

The Gartner CRM Vendor Guide, 2016

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CRM leaders are continuing to invest in digital CRM technologies to drive growth and improve the customer experience. A key priority is market differentiation via new data and analytics tools that create consistent, contextualized customer interactions across all communications channels.

Key Findings

- During the next five years, the dominant CRM deployment model will continue to be an on-premises and SaaS hybrid. But the remaining CRM application functionalities will be harder to adopt in a cloud delivery model, causing integration costs of point products to rise as CRM leaders try to get a single view of the customer across departmental lines.
- Developing a customer engagement center with an intelligent CRM case management system will be the keystone of many CRM leaders' customer service technology strategy, but at least five different vendors will be needed to succeed with this model.
- Increased competition for new CRM installations and installed base protection are driving price discounts in the U.S. across solutions at all price points. Other regions that are mature in CRM adoption are expected to see a similar trend later in the forecast period (see "Forecast Overview: CRM Software, Worldwide, 2015").
- CRM leaders no longer focus on the CRM application itself, but on how it transforms interactions with customers, partners and other parties to increase revenue or increase customer satisfaction. This demands integrating a wide range of technologies and processes.

Recommendations

- Leverage the Gartner CRM Maturity Model framework to assess your organization's CRM maturity level objectively and to form the basis for your CRM roadmap. Ensure that CRM programs are business-driven.
- Improve digital customer acquisition and increase digital commerce sales by incorporating digital commerce ecosystem applications to enhance the digital commerce customer

experience (see "Leverage the Gartner Digital Commerce Technology Ecosystem to Optimize IT Decisions").

- Make customer experience (CX) initiatives organizationwide in scope, encompassing billing, logistics, procurement, supply chain and new product development.
- Phase in a bimodal IT approach, with a different governance model and technology framework for commodity IT operations (Mode 1) and with solutions supporting differentiating and innovative CRM business ideas (Mode 2) (see "How to Achieve Enterprise Agility With a Bimodal Capability," "The CRM Innovator's Sandbox" and "How to Recognize CRM Systems of Innovation").

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Strategic Planning Assumptions

By 2017, Gartner predicts that 65% of sales organizations will use smartphones to drive user adoption and improve data quality for SFA systems.

By 2018, 60% of large organizations will develop in-house customer journey mapping capabilities.

By 2018, IT organizations without a bimodal IT strategy will find that 50% of new CRM applications will be sourced without their knowledge.

Analysis

Market Forecast: Positive Outlook for CRM, Worldwide, Through 2019

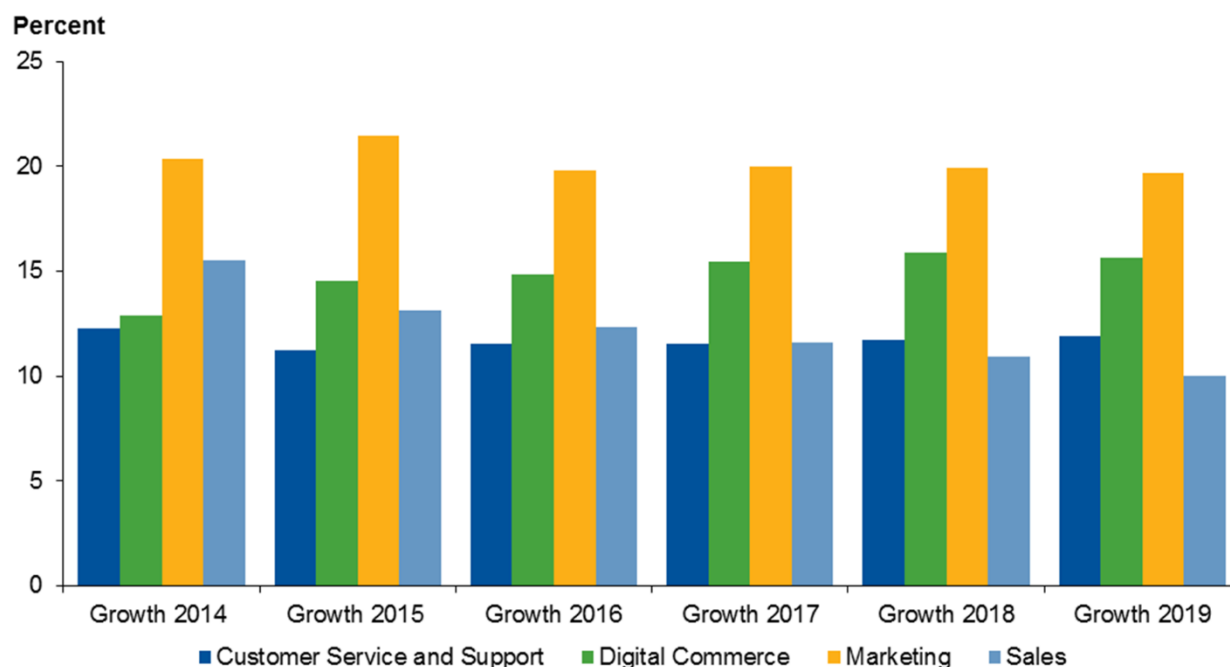
Gartner expects CRM market growth to increase to a slightly moderated rate in 2015 (see Figure 1), following multiple strong years of investment. The outlook continues to be positive throughout the forecast period, with an overall compound annual growth rate (CAGR) of 14.2%, as buyers focus on technologies that enable more targeted customer interactions in multichannel environments.

Globally, most organizations have started to break away from an on-premises, packaged commercial software CRM system, which has been the dominant delivery model of the last 20 years. It is being replaced by a hybrid model that combines on-premises software with cloud-based CRM solutions. These were adopted first in areas with decision-making autonomy (such as B2B sales force automation), or where cloud-based solutions fulfilled the new requirement better than on-premises solutions (such as social monitoring). Today, it has spread to mainstream customer service and support, and digital commerce platforms.

Many organizations will keep parts of their CRM application inventory on-premises for a long period while gradually developing and adding a solid competency in managing SaaS-based CRM applications. As a result, the dominant model over the next decade will be a hybrid environment for most, with a mix of cloud and on-premises CRM applications.

Gartner's CRM market definition includes the submarkets of customer service and support (CSS), digital commerce, marketing and sales software. We have also integrated social and mobile technologies and vendors into their operational markets as they are maturing technologies within CRM (see "Forecast Overview: CRM Software, Worldwide, 2015").

Figure 1. Actual Growth (2014) Versus Expected CRM Market Growth Through 2019



Source: Gartner (May 2016)

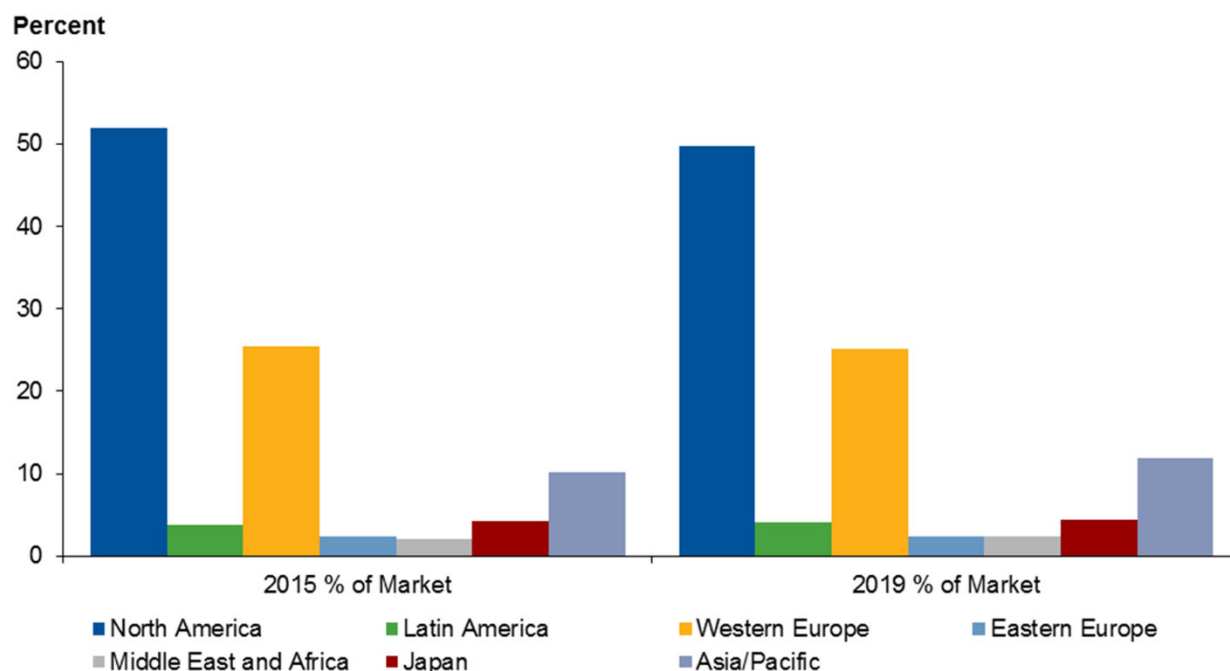
North America continues to be the largest CRM regional market. Growth in underserved markets, such as Asia/Pacific and Latin America, will be driven through 2019 by large global company purchases and rapid establishment of new enterprises, changing consumer buying patterns and increasing consumer adoption of Internet of Things (IoT). Among small and medium businesses (SMBs), this growth will benefit commerce and help them to reach new customers.

Emerging markets, particularly Latin America and Asia/Pacific, will see the strongest growth over the next five years, although from a much smaller installed and revenue base. In particular, "greenfield" opportunities within these emerging regions will come from all CRM subsegments (sales, CSS, marketing and commerce). However, country-level adoption within these emerging regions tends to be varied, depending on the strength of the economy and local SMB technology adoption. This results in uneven growth opportunities across different vertical industries.

North America and Western Europe remain the largest regions for CRM spending, accounting for 77.4% of total CRM software revenue in 2015, but the regions are expected to see a decline of 2.3% in CRM spending over the forecast period, decreasing their revenue to 74.9% in 2019 (see Figure 2).

All regions will continue to experience double-digit growth rates for the next five years, with North America having the lowest CAGR at 13.2% due to the market's mixed economic performance. Latin America and Asia/Pacific will take the lead in terms of CAGR for the next five-year period, although from a smaller installed and revenue base.

Figure 2. Percentage of Worldwide CRM Revenue by Region, 2015 and 2019



Source: Gartner (May 2016)

Customer service support is the backbone of CRM operations and has the largest share in Greater China, Latin America and emerging Asia/Pacific countries. "Greenfield" opportunities from these emerging regions come from all CRM subsegments (sales, customer service support, marketing and commerce). Nevertheless, emerging countries tend to be fragmented, with uneven growth opportunities across different verticals and more constraints on their economies.

Cool Vendors

Gartner's definition of a Cool Vendor is a small company offering a technology or product that is:

- Innovative — It enables users to do things they couldn't do before the technology emerged.
- Impactful — It has (or will have) a business impact; it's not just technology for the sake of technology.
- Intriguing — It has caught Gartner analysts' and clients' interest or curiosity during the past six months.

Our research is structured so that users can quickly determine what is cool about the vendor, what its challenges are and who in the buyer organization will benefit from the vendor's offering.

Cool Vendors, 2015

We have updated the following Cool Vendor lists to reflect changes to a vendor's status or name since first being mentioned in our Cool Vendors research.

- Allocadia
- Altocloud
- AnswerDash
- Beckon
- Boomerang Commerce
- Fuze (Contactive)
- Cyara
- Flamingo
- HotWax Systems
- Limonetik
- Mirakl
- Mtivity
- OneMob
- Powa Technologies
- Qstream
- ResponseTap
- Sidecar
- Valkre
- VoloMetrix

Cool Vendors, 2014 Through 2006

Cool Vendors, 2014

- Adam Software
- Buttle Information Systems
- ClearSlide
- DataSource
- Eudata
- FacilityLive

- Gainsight
- HubSpot
- KMS lighthouse
- MindMixer
- Personetics
- Provenir
- Selligy

Cool Vendors, 2013

- AtTask
- Conversocial
- Datahug
- Lattice
- Rapide
- RedPoint
- SproutLoud
- SundaySky
- The Tas Group
- WalkMe
- Xiaoi

Cool Vendors, 2012:

- Badgeville
- Blooming
- BlueKai
- Commerce Guys
- CustomerXPs
- Decideware
- Engage121
- GeoFluent

- GoodData
- Hearsay Social
- Interactions
- KomBea
- Moontoast
- OctaShop e-Retail Services
- Peer Squared (renamed Smartify)
- Qlika
- Qvidian
- Social Vision (Ni3)
- Vivastream

Cool Vendors, 2011:

- Acumen Solutions
- Anboto
- Coffee Bean Technology
- Collective Intellect (acquired by Oracle)
- General Sentiment
- Gigya
- Openstream
- Proxomo
- Qontext (acquired by Autodesk)
- Solutio
- Telnic
- ThreatMetrix
- Whisbi
- WorkFlex Solutions
- ZoomSafer (Aegis Mobility)

Cool Vendors, 2010:

- Artisan Solutions (now known as Artisan)
- Balihoo
- Foursquare
- GyPSii
- Jigsaw (acquired by Salesforce)
- modomodo
- NextStage Evolution
- Pontis
- Prolifiq Software
- QuickSearch
- Siri (acquired by Apple)
- SelfService Company
- Synthetix
- Thunderhead
- Transera

Cool Vendors, 2009:

- Cloud9 Analytics
- Digby
- dna13 (acquired by CNW)
- Helpstream
- Makana Solutions
- MuseWorx
- NexJ Systems
- Pontis
- Reimage
- Silent Edge
- Viclone

- Visible Measures

Cool Vendors, 2008:

- Advizor Solutions
- Aggregate Knowledge
- Cvent
- Eidoserve (GetAbby)
- EveryScape
- LandSonar
- Lemonade
- Orchestra Networks
- Saepio
- SalesCentric
- SupportSpace
- The Fizzback Group (acquired by Nice Systems)
- TopQuadrant
- Vitrium
- Xmonic-Imparta
- Ydilo
- Zoomix (acquired by Microsoft)

Cool Vendors, 2007:

- 5 Square
- Accept Software
- Eloqua
- Enkata
- Experian Hitwise
- Exploria
- Infonis International
- InsideView

- KXEN (acquired by SAP)
- Landslide
- Loyalty Lab (acquired by TIBCO)
- NearbyNow (acquired by JiWire)
- OpenQ
- PowerReviews
- RLPTechnologies
- Swivel Secure
- Toa Technologies (acquired by Oracle)
- Vistaar Technologies
- XpertUniverse

Cool Vendors, 2006:

- Business Events
- Communispace
- Exchange Solutions
- Health Market Science
- InvisibleCRM
- Invoke
- Involve Technology
- MMA
- Massive Incorporated
- Nice Systems
- Olista
- Savo
- Sigma Dynamics
- SugarCRM
- Umbria
- Venda

Sales

Sales Execution Systems

Sales Force Automation

Sales force automation (SFA) applications support the automation of sales activities, processes and administrative responsibilities for B2B organizations' sales professionals. Core functionalities include account, contact and opportunity management, sales activity management, and forecasting. Additional capabilities focus on improving the effectiveness of salespeople, including sales process configuration, content management and sales analytics.

Vendors include:

- Aplicor
- Aptean (Pivotal CRM)
- Base
- Bullhorn
- bpm'online
- CRMnext
- Heat Software (GoldMine)
- ForceManager
- Infor (Saleslogix)
- Maximizer
- Microsoft (Dynamics CRM, Dynamics CRM Online)
- NetSuite
- Oracle Sales Cloud
- Pegasystems
- Sage CRM
- Salesforce
- SAP(Cloud for Sales, CRM)
- Soffront Software
- SugarCRM

- Tour de Force
- Zoho

Partner Relationship Management

Partner relationship management (PRM) applications support indirect sales channel processes with Web-based capabilities to manage distributors, dealers, value-added resellers and all types of sales partners in general. Listed vendors in this section provide either comprehensive end-to-end solutions or are specialized point solutions. Core categories of features include partner life cycle management functionalities, channel partner marketing systems, sales enablement and execution functionalities and support partner services. The majority of PRM solutions are deployed as new implementations or to replace internally developed solutions. PRM applications will continue to be SaaS-based and will provide the sales-focused basics of PRM.

We divide our list of providers into two sections:

1. PRM application vendors for managing end-to-end sales channels.
2. Vendors supporting to-the-point areas within the sales channel management process, including specializations for channel partner marketing systems (CPMS), sales enablement and sales tools.

PRM application vendors for managing end-to-end sales channels include:

- Apttus
- bpm'online
- Entomo
- Gorilla Toolz
- Impartner (formerly TreeHouse Interactive)
- Oracle
- PartnerPath
- Pegasystems
- Relayware
- Salesforce

Point-based applications in the PRM market include:

- Allbound
- BrandMaker
- Elastic Grid

- LogicBay
- Revitas
- Showpad
- StructuredWeb
- Successful Channels
- Tie Kinetix
- Zift Solutions
- Zyme

Inside Sales and Telesales

Inside sales and telesales technologies include everything from sales enablement tools to technologies that support the full management of inside sales teams. These solutions fit in between marketing automation and sales force automation solutions, automating the most common tasks of inside sales representatives for B2B lead qualification.

Applications in this market accelerate the sales processes supporting administrative tasks, such as looking up contacts, finding business details of prospects quickly and easily, monitoring the behavior of customers and proposing the next possible steps. Many providers offer CTI functions, connecting the lead database with automated telephone dialers. Some offerings are also sales enablement solutions, automating how sales teams give presentations, conduct demos and perform most of the functions that are traditionally handled by reps in the field. Some solutions provide predictive analytics, applying algorithmic intelligence to segment, score, and identify qualified prospects.

Most organizations looking to expand into these technologies are driven by an analysis of blind spots, such as unworked or untouched leads, and by evaluating technologies that help sales teams close bigger deals more quickly, and at a higher standard of quality to generate retention among customers.

Inside sales and telesales vendors include:

- 6sense
- bpm'online
- ClearSlide
- Conversica
- Frontline Selling
- Hoopla

- HubSpot
- iAdvize
- Infer
- InsideSales.com
- Leadspace
- RingDNA
- SalesLoft
- SalesPredict
- ToutApp
- Yesmail

Sales Effectiveness and Sales Enablement

Mobile Sales Productivity

An emerging set of vendors are offering mobile sales productivity capabilities. These applications help improve the productivity of salespeople for daily tasks such as logging emails and phone calls, preparing for sales meetings, managing tasks and following through with prospects for fulfillment. These applications are not replacements for a corporate-based sales force automation system and are often directly purchased by salespeople. Most of these apps will integrate information with a sales organization's sales force automation system.

Not included on this list are SFA vendors, all of whom provide a mobile application to provide access to CRM data or access to sales content. Instead, these are mobile-centric vendors that solely are focused on delivering productivity solutions to a salesperson.

Vendors Include:

- AppMesh
- Base
- Bullhorn
- Clari
- MobileForce
- RecursiveLabs
- Resco.net
- Tact by Tactile

- ToutApp

Sales Predictive Analytics

Sales predictive analytics is an emerging category of sales enablement software. Solutions in this space are SaaS-only and fill a gap between traditional SFA functionality and sales business intelligence (BI) solutions. Predictive analytic solutions provide data-driven insights into the sales process by applying heuristic and machine-learning algorithms to a firm's historical opportunity data. They perform analytical tasks on opportunities not provided in most sales force automation systems, such as calculating propensity-to-close scores, providing estimated close dates, calculating estimated deal size and updating forecast category values.

The leading vendors offer functionality that is similar to lead scoring models, whereby different opportunity scoring models can be applied to different business units. Other vendors use predictive analytics to identify product white space opportunities to support customer success processes and renewal processes.

Adopters of opportunity management predictive analytic solutions cite improvements in deal closure rates, win rates, renewal rates, pipeline and revenue. Gartner has also noted that it improves the productivity of sales teams because it reduces the amount of time required to update forecasts and pipeline reports.

Vendors include:

- 6sense
- Clari
- Datanyze
- DxContinuum
- Fliptop
- EverString
- Gainsight
- Infer
- InsideSales.com
- Lattice
- Leadspace
- Mintigo
- TopOPPS

Configure, Price and Quote Application Suites

Configure, price and quote (CPQ) application suites provide an integrated software feature set that supports sales configuration, pricing, and quote/proposal generation activities. They improve the guidance, governance and efficiencies of selling unique combinations of products or services for different sales situations. At the same time, they reduce the nonselling work and selling cycle times, and improve overall sales effectiveness. These applications can be used by salespeople in direct channels, by partners in indirect channels and by customers in self-serve environments. CPQ application suites support needs assessment, guided selling, and solution and negotiated sales processes.

Emerging capabilities include:

- Product and pricing data management
- E-commerce support
- Proposal generation
- Deeper analytics
- Contract management
- Sales order management
- Revenue management
- Product visualization
- Configured asset management

Vendors include:

- Apparound
- Apttus
- Axonom
- Bit2Win
- BluePrint
- CallidusCloud
- Cincom
- CloudSense
- Configit
- Configure One
- Endeavor

- Experlogix
- First Trust Portfolios
- IBM Sterling Configure, Price, Quote
- Infor
- Intelliquip
- KBMax
- Model N
- Pros
- SAP
- Sigma Systems
- Sofon
- Solidify
- SteelBrick
- Tacton Systems
- VLOCITY

Sales Order Management

Sales order management applications are critical for opportunity-to-cash processes. They allow sales and business partners to manage sales orders, reduce administrative sales workload, increase solution/order accuracy, improve the quality of deliverables to clients and prospects, and, through analytics, provide valuable insights into customers' buying patterns. The applications enable a broad range of functions, including inventory availability and available-to-promise information, load and delivery management and bulk stock management, user-defined information, recurring order and order template processing, customer and item preference profiles, comprehensive order and line status tracking, and flexible pricing and discounting to support promotions, contracts and allowances.

Order management system (OMS)-centric SFA vendors provide configuration and customization tools that enable users to create "good enough" order management capabilities, eliminating the need for a third-party vendor. ERP suite vendors often provide more breadth of functionality to cover multiple functional areas.

