, The Graph, The Studio
LYTICS	Lytics CDP (Decision Engine, Cloud Connect)
NGDATA	Intelligent Engagement Platform
REDPOINT GLOBAL	Redpoint rgOne
SALESFORCE	Salesforce Customer 360
SITECORE	Sitecore Experience Platform - Sitcore Experience Database
TEALIUM	Tealium Customer Data Hub
TERMINUS	Terminus CDP
TWILIO	Segment

This list is alphabetical and includes the Top 15 customer data management vendors and solutions named and scored by the survey respondents. Although Evergage was acquired by Salesforce in 2020, a significant number of respondents named and rated that brand unprompted.

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

- ALCHEMY BY GALE
- UPLAND SOFTWARE
- ORACLE (featured in the 2020 report)
- ADOBE (featured in the 2020 report)
- DUN & BRADSTREET
- ACQUIA (featured in the 2020 report)
- COMMANDERS ACT

Six vendors are new to the list since 2020:

- CALIBER MIND
- CROSSENGAGE
- LEADSPACE
- LYTICS
- TERMINUS
- TWILIO

** See https://www.cdpinstitute.org/directory

NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a vendor scorecard will not be written.

RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT

Vendor Quick Facts

VENDOR NAME	Market Presence	Growth Rate	Customer Traction	GOOD TO KNOW
ACTIONIQ	Very Big	Very High	Strong	Aligning people, processes, and technology to deliver exceptional CX across every touchpoint at scale.
BLUECONIC	Very Big	Very High	Strong	Liberating data for more than 350 brands worldwide.
CALIBER MIND	Medium	Medium	Low	Believing that addressing data issues before layering on analytics is essential.
CROSSENGAGE	Small	Very High	Medium	Integrating data, customer journey and segmentation tools, and connecting to marketing.
EULERIAN	Medium	High	Medium	Ensuring that marketing teams invest budgets in the right place and have a 3-way understanding of their campaigns' performance.
EVERGAGE	Big	Medium	Strong	Now part of Salesforce.
LEADSPACE	Medium	Medium	Medium	Be confident of targeting the right prospects with the right offerings, throughout the sales funnel.
LYTICS	Medium	Low	Good	Making behavioral and intent-based personalization simple and 100% data-driven.
NGDATA	Big	Very High	Strong	Providing a marketer-managed system that creates a persistent, unified customer database.
REDPOINT GLOBAL	Big	Very High	Medium	Helping innovative companies to transform the customer experience they offer.
SALESFORCE	Very Big	Medium	Strong	A complete data view of your customer across marketing, commerce, sales, and service. Activate across email, mobile, advertising, web,
SITECORE	Medium	Low	Low	Lets you create secure, unified customer profiles from historical, transactional, or behavioral data for every customer
TEALIUM	Very Big	Very High	Strong	Leveraging customer data to fuel CX, create insights and analysis, and optimize the Martech stack.
TERMINUS	Medium	Medium	Medium	Deliver a sustainable growth advantage and revitalize the role of B2B marketing as a revenue growth engine for your business.
TWILIO	Big	Medium	Good	Customer engagement platform to power personalized interactions and trusted global communications with customers.

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

NOTES:
- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT

More Vendor Quick Facts

VENDOR NAME	CDP TYPE (per CDP Institute directory)				GLOBAL FOOTPRINT			TARGET INDUSTRIES
	Data	Analytics	Campaign	Delivery	NA	EMEA	APAC	
ACTIONIQ			X		70%	25%	5%	All
BLUECONIC			X		65%	35%	0%	All
CALIBER MIND			X		80%	10%	10%	FSI, Tech, Pharma
CROSSENGAGE			X		15%	85%	5%	eCommerce, Retail
EULERIAN		X			20%	75%	5%	CPG, Distribution, Retail
EVERGAGE	Not listed separately in the directory				60%	25%	15%	All
LEADSPACE		X			60%	30%	10%	FSI, Tech, Retail, Pharma
LYTICS			X		70%	20%	10%	FSI, Tech, Retail, Pharma
NGDATA			X		40%	40%	20%	FSI, Telco, Hospitality & Travel
REDPOINT GLOBAL			X		65%	30%	5%	Retail, Healthcare, FSI, Travel Services
SALESFORCE			X		60%	25%	15%	All
SITECORE			X		50%	35%	15%	Life Sciences, Manujfacturing, Retail, Utilities
TEALIUM		X			55%	30%	15%	FSI, Hospitality, Media, Tech, Retail, Pharma
TERMINUS		X			80%	15%	5%	Technology, FSI, Healthcare & Life Sciences
TWILIO	X				40%	40%	20%	FSI, Retail, Tech