Vendors include:

- Acctivate
- Amdocs

- Brightpearl
- CloudSense
- Esker
- Fishbowl
- Fujitsu (Glovia)
- Handshake
- IBM Sterling
- Microsoft
- NetSuite
- Oracle
- Rootstock Software
- SAP
- ShipStation
- SKULabs
- Stitch
- TradeGecko
- Zoho

Sales Contract Management

Contract management is becoming more intertwined with the sales process. For sales, contract management is used to automate the production and delivery of legally approved contracts to a company's prospects or customers.

Sales contract management systems (also referred to as "sell-side contract management") aim to eliminate pain points in the process that slow down sales cycles. They provide tools to support the implementation of standardized language across contracts while authoring, and include an automated approval workflow to reduce the number of required follow ups in an approvals chain. They also provide a clear and easy filing structure, including all amendments that need to be accessed quickly by salespeople, such as dedicated agreed conditions on particular products.

These systems usually help sales support organizations oversee and assist sales teams in exploiting suitable contract content in the closing phases of sales cycles. Such systems reduce paper contracts, standardize the contracting process, employ preapproved language, terms and conditions, accelerate reviews, revisions and approvals, monitor every stage of the contract life cycle, and may even support electronic distribution and signatures.

The systems may also include functionality to support project workspace, contract pricing, contract profitability impact analytics, renewals and terms management. Organizations are focusing on contract compliance and renewals as they migrate to subscription-based engagements.

Sales contract management remains a fragment in the overall contract life cycle management market, which is split into sell, buy or both. Active vendors in this space tend to cater to specific industries and departmental priorities, or provide add-ons to third-party business applications or content management systems.

Contract sales management (sell-side) vendors include:

- Advanced Software Concepts (ASC)
- Apttus Contract Management
- Beach Street
- CLM Matrix
- Thomson Reuters (Business Integrity)
- CobbleStone Systems
- Contract Logix
- Exari
- Gimmel
- HotDocs
- IBM (Emptoris)
- Icertis
- Revitas
- Determine
- SirionLabs
- Symfact
- Vistex

Price Management and Optimization

Price management and optimization (PMO) is based on a set of business algorithms that extract actionable insight and pricing guidance from big data to improve margins, revenue, and profitability. PMO product suites often include several adjacent applications or functionality to extend or deliver the core PMO functionality. These can include:

- Price guidance tools that provide direct and indirect sales channels with pricing and profitability assistance.
- Margin optimization tools that assist sales operations, product management/marketing teams and financial operations teams with setting dynamic pricing.
- Competitive insight tools that help the PMO algorithm to include competitive activity in pricing.
- Yield or inventory management tools that use pricing as one of the metrics to manage product inventory levels.

Integration with CRM or SFA applications is increasingly common, as organizations look to provide sales teams with tools that enable real-time pricing. CPQ applications represent a separate set of functionality and use cases, but are increasingly being integrated with the pricing guidance output from PMO applications.

PMO products are used by several B2B and B2C industries, including airlines, travel, and transportation; chemicals; consumer packaged goods; energy and oil; financial services; food and beverage; high tech; life sciences; manufacturing; telecommunications; and wholesale distribution.

Real-time and digital pricing is becoming increasingly common. Pricing is also increasingly based on market microsegment pricing that includes criteria such as the product, current demand, inventory availability and seasonality. PMO will likely become more widespread as the demands for digitally enabled and algorithm-based pricing increases.

Some vendors in this category provide part, or all, of the functionality described above. This category also includes strategy and consulting companies that provide consulting or implementation services and vendors that may also use their own PMO technology components in client engagements.

Vendors include:

- Accenture
- Apttus
- Capgemini
- Deloitte
- FICO
- Hitachi
- IBM
- L&T Infotech
- McKinsey Solutions
- Model N
- Navetti

- Oracle
- Pros
- PTC
- SAP
- Stratinis
- Synchron
- Vendavo
- Vistaar Technologies
- Wipro
- Zilliant

Digital Content Management for Sales

Digital content management applications for sales encompass repositories and authoring tools that are dedicated to publishing, managing and presenting documentation that help salespeople to develop and close sales opportunities. These systems manage sales collateral, sales aids, digital presentations, best practices, cases studies, objection-handling points and sales insights.

The leading solutions provide a dedicated mobile application, where sales presentations can be accessed, shared and emailed to contacts and leads. Leading solutions are built upon HTML5, which means that the applications are fully optimized for tablet form-factors or data entry. Some provide strong content library functions such as versioning, enterprise file synchronization and sharing, search and relevancy indicators. Other solutions offer deep integration into sales processes and SFA applications. Several solutions have content consumption and adoption metrics so that managers can determine how collateral pieces affect sales cycles.

Vendors include:

- bigtincan
- Bloomfire
- Brainshark
- ClearSlide
- CallidusCloud
- Highspot
- KnowledgeTree
- MindTouch

- Qvidian
- Savo
- Seismic
- Showpad
- SpringCM
- TinderBox
- Veelo

Sales Information Services

Sales information vendors offer customer/prospect master data and market insight information solutions. They are used by sales and marketing organizations that are looking to improve their sales execution. The most common capabilities in this market includes services that:

- Correct, append, or augment internal customer master data with topical, timely information about customers, partners and prospective customers.
- Collect and curate news from traditional and social channels, providing representatives with a personalized, real-time news feed about competitive, partner, peer or prospect organizations.
- Create prospecting lists.
- Deliver industry-specific insights for a discrete market, such as construction starts or technology purchases.

The leading services feature tight integration with SFA and marketing automation systems. Some solutions in this market also have predictive analytics that score leads and opportunities. This insight can be used for lead scoring, lead prioritization, customer acquisition, and to improve sales effectiveness.

Vendors include:

- Artesian
- Avention
- Bureau van Dijk
- Broadlook Technologies
- Datanyze
- Dun & Bradstreet
- Dow Jones (Factiva)
- Data.com

- FirstRain
- HG Data
- Infogroup
- InsideView
- Lattice
- LinkedIn
- realSociable
- RELX Group
- SalesPredict
- ZoomInfo

Proposal Management Solutions

Proposal management solutions are sales tools that automate a vendor's RFP process, managing the creation of outbound documents that present value propositions, product details, deal components, terms and pricing of a company's product. Proposal solutions typically have two core capabilities:

- Sales proposals templates that are based on boilerplate content
- Question and answer repositories for prospect's RFP questions

Advanced solutions have content administration and collaborative capabilities to manage projects, as well as workflow capabilities for versioning, approval and publication processes to improve the scaling of proposal resources. Some solutions serve as knowledge bases or marketing collateral repositories. Some solutions integrate with contract management systems, providing standard legal language to enforce communication discipline and governance over deals.

Vendors include:

- Cincom
- Octant Business Services
- Proposal Software (PMAPS)
- Qorus Software
- Quosal
- PandaDoc
- Qvidian

- RFPMonkey.com
- salesElement
- Savo
- Seismic
- Determine
- SpringCM

Strategic Account Management

Strategic account management (SAM) encompasses account planning, sales plan execution and selling techniques that unite internal sales resources around a common action plan for meeting revenue and relationship objectives at specific accounts. These systems automate work that would usually be performed manually, providing resources with action plans, playbooks, status reports, relationship maps and workflows.

Vendors include:

- Axiom Sales Force Development
- Interactive Medica
- Miller Heiman
- Oracle
- Revegy
- SalesMethods
- Savo
- Altify (The Tas Group)

Sales Performance Management

Sales Incentive Compensation Management Software

Sales incentive compensation management (ICM) applications document remuneration plans and associated rules and quotas for internal and external salespeople, and track and report results and performance-based payments. Sales ICM applications are designed to manage credits, adjustments and calculations of commissions and bonuses for direct and partnered sales organizations. Such software packages should provide extensive reporting for sales management and finance, and include tools to model and analyze compensation strategies for influencing selling behaviors.

Vendors include:

- Anaplan
- CallidusCloud
- IBM Cognos Sales Performance Management
- beqom
- Iconixx
- Incentive Solutions
- Nice Systems
- Optymyze
- Oracle Sales Cloud
- SAP
- Cornerstone Software
- Optymyze
- Xactly
- Zoho

Territory Management

Territory management solutions manage the planning, mapping, definition and assignment processes for allocating sales resources to maximize market coverage productivity. Such applications should help enterprises establish the sales hierarchies and manage the assignment of representatives into the levels of the hierarchy. Territory management solutions also automate account-to-territory assignments.

The sophistication of these applications ranges from basic administrative functionality for rendering hierarchies, assignments and crediting rules, to simple mapping software, to advanced analytics for optimizing territories. Some solutions also offer quota management functions.

Vendors include:

- Anaplan
- AlignStar
- CallidusCloud
- IBM Cognos Sales Performance Management
- Oracle Sales Cloud
- Optymyze

- ProAlign from MappingAnalytics
- SAP
- Salesforce
- Tactician
- The TerrAlign Group
- ZS Associates

Sales Training Management Solutions

Sales training solutions train salespeople on the policies, procedures, processes, methodologies, best practices, and market and product information required to fulfill sales responsibilities. The market is composed of many different types of solutions. The most widely used are learning management systems (LMSs), but there are several non-LMS solutions emerging. Some will embed training videos and rich-content text directly into the SFA systems, while others are also sales enablement systems, providing sales content management capabilities. The newest category, continuous sales training, delivers short training lessons via mobile apps.

Vendors include:

- Brainshark
- CallidusCloud
- CommercialTribe
- Cornerstone OnDemand
- HireVue
- IBM (Kenexa)
- Qstream
- Sales Performance International (SPI)
- SAP (SuccessFactors)
- Savo
- Showpad
- Skillaware
- Veelo
- WalkMe

Sales Appraisal Management

Appraisal and evaluation systems enable the sales management team to understand a salesperson's progress against quantitative measures (such as attainment of quotas or other key performance indicators) and qualitative measures (such as product knowledge, industry expertise and selling techniques). Appraisals can be formal, such as completing year-end evaluations, or informal, such as observing sales calls. Use performance appraisal and assessment solutions to help manage goals and objectives, assess competencies (self-assessment to 360-degree assessment) and create development plans.

Vendors include:

- Axiom Sales Force Development
- CallidusCloud
- Cornerstone OnDemand
- Halogen Software
- IBM (Kenexa)
- Oracle (Taleo)
- Qstream
- Salesforce (Work.com)
- SAP (SuccessFactors)

Sales Coaching Systems

Sales coaching systems automate the way that sales representatives are assessed for selling proficiency and execution. They optimize performance through the delivery of appropriate feedback and coaching materials, such as best practice documents, written objectives or specific coaching notes from a supervisor. These tools enable the sales representatives to identify areas for improvement and to identify the skills that will enable them to sell more effectively.

Vendors include:

- Allego
- Beqom
- Brainshark
- CallidusCloud
- IBM
- Incentive Solutions

- Nice Systems
- Optymyze
- Qstream
- Sales Performance International (SPI)
- Salesforce (Work.com)

Gamification for Sales

Gamification is the use of game mechanics and design techniques in nongame contexts to shape behaviors, develop skills or engage people in innovation. Using gamification to manage sales contests and incentive programs has become a normal course of action for many sales organizations. In this case, they do not necessarily apply "game design" techniques, but use badges, ranking or scoring to keep track and award salespeople.

Vendors

- Badgeville
- Bunchball
- CallidusCloud
- CRMGamified
- Hoopla
- Incentive Solutions
- Microsoft (FantasySalesTeam)
- Optymyze
- LevelEleven
- SAP

Social for Sales

Social Analytics for Sales

Social analytics applications for sales help organizations uncover the nuances in prospect or customer interactions to transform diverse sets of social data into actionable strategies.

Vendors include:

- Artesian
- Avention

- FirstRain
- realSociable
- Tracx

Social Media Engagement for Sales

Social media engagement applications for sales enable salespeople to monitor and respond to social media activity in order to reach out to prospects.

Vendors include:

- Artesian
- FirstRain
- LinkedIn
- InsideView
- Nimble
- Tracx

Internal Community Software

Internal community software for customer service enables internal collaboration between salespeople when acquiring a prospect, an account or a set of accounts. Internal community software capabilities should ideally be embedded within a broader sales application.

Vendors include:

- IBM
- Jive
- Microsoft
- Oracle
- Salesforce
- SAP
- SugarCRM

Social Contact Enrichment for Sales

Social contact enrichment applications help organizations consolidate social contact profiles with another contact profile of record.

Vendors include:

- FullContact
- KiteDesk
- IDInteract
- InsideView
- Lattice

Recurring Revenue Management

Customer Success Management

Customer success management systems automate the postsales client relationship processes that are common to companies with subscription-based revenue models. These solutions are implemented to manage customer retention and customer upsell objectives. Their capabilities include customer health monitoring, product adoption monitoring, quarterly business reviews and customer retention workflow.

Vendors include:

- Amity
- Azuqua
- Bluenose
- Gainsight
- Natero
- Right On Interactive
- ServiceSource
- Totango

Revenue Management for Sales

Companies with recurring revenue business models must manage these revenue streams from active customers as rigorously as they manage their new sales pipelines. Existing CRM systems assist in managing accounts, contacts and new opportunities, but companies must also capitalize on every customer-recurring opportunity to meet and exceed revenue targets. This need to recognize renewal revenue or recurring revenue on consistent schedules has created a new market for SaaS technology vendors.

Revenue management is a back-office function that integrates with SFA, CPQ, and ERP systems to manage the business rules that support recurring revenue streams. Vendors' capabilities include

usage-based billing, pricing optimization, refund/rebate processes and customer life cycle management. This function's outputs are used in billing, renewal, and customer success processes.

Vendors include:

- Aria
- Cisco Impact
- Model N
- Pramata
- Pros
- Revitas
- ServiceSource
- Zuora

Digital Commerce

Digital Commerce Platforms

A digital commerce platform facilitates online and supports the creation and continuing development of an online relationship with a consumer or business customer across multiple retail, wholesale, mobile, direct and indirect sales, call center and digital sales channels. Digital commerce platforms enable organizations to build B2B, B2C or B2B-to consumer (B2B2C) commerce sites and support a continuum of business objectives, ranging from generating incremental revenue to enabling transformational business development.

Decision criteria that are frequently considered when evaluating or selecting a digital commerce platform vendor include:

- The implementation model
- The relative amount of gross merchandise value (GMV) or online revenue the platform is expected to support
- The suitability of the platform to support a particular business model (B2C, B2B, or vertical industry)

On-Premises (or Hosted) Software

Platforms in this category are typically licensed via a one-time perpetual license fee, and can be installed on local servers that are maintained by the user organization or hosted by either a third-party company or by the commerce platform vendor. Most of the platforms provided by the largest commerce vendors continue to be on-premises or hosted applications (as opposed to SaaS-only

solutions). Several of the platforms, particularly those from the largest vendors, can support global implementations, both B2C and B2B business models, large volumes of transactions and high levels of GMV.

While many of the platforms in this section can be hosted by the vendor, and are frequently labeled as "cloud" applications by the vendors, they represent a fundamentally different implementation model than the SaaS-only platforms listed in the next section. Although most of the platforms in this section are licensed on the basis of a one-time perpetual license fee, licensing models based on revenue share or transaction volumes are also becoming more common.

Vendors include:

- Active Commerce
- Avetti Commerce
- Broadleaf Commerce (productized open source)
- Elastic Path
- Emeldi Commerce
- Episerver
- HotWax Systems (productized Apache OFBiz)
- IBM (WebSphere Commerce)
- Intershop
- K-ecommerce
- Kentico
- Magento Commerce Enterprise Edition (productized open source)
- MyWebGrocer
- Nexternal
- Oracle (Commerce, iStore)
- Orckestra
- Sana Commerce
- SAP Hybris
- Sitecore (Commerce)
- Shopware Professional and Enterprise (productized open source)
- SoftSlate Commerce Enterprise Edition
- Spryker

- Unilog
- Wix

SaaS

The vendors and products in this section provide digital commerce functionality using only a SaaS platform: there is no provision for implementing these products in an on-premises deployment or using a third-party hosting platform. A SaaS platform can provide several advantages over on-premises alternatives, including a simpler and shorter implementation time, maintenance and functional upgrades that can be downloaded and implemented with minimal disruption to the business, and, typically, a license model that is based on a revenue share or transaction volume model and that helps to align platform costs with revenue.

On the other hand, SaaS commerce platforms typically:

- Provide less ability to customize the storefront or user interface
- Often support GMV levels of less than \$250 M/year
- Often eliminate the subscriber company's ability to manage the underlying infrastructure of network, servers, operating system, storage, databases, or application platform services
- Are never "owned" by the user organization (due to the licensing model), meaning that the software licensing costs for a SaaS commerce platform are never eliminated.

Vendors include:

- Aptos
- Apttus
- Avangate
- Bigcommerce
- cleverbridge
- CloudCraze
- Commerce Tools
- Corevist
- Demandware
- Digital River
- Insite Commerce
- Kalio Commerce
- Kibo Commerce

- NetSuite (SuiteCommerce)
- Oracle (Commerce Cloud)
- Shopify
- Squarespace
- Unilog
- Volusion (Volusion, Mozu)
- Vtex

Open Source

Open-source software (OSS) solutions for digital commerce range from shopping carts to entire platforms. OSS is generally available for free under a GNU's Not Unix (GNU) general public license, although other license types may exist and fees may apply. Many of these have commercial support, such as for "enterprise editions" that can scale beyond the OS version.

The adoption of OSS for certain aspects of digital commerce — such as application servers, OSs and databases (Linux, Apache, Nginx, MySQL, MongoDB, PHP [LAMP] and Java platforms) — has been a mainstream activity for more than eight years. However, many large enterprises remain concerned about the reliability of OSS to support large transaction volumes. Organizations want to know if digital commerce OSS is scalable, secure and robust enough for large-scale transactional sites, given that many startup companies and SMBs that use open source are not transactional.

While OSS solutions are continuing to improve, it will take several more years before they mature to the standards of today's enterprise digital commerce licensed software and SaaS solutions.

Vendors include:

- AgoraCart
- Apache OFBiz
- Broadleaf Commerce
- Commerce Guys (Drupal Commerce)
- CubeCart
- JadaSite
- Magento Commerce (Community Edition)
- OpenCart
- osCommerce
- PrestaShop

- Shopizer
- Shopware
- SoftSlate Commerce
- Solveda (BigFish Open Source [OFBiz] ecommerce)
- Spree Commerce
- TomatoCart
- Ubercart
- VirtueMart (for Joomla)
- WooCommerce (for WordPress)
- Zen Cart
- ZeusCart

Digital Commerce Ecosystem

Enterprise Search

Digital commerce search enables a customer to find the right products by identifying their intent and matching it to the most appropriate products or services which, in turn, contributes to increased sales and higher profits. Commerce search often combines free text with autocomplete, guided navigation and interactive facets/filters to achieve results that can be displayed as highly visual content using appealing layouts. Best-of-breed commerce search products can provide enhanced capabilities and performance over the out-of-the-box storefronts provided by digital commerce platforms such as merchandising, SEO management, promotions, and, increasingly, personalization. In some cases, these capabilities may also be achieved via enterprise search (see "Magic Quadrant for Enterprise Search").

Vendors include:

- Adobe Target
- Algolia
- BloomReach
- EasyAsk
- Elastic
- Lucidworks (SOLR)
- Nextopia

- Oracle (Endeca)
- PureClarity
- SDL Fredhopper
- SLI Systems
- Swiftype
- Xilopix

Web Content Management

See the Cross-Functional Customer Analytics section.

Distributed Order Management

Advanced ordering and fulfillment functionality is typically needed to support more complex scenarios involving multiple channels, especially when a product is ordered from one channel and either shipped or returned to a different channel. For example, when a customer orders a product from a website and returns it to a store or when a sales associate places an online order in the store on behalf of a customer for home delivery. This functionality is typically accomplished via distributed order management (DOM), which supports the management and prioritization of orders from multiple order entry systems to serve multiple fulfillment systems as locations. It enables:

- Aggregation
- Central brokering
- Global inventory visibility across fulfillment locations, channels and third parties
- Intelligent order sourcing and fulfillment capabilities that enable a more flexible and adaptive supply chain response to demand
- Order promising capabilities for bundled products and services coming from multiple fulfillment locations

Vendors include:

- Aptos
- Circle Commerce
- CommerceHub
- Demandware (Mainstreet Commerce)
- Deposco
- Freestyle Solutions (previously Dydacomp)
- Epicor Software (ShopVisible)

- IBM (Sterling Commerce)
- Infor
- Jagged Peak
- JDA Software (Distributed Order Management)
- Kibo Order Management (previously Shopatron)
- Manhattan Associates
- Microsoft (Dynamics AX, Dynamics NAV)
- NetSuite (OMX)
- OrderDynamics
- Order Management Systems
- Oracle
- Radial (previously eBay Enterprise)
- SalesWarp
- SAP (Hybris Order Management for omnichannel commerce)
- Softeon
- Symphony EYC
- UniteU

Personalization Engines

Personalization creates a relevant, individualized interaction between two parties that is designed to enhance the experience of the recipient. It uses insights derived from the recipient's personal data, as well as from behavioral data about the actions of similar individuals, to deliver an experience that meets specific needs and preferences.

Digital personalization engines are technology solutions that identify the optimum experience for an individual and will alter the online presentation layer, trigger an automated response, or pass on analyses to the seller or service personnel to act on as they deem fit. These engines may be used across multiple touchpoints (see "Use Digital Personalization to Enrich the Customer Experience" and "Market Guide for Digital Personalization Engines").

Vendors include:

- 4-Tell
- Acquia

- Adobe
- Barilliance (Israel)
- Baynote
- BloomReach
- Blueknow (Spain)
- Boxever
- BrainSINS (Spain)
- BySide
- Certona
- Crayon Data
- Cxense
- Dynamic Yield
- Evergage
- Flytxt
- IBM Coremetrics
- IBM Unica
- Ignition One (Knotice)
- Infosys AssissttEdge
- Marketo
- Oracle (Maxymiser)
- Monetate
- MyBuys
- nectarOM
- NGDATA
- Nosto (Helsinki)
- Optimizely (NL/SF)
- Oracle Real-Time Decisions
- Peerius
- Provenir

- prudsys
- Qubit
- Reflektion
- RichRelevance
- Sailthru
- Salesforce
- SAP
- SAS
- Squiz
- Strands
- Syntasa
- Twelvelfold

Social Commerce

Product Review Technologies

Product reviews and ratings technologies refer to the capture, presentation, and sharing of product-, service- or experience-specific perspectives among customers, both on- and off-site. Buyers can write, post and view reviews on an e-commerce or social website while shopping or browsing online.

Vendors include:

- Bazaarvoice
- Gigya
- Mzinga
- PowerReviews
- ReadyPulse
- Reevoo
- re.vu
- SAP Hybris
- ShopSocially
- Sprinklr

- TurnTo
- Yotpo

Social Network Selling

Social network selling facilitates the promotion, merchandising and subsequent purchasing of products and services via social networks. Social network selling will result in a sale directly on a social network or through a link from the social network to the seller's website. For example, Facebook, Twitter and Instagram offer "buy now" or "shop" buttons, while some community sites, such as Salesforce, enable sales through partnerships with digital commerce platforms (such as CloudCraze and Demandware).

Vendors include:

- Oracle
- ReadyPulse
- Reevoo
- ShopSocially
- Sprinklr

Product or Brand Advocacy

Product (or brand) advocacy refers to instances in which a customer or influencer provides a personalized product review, endorsement, user-generated content (such as a photo or video describing how they are using the seller's product) or clarification. Prospective customers correspond with other customers or advocates who have previously purchased and are using the products, or have significant experience with, or knowledge of, the products under consideration.

Vendors include:

- Bazaarvoice
- Gigya
- Needle
- Media Needle
- PowerReviews
- ReadyPulse
- Reevoo
- SAP Hybris
- ShopSocially
- Sprinklr

- TurnTo

Mobile Commerce

Approaches to mobile commerce include three types:

- **Mobile Web** is the use of a mobile-friendly, browser-based Internet service and is most commonly delivered in two ways: designed from the ground up (more common in countries where mobile has leapfrogged Web), or through an extension of the digital commerce platform via responsive/adaptive design (see the Digital Commerce Platform section for a list of potential vendors).
- **Mobile app** native is an application that extends beyond the digital commerce platform and is best used by an already-committed customer. It is typically used to entice customers into brick-and-mortar facilities, to improve the customer's in-store shopping experience, and for contextual promotional offers and suggestions, assisted ordering, and optimized mobile check-out and payments (see "Build Great Mobile Apps With HTML5" and "Use Mobile Apps to Stimulate Digital Business").
- **Clientelling** occurs when the digital commerce platform pushes customer information to mobile devices, such as tablets to sales associates in the physical store, to build a stronger relationship with the customer. The most robust applications provide a 360-degree view of the customer and include data such as demographics, transaction history, preferences, interests and loyalty. In addition to those listed below, see the Digital Commerce Platform section for a list of potential vendors.

Mobile app development platform vendors include:

- Adobe
- Alpha Software
- AnyPresence
- Appcelerator
- Appain
- AppsFreedom
- Backbase
- DSI
- Embarcadero
- IBM
- Kinvey
- Kony

- Mendix
- Microsoft (acquired Kamarin)
- MobileFrame
- Oracle
- Outsystems
- Pegasystems
- Progress (Terlerik)
- Ret Hat
- Salesforce
- SAP

Clientelling software vendors include:

- Manhattan Associates
- Raymark

Payment Solutions

Payment Gateways and Processors

Payment gateways and processors enable buyers to make electronic payments to sellers. The ability to offer multiple payment options with varying types of settlement methods is a core requirement for commerce. Depending on the type of payment method used, digital commerce may require one or more payment services, such as a gateway or processor. Payment technologies required for digital commerce may or may not be included in the digital commerce platform.

A payment gateway connects a seller's digital store or mobile app to the party responsible either for obtaining payment authorization or actually providing payment authorization. Gateways initiate the payment authorization request and return the authorization response to the merchant.

Payment processors facilitate payment approval and settlement of payments funds between the merchant and the party responsible for authorizing the payment (such as the credit card issuer, holder or guardian of the funding account). There are two types of vendors that process e-commerce payments: merchant acquirer banks and payment service providers (PSPs). Merchant acquirer banks have a one-to-one relationship with the seller and serve as an intermediary between the seller, card networks and card issuing banks. PSPs (also known as merchant account providers or aggregators) connect digital commerce sellers to an acquiring bank, allowing multiple customers to use the same merchant accounts. PSPs also typically support multiple types of payments beyond debit and credit cards.

Vendors include:

- ACI Worldwide
- Acculynk
- Adyen
- allpago
- Authorize.net (gateway only)
- BluePay
- BlueSnap
- Computop
- CyberSource (gateway only)
- Digital River
- eWay
- exp
- First Data
- IBM (gateway only)
- Limonetik
- Mindgate
- N&TS Group
- PayGate
- Paymentwall
- PayPal
- PaySafe
- Radial (previously eBay Enterprise)
- SafeCharge
- Sage
- Vantiv
- Verifone (gateway only)
- Worldline
- Worldpay

Digital Subscription Management and Billing

Digital subscription management supports:

- The selling of digital goods (such as software, music or content subscriptions), which include the ability to configure and download, as well as mail, product keys
- Free trial accounts and extensions to customers or customer groups
- Rights management, including access control
- Returns, including subscription billing and management

While some digital commerce vendors have added this functionality to their digital commerce platform, it is also offered as a stand-alone application.

Vendors include:

- Aria
- Avangate
- Chargify
- cleverbridge
- Digital River
- Elastic Path
- Metratch
- FastSpring
- Monexa
- NetSuite
- Oracle
- Recurly
- SAP
- goTransverse
- Vindicia
- Zuora

Marketing

Integrated Marketing Management

Integrated marketing management (IMM) represents the marketing strategy, process automation and technologies required to integrate people, processes, campaigns, channels, resources and technologies across the marketing ecosystem. The marketing ecosystem includes internal marketing staff and external stakeholders (see "IT Leaders Need to Understand Integrated Marketing Management Capabilities to Adequately Support Marketing").

IT leaders supporting marketing should understand the numerous roles and functions across the marketing ecosystem that must be integrated to complete marketing programs, campaigns and initiatives. There are three major types of processes that these roles and functions must support, with numerous subprocesses and capabilities required for each role and function. The three major types of processes are:

- **Executional:** These processes analyze customer data, segment customers, and target campaigns and offers to customers or partners across multiple channels and points of interaction (both digital and offline), and across different types of interactions (outbound, inbound and event-triggered). Multichannel campaign management (MCCM) is the term we use to describe this set of executional capabilities and processes.
- **Operational:** These processes support the internal operations of the marketing department and management of resources (such as budgets, projects, HR and content/assets). Key competencies include planning and financial management, creative production and project management, marketing asset management, and marketing fulfillment. Marketing resource management (MRM) is the term we use to describe the set of operational processes and associated application functionality.
- **Analytical:** These processes support executional and operational processes by driving planning, optimizing outcomes and measuring performance. Many of these processes are embedded within the executional and operational ones, but marketing performance management (MPM), marketing ROI and marketing mix optimization require integration of campaign management and MRM.

IMM integrates executional, operational and analytical marketing processes in a closed loop across the marketing ecosystem to support marketing initiatives (such as programs, campaigns and creative projects) and to enable the different roles to perform their various functions. For each subprocess step in the closed-loop marketing process, IMM blends the appropriate executional, operational and analytical capabilities required for that step. Key steps include:

- Developing the concept or idea
- Planning and optimizing the initiative
- Resource allocation
- Campaign or content creation

- Conducting a pilot
- Executing the campaign or program
- Evaluating and analyzing the results
- Providing feedback for ongoing and new initiatives

The impact of technology and applications across these processes is quite profound and will require a strong relationship between IT and marketing.

A variety of suppliers offers marketing technologies and functionality. These suppliers generally fall into one of five categories:

1. Enterprise and CRM suites
2. Integrated marketing suites
3. Campaign management suites
4. MRM suites
5. Boutique/specialty vendors

Vendors that offer a broad solution covering the three process areas include:

- Adobe
- Direxxis (A Broadridge Company)
- IBM
- Infor
- Marketo
- Microsoft Dynamics
- Oracle
- Pegasystems
- Pitney Bowes
- RedPoint
- SAP
- SAS
- SDL
- Teradata

Multichannel Campaign Management

Segmentation and Outbound Campaign Management

Segmentation is the process of grouping customers along one or more dimensions, on either a formal or ad hoc basis. Segmentation tools typically group customers based on different attributes, such as products owned and demographics. One new function of these tools segments by customer value and life stages. The key attributes required to improve campaign segmentation can be determined by using modeling, clustering algorithms, visualization and data mining. These multidimensional techniques are used to decide on the right campaigns for the right customer, using the right combination of channels.

Multichannel campaign management (MCCM) processes enable companies to define, orchestrate and communicate offers to customer segments across different channels; for instance, through direct mail, call centers, websites, email and social communities. Basic campaign management includes functions for segmentation, campaign execution and campaign workflow. Advanced analytics functions include predictive analytics and campaign optimization. Advanced execution functions include loyalty management, content management, event triggering and real-time decisioning/offer management in inbound and outbound environments.

Vendors include:

- Adobe
- AgilOne
- Experian
- IBM
- Listrak
- Marketo
- Oracle
- Pegasystems
- Pitney Bowes
- RedPoint
- Salesforce
- Selligent
- SAP
- SAS
- Sitecore

- Teradata
- Zeta

Event-Triggered Marketing

Event-triggered marketing uses events that are personally relevant to the customer, such as a birthday, an upcoming renewal date or the achievement of a new buyer status, as the basis for offers and communication. For example, some vendors will automatically present a customer with a special offer when they recruit family members or friends, or will provide a special offer when a customer purchases a series of luxury goods, thus qualifying them for a change in buyer status.

An appealing customer offer meets a real or perceived need. The offer must be delivered when the customer recognizes the need and is most receptive to the offer.

Event-triggered marketing uses analytics for event detection or profile changes to recognize cross-sell or retention opportunities in the customer base. Business process management enables execution of those offers through the most effective channels of communication. Effective deployment involves five stages, from event identification to response execution (see "Five Steps for Event-Triggered Multichannel Marketing").

Vendors include:

- Adobe
- IBM
- Infor
- Marketo
- Oracle
- Pegasystems
- Pontis
- Salesforce
- SAP
- SAS
- Teradata

Next-Best-Offer Recommendations/Inbound Marketing

Next-best-offer recommendations use predictive analytics and decision capabilities to identify the optimal action that the business should take during a customer interaction. This action is based on both the customer's needs and the organization's strategy. The analysis can be based on a variety of approaches, such as the customer's product affinities, demographic profiles or prior purchases.

The result is a recommended course of action or a decision on which offer to provide (next-best offer).

Vendors include:

- Adobe
- FICO
- IBM
- Oracle
- Pegasystems
- SAS
- Marketo

Loyalty Management

Loyalty management uses incentives and rewards to attract, acquire and retain customers. Advocacy and loyalty management campaigns can enhance the total customer value proposition by integrating buyer incentives with the brand promise and product marketing messages.

But few vendors have an integrated vision for bringing loyalty, customer advocacy techniques, and customer acquisition and retention together in a multichannel marketing framework. Social marketing has offered a new way to engage with followers and influencers, but this approach still needs more hard metrics to substantiate conversions. Eventually, loyalty management will be treated as more than just another division or a separate initiative. Indeed, it will become part of a larger-scale focus on managing the customer experience.

Vendors include:

- Aimia
- Bond Brand Loyalty
- Brierley+Partners
- Comarch
- Epsilon
- Kobie Marketing
- Oracle (Siebel)
- SAP
- TIBCO Software (Loyalty Lab)

Digital Marketing

Digital marketing includes marketing to personas, segments and individuals through a multitude of digital channels and touchpoints, including disciplines such as email marketing, addressable branding/advertising and mobile marketing.

Email Marketing

Email marketing is the use of the email channel to deliver marketing messages. Email can be used to send brand newsletters, as well as more targeted, contextually relevant, real-time and personalized communications to support touchpoints throughout the customer life cycle. Transactional email messages can also cross over into email marketing programs to the extent that account statements, for example, include promotions or offers based on customer insights.

Vendors include:

- Acxiom
- Adobe
- Constant Contact
- ContactLab
- dotmailer
- Epsilon
- Experian
- IBM
- MailChimp
- Marketo
- MessageGears
- Oracle
- Salesforce
- Sailthru
- SparkPost
- Selligent

Addressable Branding/Advertising

This capability automates the buying and placement of advertisements for a campaign. Features could include real-time bidding and integration with demand-side or data management platforms.

This is the biggest integration gap in multichannel campaign offerings, given that much has been outsourced to agencies.

Vendors include:

- Adobe
- AOL
- Epsilon
- Facebook
- PubMatic
- AudienceScience
- ChoiceStream
- Krux
- MediaMath
- Oracle
- Rocket Fuel
- Turn
- Kenshoo

Mobile Marketing

Mobile marketing involves the use of mobile technologies to gather and analyze information about customers, and to target them with offers and content. It requires using the right combinations of mobile technologies and applying them to established techniques (such as direct-marketing email campaigns).

Mobile analytics offerings:

- Instrument mobile-optimized Web properties, including websites and apps for smartphones and tablets
- Collect usage and related data
- Provide tools for visualizing patterns, setting and tracking goals, and benchmarking

Vendors include:

- Adobe
- IBM

- Google
- Webtrends
- Apmetrix
- App Annie
- Apsalar
- Clicktale
- Localytics
- Mixpanel
- Upsight
- Fiksu
- Flurry
- Kahuna
- Kochava
- Placed
- Taplytics

Lead Management

Lead management processes take in unqualified contacts and opportunities from a variety of sources, including Web registration pages and campaigns, email marketing activity, direct mail campaigns, paid searches, social, database marketing, third-party leased lists, social media, tradeshow, and webinars and other events. The output — that is, qualified, scored, nurtured, augmented and prioritized selling opportunities — is passed on to direct, indirect or digital commerce sales channels for action and closure. Lead management integrates business process and technology to connect marketing with direct or indirect sales channels, and to identify and develop higher-value opportunities through improved demand creation, execution and opportunity management.

Companies that implement lead management processes are primarily B2B or B2B2C organizations, but B2C organizations selling high-value, complex products — such as financial services, insurance, capital-intensive consumer products, and sports and entertainment — are also investing in and implementing lead management applications.

Vendors include:

- Act-On
- Adobe Campaign

- CallidusCloud Marketing Automation
- CRMnext
- HubSpot
- IBM Marketing Cloud
- Marketo
- Microsoft (Dynamics Marketing)
- MMIT
- Oracle (Eloqua)
- Salesforce (ExactTarget; Pardot)
- Salesfusion
- SugarCRM
- Impartner
- Velocify
- Zoho

Marketing Resource Management

MRM is a set of processes and capabilities designed to enhance a company's ability to orchestrate and optimize internal and external marketing resources.

MRM applications enable companies to:

- Plan and budget
- Create and develop content and programs, and manage creative projects
- Store and manage content and collateral
- Support knowledge management (KM)
- Fulfill and distribute marketing content and collateral
- Measure and optimize marketing performance (see "The Five Competencies of MRM 'Re-Defined'").

Gartner sees MRM growing within organizations through (1) a company's global expansion, (2) an increase in the number of users within a region, and (3) an expansion of MRM capabilities across the five areas of MRM competency. MRM is also moving more firmly into the midmarket, particularly with the SaaS and hosted-deployment options. The MRM competency that Gartner clients are most likely to ask about is creative production management. Inquiries about marketing financial

management are increasing; more clients asked about this MRM capability in 2015 than in any other year. Marketing financial management is regarded either as a stand-alone capability or as a Phase 2 initiative after creative production management. We have seen a bit of a flattening of interest in marketing asset management and fulfillment and movement of vendors. These areas of MRM functionality are moving toward more campaign execution and campaign management as opposed to resource management solutions.

As the market matures, larger players and some vendors will experience more "explosive" growth, while small vendors, particularly those with less than \$10 million in revenue, may not survive and are increasingly likely to be acquired by larger players. We expect approximately half of these smaller players to be acquired or go out of business during the next three years. We expect smaller companies to broaden their MRM capabilities or geographical footprint, and larger vendors to acquire smaller vendors and enter the MRM market, or to expand on their current MRM capabilities (see "Magic Quadrant for Marketing Resource Management" and "Toolkit: How to Create a Marketing Resource Management Application RFP").

Vendors include:

- Adgistics
- Allocadia
- Beckon
- Workfront
- BrandMaker
- BrandSystems
- Brandworkz
- Bynder
- Capital ID
- Clarizen
- Code Worldwide
- DataSource
- Direxxis (A Broadridge Company)
- Elateral
- Gap Systems
- IBM
- Infor
- Marketo

- Microsoft Dynamics
- Mtivity
- Oracle
- Ricoh (MarcomCentral)
- Saepio
- SAP
- SAS
- Teradata
- wedia

Marketing Analytics

Marketing Performance Management

MPM enables the marketing organization to monitor, manage and predict the performance of its initiatives, such as strategies, processes, programs and campaigns, through the use of analytics applications and tools. Analytics for MPM supports descriptive, diagnostic, predictive and prescriptive analytics.

MPM encompasses the tools, technologies, consulting services and solutions that enable marketing users to access insights, analyze data, make predictions, and optimize marketing programs and resources. MPM is a critical element of an IMM platform, providing visibility into the success of marketing initiatives in order to understand that performance and take action based on the knowledge gained. MPM also enables enterprises to make predictions about customers, markets and competitors, as well as run simulations on future marketing scenarios and perform scenario planning.

Few vendors offer a comprehensive MPM solution. Most are tactically focused on providing insights into the use of software applications and supported processes (such as application reporting), not on examining the functional performance of the marketing organization and its processes. However, more marketing vendors are investing in MPM capabilities with improved dashboards, integrated data from a variety of internal and external sources, and data visualization and advanced analytics tools. System integrators, professional service providers, marketing service providers and agencies also are likely to show interest in partnering with technology providers to build solutions around MPM, or in enhancing their consulting offerings to focus on key MPM objectives.

Vendors include:

- Accenture
- Adobe

- Allocadia
- Beckon
- BrandMaker
- iProspect
- IBM DemandTec
- Direxxis (A Broadridge Company)
- General Sentiment
- GroupM
- Hewlett Packard Enterprise (HPE) Autonomy
- IBM
- Infor
- iQor (HardMetrics)
- Marketo
- MarketShare
- Microsoft Dynamics
- Mindtree
- MMA
- Mu Sigma
- Oracle
- RedPoint
- Sailthru
- SAP
- SAS
- Teradata
- ThinkVine
- Vistaar Technologies

Social for Marketing

External Community Software

External community software enables customers and partners to blog and post about, as well as rate, products/services, and to construct ideas. It also enables peer interactions and helps build loyalty.

Vendors include:

- Acquia
- Jive
- Lithium
- mySidewalk
- Salesforce
- Sprinklr

Social Analytics for Marketing

Social analytics applications for marketing enable marketers to identify influencers and trends, profile customers, evaluate content and campaigns, and classify social content by subject/topic, sentiment and intent.

Vendors include:

- Brandwatch
- Crimson Hexagon
- Digimind
- Linkfluence
- Microsoft
- NetBase
- Oracle
- Salesforce
- Simply Measured
- Socialbakers
- Synthesio

- Sysomos
- Talkwalker

Social Media Engagement for Marketing

Social media engagement applications for marketing enable marketers to monitor and respond to social media activity in order to promote, develop, strengthen or defend a product, service or brand.

Vendors include:

- Digimind
- Hootsuite
- Oracle
- Salesforce
- Spredfast
- Sprinklr
- Synthesio
- Sysomos
- Tracx

Social Media Publishing for Marketing

Social media publishing applications for marketing enable organizations to coordinate social media campaigns and, ultimately, push content out to different social networks.

Vendors include:

- Adobe
- Falcon Social
- Oracle
- Percolate
- Salesforce
- SocialFlow
- Spredfast
- Sprinklr

Customer Service

Customer Engagement Center

Customer Engagement Center Suite

The customer service business application space is rapidly evolving from a software in the contact center that manages cases, to a multichannel customer engagement center that handles all incoming and outgoing media channels and devices, as well as handling the customer engagement rules, content and workflow.

The new capabilities facilitate community engagement and social engagement with customers on any social channel, such as online forums, Twitter and Facebook, as well as heavier use of personalization, advanced analytics, video chat, co-browsing, mobile support, and Internet devices embedded in objects and wearables. The basic customer engagement center is divided into nine logical groups:

1. CSS problem management, trouble ticketing and case management; generally must have a CRM database/account, case and activity objects to be considered
2. Knowledge base solutions and advanced desktop content federation and search
3. Desktop integration with telephony, co-browsing and mobile devices
4. Web and mobile extension of the solution to online communities interested in P2P collaboration management, as well as social media engagement tools (social media such as Facebook, Twitter and online forums)
5. Real-time analytics for decision support, including routing, workflow, sales and offer management
6. Other analytics: social network analysis, reputation analysis, sentiment analysis of posts, text, voice and images, and real-time feedback and surveys
7. Business process management and workflow for case and engagement
8. Connections to remote sensors embedded in equipment, such as consumer electronics
9. Content management to guide customer communication

The first layer, CRM business applications for customer interactions, handles a wide range of tasks, such as case management and problem resolution. Other functions include advisory services, problem diagnostics and resolution, account management and returns management. Applications may also be tailored to government purposes, not-for-profit agencies and higher education institutions. They may include knowledge-enabled service resolution (such as advanced search tools), community management, offer management and service analytics dashboards. They are designed to enable employees or agents of a company to support clients directly, usually within a contact center, regardless of whether the product is a consumer good, a durable good or a

business service, such as financial services, customer services (for example, retail banking, wealth management or insurance), hospitality, telecommunications, government, utilities or travel.

Some of the capabilities include:

- Allowing the agent to support the customer, regardless of whether the customer is on a website or social media, on a mobile device, at a kiosk or in a vehicle. This means that the agent:
 - Sees what the customer sees
 - Knows the path that the customer has taken before the voice conversation takes place (the agent knows the communication context of the interaction)
 - Has the tools to solve the customer's problem or to address their issue from a remote location
- Enabling the customer engagement center to send out proactive, automated alerts. For example, when a customer needs to be made aware of the status of a back-end system change, an alert is sent to one (or several) devices until the customer acknowledges the notification. Customers might also need to be notified about their bank balance, credit card fraud, flight delays, available (product) upgrades, price range reached, special offers or insurance policy exceptions.
- Providing business rules for complex entities (for example, contact, enterprise, subsidiary or partner) and the workflow processes to route a case, opportunity or order based on the rule set for the specific relationship.
- Routing a case from one department to another, depending on the type of case.
- Supporting multiple languages simultaneously.
- Providing real-time decision support, if necessary.
- Enabling multiple back-end systems to synchronize using their own rules (for example, credit card fraud; telecommunications-specific functions, such as telecommunication billing, service and resource management; product life cycle management; digital content; and advertising bundling) and integrated order management.