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

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

RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™:
EVALUATION CRITERIA

STRATEGY

✔	**Vision And Go-To-Market**	**30%**	› Does the company have a coherent vision in line with the most probable future market scenarios? › Does the go-to-market and sales strategy fit the target market and customers?
✔	**Innovation And Differentiation**	**30%**	› How innovative is the company in this market? › Does the solution have a unique selling proposition and clear market differentiators?
✔	**Viability And Execution Capabilities**	**15%**	› How likely is the long-term survival of the company in this market? › Does the company have the necessary resources to execute the strategy?
✔	**Recommendation Index**	**25%**	› Would customers recommend this vendor in this market to their peers?

EXECUTION

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

NOTES:
- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
- 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
- 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
- 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.

The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

CUSTOMER DATA MANAGEMENT

**Customer Data Managenment
The Top Global Vendors 2023**
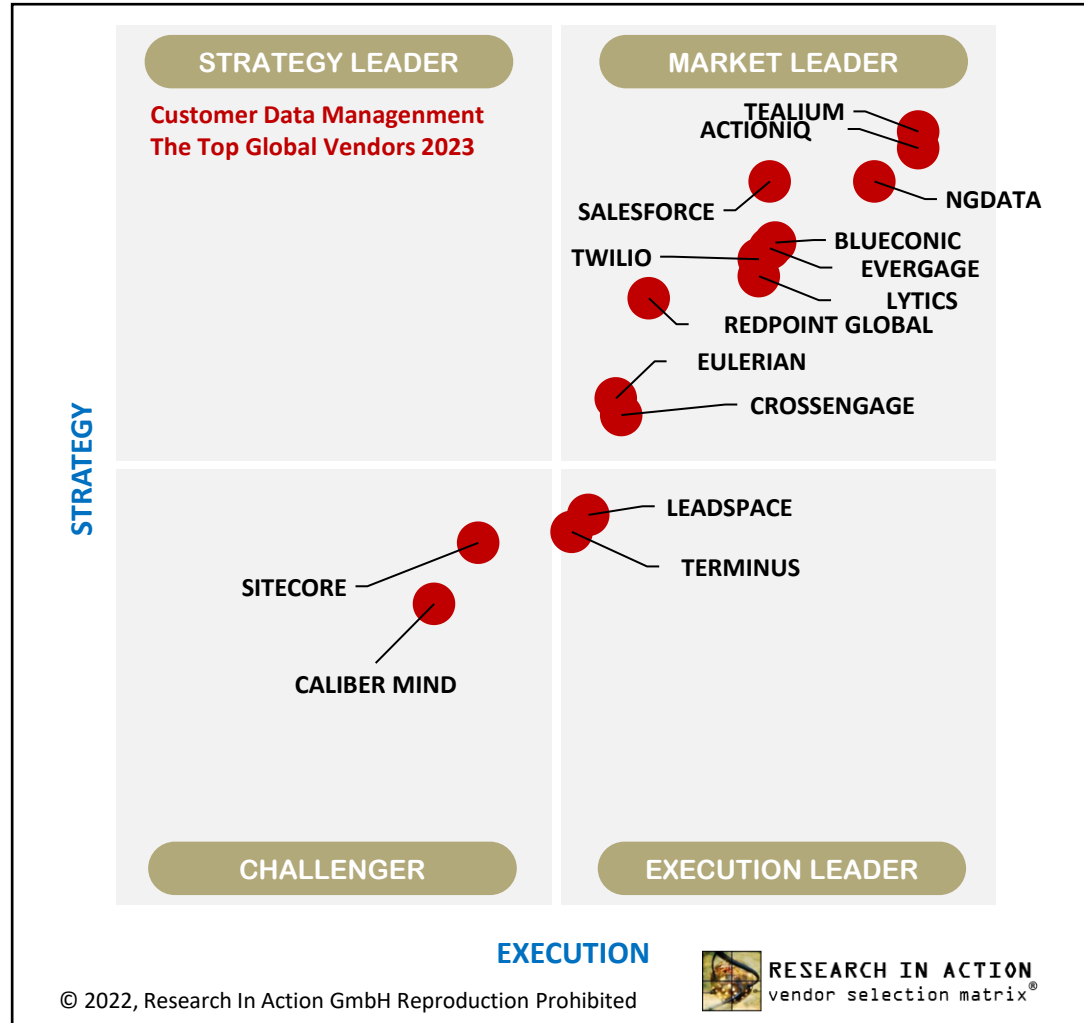
		STRATEGY	EXECUTION	TOTAL
1.	TEALIUM	4.75	4.83	9.58
2.	ACTIONIQ	4.71	4.83	9.54
3.	NGDATA	4.64	4.73	9.36
4.	SALESFORCE	4.64	4.49	9.13
5.	BLUECONIC	4.50	4.50	9.00
6.	EVERGAGE	4.49	4.49	8.98
7.	TWILIO	4.46	4.46	8.93
8.	LYTICS	4.43	4.46	8.89
9.	REDPOINT GLOBAL	4.38	4.21	8.59
10.	EULERIAN	4.15	4.14	8.29
11.	CROSSENGAGE	4.11	4.15	8.26
12.	LEADSPACE	3.89	4.08	7.96
13.	TERMINUS	3.85	4.04	7.89
14.	SITECORE	3.83	3.83	7.65
15.	CALIBER MIND	3.69	3.73	7.41