For the positioning of key vendors, see "Magic Quadrant for the CRM Customer Engagement Center."

We divide our list of providers into two sections:

- Core customer service CRM application vendors for the customer engagement center
- Vendors that offer tools to enhance the core customer service agent desktop

Vendors with core customer service CRM application vendors for the customer engagement center include:

- Amdocs

- Aptean
- Astute Solutions
- bpm'online
- Coheris
- CRMnext
- Dassault Systèmes (Exalead)
- eGain
- Eptica
- Eudata
- Freshdesk
- Mplsystems
- Microsoft Dynamics CRM Customer Service
- Neocase Software
- NexJ Systems
- Nice Systems
- Lithium
- Oracle (Siebel CRM; Service Cloud)
- Pegasystems
- Salesforce
- SAP
- ServiceNow
- SugarCRM
- Aureka
- Verint (Kana)
- Vertical Solutions
- Wilke Global
- Zendesk

Live Chat

Live chat is an agent-based interaction or discussion via text chat. A chat session involves interactive, Internet-browser-based, live-text or video interactions among customer service representatives (CSRs), live chat agents and external customers. During a chat session, complementary Internet-based interactions (such as collaborative browsing, screen or application sharing, or assisted forms completion) may take place. A chat session could also be initiated through other self-service applications, such as a virtual customer assistant, then passed on to a live agent. Live chat is primarily an externally focused collaboration tool, as opposed to IM, which is an internally focused collaboration tool.

Live chat is increasing in popularity as a preferred customer digital engagement channel; it represents 2% of overall interactions that take place today. This figure is predicted to increase to 10% in 2018. Based on data collected from customer surveys and Gartner client inquiries, over 60% of companies are offering some form of live chat on their website or on mobile devices. The use of live chat has grown from 30% in 2009 to almost 60% in 2014. Feedback gathered during research for vendor evaluation reports shows that live chat satisfaction rates are currently between 75% and 85%. Live chat helps fulfill customers' expectations for convenient, fast and meaningful engagements.

Some advanced companies provide proactive live-chat capabilities, but websites often bury the chat option under "contact," "customer support" or "help" menus.

Innovative UI designs for live chat was a key consideration in 2015 and will continue to be so in 2016. Customers have learned to appreciate good design and expect high quality experiences. Organizations give strategic value to user experience (UX) when designing products and services across multiple platforms, devices and sales, and support and service channels.

For a successful chat engagement, making the agent's UI design intuitive is just as important as doing so for the customer's UI.

Vendors include:

- BoldChat
- eGain
- LiveChat
- LivePerson
- Microsoft Dynamics CRM (Parature)
- Moxie Software
- Oracle Service Cloud
- Salesforce
- TouchCommerce

- [24]7
- Velaro
- Zendesk

Knowledge Management for Customer Service and Support

Knowledge Management (KM) emphasizes an integrated approach to managing an enterprise's knowledge assets, which are made up of the information available to an enterprise about its "best practices," critical business processes and operating environment. A successful KM strategy is comprised of:

- **People** — People who inform our need for information can come from within an enterprise and outside the enterprise. The goal of a KM strategy is to empower as many people as possible to participate in creating and consuming relevant knowledge.
- **Processes** — KM processes include the methods utilized to develop, maintain, deliver and measure knowledge, and to encourage participation. This can be highly complex, as there is a potentially wide range of KM processes.

Knowledge management is composed of a back-end knowledge base, search technology and a UI.

KM is used widely:

- For internal employees
- For customer self-service (on mobile and the Web, kiosks, high-tech equipment/appliances and wearables)
- For social media efforts (communities)
- By partners
- In other applications, such as for point of sale (POS), automated teller machines (ATMs) and ticket machines

Customer service and support processes are required for all channels of engagement and on all types of devices (including home appliances and wearables) and to perform a wide variety of tasks. Every enterprise faces the complex KM challenge of accessing the exact piece of information to solve a problem or to answer a question.

It is not possible for any one software supplier to address all combinations of KM requirements for CRM customer service. KM happens through virtual customer assistants, in chat sessions, on the telephone, in community forums and in many other areas. Knowledge artifacts can be found through search tools via enterprise portals or through content management tools. Business cases must focus on integrating the knowledge base with multiple channels: a Web chat to reduce chat duration, an email response management system to return emails with accurate answers, a virtual assistant to enhance information delivery, as well as the self-service search on the website. Realizing the value of knowledge management is possible as part of a long-term commitment to

fine-tuning and enhancing the knowledge base. By focusing on knowledge management, the aim is to achieve at least an 85% relevance of responses, guarantee constant use and avoid users abandoning the search. The knowledge should be contextual, and available on all communication channels.

Knowledge management for customer service and support consists of six categories of knowledge:

1. **Agent** — The contact center agent is a repository of information on corporate products and services, as well as problem resolution. Capturing agent knowledge in a repository can speed up the delivery of services and the training of new individuals.
2. **Corporate** — Corporate knowledge contains the total body of knowledge necessary to deliver on the strategic aims and objectives of an organization. It provides product and service information, and can typically be accessed by any internal corporate Web citizen. Typically, the head of operations will take responsibility for this information. In a sales-oriented organization, the head of sales will take responsibility for this information's upkeep and delivery.
3. **Social** — Many people belonging to social networks post information on bulletin boards and blogs. By gathering and analyzing the information written about your corporate products and services, you will become aware of the public perception of your organization. Collect this information and store it centrally for self-service access, because your customers often know more about your products and services than you. Use social knowledge to expand your corporate thinking, taking into account what is being said about your organization.
4. **Partner** — If you have partners in your supply chain, then they are often the ones dealing directly with your customers. Collect and store this information for Web-based, self-service access by other partners within the supply chain so you have a common way to resolve problems and queries. Also, use this to bring new partners online in as short a time as possible, and to check on the quality and content of interactions that your partners have with your most valuable asset: your customers.
5. **Search** — Public search engines do not include corporate knowledge unless specific items of corporate knowledge are tagged as accessible to search engine spiders. By opening up some areas of corporate knowledge via a public self-service engine, it is possible to have your internal information listed together with publicly searched results.
6. **Hosted community** — In developing and deploying theme-based community forums, a group of like-minded people impart valuable information that can be collected, filtered, authored and provided back to the community or other areas for self-service search. Use these community areas to capture knowledge, or to provide the community with access to the knowledge repository to store its specific information, which can be accessed and retrieved only by that community.

Vendors include (note that VCAs are not listed here):

- Almawave (Iride CRM)
- Aptean Knova
- AnswerDash

- Astute Solutions (Astute Knowledge)
- Coveo
- Dezide
- eGain KnowledgeAgent
- Eptica
- FacilityLive
- Verint (Kana Knowledge Management)
- KMS lighthouse
- KnowledgeBroker
- Microsoft Dynamics CRM Parature
- MindTouch
- Moxie
- noHold
- Oracle Knowledge
- Panviva
- RightAnswers
- Safeharbor Knowledge Solutions (Owned by Enghouse Interactive)
- PTC (Servigistics)
- Transversal

Virtual Customer Assistants

A virtual customer assistant (VCA) simulates a conversation to deliver information or performs transactions on behalf of the customer on the Web or on a mobile device. The technology can consist of up to five components:

1. Natural-language processing engine
2. Speech recognition
3. A user interface that receives the request and delivers the response via speech or text
4. A search engine that can traverse big data repositories of knowledge and content (strong content authoring and management is essential)
5. A context engine to understand the intent of an individual

The use of VCAs is at a tipping point. Heavily improved natural-language processing technologies, the use of mobile devices and the customer acceptance of robotic technology drive the increased interest in this technology. The work being done by VCA vendors is raising awareness of general virtual assistant technology as a practical tool.

Virtual assistants are shifting from reactive responses — responding to questions for which answers can be found in structured content libraries — to proactive — looking at the customer's characteristics and acting on their behalf. But it will take a few years before this shift reaches the mainstream. A second shift — to a mobile-first user experience — means that many VCAs need updating, especially to leverage the information available on smartphones.

Effective use of a VCA can divert customer interactions away from an expensive phone channel to a less expensive, self-service channel, and especially to a mobile platform. The use of a voice-enabled VCA in a kiosk or an ATM can alleviate the need for typed interventions, and can help to create an interesting interaction for a nontraditional audience.

VCA interactions take place via the Web, SMS, chat messenger, or other Web-based or mobile interfaces. The combination of speech technology and VCA creates a strong customer service proposition. A great virtual customer assistant today must do more than just search; it should enrich the quality of the customer experience and help the customer throughout the online interaction.

For many customers, the VCA will be their starting point for customer service journeys. The VCA will operate as a tightly integrated part of the omnichannel environment, allowing seamless transitions between channels. When an interaction is transferred between channels, the full history and context from the originating channel will be available to the receiving channel. Each channel will also have a full and complete view of past interactions across all channels. These interaction channels will share application logic. Natural-language understanding (NLU) models for speech and text will be unified, and the lines between VCA and chat will blur.

Vendors include:

- [24]7
- Anbotto
- Artificial Solutions
- CodeBaby
- Creative Virtual
- eGain
- True Image Interactive (GetAbby)
- Existor
- GyrusLogic
- Google

- Inbenta
- IntelliWISE
- Interactions
- Nanorep
- Next IT
- Nuance
- CX Company
- Stanusch Technologies
- Synthetix
- Zucchetti

Co-Browsing

Collaborative browsing, or co-browsing, lets an agent interact with a customer by using the customer's Web browser to share the same screen space. Regardless of their physical locations, customers and agents can share a browser view and simultaneously browse a site to assist with form completion or to guide the customer through a series of customer self-service interactions. Co-browsing differentiates itself from screen or application sharing because it is not achieved by sending numerous screen shots of the presenter's screen to one or more participants. Instead, in a synchronous fashion, it distributes the URL(s) visited by the presenter to the participant's browser.

Working with the customer on the customer self-service screen while in contact on the phone or via Web chat provides a great opportunity to resolve any questions, demonstrate best practices and resolve self-service issues. The technology for collaborative browsing is fairly mature and the business process and benefits for in-channel support are well-proven.

Vendors include:

As part of the CRM suite

- Salesforce (AppExchange Verishow and Golnstant)
- Microsoft Dynamics CRM (Parature)
- Oracle Rightnow (Livelihood)
- Pegasystems (Firefly)

As part of the Customer Engagement Suite

- eGain
- Moxie

- Kana

Point Solutions

- unblu
- Recursive Labs
- Surfly
- Whisbi

External Community Software

External community software enables customers and partners to blog and post about, as well as rate, products/services and to construct cases. It also enables peer interaction and knowledge management.

Vendors include:

- Acquia
- Dimelo
- Jive
- Lithium
- Salesforce
- Sprinklr
- Verint (Telligent)
- Voycer

Recorded Video Customer Service

General consumer acceptance of YouTube as an instructional video website, as well as increased mobile network bandwidth, makes video an increasingly important part of the customer experience. Prerecorded video clips that impart how-to instructions to support customer service or training can reduce the number of interactions with the customer engagement center. Phone or Web chat agents can also provide customers with a URL to a recorded video clip that shows how to address a specific problem.

The technology for this kind of service has evolved beyond prerecorded video clips that impart "how-to" instructions for customer service or that train customers on how to use a product or service. Today, personalized video engagements tailor the message to the individual customer. Going a step beyond this, interactive personalized video where the viewer actually controls the personalization for the optimal customer experience.

All personalized video systems have:

1. Video content management of video components or clips
2. A rule engine to parse input data for the video and determine the clip sequence to be created
3. An Assembly engine to piece together video clips into the desired video
4. An Administration portal to add content to the system, establish rules and manage content
5. A Reporting dashboard to show video view count statistics

Videos are especially effective at capturing and recording deep and broad instructions for a wide array of "task families," such as manipulative acts for mechanics, development logic for software workers and lengthy time-lapse processes for workers of all kinds. Organizations can deflect interactions from the customer engagement center using a how-to video to provide instructions, for instance, on how to change a battery in a vehicle or a laptop, or as a demonstration tool. These video clips can form part of an organization's "video knowledge" repository, or they can be indexed from social networks, such as YouTube, and accessed using a search tool for internal knowledge bases.

Vendors include:

- Avaya
- eGain
- Idomoo
- Moxie
- Oracle RightNow CX Cloud Service
- Pitney Bowes
- Salesforce
- SundaySky
- Verint (Kana)
- Vidyo

Mobile Customer Service

Mobile devices now outsell desktop and laptop devices. Combined with the ever-increasing processing power of the smartphone, this has resulted in many organizations investing in a mobile strategy to expand their customer interactions.

Mobile customer service applications provide mobile applications that reside in, or are accessible from, smartphones or tablets, and are completely supported by the enterprise. This can take the form of contextual searches, contextual delivery of knowledge, location-based services, or

multimodal customer support (meaning that the customer can be engaged in a self-service process, but can request or be given live-agent support via chat, voice or co-browsing).

Over the last twelve months, we have observed the rising popularity of mobile customer service applications in multiple industries and geographies. The development, however, was not as fast as we thought, as many consumer-facing apps that people use daily are free of charge and, thus, provide minimum or no support. In-app support, as well as support via a company's mobile website, has only started to emerge in industries such as hotel, airline, banking and telecommunications, because expectations of customer service through mobile are higher in these industries than other channels.

The mobile customer interaction could be presented in one of three ways:

- **Mobile browser** — Making Web-based content accessibly using a mobile device's built-in Web browser is the least expensive investment an organization can make when starting to deploy customer interactions. Any Web-based functionality and content that is available on a laptop or via a desktop browser can be accessed by a mobile device. The customer experience, however, is not very rich, because content drops off the bottom and right side of the screen, requiring the customer to continuously scroll to access all content.
- **Mobile Web** — Organizations deploy mobile Web technologies on a back-end server. The mobile server recognizes the incoming device, and formats the screen content accordingly, so a BlackBerry is distinguished from an iPhone in that the content is formatted on the server and delivered to the device, with the correct function keys and formatting enabled for that particular device. This method caters to a vast array of mobile devices and retains the processing power on the server, as opposed to relying on the phone, and can deliver a rich customer interaction.
- **Mobile application** — The mobile application is downloaded from the Web and installed on the device. Because mobile applications are unique to each mobile platform, multiple versions of the application are needed. The mobile application moves some processing power and all display and formatting processing to the mobile device, and focuses mostly on the transfer of information. The mobile application has the potential to deliver rich customer interactions, but is the most expensive method for moving interactions to a mobile device.

Vendors include:

- 24 [7] (IntelliResponse)
- Creative Virtual
- eGain
- Eptica
- Genesys
- Interactive Intelligence
- Moxie
- Mplsystems

- Oracle
- Pegasystems
- Salesforce
- SAP
- TouchCommerce
- Verint (Kana)

Vendors that have mobile CRM customer service applications that are available *exclusively* on a mobile device, and not available as a desktop or laptop installation include:

- Apple (Siri)
- [24]7
- EasyAsk (Quiri Software)
- Iris
- Nuance (Nina)
- Sherpa
- Urban Airship
- Helpshift
- Intercom
- UserCare
- Easemob Technologies

Customer Service Software for the MSB

There is no market specifically defined for midsize business (MSB) customer service vendors (see "Top CRM Customer Service Processes and Technologies for Midsize Businesses"). However, there are dozens of vendors globally that understand the needs of the MSB. A few of the more prominent vendors include:

- Aptean
- bpm'online
- Eptica
- Freshdesk
- Help Scout

- Kayako
- Microsoft (Dynamics CRM Online)
- Mplsystems (mainly U.K.)
- NetSuite
- Sage CRM
- Salesforce (Desk.com)
- SugarCRM
- TeamSupport (mainly high-tech industry)
- Zendesk
- Zoho CRM

MSBs should strongly favor cloud-based SaaS providers, as this is the future direction of software delivery. For an MSB, sourcing a cloud-based SaaS provider is also the best way to get access to world-class software solutions that were previously only made available on-premises to large organizations. Software that lacks this model, and multitenancy in particular, is likely to have been architected and built on outdated technologies.

The communication infrastructure to connect all of the devices and engagement channels is often, but not always, available from a separate set of vendors that provide:

- Email response
- Chat
- Telephony toolbar
- Computer-telephony integration (CTI)
- Automatic call distribution (ACD)
- Voice response
- Social media engagement

A sample shortlist of vendors for these infrastructure components would include:

- Genesys
- Interactive Intelligence (especially its CaaS Small Center offering)
- 8x8
- Five9
- NewVoiceMedia

Another key area is workforce optimization (WFO). Though many organizations might think that the smaller pool of customer service agents means that they do not need tools for WFO, careful consideration should be given to this area. WFO solutions contain complementary functions designed to improve customer engagement center performance through the deployment of appropriately trained and motivated agents.

Some of the vendors in this space, and which are appropriate for the MSB market, include:

- Calabrio
- Monet Software
- Pipkins
- KnoahSoft (owned by Avaya)
- Teleopti Group
- Uptivity (owned by inContact)
- Zoom

Point-Based Solutions in the Customer Service Market

Beyond the small number of CRM vendors delivering a complete customer service desktop and business applications, there are many more vendors that augment agent capabilities. Some of these provide knowledge management capabilities, while others have business process management (BPM) features, next-best action, or customer behavior analytics. We list them because of the significant value that they might have for your enterprise's customer service strategy.

- [24]7
- Afiniti
- AnswerDash
- AnswerOne
- Attensity
- Beyond Verbal
- Cirrus Insight
- Clarabridge
- ClearMash
- ClickFox
- Coveo
- Cyara

- Dimelo
- eBuilder
- FacilityLive
- ForeSee (an Answers company)
- Humanify
- IBM Tealeaf CX
- Interactions
- InvisibleCRM
- Jacada
- Knowesia
- Lithium
- Medallia
- MindTouch
- Morphis
- Insightpool (NextPrinciples)
- Nice Systems
- Panviva
- Recursive Labs
- RightAnswers
- Servion
- SpiceCSM
- Thunderhead
- Transversal
- Verint (Telligent)
- WalkMe

Contact Center Workforce Optimization

Workforce Optimization Suite

The traditional, siloed approach to buying agent-centric technologies stifles a contact center's ability to be efficient, yet still align with strategic customer objectives, such as retention, satisfaction and growth. Organizations need an integrated solution that enables information, insights, workflow and core contact center functions to work together seamlessly, and that complements and aligns with the business's CRM deployment. Integrated solutions have emerged during the past four years under the name "contact center workforce optimization." The incremental value associated with an integrated workforce optimization suite should influence organizational buying strategy for these contact center applications.

Vendors include:

- Aspect
- Calabrio
- Collab
- Genesys
- Globitel
- inContact (Uptivity)
- Interactive Intelligence
- Magnetic North
- Nice Systems
- Verint
- VoiceCyber
- Zoom

Workforce Management

At its core, contact center workforce management software is intended to maximize the use of agent labor by projecting incoming and outgoing call volumes or other communication methods (such as email or chat) and scheduling staff to meet these needs by a designated time — for example, a particular time of day, day of the week, or week within a month.

Vendors include:

- inContact (ac2 Solutions)
- Aspect

- Calabrio
- Collab
- Expert Systems
- Genesys
- Globitel
- Holy-Dis
- inContact (Uptivity)
- Infor
- Interactive Intelligence
- InVision
- ISC Consultants
- Monet Software
- Netcall (Qmax)
- Nice Systems
- Noble Systems (OpenWave)
- Oracle
- Pipkins
- Portage Communications
- Loxysoft Group (ProScheduler) (formerly known as XLScheduler)
- SAP
- ScheduleSource
- Teleopti Group
- TelStrat
- WorkForce Management Software Group
- Verint
- WorkFlex Solutions

Interaction Recording

The quality management software market encompasses applications for on-demand, selective and full-time recording of customer audio interactions, as well as screen capture of agent desktop

activity. The vendors in this market also provide call evaluation tools, online monitoring tools for joining live calls, and speech analytics for audio insight. These tools are traditionally used for compliance and quality purposes.

Vendors include:

- Alcatel-Lucent
- Altitude
- ASC Technologies
- Aspect
- Avaya (Knoahsoft)
- HPE Autonomy (eTalk)
- Cacti
- Calabrio
- Cisco
- Collab
- Cogna
- dvsAnalytics
- eLoyalty
- Enghouse Interactive (Telrex)
- Envision
- Genesys
- Globitel
- HigherGround
- Huawei
- inContact (Uptivity)
- Interactive Intelligence
- LiveOps
- Magnetic North
- Mattersight
- Mitel-Aastra/Oaisys

- Monet Software
- Netcall
- Nice Systems
- OnviSource
- Red Box Recorders
- TantaComm
- TelStrat
- Verba
- Verint
- VirtualLogger
- VoiceCyber
- VPI
- Zoom

Agent Evaluation

Agent evaluation traditionally relies on the playback of captured call recordings and an assessment of each agent's performance by a supervisor or dedicated quality assurance team. Calls are selected randomly or by using basic operational criteria, such as call length or routing logic. Most interaction recording vendors supply this software, but with varying degrees of sophistication. The emergence of speech analytics adds a degree of intelligence to this process and introduces evaluation vendors that may own the interaction recording.

Vendors include:

- See Interaction Recording section
- See Interaction Analytics section

Performance Management

Performance management systems in the contact center integrate the enterprise's in-place contact center technologies, CRM systems and other data sources to provide a transparent picture of performance across sites, functions, levels and agents, while aligning targets with business objectives. These solutions are combined with business intelligence analytical tools to filter, drill, graph and analyze key performance indicators to determine the root cause of a good or bad performance and make adjustments, even in real time, if needed.

Vendors include:

- Aceyus
- AnswerOn
- Cognos (Databeacon)
- CRM vendors (for example, Oracle's Siebel CRM)
- eGain (Exony)
- Empirix
- iQor (HardMetrics)
- Jacada
- Mattersight
- Nice Systems
- OpenSpan (Enkata)
- QPC
- Servion
- Verint

Interaction Analytics

Interaction analytics combine and analyze the multiple, disparate data sources involved in a customer-agent interaction to identify trends and insights. The data can be structured, such as operational data and call flow dynamics, or unstructured, such as audio and text (voice, email, IM or chat). Deployment in a contact center can potentially uncover a diverse range of insights to improve the performance of the contact center and its agents, as well as provide customer and departmental insights (such as customer perceptions of a marketing campaign or new product pricing strategy).

Vendors include:

- Almage
- Avaya (Aurix)
- CallMiner
- Genesys (Utopy)
- HPE Autonomy
- Interactive Intelligence
- Mattersight
- Nexidia

- Nice Systems
- Nuance
- Phonexia
- Predictive Business Intelligence
- Ramp
- Raytheon BBN Technologies (Avoke)
- Uniphore
- Verint
- Voci
- Yactraq
- Zoom

Post-Call Surveys

Post-call surveying captures the customer's perspective of the interaction that they had with an agent and can be a key factor in evaluating customer satisfaction and agent performance. Traditional interactive voice response (IVR)-based survey tools are making way for more cross-channel solutions that enable contact centers to collect feedback via email, SMS and other channels. Operational integration triggers the customer invitation automatically and personalizes it so that the name of the agent and topic of conversation are highlighted. The questions are related to the interaction that occurred. Leading enterprise feedback management vendors or agent evaluation vendors typically offer this feature.

Vendors include:

- See Enterprise Feedback Management section
- See Agent Evaluation section

Agent Coaching

A further subset of e-learning is the specific coaching/training requirements of CSRs, linked to quality evaluations from recorded calls. These solutions help optimize agent performance through the delivery of appropriate feedback and lightweight coaching materials, such as best-practice audio clips, documents and specific notes from the supervisor.

Vendors include:

- See Interaction Recording section
- See Agent Evaluation section

E-Learning

Gartner defines e-learning as the electronically enabled transfer of skills and knowledge. It is a multimodal style of distributed learning that includes Web-based learning, computer-based learning, mobile learning, virtual classrooms and online collaboration. Courses are delivered via a variety of mechanisms, including an internal learning portal, the Internet, audiocasts, videocasts and mobile devices.

The call center e-learning marketplace is a subset of the broader e-learning market. A growing number of organizations are complementing their instructor-led training with e-learning and more real-time support. However, in many organizations, the call center remains a siloed environment, because CSRs who are linked to quality evaluations from recorded calls require specific coaching and training. E-learning solutions help optimize agent performance through the delivery of appropriate learning programs, from basic skills training to complex-scenario courses and assessments. The vendors listed here provide off-the-shelf course content for training call center employees. Courseware content can also be developed using courseware authoring tools or by leveraging content development firms.

Vendors include:

- MHI Global
- Intradiem
- ProEdge Skills
- Skillsoft
- SQLearn

Contact Center Infrastructure

Contact Center Routing Systems

The contact center infrastructure (CCI) market has been trending toward consolidation for several years, with an increased focus on cloud-based solutions. While some best-of-breed point products remain relevant, customers are shifting to broader solutions that provide a portfolio of applications spanning a broad set of functionality, including:

- Automatic call distribution (ACD)
- Multimedia routing
- IVR
- Automated outbound calling
- Computer-telephony integration (CTI)

- Workforce optimization

Many small and midsize contact centers (up to 300 agents in North America and 150 agents in most other geographies) are now evaluating and deploying contact center as a service (CCaaS) solutions, though adoption has been slower than in many other technology areas. Many CCaaS offerings can scale much larger than 300 agents, but Gartner often sees psychological barriers to adoption at larger contact centers. These barriers are typically based on perceptions about security, customization support, service reliability and total cost of ownership.

Enterprises increasingly recognize the potential synergies between customer-facing CCI and software solutions and their current or planned investments in internal-facing unified communications (UC) architectures. As a result, planners must consider how these two strategies can coexist and how to potentially share communication and collaboration components (see "Magic Quadrant for Contact Center Infrastructure, Worldwide," "Magic Quadrant for Contact Center as a Service, North America," and "Magic Quadrant for Contact Center as a Service, Western Europe" for an overview of the leading CCI vendors by geographic region).

Vendors include:

- 8x8
- ALE
- Altitude
- Aspect
- Atlantic Technologies
- Avaya
- Bell Canada
- BT
- C-Zentrix
- Capgemini
- CenturyLink
- Cisco
- Colt
- ComputerTalk
- Content Guru
- Convergys
- Dimension Data
- Drishti-Soft Solutions

- eGain
- Enghouse Interactive (Apropos; CosmoCom; Syntellect; Zeacom)
- Five9
- Genesys
- Huawei
- inContact
- Interactive Intelligence
- KPN International
- LiveOps
- Mitel
- NEC
- NewVoiceMedia
- Noda
- Orange Business Services
- SAP
- ShoreTel
- Telax
- Telefónica
- TeleTech
- Toshiba
- Transera
- Atos (Unify)
- Verint (Kana)
- Verizon
- Vocalcom
- Vodafone
- VoltDelta
- West

- ZTE

Visual IVR

As more interactions move to handheld devices, such as smartphones, the existing IVR design that requires a customer to listen to a voice prompt ("Press 1 for the Service Department ...") is inefficient and must be overhauled. In its place will be visual guidance that is designed for a user to touch, swipe, and press buttons on the screen to complete an interaction. There are many vendors developing prototypes or production systems, though wide-scale demand will probably not emerge until 2017.

Vendors include:

- Avaya
- CallVU
- Radish Systems (ChoiceView)
- Genesys
- Jacada
- Zappix

Voice Self-Service

Automated self-service that includes voice functionality is an important option for contact centers. These solutions provide an alternative to live contact center agents when resolving a range of customer service issues. They also let managers balance the quality of live call service with the cost and scaling advantages of automation. Most contact centers seek to increase self-service automation by continuously evaluating customer satisfaction while simultaneously developing options that increase self-service utilization and completion rates.

There are two primary options for interacting with telephone callers using voice self-service:

1. Via the standard touch-tone telephone keypad. This remains the most common form of telephone information entry.
2. Using speech recognition. This is particularly effective for certain types of problems and environments, and comes in various forms.

There is an increased demand for options that allow for interacting with callers who also have other simultaneous interaction options. Two related options are:

1. **Initiating calls to customer service from within a Web session** — There are different ways to initiate a live call from a Web session. Two common options for integrating Web activity with a subsequent call are 'click-to-call-back' and the use of Visual IVR tools to help convert IVR scripts to Web and mobile screens. An emerging trend is to initiate voice calls to customer service directly from within a self-service Web session using WebRTC or another browser-based

session. A related form of voice interaction is when customers contact customer service via a voice over IP (VoIP) soft client such as Skype or a custom mobile application. As Internet voice usage increases, these forms of interaction will become an attractive option for some contact centers.

2. **Using omnichannel tools to improve self-service** — Omnichannel interactions are primarily geared toward interacting with callers using smart mobile devices. Omnichannel interactions occur when a single session is aware of the other channels and can offer options to incorporate them. For instance, in a self-service call flow, a caller asking about a doctor's office or a restaurant might be given the option to have the address sent to the SMS number from which they are calling. This saves the caller having to write down information, which is especially critical if they are driving while on the call. A more sophisticated form of omnichannel involves custom mobile applications where, in addition to voice, the mobile client can support text, SMS, GPS, visual display and video. Scenarios in which this can be useful include insurance claims where the agent wishes to interact with a customer who is experiencing a problem, and where the agent also wishes to see, via video, the topic being discussed.

Voice Response Platforms

Voice response platforms provide voice access to information and applications, and can perform complex call routing based on information provided by the caller (see "Market Guide for IVR Systems and Enterprise Voice Portals, 2015").

Interactive voice response (IVR) systems were initially deployed on dedicated, special-purpose hardware-based platforms. Starting in 2000, a new generation of more open, software-based communication platforms emerged. These supported IVR based on a Web-style architecture that separated the Web applications from the voice portal platform. In effect, there were two layers: the Web application layer and the voice portal platform layer. The control protocol between the two layers is based on Internet standards, in particular on VoiceXML and Call Control XML (CCXML). These new voice portal architectures also increasingly supported VoIP standards, such as Session Initiation Protocol (SIP), and speech standards such as Media Resource Control Protocol (MRCP). The Voice Portal model had become the dominant approach by 2005.

In 2010, another architectural approach emerged that was designed for flexible cloud deployments. This approach uses a three-layer approach common to cloud architectures — infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS). The Communication PaaS layer (CPaaS) incorporates functionality similar to the Voice Portal, and typically supports VoiceXML. To do this, the CPaaS layer has unique characteristics to enable real-time communications such as voice, telephony and video. In current implementations, some solutions integrate the CPaaS and IaaS layers in order to support the more exigent real-time communication requirements. However, the solutions may also leverage established IaaS solutions, such as Amazon Web Services (AWS) or Microsoft Azure, for scaling and cost reasons.

The CPaaS approach currently offers significant advantages when addressing the omnichannel requirements of applications and users, because it can be easily extended to accommodate emerging technology options, and can easily allow self-service functions to be integrated with

business applications. The CPaaS and IaaS approach offers scaling and startup cost advantages because applications only pay for services as they are used. An important characteristic of these solutions is their ability to leverage an ecosystem of partners to deliver services at each of the layers (see "Market Guide for Communication Platform as a Service" for a more complete review of CPaaS vendors). Gartner expects the CPaaS environments to be increasingly selected as an alternative approach for self-service.

CPaaS vendors include:

- Aspect Software
- Nexmo
- Plivo
- Plum Voice
- Cisco (Tropo)
- Twilio

Below, we list the vendors whose IVR platforms are often sold as stand-alone solutions. Many additional vendors sell IVR applications primarily as part of a broader contact center solution.

IVR vendors include:

- Aspect
- Avaya
- Cisco
- Convergys
- Enghouse Interactive
- Genesys
- Plum Voice
- SmartAction
- West

Speech Technologies

Contact center speech software enables communication IVR applications to identify spoken words or phrases (utterances). This technology, often called automatic speech recognition (ASR), allows certain IVR tasks to be performed more effectively than via touch-tone phone keypad entry.

ASR offers improvements in three major areas:

- **Complex data entry** — Data entry via touch-tone phone, such as date and time, the names of cities and states, or the names of airports, is extremely difficult to accomplish via a telephone keypad. ASR allows callers to speak the date and time or the name of the city and state. The system identifies the answer.
- **Open menu applications** — Complex menus are difficult to navigate via touch tone and result in low call-completion rates. For instance, applications that offer callers a broad range of possible problem-solving options or many service options are not easily accomplished via touch tone. An open menu can simply ask "How may I help you?" and then use speech recognition to identify the caller's needs.
- **Hands-free operation** — This is a third area where ASR is particularly helpful. It is useful when the caller must make the requests without using their hands — for instance, the caller may be operating a vehicle or some type of machinery when seeking help.

Speech recognition IVR applications are more expensive than standard dual-tone multi-frequency (DTMF) touch-tone applications. To properly evaluate the options, enterprises must understand how much incremental improvement the ASR technology will offer over the less-expensive DTMF interface.

Vendors include:

- Interactions (acquired AT&T Watson technology)
- Microsoft
- Nuance

Open-source ASR options include:

- CMU Sphinx (developed at Carnegie Mellon University [CMU], Pittsburgh, Pennsylvania)
- Julius (developed at Nagoya Institute of Technology, Japan)
- VoxForge (part of Source Forge)
- Simon (a project at the Federal University of Para, Brazil)

Several ASR-related technologies can enhance application performance and the user experience under specific conditions: speaker verification, human-assisted IVR and speech functionality.

Speaker verification, also known as voice recognition and voice biometrics, identifies the person who is speaking by the characteristics of their voice. The most common applications are password reset and the prequalification of callers into a sensitive IVR application, such as those used by the banking or healthcare industries.

Vendors include:

- Nuance
- Twilio

- ValidSoft
- VoiceVault

Human-assisted IVR integrates speech recognition functions with a live human agent. This integration can significantly increase speech recognition rates while also leveraging ASR tools. One approach is to record spoken utterances that are not recognized by the ASR engine and pass them to a pool of waiting agents who identify what is being said. This happens quickly and without the awareness of the caller.

Vendors include:

- Interactions
- Nuance
- Spoken Communications

Social for Customer Service

External Community Software

External community software enables customers and partners to blog and post about, as well as rate products/services and construct cases. It also enables peer interaction and knowledge management.

Vendors include:

- Acquia
- Dimelo
- Jive
- Lithium
- Salesforce
- Sprinklr
- Telligent
- Voyager

Social Analytics for Customer Service

Social analytics applications for customer service enable organizations to pinpoint the area where a customer service process falls short, and the factors that caused inadequate support to be offered to the customer. These applications are often packaged with social media engagement applications for customer service.

Vendors include:

- Clarabridge
- Conversocial
- Coosto
- Five9
- Lithium
- Medallia
- Sparkcentral

Social Media Engagement

Social media engagement applications for customer service enable organizations to monitor social media monitoring and respond to customers. These applications handle inquiries and complaints raised on popular social networks, forums and blogs in a linear, case-by-case manner.

Vendors include:

- Brand Embassy
- Clarabridge
- Conversocial
- Lithium
- Hootsuite
- Oracle
- Salesforce
- Sparkcentral
- Sprinklr

Internal Community Software

Internal community software for customer service enables internal collaboration among customer service agents for a case, a set of cases or a customer record. Internal community software capabilities should ideally be embedded in a customer service application.

Vendors include:

- IBM

- Jive
- Microsoft
- Salesforce
- SAP
- SugarCRM

Customer Service Analytics

Interaction Analytics

Interaction analytics combine and analyze the multiple, disparate data sources involved in a customer-agent interaction to identify trends and insights. The data can be structured, such as operational data and call flow dynamics, or unstructured, such as audio and text (voice, email, IM or chat). Deployment in a contact center can potentially uncover a diverse range of insights to improve the performance of the contact center and its agents, as well as provide customer and departmental insights (such as customers' perceptions of a marketing campaign or a new product pricing strategy).

Vendors include:

- Almagest
- Avaya (Aurix)
- CallMiner
- Genesys (Utopy)
- HPE Autonomy
- Interactive Intelligence
- Mattersight
- Nexidia
- Nice Systems
- Nuance
- Phonexia
- Predictive Business Intelligence
- Ramp
- Raytheon BBN Technologies (Avoke)
- Uniphore

- Verint
- Voci
- Yactraq
- Zoom

Text Analytics

Text analytics can process large volumes of text-based material to derive business insight, understand customer behavior, automate processes and organize information. The text analytics market consists of a large number of vendors, but many of them are small and are using immature technologies and products that may be unsuitable for some uses. We list a sample set of leading vendors.

Vendors include:

- Attensity
- Clarabridge
- HPE Autonomy
- IBM
- Kapiche
- Megaputer
- Nice Systems
- Salesforce
- SAS

Social Analytics for Customer Service

Social analytics applications for customer service enable organizations to pinpoint the area where a customer service process falls short, and the factors that caused inadequate support to be offered to the customer. These applications are often packaged with social media engagement applications for customer service.

Vendors include:

- Clarabridge
- Conversocial
- Coosto
- Five9

- Lithium
- Medallia
- Sparkcentral

Real-Time Decisioning

Real-time decisioning software combines analytical insight with business strategy to identify the optimal customer treatment that applies broadly across the enterprise. Most deployments are in the contact center and focus on cross-selling activity. Real-time decisioning solutions have also been deployed across other channels, such as retail stores, bank branches and websites. Other applications include prioritizing customer support opportunities, fraud detection and service personnel alignment.

Vendors include:

- FICO
- IBM
- Infor
- Oracle
- Pegasystems
- Pitney Bowes
- Pontis
- SAP
- SAS
- Teradata
- ThinkAnalytics
- Thunderhead

Field Service

Field Service Management

The applications that we focus on in this section help field service personnel in five ways:

1. Receive requests for a field service technician over the Internet or telephone, or from an intelligent device
2. Assign a service technician (enables long, midrange, weekly and intraday optimization of the technician, factoring in assets and improved service-level agreement compliance)

3. Mobilize technician(s) to arrive on-time and prepared with the appropriate parts, skills, task instructions and access to inventory in real time or cached on a mobile device
4. Enable the technician to digitally capture their completed work, time spent, expenses, parts used, authorized signature and next steps, regardless of Internet connectivity
5. Obtain field service functionality that supports a continuum of field service models, from reactive to preventive, to predictive maintenance, by utilizing employed and subcontracted technicians

In addition to the core scheduling component and mobile support mentioned above, an end-to-end field service management (FSM) solution may also contain the following:

- Field technician management (skills, plan board, assignment, route and technician schedule optimization)
- Entitlements and contract management
- Product and pricing configuration
- Case-based reasoning/knowledge management
- Project management software
- Reporting and service analytics
- Bill/invoice preparation
- Field parts, tools and material/parts management (essentially a field SCM system)
- Intelligent device management and fleet management
- Reverse logistics and depot repair
- Software to administer mobile application permissions, workflow and additional forms
- A service integration framework or platform, including templates for ERP and CRM integration
- Service sourcing and subcontractor enablement
- Social enablement

FSM vendors include:

- ABB
- Arris
- Astea International
- ClickSoftware
- Comarch

- Core Systems
- Corrigo
- Fast Lean Smart (FLS)
- FieldAware
- FieldConnect
- FieldPower
- Geoconcept Group
- Hitachi Solutions
- IFS
- Infor
- isMobile
- KEY2ACT (formerly WennSoft)
- Microsoft (FieldOne Systems)
- MSI Data
- mplsystems
- Oracle
- OverIT
- Quintiq
- Retriever
- SAP
- ServiceMax
- ServiceNow
- ServicePower
- Praxedo
- Tesseract
- Trimble
- Verisae (ViryaNet)
- Vertical Solutions
- WorkWave (Marathon Data Systems)

Customer Experience Management

Enterprise Feedback Management

Enterprise feedback management is a fragmented market with no leaders and more than 300 offerings (as identified by Gartner). We group these into three types of vendors:

1. Vendors that provide simple tools for collecting surveys in a single communication channel (such as via the Web or IVR).
2. Vendors that specialize in processes such as customer satisfaction surveying, employee satisfaction, new product development feedback or complaint management.
3. A smaller group of vendors, listed below, that provide enterprise feedback management applications that work across multiple channels and can be used for multiple processes. Gartner hears the most about these vendors from our end-user clients, partners and vendor clients.

We expect consolidation to occur in the enterprise feedback management market during the next few years and will keep clients apprised of changes.

Vendors include:

- Aptean (Respond)
- Charter UK
- CallidusCloud (Clicktools)
- Clarabridge (Market Metrix)
- Concept myK
- Confirmit
- SandSIV (Custvox)
- Business & Decision (FBC Software)
- ForeSee
- GetFeedback
- InMoment
- InsightNow
- InTouch
- Inworks
- iPerceptions

- iSky
- MatrizCX (Allegiance)
- Medallia
- Nice Systems
- NetReflector
- OpinionLab
- PeriscopelQ
- Qualtrics
- Questback
- Quick Search
- ResponseTek
- SAS
- Satmetrix
- Smoke Customer Care Solutions
- SynGro
- Thirty by Thirty
- Vision Critical
- Verint

Voice of the Customer

Voice of the customer (VoC) solutions combine multiple, traditionally siloed technologies associated with the capture, storage and analysis of direct, indirect and inferred customer feedback. Technologies such as social media monitoring, enterprise feedback management, speech analytics, text mining and Web analytics, are integrated to provide a holistic view of the customer's voice. Astute CRM specialists capitalize on the resultant customer insights by disseminating relevant information to the right person, at the right time, and on the right channel. The landscape is still taking shape; the leading vendors come from a variety of backgrounds with very different core strengths.

Vendors include:

- Attensity
- CallMiner
- Clarabridge

- ClickFox
- Confrimit
- Custvox
- ForeSee
- HPE Autonomy
- InMoment
- iPerceptions
- iSky
- Medallia
- Maritz CX (Allegiance)
- NetReflector
- Nexidia
- Nice Systems
- OpinionLab
- Qualtrics
- Questback
- ResponseTek
- SandSIV
- Smoke Customer Care Solutions
- SynGro
- Thirty by Thirty
- Verint

Customer Journey Analytics

Customer journey analytics is the process of tracking and analyzing the way customers use a combination of available channels to interact with an organization. It covers all possible channels, including those with human interaction (such as a call center), those that are fully automated (such as a website or mobile device), those that are operated by third parties (such as an independent retail store) and those with limited two-way interaction (such as display advertising).

Organizations that have a clear and deep understanding of their customers' journeys will gain competitive advantage to successfully exploit business moments. Customer journey analytics

solutions provide a wide variety of benefits to organizations, such as providing critical data that increases the effectiveness of customer engagements, improves the customer experience and yields better customer metrics and management (see "Technology Overview for Customer Journey Analytics" for more information about customer journey analytics and the associated benefits).

The market for these emerging solutions is fragmented, so it can be difficult to identify which approach and tools are most appropriate. It is essential to include stakeholders from across the organization to help identify a relevant solution. Additionally, each organization has its unique needs associated with customer journey analysis. It is important for organizations to identify the most strategic and frequently used channels in existing customer journeys before embarking on an implementation.

Vendors include:

- Acxiom
- Adobe
- ClickFox
- IBM
- InQuba
- Kitewheel
- ResponseTap
- Salesforce
- SAP Hhybris
- TandemSeven
- Thunderhead
- UserReplay
- Verint

Customer Experience Management Service Providers

We put customer experience (CX) management service providers into five groups: Tier 1 system integrators, marketing service providers, business process outsourcers, digital agencies and specialist consultancies.