RESEARCH IN ACTION
vendor selection matrix®

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

RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™
CUSTOMER DATA MANAGEMENT

Tealium is the global leader in Customer Data Management, leveraging customer data to fuel CX, create insights and analysis, and optimize the Martech stack.

STRATEGY	RESULT
Vision And Go-To-Market	4.75
Innovation And Differentiation	4.75
Viability And Execution Capabilities	4.75
Recommendation Index	4.75
	4.75

EXECUTION	RESULT
Breadth And Depth Of Solution Offering	5.00
Market Share And Growth	4.75
Customer Satisfaction	4.75
Price Versus Value Ratio	4.75
	4.83

GENERAL:

Founded in 2008, Tealium has over 750 employees with HQ in San Diego, CA, plus offices around the globe.

Its customers include B2C and B2B enterprises in many sectors including retail, e-commerce, FSI, healthcare, pharmaceutical, travel and hospitality, media/publishing, technology, gaming, telecom, and education.

The vendor connects customer data across web, mobile, offline and IoT devices to help companies connect with their customers.

Tealium manages the "Data Supply Chain" for customers with these phased functions: Collect, Standardize, Transform and Enrich, Integrate, Activate.

Tealium's integration ecosystem supports over 1,300 client-side and server-side vendors and technologies.

STRATEGY:

The Tealium Customer Data Hub includes tag management, an API hub, a customer data platform, and data management solutions that enable organizations to leverage real-time data for creating insight and building personalized digital experiences across every organizational team, technology, and customer touchpoint.

The software highlights key attributes or predictive data points, enabling more targeted segmentation for AdTech, MarTech, Customer Experience, Analytics, and other systems.

It received a very high score in the survey for its Vision and Go-to-Market capabilities. As well as being the Gobal Winner, the vendor also scored a very high Recommendation Index of 98%.

EXECUTION:

Tealium is one of the few vendors that provide messaging and functionality to all three CDM communities: marketers, data analysts, and developers. It spans the CDM world from gathering the "breadcrumbs of identity" right through to real-time activation of marketing campaigns.

Marketers can even use a machine-learning module, Predict ML, to further define segments and trigger actions using individualized customer predictions of likely success or failure for defined goals that are configurable.

As well as being #1 Global Winner in this matrix, the survey scored Tealium #1 in the Customer Satisfaction and Price vs Value Ratio categories.

Tealium also scored a maximum of 5.00 for Breadth and Depth of Solution Offering in CDM.

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

BOTTOM LINE:

B2C companies use Tealium for data cleansing/hygiene/enrichment/consolidation, complex segmentation, dynamic audience management, cross-channel data management, campaign personalization and progressive profiling. B2B use cases include data onboarding, data unification, single view of customer, ABM, data orchestration, and sales enablement/intelligence.

Growing at 20% each year, the vendor has been solving customer data challenges in the most privacy-rigorous industries since 2013. Customers report that it works with them as a true partner with a very responsive services organization.
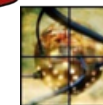
RESEARCH IN ACTION
vendor selection matrix®

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

About:

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

RESEARCH IN ACTION
vendor selection matrix®

CONTACT

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

RESEARCH IN ACTION
independent research & consulting

Research In Action GmbH
Alte Schule
56244 Hartenfels
Germany

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

RESEARCH IN ACTION
independent research & consulting