Tier 1 CX consultants include:

- Accenture Digital
- Atos
- BearingPoint

- BT (BT Global Services)
- Business & Decision
- Capgemini
- CGI
- Cognizant
- CSC
- Deloitte Digital
- EY
- Fujitsu
- HCL
- HPE
- IBM Interactive
- Infosys
- KPMG
- NTT Data
- PwC
- Reply
- Tata Consultancy Services (TCS)
- Tech Mahindra
- Walker
- Wipro

Marketing service providers include:

- Acxiom
- Affinity Solutions
- Aimia
- Allant
- Brierley+Partners
- Deloitte Digital

- Dex Media
- dunnhumby
- Epsilon
- Equifax
- Experian
- FICO
- Harte Hanks
- KBM Group
- Merkle
- Rapp
- Targetbase
- Valassis (Valassis Relationship Marketing Systems [VRMS])

Business process outsourcers include:

- Aegis Marketing Solutions
- Alorica
- Atento
- Concentrix
- Convergys
- Expert Global Solutions (EGS)
- Firstsource
- HPE
- IBM Global Process Services
- Tech Mahindra Business Services Group
- Serco
- Sitel (acquired by Actical Group from France)
- Sutherland Global Services
- Sykes
- Teleperformance
- TeleTech

- Transcom
- transcosmos
- Vertex Business Services
- West
- Xerox

Digital and brand agencies include:

- Acceleration (WPP)
- AKQA (WPP)
- Blast Radius (WPP)
- Creuna
- DigitasLBi (Publicis)
- FCB (Interpublic)
- FullSix (Havas)
- iCrossing (Hearst)
- Isobar (Dentsu Aegis Network)
- Landor (WPP)
- Lippincott
- MRM/McCann
- Meredith Xcelerated Marketing
- Mindworks (Dentsu Aegis)
- Nurun (Publicis)
- Ogilvy & Mather (WPP)
- Organic (Omincom)
- Possible (WPP)
- Pixelpark (Publicis)
- R/GA (Interpublic)
- RAPP (Omnicom)
- Razorfish (Publicis)

- Rosetta (Publicis)
- Sapient (Publicis)
- Syzygy (WPP)
- Universal Mind
- Vivid Group (Dentsu Aegis)
- VML (WPP)
- Wieden+Kennedy
- Work Club (Havas)
- Wunderman (WPP)

Specialist consultancies include:

- AboutFace
- Adaptive Path (Capital One)
- ClearAction
- Copernicus Marketing Consulting
- CustomerBliss
- The Customer Experience Company
- Econsultancy
- EffectiveUI
- EMC (EMC Consulting)
- Fifth Quadrant
- Futurelab
- Mulberry Consulting
- Nielsen Norman Group
- OgilvyOne
- Peppers & Rogers Group (part of TeleTech)
- Prophet
- Root
- Strativity Group
- Talent Vectia

- TandemSeven
- The Service Profit Chain Institute
- Utopia Image
- Walker
- West Monroe Partners
- ZS Associates
- Zyman Group

Cross CRM

Cross-Functional Customer Analytics

Web Analytics

Web analytics is a market of specialized analytics applications that are used to understand and improve the online channel UX and visitor acquisition and actions, and to optimize digital marketing or intranets. Products offer reporting and segmentation capabilities, analytical and performance management, historical storage, and integration with other data sources and processes. The tools are used by marketing professionals, advertisers, content developers, CSS and the website's operations team.

Vendors include:

- Adobe
- Ensignten (Anamatrix)
- comScore
- Google
- IBM
- Kissmetrics
- SAS
- Teradata
- Webtrends

Customer Value Analysis

Customer value analysis usually includes channel and product profitability (often finance-driven) and the multiple types of marketing-driven customer profitability (such as contribution, current profitability and lifetime value) prevalent in most businesses. This subject requires a wide range of capabilities, from activity-based costing (ABC) to predictive modeling and raw scoring capabilities.

Vendors include:

- Ignite Technologies
- Oracle
- SAP
- SAS
- Teradata

Customer Predictive Analytics

The term "predictive analytics" is used to describe a data mining approach with four attributes:

- Emphasis on prediction (rather than description, classification or clustering)
- Rapid time to insight (measured in hours or days)
- Emphasis on the business relevance of the resulting insights
- Increasing emphasis on ease of use (thus making the tools accessible to business users)

Customer predictive analysis involves estimating or modeling the potential aspects of a relationship. Predictive analysis solutions come in the widest variety of any CRM application solution. User organizations need to consider the level of expertise each user will have, from data mining workbenches to industry vertical black-box applications.

Vendors include:

- Alpine Data
- Alteryx
- Angoss
- Dell
- FICO
- IBM
- Microsoft
- Oracle

- Pegasystems
- Pitney-Bowes
- SAP
- SAS
- TIBCO Software

Real-Time Decisioning

See Customer Service Analytics section

Customer Journey Analytics

See Customer Experience Management section

Text Analytics

See Customer Service Analytics section

Interaction Analytics

See Contact Center Workforce Optimization section.

Intelligent Business Process Management Suites

An intelligent business process management suite (iBPMS) takes advantage of system and human intelligence to create, manage and improve a wide range of business processes — most frequently for customer service processes, but often coordinated across different business functions too. An iBPMS is a process-centric, model-driven application composition platform that uses processes and rules as the primary orchestration focus of an application, and is easily built and changed by modifying an abstract model of the application rather than by writing code. A key aspect of an iBPMS is that business users tend to be highly involved in managing the full life cycle of the process.

Examples of intelligent business processes include the ability to discover trends or predict events that could adversely impact business outcomes, and to then suggest alternative approaches that may dynamically change the process to avoid these events (such as possible service-level breaches). The iBPMS may also enable collaboration in the context of a specific process instance to ensure improved outcomes, perhaps by using information obtained in a similar situation. In more advanced iBPMSs, ad hoc actions can be "automated" by a smart agent or a goal-seeking, rule-driven capability that learns from prior process instances and improves the ad hoc response over.

In an iBPMS, the universe of process knowledge can expand using operational intelligence business activity monitoring (BAM), a term that means data from external sources can be dynamically

correlated and analyzed with in-flight process performance data (see "Find the Best Approach to Decision Management"). As a result, an iBPMS can take advantage of the insights derived from the processes it orchestrates, as well as the insights and context derived from other sources (such as big data and context brokers). This capability is essential to compressing the time it takes to go from insight (context evaluation) to action in exploiting each digital business moment — allowing organizations to service their customers in a more contextually relevant and intelligent way (see "Eight Dimensions of Process IQ Determine How Smart Your Process Needs to Be").

Vendors include:

- AgilePoint
- Appian
- AuraPortal
- BP Logix
- DST Systems
- IBM
- K2
- Lexmark (Kofax)
- NewGen Software
- Oracle
- Pegasystems
- PNMsoft
- Software AG
- TIBCO Software
- Whitestein Technologies

Master Data Management for Customer Data

Master data management (MDM) helps organizations create and maintain a consistent, shareable, accurate and trusted single version of key enterprise data (such as customer data) across their business operations. It provides both the framework and technology needed to ensure the uniformity, accuracy, stewardship, semantic consistency and accountability of enterprisewide, shared customer master data assets.

Trusted customer data and a single view of the customer are fundamental to the success of a CRM or other customer-centric strategy. The ability to identify customers correctly and to draw on a reliable, accurate and comprehensive single-customer view in customer-centric processes and interactions is highly valuable to groups that interact with customers, such as marketing, sales and

service organizations. It can help organizations deliver the appropriate customer experience, cross-sell (between products and markets), retain customers and execute end-to-end processes efficiently and effectively. It can help organizations manage risk and enable regulatory compliance. As the use of social media and big data becomes "business as usual," MDM of customer data is increasingly crucial for managing the links between the fragments of customer data, enabling organizations to better understand the behaviors and sentiments of their customers.

Vendors include:

- Ataccama
- IBM
- Informatica
- Oracle
- Orchestra Networks
- Profisee
- SAP
- Talend
- TIBCO Software
- VisionWare

Web Content Management

Gartner defines Web content management (WCM) as the process of controlling the content to be consumed over multiple digital channels through the use of specific management tools based on a core repository. Product functionality goes beyond simply publishing Web pages to include:

- Content creation or authoring functions, such as templating, workflow and change management
- WCM repositories that contain content or metadata about content
- Library services, such as check-in or check-out, version control and security

Vendors include:

- Acquia (Drupal)
- Adobe
- Automattic (WordPress)
- CoreMedia
- CrownPeak

- Drupal
- Episerver
- e-Spirit
- eZ Systems
- GX Software
- Hippo
- HP Inc.
- IBM (Web Content Manager)
- Microsoft SharePoint
- OpenText
- Oracle (WebCenter Sites)
- Progress (Telerik)
- SDL (Tridion)
- Sitecore
- Squiz

Regional CRM Specialists

European CRM Application Software Specialists

Europe has many local CRM vendors in addition to large global vendors. Customer-centric activities in Europe tend to be regionally driven, and so local software vendors specialize in regional needs and functional capabilities. Many European companies prefer local country providers because they assume that these providers know more about local customer experience needs. Knowledge of cultural norms, language and localization provides a strong value proposition for vendors in the local space. Many of these vendors operate in multiple countries or specialize by industry. The best known European specialists, including non-European companies, are listed by country.

Vendors include:

Austria:

- Fabasoft
- UNiQUARE
- Aurea (update software)
- Upper Network

- Viscovery

Belgium:

- Efficacy
- Selligent

Czech Republic:

- Futurelytics

Denmark:

- Agnitio
- ChannelCRM
- Falcon Social
- Voxmeter

Finland:

- Innofactor

France:

- Atos (blueKiwi)
- Pros (Cameleon Software)
- Cegedim Dendrite
- Sparkow
- Criteo
- Dimelo
- easiware
- Eptica
- eServGlobal
- iAdvize
- IKO System
- Mediatech
- Neocase Software
- PTC Servigistics

- Synthesio

Germany:

- Accenture CAS
- Cursor
- OpenText (Cordys)
- GFT
- Intershop
- ITyx
- PiSA sales
- Pro-Team Solutions
- Team 4 Solutions
- unblu
- USU Software
- ValueScope
- Wice

Greece:

- InterWorks.Cloud

Ireland:

- Datahug
- Fineos
- Idir
- BAE Systems Applied Intelligence

Israel:

- Amdocs
- Kampyle
- Nice Systems
- Pontis

Italy:

- Almaxwave
- Entertainment Software Association (ESA)
- Gruppo Formula
- Pat Group
- Siseco
- Trueblue
- Xtel Communications

Netherlands:

- Exact
- getbizzi
- IDB Groep
- Scope 1 marketing technology
- CX Company
- Unit4

Norway:

- 24SevenOffice
- Confermit
- Questback
- SuperOffice

Poland:

- Comarch

Portugal:

- Altitude Software

Russia:

- InvisibleCRM
- Bpm'online (Terrasoft)

Spain:

- Accenture (Neo Metrics)

- B-kin
- Yunbit
- Infonis International
- Interactive Medica
- Léelo
- SmartFocus
- Vincle

Sweden:

- Abalon
- EVERY Consulting AB (EDB Proconsa Application Suite)
- IFS
- Tacton
- Teleopti Group
- Wipcore

Switzerland:

- BPA Solutions
- BSI
- SandSIV

Turkey:

- Ericsson (Bizitek)
- SFS
- VeriPark

U.K.:

- Actis Sales Technologies
- Civica Group (Asidua)
- BAE Systems Applied Intelligence
- EmergeAdapt (CaseBlocks)
- Celerity
- Charter UK

- CommuniGator
- Conversocial
- Creative Virtual
- DataSift
- Elateral
- SmartFocus
- Feefo
- DST Systems
- Aurea (Lyris)
- Oracle (Maxymiser)
- Noetica
- Northgate Information Solutions
- numero
- Rant & Rave
- Really Simple Systems CRM
- Redcastle
- Reevoo
- Relayware
- Sage Group
- SDL
- SynGro
- ThinkAnalytics
- Transversal
- Logicalis (Trovus)
- webCRM
- Workbooks

Asia/Pacific CRM Application Software Specialists

The Asia/Pacific region continues to invest in CRM, with a primary focus on sales, followed by customer service and marketing. Overall investments in social for CRM, marketing automation and digital commerce increased in 2015. Asia/Pacific includes multiple markets with diverse needs and maturity levels. Although multinational corporations continue to invest in the region, local players challenge the global players in various industries and geographies.

Vendors include:

- [24]7
- Adobe
- Amdocs
- Aptean
- Avaya
- Axind
- Bigcommerce
- Blackbaud
- Capillary
- Cegedim Dendrite
- CipherCloud
- Cisco
- Criteo
- Epicor Software
- Experian
- Flytxt
- Freshdesk
- Heat Software (GoldMine)
- Genesys
- IBM
- Infor
- Interactcrm
- Interactive Intelligence

- Jacada
- Jive Software
- Lithium
- Mara-Ison Technologies
- Microsoft (Dynamics CRM)
- NetSuite
- Nice Systems
- OpenText
- Oracle
- Pegasystems
- Pitney Bowes
- Sage CRM
- Salesforce
- SAP
- SapientNitro
- SDL
- Shopify
- Squiz
- SugarCRM
- SunTec Business Solutions
- Teradata
- Teleopti Group
- Verint
- Vinculum
- Zendesk
- Zoho

We divide the list further by regional providers.

Regional providers include:

Australia:

- Cyara
- Fifth Quadrant
- Flamingo
- Panviva
- Premier Technologies
- Pronto
- SMS Management & Technology
- TechnologyOne
- Unity4
- UXC

China:

- 800App
- Alibaba Group
- AsialInfo
- BlueFocus
- Channel Soft
- China UnionPay
- ChinaPNR
- CIC
- Computop
- Dodoca
- Easemob Technologies
- eSoon
- FXIAOKE Technology
- Hecom
- Huawei
- iFlytek
- Nacsent (Kedao CRM)

- Kingdee International Software Group
- Neusoft
- SinaWeibo
- Shopex
- Socialtouch
- Tencent
- TravelSky
- Yonyou
- U-try
- Weimob
- Weixinhai
- Xiaoi
- Xiaoshouyi
- Zc-digital
- ZTEsoft

India:

- Axind
- Cirrius Wireless Technologies Pvt Ltd
- CRM24x7
- CRMnext
- CustomerXPs
- Drishti
- Flytxt
- In10stech
- Litmus7
- Manthan
- MartJack
- Net Solutions

- NetSoft Solutions
- OctaShop e-Retail Services
- Ramco Systems
- Servion
- Talisma
- Unilog
- Vinculum

Japan:

- Canon Esquisse System
- Commerce21
- CTC
- Fujitsu
- Iwatsu Electric
- Lockon
- MKI
- NEC
- Nihon Unisys Group
- Nomura Research Institute (NRI)
- NTT Communications
- NTT Data
- NTT Software Corporation
- OKI
- OKWave
- Sansan
- Shanon
- Softbrain
- ecbeing
- Synergy Marketing
- Plus Alpha Consulting

- TechMatrix
- XyXon

Korea:

- Bridge Technologies
- Buttle Information Systems
- Hansol PNS
- MPC
- Rsupport
- WillBe Solutions

Malaysia:

- Juris Technologies
- NuSuara Technologies

Singapore:

- NCS
- Vocanic
- Linkfluence

CRM Business Process Outsourcers

Outsourcing Providers With Capabilities in North America

Major providers include:

- Accenture
- Alorica
- Arise Virtual Solutions
- American Customer Care
- Telerx (C3i)
- CallTek Center International
- Capgemini
- Cincom

- Computer Generated Solutions (CGS)
- Concentrix
- Convergys
- CSC
- DecisionOne
- Expert Global Solutions (EGS) – (former APAC Customer Services and NCO)
- EXL
- Firstsource
- GC Services
- General Dynamics (Vangent)
- Genpact
- Harte Hanks
- HPE
- Hinduja Global Solutions (HGS)
- Knoah Solutions
- LiveOps
- Minacs
- NexxLinx
- Percepta
- Sature
- Sitel (acquired by Acticall Group from France)
- SMT Direct
- Startek
- Sutherland Global Services
- Sykes
- TCS
- Teleperformance
- Telerx
- TeleTech

- Telus International
- Transcom
- transcosmos
- Unisys
- West
- WNS
- Working Solutions
- Xerox

Outsourcing Providers With Capabilities in Latin America

Major providers include:

- Aegis
- Atento
- Grupo Contax
- Capgemini
- CGS
- Concentrix
- Cincom
- Convergys
- CSU
- Grupo Konecta
- Digitex
- GSS
- HPE
- Sitel (acquired by Acticall Group from France)
- Sykes
- SVI Connect (Telemarketing Concepts)
- Teleperformance
- TeleTech

- Televista
- Trivit.net
- Unisono
- General Dynamics (Vangent)
- Xerox

Outsourcing Providers With Capabilities in EMEA

Most of these European-headquartered providers have a major presence across EMEA. They are listed by country.

Vendors include:

France:

- Atos
- Capgemini
- CCA International
- Teleperformance
- Webhelp
- Sitel (acquired by Acticall Group from France)

Germany:

- arvato
- walter services

Ireland:

- Voxpro
- OneSource Virtual (OSV)

Italy:

- AlmavivaA
- Visiant Contact

Nordic Countries and Luxembourg:

- Transcom

Netherlands:

- Cendris

Romania:

- FSP Global

South Africa:

- BPeSA Western Cape (formerly known as Calling the Cape)
- Dialogue Dimension Data
- Dimension Data
- Mindpearl
- Savant

Spain:

- Atento
- Digitex
- Grupo Konecta
- Unisono

Turkey:

- Turkcell Global Bilgi

U.K.:

- 2Touch
- BT Group (BT Global Services)
- Capita (Ventura)
- Domestic & General Group (Inkfish)

Non-European-headquartered providers with a sizable presence in EMEA include:

- Accenture
- Aegis
- Arise Virtual Solutions
- Cincom
- Concentrix
- Convergys

- CSC
- Expert Global Solutions (EGS)
- Firstsource
- FIS
- Harte Hanks
- HCL Technologies
- Hinduja Global Solutions (HGS)
- HPE
- Infosys
- Intelenet (former Serco)
- Minacs
- Sitel (acquired by Acticall Group from France)
- Sutherland Global Services
- Sykes
- TCS
- Tech Mahindra Business Services Group (BSG)
- TeleTech
- Unisys
- General Dynamics (Vangent)
- WNS
- Wipro
- Xerox

Outsourcing Providers With Capabilities in the Asia/Pacific Region

Below is a list of CRM business process outsourcing providers that are active in the Asia/Pacific region. Most providers operate across multiple countries across Asia/Pacific.

Vendors include:

Asia/Pacific region:

- Aegis
- Atos

- Capgemini
- Convergys
- Concentrix
- CSC
- Expert Global Solutions (EGS)
- Firstsource
- Fuji Xerox
- Harte Hanks
- HCL Technologies
- Hinduja Global Solutions (HGS)
- HPE
- Intelenet (former Serco)
- ISON BPO
- Salmat (Australia)
- Scicom (Malaysia)
- Sitel (acquired by Acticall Group from France)
- Spanco
- Sykes
- Tata Business Support Services (Tata BSS)
- Tech Mahindra Business Services Group (BSG)
- Teleperformance
- TeleTech
- Unisys
- VADS
- PT Visionet Data Internasional (Indonesia)
- Wipro
- Xerox

China:

- Beyondsoft
- CDG
- Wicresoft

Japan:

- BELLSYSTEM24
- SCSK ServiceWare
- Relia
- NTT Group
- Prestige International
- Telemarketing Japan (TMJ)
- transcosmos

CRM Service Providers

CRM Service Providers With Capabilities in North America

In 2015, the North American market for the CRM implementation services market was worth approximately \$16 billion, with a growth rate of around 6%. Large, complex CRM deployments in this region focus on business-centric solutions to improve front-office operations and digital marketing. This focus requires multiple competency domains, including:

- CRM software
- Enterprise architectures
- Industry consulting
- Customer analytics
- Commerce
- Mobility
- Social and cloud technologies

Customer service is the largest domain, emphasizing information management, architecture and the integration of multiple front office and operational systems. Salesforce is still the largest software platform being implemented; Microsoft Dynamics CRM is second. Application management is more focused on Oracle Siebel and SAP.

These providers support large, complex on-premises and SaaS-based CRM implementations. Most of them have capabilities on one or more of the major platforms, including Adobe, SAP CRM, SAP Hybris CRM, Oracle Siebel, Oracle Customer Experience Cloud, Salesforce and Microsoft Dynamics

CRM. We list the largest providers of project-based services that operate across multiple EMEA countries to support pan-European projects.

Providers include:

- Accenture
- Atos
- Avanade
- Capgemini
- CGI
- Ciber
- Cognizant
- CSC
- Deloitte
- EY
- HCL Technologies
- HPE
- IBM Global Business Services
- Infosys
- ITC Infotech
- KPMG
- Ledgeview Partners
- NTT Data
- Oracle Consulting
- Perficient
- PwC
- SAP Services
- SapienNitro
- Salesforce Services
- Tech Mahindra
- TCS

- West Monroe Partners
- Wipro

CRM Service Providers With Capabilities in EMEA

The Western European market for CRM implementation services market was worth more than \$12 billion in 2013, with a growth rate of just under 7%. Large, complex CRM solutions in Western Europe are driven by business-centric solutions that improve the front-office operations through multiple competency domains, including CRM software, enterprise architectures, industry consulting, CRM analytics, e-commerce, mobility, social and cloud technologies. The leading platform in the European market is Salesforce CRM, with Microsoft Dynamics a close second. SAP remains more important to the consultants and system integrators in the Western European market than in other regions.

These providers support large, complex on-premises and SaaS-based CRM implementations and most have capabilities on one or more of the major platforms, including Adobe, SAP CRM, SAP Hybris CRM, Oracle Siebel, Oracle Customer Experience Cloud, Salesforce and Microsoft Dynamics CRM. We list the largest providers of project-based services that operate across multiple EMEA countries to support pan-European projects.

Providers include:

- Accenture
- Atos
- Avanade
- BearingPoint
- BT (BT Global Services)
- Business & Decision
- Capgemini
- CGI
- Ciber
- Cognizant
- CSC
- Deloitte
- EY
- Fujitsu Consulting
- HCL Technologies

- HPE
- IBM Global Business Services
- Infosys
- NTT Data
- Ordina
- Oracle Consulting
- Reply
- SAP Services
- Salesforce Services
- Sopra Steria Group
- Tech Mahindra
- TCS
- Tieto
- T-Systems
- Wipro

CRM Service Providers With Capabilities in Asia/Pacific and Japan

In recent years, business buyers have gained influence in driving CRM solutions. Cross-selling and upselling in multiple organizations continue to be a priority in the Asia/Pacific and Japan market. Business users have two priorities:

- Discovering solutions that solve their business issues
- Evaluating alternative delivery and contracting options that give them more flexibility and faster ROI

As a result, organizations are gradually moving from on-premises to cloud-based CRM solutions (including public, private, managed cloud or hybrid solutions). This movement is partly to achieve cloud benefits such as lower initial setup costs and greater flexibility. But most importantly, it shows a realization that CRM is less mission-critical.

There has been rising interest and uptake of Salesforce and Microsoft CRM solutions in Asia/Pacific and Japan. Salesforce was ranked as the No. 1 CRM software in the region. Nevertheless, both Oracle and SAP continue to be important offerings for consultants and system integrators as organizations take a more holistic approach to CRM and look to enlist external help to deal with a range of challenges, including enterprise architectures, industry consulting, e-commerce, multichannel integration, CRM analytics, mobility, and social and cloud technologies. Most

providers have capabilities on one or more of the major platforms, including SAP CRM, Oracle (Siebel, PeopleSoft), Salesforce or Microsoft Dynamics CRM.

Vendors include:

- ABeam
- Accenture
- Aktiv Consulting
- Asterisk Computer (FE)
- Atos
- Avanade
- Capgemini
- Cognizant
- CSC
- Deloitte
- Empired
- EY
- Fujitsu
- HCL Technologies
- HPE
- Hitachi
- IBM Global Business Services
- iMatriz Solutions
- Infosys
- IT Holdings
- Itochu Techno-Solutions
- L&T Infotech
- NCS
- NEC
- Nihon Unisys Group
- Nomura Research Institute (NRI)

- NS Solutions
- NTT Data
- Oracle Consulting
- Pactera
- PwC
- Samsung SDS
- SAP Services
- SMS Management & Technology
- TCS
- Tech Mahindra
- Tectura
- transcosmos
- Virtusa
- Wipro

CRM Service Providers for SaaS Implementations

Organizations continue to adopt SaaS solutions and related IT services. For CRM applications, spending on SaaS is growing at three times the rate of on-premises spending. Parallel adoption of consulting and solution implementation (CSI) services for SaaS is also accelerating, especially in CRM, where more than 50% of new deployments are SaaS-based solutions. This growth presents an opportunity for providers to enter or expand their presence in this marketplace.

Configuring and deploying SaaS CRM solutions is often done as a stand-alone implementation. However, these solutions are deployed more frequently as part of a front-office transformation and must integrate with many applications and data sources. This often represents a business process change as much as a technology change, and typically requires the use of a CRM service provider to design, integrate, deploy and support the change management requirements.

First, we list traditional system integrators that support all major SaaS platforms. This is followed by lists of smaller SaaS specialists, separated into Salesforce-centric providers and Microsoft Dynamics CRM providers. For more information on the market for Salesforce CRM services, see "Reduce Risk and Increase Speed Using Gartner's Guide for Salesforce.com Implementation Partners."

Global and traditional system integrators with a Salesforce focus include:

- Accenture

- BearingPoint
- Business & Decision
- Capgemini
- CGI
- Cognizant
- CSC
- Deloitte
- EY
- Fujitsu Consulting
- HCL Technologies
- HPE
- IBM Global Services
- Infosys
- KPMG
- NTT Data
- PwC
- Salesforce Services
- TCS
- Tech Mahindra
- Wipro

Salesforce specialist providers listed by geographical coverage

Specialists with global coverage (North America, Europe, Asia) include:

- Appirio
- Bluewolf
- Acumen

North America Salesforce providers include:

- Aptaria
- Idea/Astadia

- Bodhtree
- Cinovate
- Cloudware Connections
- Customertimes
- Birlasoft (EnablePath)
- Force by Design
- Ledgeview Partners
- Mindtree (Magnet360)
- Nubik
- Persistent Systems
- Sererra
- ShiftCRM
- Silverline
- Slalom Consulting
- Soliant Consulting
- Sonoma Partners
- Stratus360
- Traction
- Virsys12
- Vertiba
- West Monroe Partners
- Your SL

United Kingdom Salesforce services providers include:

- BrightGen
- CloudSocius
- MakePositive

Western Europe Salesforce service providers include:

- ABSI

- 4C Consulting
- Atlantic Technologies
- Blat-Lapidot
- Waeg (Business Aligner)
- Cloud Concept
- CRMWaypoint
- Factory42
- Fluido
- Nefos
- New Energy Group
- Outbox
- Parx
- S4G Consulting
- ServiceWise
- Telnext

Australia Salesforce service providers include:

- Arxxus
- The Customer Experience Company
- ProQuest Consulting
- Davanti Consulting
- Fronde
- System Partners

China/Asia Salesforce service providers include:

- Breakingpoint Consulting
- Celnet Technology
- Compro Technologies
- Frensworkz Software Technology
- Future Intelligence Technology Inc
- IPC

Microsoft Dynamics CRM specialist providers (listed by country/region)

Microsoft Dynamics CRM global and region system integrators include:

- AlphaPeople — Global
- Avanade — Global
- Atos — Western Europe
- BearingPoint — Western Europe
- Business & Decision — Western Europe
- Capgemini — Global
- Ciber — North America and Western Europe
- Cognizant — Global
- Columbus — Global
- CSC — Global
- Delaware Consulting
- Espire Infolabs — Global
- Fujitsu Consulting — Global
- Hitachi Consulting — Global
- HPE — Global
- HCL Technologies — Global
- IBM — Global
- incadea — Germany
- Indra — Western Europe and Latin America
- Infosys — Global
- ITC Infotech — Global
- KPMG — Global
- L&T Infotech — Global
- Ness Software Engineering Services (Ness SES)
- NTT Data — Global
- PwC — Global

- Sonata Software/IBIS — Global
- TCS — Global
- Tech Mahindra — Global
- Tectura — Global
- Touchstone Group — U.K. and Western Europe
- UXC Eclipse (CSC) — Australia
- xRM1 Business Solutions — Germany

North America Microsoft Dynamics CRM service providers include:

- 360 Visibility
- AbleBridge
- Altriva Solutions
- Armanino
- Avtex
- BDO Solutions
- Bond Consulting Services
- Celenia Software
- Catapult Systems
- Edgewater Fullscope
- Green Beacon
- Hitachi Solutions (Ignify)
- InterDyn BMI
- Ledgerview Partners
- LiquidHub
- mcaConnect
- RSM (McGladrey)
- Neudesic
- Perficient
- Protech Associates
- PSC Group

- Slalom Consulting
- Socius
- Sonoma Partners
- Tribridge
- Webfortis
- Edgewater Fullscope

United Kingdom and Ireland Microsoft Dynamics CRM service providers include:

- Cloud9 Insight
- Codec-dss
- Pythagoras
- Touchstone
- Version 1

Western Europe Microsoft Dynamics CRM service providers include:

- Accentis
- CRM Partners
- CRM Resultants
- FWI Information Technology
- Ibermática
- Infoaván
- Infront
- k.section business solutions
- MakeSoft Technologies
- Orbis
- Prodware Group
- QS solutions
- Reply
- RealDolmen (Traviata)

Nordic Microsoft Dynamics CRM service providers include:

- Acando
- Cinteros
- Crayon
- Mepco
- Netcompany

Eastern Europe, Middle East and Africa Microsoft Dynamics CRM service providers include:

- ATP Ticari Bilgisayar
- AutoCont
- Crm Akademi
- Dot.Cy
- Eyron Software Group
- Guardian Information Systems
- Korus Consulting
- Link Development
- MalamTeam
- Mint Management Technologies
- Netwise
- Norbit
- VeriPark

CRM Suites for Small or Midsize Businesses

Many vendors serve small or midsize businesses (SMBs) that have an average of fewer than 50 seats. These are the most common vendor types that Gartner encounters.

Vendors include:

- 24SevenOffice
- Act-On
- Apptivo
- amoCRM
- Averware
- Base

- Batchbook
- Bitrix24
- CampaignerCRM
- Capsule
- Clevertim
- ContactMe
- Contactually
- Epicor Software
- FreeCRM
- Heat Software (GoldMine)
- Highrise
- icomplete.com
- Infor
- Infusionsoft
- Insightly
- LexisNexis (InterAction)
- InTouch
- Maximizer
- Meltwater (JitterJam)
- NetSuite
- Nimble
- Nutshell
- OpenCRM
- PipelineDeals
- Really Simple Systems CRM
- Sage CRM
- Salesboom.com
- Salesnet

- Scope
- Solve/Solve360
- SprintCRM
- Streak
- Swiftpage (Act)
- SugarCRM
- SuperOffice
- Tactile CRM
- Trivaeo
- Vtiger CRM
- webCRM
- X2CRM | X2 Engine
- Zendesk
- Zoho
- Workbooks

[More on This Topic](#)

This is part of an in-depth collection of research. See the collection:

- [The Salesforce Vendor Rating Companion Guide, 2016](#)

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The Gartner Digital Commerce Vendor Guide, 2016

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The digital customer experience depends on interoperability between a wide range of commerce platforms, services and ecosystem applications. IT leaders can use this Vendor Guide along with other Gartner publications to guide their decisions about digital commerce technology.

Key Findings

- Digital commerce has become a major component of the customer experience, one that involves a growing ecosystem of technologies, vendors and services.
- Getting the core digital commerce platform to work with multiple adjacent technologies, applications and data repositories represents a significant challenge for user organizations. Interoperability can have a major impact on the customer experience.
- Multiple license models and deployment options for digital commerce applications will continue to coexist for the next three to five years.

Recommendations

IT leaders should:

- Work with their peers in commerce, sales, marketing and customer service roles to closely integrate the digital commerce experience with all customer-facing channels.
- Ensure interoperability between their digital commerce technology platform and all adjacent technologies and applications that enable a digital commerce experience.
- Achieve digital commerce cost optimization goals by aligning their customer experience vision with the requirements of all customer-facing touchpoints. Re-evaluate current contracts, licenses and deployment models for potential cost savings.

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Strategic Planning Assumptions

By 2018, more than 50% of commerce sites will integrate technologies from more than 15 vendors to deliver a digital customer experience.

By 2018, 40% of B2B digital commerce sites will use price optimization algorithms and configure/price/quote tools to dynamically calculate and deliver product pricing.

By 2018, 30% of cross-border purchases made by Asian shoppers will match the delivery experience of online commerce in those shoppers' home countries.

By 2018, social networks' "buy" buttons will contribute 2% of brands' digital commerce sales.

By 2020, smart personalization engines used to recognize customer intent will enable digital businesses to increase their profits by up to 15%.

Analysis

This document was revised on 2 June 2016. The document you are viewing is the corrected version. For more information, see the [Corrections](#) page on gartner.com.

Digital Commerce Market: Definition, Growth and Trends

Definition

Digital commerce is the buying and selling of goods and services using the internet, mobile networks and commerce infrastructure. It is not restricted to a single proprietary website; it can encompass multiple digital sales channels, including social commerce sites, mobile commerce applications, marketplaces and in-store "clienteling" solutions. In this respect, digital commerce

includes capabilities delivered by both core digital commerce platforms and digital commerce ecosystems composed of smaller, focused "point" solutions.

A digital commerce platform facilitates purchasing transactions over the web, and supports the creation and continuing development of an online relationship with consumers or business customers across multiple retail, wholesale, mobile, direct and indirect sales, call center and digital sales channels. Digital commerce platforms enable organizations to build B2B, B2C or B2B-to-consumer (B2B2C) commerce sites and support a continuum of business objectives, ranging from the generation of incremental revenue to the enabling of transformational business change.

Growth

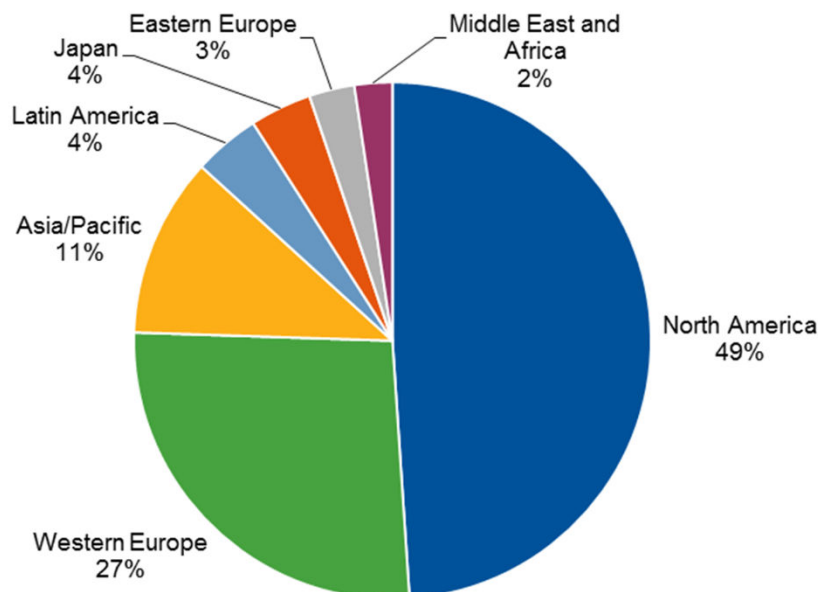
Gartner estimates that the digital commerce platform market will continue to grow, with a forecast compound annual growth rate of over 15% from 2015 through 2020, which includes revenue from SaaS, licenses and maintenance. Worldwide spending on digital commerce platform software in 2015 was approximately \$4.7 billion in constant currency, a 15% year-over-year increase.

North America and Western Europe account for 76% of worldwide revenue from digital commerce platform software, excluding custom and internally developed software (see Figure 1).

In terms of online sales volume, however, Asia/Pacific dominates. China, particularly, has surpassed the U.S. in terms of purchasing online. Growth is triggered by large Asian conglomerates' expansion into e-commerce businesses, often by setting up new business units in order to tap and enlarge their customer bases. The strong small and midsize business (SMB) market for commerce platforms and services, fueled by startups with digital commerce technology, also fuel growth. Strong mobile device and smartphone penetration, better internet penetration in developing regions, government initiatives, and logistical and infrastructural improvements are additional factors supporting growth in Asia/Pacific.

A large ecosystem of technology solutions and services also attracts high levels of investment as organizations integrate technologies in areas adjacent to digital commerce, including distributed order management (DOM), payments, digital marketing and web content management (WCM). This document lists the many segments and vendors that make up this broad ecosystem of technologies and services.

Figure 1. Revenue From Digital Commerce Platform Software by Region, 2015



Data from "Forecast: Enterprise Software Markets, Worldwide, 2013-2020, 1Q16 Update"

Source: Gartner (May 2016)

Trends

Trends in the digital commerce market are as follows:

- Multiple deployment models will continue to coexist for the next three to five years.** These deployment models, which include multitenant SaaS platforms, commerce applications hosted by the vendor or a third-party hosting company, on-premises implementations, marketplaces and outsourced commerce solutions, each have their advantages and disadvantages. An increasing number of organizations are choosing off-premises implementations such as SaaS or hosted software models. Of the 205 companies that responded to a survey conducted by Gartner in November 2015 for "Magic Quadrant for Digital Commerce," 62% indicated they were using SaaS or hosting services provided by the vendor or a third party, up from 58% in 2014.
- Licensing models continue to evolve** as client companies look to manage costs, reduce upfront capital investment, and more closely align their spending on commerce technology with their revenue. As with deployment models, no one licensing model dominates. Licensing models include one-time perpetual licenses; revenue-sharing licenses, in which the vendor takes a percentage of the customer's online revenue, typically between 1% and 15%; subscription (nonperpetual) licenses that are paid for annually or quarterly, based on transaction volume; and subscription licenses that are based on revenue tiers or tranches.

- **Digital commerce ecosystem technologies, such as DOM and payment services, are adding another level of complexity** as they have their own licensing models. Because digital commerce sites integrate multiple technologies and vendors, licensing complexity is a growing focus and challenge for user organizations.
- **Integration and interoperability of the multiple technologies, applications, services and data that support a digital commerce experience has become a major consideration.** Because the digital commerce ecosystem is built on multiple vendors and technologies, the level of integration and interoperability between systems varies widely. Interoperability and integration may or may not be developed, certified, and supported by the vendor and its partners; and while vendors may make integration claims, often under the "cloud" banner, user organizations should examine the provenance of interoperability very closely.
- **Emerging commerce markets, including those of Asia and Latin America, represent both challenges and opportunities for many commerce vendors.** Several global vendors are quite weak in regional markets, through either a lack of local sales and support representation or an inability to understand the requirements of a local market. The large variations of dynamic between countries also tend to drain global vendors' resources fast. The complexity of emerging markets — in areas such as logistics, payments, marketing and government regulation — also tend to work in favor of smaller, local providers that understand the local environment. In addition, large enterprises tend to use their in-house IT teams to develop their own digital commerce strategy and capability, in effect competing with digital commerce platform vendors.
- **The growth of e-commerce is attracting nontraditional vendors to compete in this market,** but with different competency levels. Logistics providers (including couriers and postal service organizations), telecom providers and financial services organizations are among the more aggressive entities looking into e-commerce. More partnerships, as well as mergers and acquisitions, will be forthcoming as these vendors seek to broaden their functionalities and coverage.
- **Digital commerce technologies are attracting the attention of private equity and venture capital companies, as well as megavendor technology companies and service providers,** which has led to mergers and acquisitions, and to roll-ups of two or more companies into a single commerce company, over the past 18 months. For investment and private equity firms, the primary goal is to maximize the profitability of a potentially underperforming company and digital commerce platform. For technology companies or service providers, the primary objective is to complement an existing technology portfolio with adjacent software assets, or to acquire the installed base of customers (and maintenance/service revenue) that comes with a technology.

Digital Commerce

Digital Commerce Platforms

Decision criteria that are frequently considered when evaluating or selecting a digital commerce platform vendor include the implementation model; the relative amount of gross merchandise value

(GMV) or online revenue that the platform is expected to support; and the platform's suitability to support a particular business model (B2C, B2B or industry).

On-Premises (or Hosted) Software

Platforms in this category are typically licensed through a one-time perpetual license fee. They can be installed on local servers maintained by the user organization or hosted by either a third-party hosting company or the commerce platform vendor. Most of the platforms provided by the largest commerce vendors continue to be on-premises or hosted applications (as opposed to SaaS-only solutions). Several of the platforms in this section, particularly those from the largest vendors, can support global implementations; can support both B2C and B2B business models; and can support large volumes of transactions and high levels of GMV.

While many of the platforms in this section can be hosted by the vendor, and are frequently labeled as "cloud" applications by the vendors, they represent a fundamentally different implementation model from the SaaS-only platforms listed in the next section. Although most of the platforms in this section are licensed on the basis of a one-time perpetual license fee, licensing models based on revenue sharing or transaction volumes are also becoming more common.

Vendors include:

- Active Commerce
- Avetti Commerce
- Broadleaf Commerce (productized open source)
- Elastic Path
- Emeldi Group
- Episerver
- HotWax Systems (productized Apache OFBiz)
- IBM (WebSphere Commerce)
- Intershop Communications
- k-eCommerce
- Kentico
- Magento Commerce (productized open-source Magento Enterprise Edition)
- MyWebGrocer
- Nexternal
- Oracle (Commerce, iStore)
- Orckestra

- Sana Commerce
- SAP Hybris (SAP Hybris Commerce)
- Shopware (Professional and Enterprise; productized open source)
- Sitecore (Commerce)
- SoftSlate Commerce (Enterprise Edition)
- Spryker Systems
- Unilog

SaaS

The vendors and products in this section provide digital commerce functionality using only a SaaS platform: There is no provision for implementing these products in an on-premises deployment or using a third-party hosting platform.

A SaaS platform can provide several advantages over on-premises alternatives, including simpler and shorter implementation; maintenance and functional upgrades that can be downloaded and implemented with minimal disruption to the business; and, typically, a licensing model that is based on a revenue-sharing or transaction volume model and that helps to align platform costs with revenue.

On the other hand, SaaS commerce platforms typically provide less ability to customize the storefront or user interface; often support GMV levels of less than \$250 million per year; and eliminate the subscriber company's ability to manage the underlying infrastructure of network, servers, operating system, storage, databases and application platform services. Because of the licensing model, SaaS platforms are also never "owned" by the user organization, meaning that the software license costs of a SaaS commerce platform are never eliminated.

Vendors include:

- Aptos
- Apttus
- Avangate
- Bigcommerce
- cleverbridge
- CloudCraze
- commercetools
- Corevist
- Demandware

- Digital River
- Four51
- IBM (Commerce on Cloud)
- Insite Software
- KalioCommerce
- Kibo
- Mirakl
- NetSuite (SuiteCommerce)
- Oracle (Commerce Cloud)
- Shopify
- Squarespace
- Volusion (Volusion, Mozu)
- VTEX
- Wix
- Zerogrey (Kooomo)

Digital Commerce for Midsize Businesses

Gartner defines midsize businesses as organizations that have between 100 and 1,000 employees, or that generate revenue of less than \$1 billion per year. The digital commerce platforms in this section are appropriate for midsize businesses in that they support lower levels of transactions than enterprise-scale digital commerce implementations and are less expensive and less resource-intensive to implement and support than platforms intended for large deployments. These commerce platforms are also used by subsidiaries and regional or product divisions of large, global organizations that require a separate and unique digital commerce platform, and that also prefer the lower cost and resource requirements associated with these products.

While there is no definitive cut-off point between the functional requirements and cost limitations of an SMB and those of a large enterprise, the following vendors are frequently implemented by midsize businesses and by divisions or business units of large enterprises:

- Aptos
- Avangate
- Avetti Commerce
- Bigcommerce

- cleverbridge
- Corevist
- Demandware
- Episerver
- HotWax Systems
- IBM (Commerce on Cloud)
- IBM (WebSphere Commerce)
- Insite Software
- KalioCommerce
- k-eCommerce
- Kentico
- Kibo
- Magento Commerce (Magento Community Edition, Magento Enterprise Edition)
- Mirakl
- NetSuite (SuiteCommerce)
- Nexternal
- Oracle (Commerce Cloud)
- Orckestra
- Shopify
- Shopware
- Sitecore (Commerce)
- SoftSlate Commerce (Enterprise Edition)
- Squarespace
- Volusion (Volusion, Mozu)
- Wix
- Zerogrey (Kooomo)

Digital Commerce for B2C Organizations

The digital commerce products in this section are used mostly by B2C organizations, such as retailers and brand manufacturers selling directly to consumers. The products in this section range

from products that support large or global B2C implementations to products that are more appropriate for SMBs; include both licensed/on-premises and SaaS-only technologies; and may also support B2B business models. However, most of the technologies in this segment provide important B2C functionality including omnichannel support, such as the ability to buy-online and pick up in store; point of sale (POS) or associate clienteling functionality; integrate with or provide their own order management/DOM functionality, personalization, and search technologies; or provide the product catalog, storefront, shopping cart, and payment integration capabilities required for B2C.

Vendors include:

- Active Commerce
- Aptos
- Avangate
- Avetti Commerce
- Bigcommerce
- Broadleaf Commerce
- cleverbridge
- commercetools
- Demandware
- Digital River
- Elastic Path
- Emeldi Commerce
- Episerver
- HotWax Systems
- IBM (Commerce on Cloud, WebSphere Commerce)
- Intershop Communications
- KalioCommerce
- k-eCommerce
- Kentico
- Kibo
- Magento Commerce
- Mirakl

- MyWebGrocer
- NetSuite (SuiteCommerce)
- Nexternal
- Oracle (Commerce, Commerce Cloud)
- Orckestra
- SAP Hybris (SAP Hybris Commerce)
- Shopify
- Shopware
- Sitecore (Commerce)
- SoftSlate Commerce (Enterprise Edition)
- Spryker Systems
- Squarespace
- Volusion (Volusion, Mozu)
- VTEX
- Wix
- Zerogrey (Kooomo)

Digital Commerce for B2B Organizations

Products in this category are used by B2B organizations; although several of these products also support B2C business models, they provide functionality specific to B2B digital commerce.

Because a B2B organization's B2B technologies almost always support multiple channels through which customers can place orders — such as direct sales, call and contact centers, and indirect or partner sales channels — there are often cost constraints on how much a company wants to invest in a B2B platform.

The following companies and technologies are often used in B2B implementations, although several of these platforms are also used in B2C implementations:

- Apttus
- Avetti Commerce
- Broadleaf Commerce
- CloudCraze
- Corevist

- Digital River
- Episerver
- Four51
- HotWax Systems
- IBM (Commerce on Cloud; WebSphere Commerce)
- Insite Software
- Intershop Communications
- KalioCommerce
- k-eCommerce
- Magento Commerce
- NetSuite (SuiteCommerce)
- Nexternal
- Sana Commerce
- Oracle (Commerce, iStore)
- SAP Hybris (SAP Hybris Commerce)
- Unilog
- VTEX

Table 1 summarizes vendor functionality and typical use cases for B2C, B2B and midsize organizations. Almost all the vendors can provide digital commerce platform functionality across multiple use cases and deployment models, and to various sizes of organization. This summary is intended to illustrate the most representative or typical use cases of each vendor. For more details of many of the vendors and their platform functionalities, see "Magic Quadrant for Digital Commerce," "Critical Capabilities for Digital Commerce" and "Cool Vendors in Digital Commerce, 2016."

Table 1. Index of Digital Commerce Platforms

Vendor	On-Premises or Hosted Software	SaaS (Available Only as SaaS Solution)	B2C	B2B	Midsize Business
Active Commerce	X		X		
Aptos		X	X		X
Apttus		X		X	
Avangate		X	X		X
Avetti Commerce	X		X	X	X
Bigcommerce		X	X		X
Broadleaf Commerce	X		X	X	
cleverbridge		X	X		X
CloudCraze		X		X	
commercetools		X	X		
Corevist		X		X	X
Demandware		X	X		X
Digital River		X	X	X	
Elastic Path	X		X		
Emeldi Commerce	X		X		
Episerver	X		X	X	X
Four51		X		X	
HotWax Systems	X		X	X	X
IBM (Commerce on Cloud)		X	X	X	X
IBM (WebSphere Commerce)	X		X	X	X
Insite Software		X		X	X
Intershop Communications	X		X	X	
KalioCommerce		X	X	X	X

Vendor	On-Premises or Hosted Software	SaaS (Available Only as SaaS Solution)	B2C	B2B	Midsized Business
k-eCommerce	X		X	X	X
Kentico	X		X		X
Kibo		X	X		X
Magento Commerce	X		X	X	X
Mirakl		X	X		X
MyWebGrocer	X		X		
NetSuite (SuiteCommerce)		X	X	X	X
Nexternal	X		X	X	X
Oracle (Commerce Cloud)		X	X		X
Oracle (Commerce)	X		X	X	
Oracle (iStore)	X			X	
Orchestra	X		X		X
Sana Commerce	X			X	
SAP Hybris (SAP Hybris Commerce)	X		X	X	
Shopify		X	X		X
Shopware Enterprise	X		X		X
Sitecore (Commerce)	X		X		X
SoftSlate Commerce (Enterprise Edition)	X		X		X
Spryker Systems	X		X		
Squarespace		X	X		X
Unilog	X			X	
Volusion (Volusion)		X	X		

Vendor	On-Premises or Hosted Software	SaaS (Available Only as SaaS Solution)	B2C	B2B	Midsized Business
Volusion (Mozu)		X	X		X
VTEX		X	X	X	
Wix		X	X		X
Zerogrey (Kooomo)		X	X		X

Source: Gartner (May 2016)

Open Source

Open-source software (OSS) solutions for digital commerce range from shopping carts to entire platforms. OSS is generally available for free under a GNU's Not Unix (GNU) general public license, although other license types may exist and fees may apply. Many of these have commercial support, such as "enterprise editions" that can scale beyond the OSS version.

Adoption of OSS for certain aspects of digital commerce — such as application servers, OSs and databases (Linux, Apache, NGINX, MySQL, MongoDB, PHP [LAMP] and Java platforms) — has been a mainstream activity for more than eight years. However, many large enterprises remain concerned about the reliability of OSS to support large transaction volumes. Organizations want to know whether digital commerce OSS is scalable, secure and robust enough for large-scale transactional sites, given that many startups and SMBs that use OSS may not be capable of supporting high volumes of commerce transactions.

Although OSS solutions are continuing to improve, it will be several more years before they mature to the standards of today's enterprise digital commerce licensed software and SaaS solutions.

Sample vendors include:

- AgoraCart
- Apache OFBiz
- Broadleaf Commerce
- Commerce Guys (Drupal Commerce)
- CubeCart
- HotWax Systems
- JadaSite
- Magento Commerce (Magento Community Edition)

- OpenCart
- osCommerce
- PrestaShop
- Shopizer
- Shopware Community
- SoftSlate Commerce (Community Edition)
- Solveda (BigFish Open Source eCommerce [extends OFBiz])
- Spree Commerce
- TomatoCart
- Ubercart
- VirtueMart (for Joomla)
- WooCommerce (for WordPress)
- Zen Cart

Marketplace Commerce Sites

Marketplace sites represent one of the largest segments of digital commerce in terms of total online revenue generated. A marketplace site provides a place where merchants, branded manufacturers, retailers and consumer goods manufacturers can post and sell products. Merchant sites support large numbers of SMBs. Large companies are beginning to use marketplace sites as another sales channel. Most marketplace buying transactions are B2C, although some sites have recently developed capabilities for, and a specific market focus on, B2B transactions.

Retailers, manufacturers and consumer goods companies are increasingly integrating marketplace sites into their digital commerce strategies. A marketplace can be used to sell inventory or close-out products, and for returns or unwanted or damaged merchandise. The site can also simply be another channel through which to reach potential customers. In China, the world's No. 2 market for digital commerce (the U.S. is No. 1), marketplace digital commerce sites represent by far the largest digital commerce business model.

Vendors include:

- Alibaba.com
- Amazon (Amazon.com; Amazon Business)
- eBay
- eBay Korea (Gmarket)

- Flipkart
- Google (Google Store)
- Jabong.com
- Jingdong (or JD.com)
- Rakuten
- Snapdeal.com
- Suning Commerce Group
- Tencent

Digital Commerce Services

Vendors in this category provide a variety of services that support the scoping and needs assessment, implementation, system integration, custom development, hosting and managed services that support complex digital commerce initiatives.

Digital Commerce Service Providers

Digital commerce service providers offer a variety of digital commerce implementation services, including ones for the design, development, integration and deployment of specific processes, functions, applications and initiatives in user organizations that support transactional digital commerce applications and related functionality. These services aim to optimize a company's processes and integrate related technology applications and platforms into a consistent, stable and secure customer experience for digital commerce. Some of these companies may focus on providing specialized services, such as strategy consulting, customer experience and user experience services, and integration and custom development services.

Vendors include:

- Accenture
- Atos
- BearingPoint
- Bertelsmann (arvato)
- Business & Decision
- Capgemini
- Cognizant
- CSC
- Deloitte Digital

- Epam
- EY
- Fujitsu
- HCL Technologies
- Hewlett Packard Enterprise
- IBM Global Business Services
- Infosys
- McKinsey & Co.
- Mindtree
- NTT Data
- Optaros
- Perficient
- Publicis Groupe (Razorfish)
- Publicis.Sapient
- PwC
- Rosetta
- Salmon
- Summa
- TandemSeven
- Tata Consultancy Services (TCS)
- Tech Mahindra
- UST Global
- West Monroe Partners
- Wipro
- Zensar
- Zeon

Hosting Services and Managed Services

Managed hosting services are standardized, productized offerings that combine data center facilities, provider-managed computing, network bandwidth and storage capacity. Their individual components may be physical or virtual, and dedicated to a single customer or shared by many. At minimum, the provider must supply server OS management services, including guest OSs if virtualization is used. The provider may optionally supply other managed and professional services relating to the deployment and operation of the infrastructure. Managed hosting services offer limited customization and are sold on a stand-alone basis, with no requirement to bundle them with other services (such as application development, application maintenance and data center outsourcing services).

Vendors include:

- Amazon (Amazon Web Services [AWS])
- AT&T
- Carpathia
- CenturyLink
- Cogeco Peer 1
- CSC
- Datapipe
- Dimension Data
- IBM
- Microsoft Azure
- NTT Communications
- Rackspace
- Sungard Availability Services
- Time Warner Cable (NaviSite)
- Verizon (Verizon Cloud)

Digital Commerce Ecosystem

Distributed Order Management

Complex ordering and fulfillment capabilities are typically needed for functions such as ordering from multiple channels and returning to multiple channels when the order-from and return-to channels differ. The required functionality is typically accomplished via DOM, which supports management and prioritization of orders from multiple order entry systems to serve multiple

fulfillment systems as locations. It enables aggregation; central brokering; global inventory visibility across fulfillment locations, channels and third parties; intelligent order sourcing and fulfillment capabilities that enable a more flexible and adaptive supply chain response to demand; and available-to-promise capabilities for bundled products and services coming from multiple fulfillment locations.

Vendors include:

- Aptos
- Circle Commerce
- CommerceHub
- Demandware (Order Management)
- Deposco
- Freestyle Solutions
- IBM (Sterling Order Management)
- Infor
- Jagged Peak
- JDA Software (JDA Distributed Order Management)
- Kibo (Shopatron)
- Manhattan Associates
- Microsoft (Dynamics AX, Dynamics NAV)
- NetSuite (OMX)
- Oracle
- Order Management Systems
- OrderDynamics
- Radial (formerly eBay Enterprise)
- SalesWarp
- SAP Hybris (SAP Hybris Order Management); SAP (Sales Order Management)
- Softeon
- Sopra Steria
- Symphony EYC
- UniteU

- Virtualstock

Mobile Commerce

There are three types of approach to mobile commerce. They involve, respectively, the use of:

- **The mobile web** — a mobile-friendly, browser-based internet service, most commonly delivered in two ways: either designed from the ground up (this is more common in countries where mobile channels have leapfrogged the main web) or through an extension of a digital commerce platform via responsive design.
- **Native mobile apps** are applications extending beyond the digital commerce platform and are best used by customers who are already committed. They are typically used to entice customers into bricks-and-mortar facilities, to improve customers' in-store shopping experience, and for contextual promotional offers and suggestions, assisted ordering, and optimized mobile check-out and payments (see "Build Great Mobile Apps With HTML5" and "Use Mobile Apps to Stimulate Digital Business"). See the list of mobile app development platform vendors below.
- **Clienteling** occurs when a digital commerce platform pushes customer information to mobile devices, such as tablets, and to sales associates in physical stores, to build stronger relationships with customers. The most robust applications provide a "360-degree view" of the customer and include data such as demographics, transaction history, preferences, interests and loyalty. In addition to the vendors listed below, see the Digital Commerce Platforms section for a list of clienteling software vendors.

Mobile app development platform vendors include:

- Adobe
- Alpha Software
- AnyPresence
- Appcelerator
- Appian
- appsFreedom
- Backbase
- DSI
- Embarcadero
- IBM
- Kinvey
- Kony

- Mendix
- Microsoft (acquired Xamarin)
- MobileFrame
- Oracle
- OutSystems
- Pegasystems
- Progress (Telerik)
- Red Hat
- Salesforce
- SAP

Clienteling software vendors include:

- Manhattan Associates
- Mi9 Retail (Raymark)

Payment Solutions

Payment Gateways and Processors

Payment gateways and processors enable buyers to make electronic payments to sellers. The ability to offer multiple payment options with varying types of settlement method is a core requirement for commerce. Depending on the type of payment method used, digital commerce may require one or more payment services, such as a gateway or processor. Payment technologies required for digital commerce may or may not be included in a digital commerce platform.

A payment gateway connects a seller's digital store or mobile app to the party responsible either for obtaining payment authorization or providing payment authorization. Gateways initiate the payment authorization request and return the authorization response to the merchant.

Payment processors facilitate payment approval and settlement of payment funds between the merchant and the party responsible for authorizing the payment (such as a credit card issuer or the holder or guardian of a funding account). Two types of vendor process e-commerce payments: merchant acquirer banks and payment service providers (PSPs). Merchant acquirer banks have a one-to-one relationship with the seller and serve as intermediary between seller, card networks and card-issuing banks. PSPs (also known as merchant account providers or aggregators) connect digital commerce sellers to an acquiring bank, allowing multiple customers to use the same merchant account(s). PSPs also typically support multiple types of payment beyond debit and credit cards.

Payment gateway vendors and PSPs include:

- ACI Worldwide
- Acculynk
- Adyen
- allpago
- Authorize.Net (gateway only)
- BluePay
- BlueSnap
- Computop
- CyberSource (gateway only)
- Digital River
- eWAY
- EPX
- First Data
- IBM (gateway only)
- Limonetik
- Mindgate
- N&TS Group
- Paysafe
- PayGate
- Paymentwall
- PayPal
- Radial (previously eBay Enterprise)
- SafeCharge International Group
- Sage
- Vantiv
- Verifone (gateway only)
- Worldline
- Worldpay

Commerce Search

Digital commerce search enables a customer to find the right product(s) by identifying the customer's intent and matching it to the most appropriate products or services, which, in turn, contributes to increased sales and higher profits. Commerce search often combine free text with autocomplete, guided navigation and interactive facets/filters to achieve results that can be displayed as highly visual content using appealing layouts. Best-of-breed commerce search products can provide enhanced capabilities and performance over the out-of-the-box storefronts provided by digital commerce platforms, such as for merchandising, search engine optimization management, promotions and, increasingly, personalization. In some cases, these capabilities may also be achieved via enterprise search apps (see "Magic Quadrant for Enterprise Search").

Vendors include:

- Adobe (Adobe Target)
- Algolia
- Apache Software Foundation (Apache Solr)
- BloomReach
- EasyAsk
- Elastic
- exorbyte
- Grid Dynamics
- IBM InfoSphere Data Explorer
- Nextopia
- Oracle (Endeca)
- PureClarity
- SDL Fredhopper
- SearchSpring
- SLI Systems
- Swiftype

Web Content Management

Gartner defines WCM as the process of controlling content that is to be consumed over multiple digital channels through the use of specific management tools based on a core repository. Product functionality goes beyond simply publishing web pages, to include content creation and authoring functions, such as templating, workflow and change management; WCM repositories that contain

content and/or metadata about content; and library services, such as check-in and check-out, version control and security.

Vendors include:

- Acquia (Drupal)
- Adobe
- Automattic (WordPress)
- CoreMedia
- CrownPeak
- Episerver
- e-Spirit
- eZ Systems
- GX Software
- Hippo
- HP Inc.
- IBM (Web Content Manager)
- Microsoft (SharePoint)
- OpenText
- Oracle WebCenter Sites
- Progress (Telerik)
- SDL Tridion World
- Sitecore
- Squiz

Personalization Engines

Personalization creates a relevant, individualized interaction between two parties that is designed to enhance the experience of the recipient. It uses insight based on the recipient's personal data as well as behavioral data about the actions of similar individuals to deliver an experience that meets specific needs and preferences.

Digital personalization engines are technology solutions that identify the optimum experience for an individual and will alter the online presentation layer, trigger an automated response, or pass on analyses to the seller or service personnel to act on as they see fit. These engines may be used

across multiple touchpoints (see "Use Digital Personalization to Enrich the Customer Experience" and "Market Guide for Digital Personalization Engines").

Vendors include:

- 4-Tell
- Acquia
- Adobe
- Barilliance
- Baynote
- BloomReach
- Blueknow
- Boxever
- BrainSINS
- BySide
- Certona
- Crayon Data
- Cxense
- Dynamic Yield
- Evergage
- Flytxt
- IBM Coremetrics
- IBM Unica
- IgnitionOne (Knotice)
- Infosys AssistEdge
- Marketo
- Oracle (Maxymiser)
- Magnetic
- Monetate
- nectarOM
- NGDATA

- Nosto
- Optimizely
- Oracle Real-Time Decisions
- Peerius
- Provenir
- prudsys
- Qubit
- Reflektion
- RichRelevance
- Sailthru
- Salesforce
- SAP Hybris (SeeWhy)
- SAS
- Squiz
- Strands
- Syntasa
- Twelfefold

Digital Analytics

Digital analytics enable sellers to better understand how their websites are performing, and to provide content to prospective buyers that will enhance the customer experience. What was previously referred to as web analytics has morphed into a set of specialized analytics applications used to understand and improve the online digital experience for shoppers. It will ultimately cover all channels, including those that use human interaction (such as call centers), are fully automated (websites and mobile devices), are operated by third parties (such as independent retail stores) or have limited two-way interaction (such as display advertising). Core processes of digital analytics include collecting, monitoring, analyzing and reporting on customer behavior on websites, as well as mobile and social channels, in order to improve the customer experience and make other activities more effective. More advanced capabilities include customer journey analytics, real-time event triggers, customer segmentation, customer data aggregation and exchange via APIs and predictive analytics.

Vendors include:

- Adobe (Adobe Analytics)

- comScore
- Google (Google Analytics)
- IBM (customer experience analytics)
- Webtrends

Customer Journey Analytics

Customer journey analytics is the process of tracking and analyzing the way customers use a combination of available channels to interact with an organization. Organizations with a nuanced understanding of their customers' journeys will have a clear advantage over their competitors in successfully exploiting business moments. Customer journey analytics solutions provide a wide variety of benefits inside organizations, including providing critical data to increase the effectiveness of customer engagement, improve the customer experience, and enhance customer metrics and management.

Vendors include:

- Acxiom
- Adobe
- APT
- CallMiner
- ClickFox
- Conversity
- Genesys
- GMC Software
- IBM
- inQuba
- Kitewheel
- Nice Systems
- QPC
- ResponseTap
- Salesforce
- SAP Hybris
- TandemSeven

- Thunderhead
- UserReplay
- Verint

Digital Customer Acquisition for Service Industries

Digital customer acquisition for service industries and governments supports the sale of more complex items for service industries (such as financial services and insurance, education, healthcare and government). Activities that may be covered include applying for a credit card or loan, buying insurance, enrolling in a university course or obtaining a permit.

Vendors include:

- Andera
- Avoka
- D+H (uOpen)
- Lexmark (Kofax)
- SAP Hybris (SAP Hybris Financial Services Accelerator)

Marketplace/Channel Integration Platforms

Vendors of these platforms facilitate the processes, data transfer and logistics of selling products on marketplaces. They may provide the following services: product feed generation, publication and optimization; marketplace sales reporting; pricing and product editing; product performance optimization; and customer service routing and management. These vendors provide solutions applicable to small and midsize companies that use marketplaces as their sole commerce channel and to larger companies that augment their existing digital commerce properties by extending their products into marketplaces.

Vendors include:

- ChannelAdvisor
- CommerceHub
- DNA Response
- Google (Channel Intelligence)
- Mirakl
- nChannel
- Neteven
- SalesWarp

- Thomas Enterprise Solutions
- Vinculum
- Volo (formerly eSellerPro)

Social Commerce

Product Review Technologies

Product reviews and ratings refer to the capture, presentation and sharing of product-, service- or experience-specific perspectives among customers, both on- and off-site. Buyers can write, post and view reviews on an e-commerce or social website while shopping or browsing online.

Vendors include:

- Bazaarvoice
- Gigya
- Mzinga
- PowerReviews
- ReadyPulse
- Reevoo
- re.vu
- SAP Hybris
- ShopSocially
- Sprinklr
- TurnTo
- Yotpo

Social Network Selling

Social network selling facilitates the promotion, merchandising and subsequent purchasing of products and services, via social networks. Social network selling will result in a sale directly on a social network or through a link from the social network to the seller's website. For example, Facebook, Instagram and Twitter offer "buy now" or "shop" buttons, while some community sites, such as that of Salesforce, enable sales through partnerships with digital commerce platforms (such as CloudCraze and Demandware).

Vendors include:

- Oracle
- ReadyPulse
- Reevo
- ShopSocially
- Sprinklr

Product or Brand Advocacy

Product (or brand) advocacy is manifest in personalized product reviews, endorsements, user-generated content (such as photos or videos created by customers to how they use a product) and clarifications by existing customers or influencers. Prospective customers correspond with other customers or advocates who have previously purchased and are using the products or who have significant experience with or knowledge of the products under consideration.

Vendors that enable product reviews or brand advocacy include:

- Bazaarvoice
- Gigya
- Media Needle
- Needle
- PowerReviews
- ReadyPulse
- Reevo
- SAP Hybris
- ShopSocially
- Sprinklr
- TurnTo

Subscription Management

Subscription management enables the business processes that support the sales, contractual, fulfillment, financial management and billing functionality required by companies that sell products and services on a recurring basis. Examples of products sold in a recurring revenue model include software, media, gaming and music services, as well as business services such as maintenance and technical support. In addition, subscription management can be used to support the sale of physical products in an automated replenishment model in which products are shipped periodically or when a specific inventory level is reached.

Subscription management supports a variety of recurring business models, such as monthly or annual usage, metered usage and one-time usage. Leading subscription management services provide for integration with digital commerce or sales applications, and with back-end financial management and billing systems. Depending on specific industry requirements, additional functionality can include real-time metering and rating, mediation, allowance management, payments, multitier pricing, multiple revenue streams per customer, service and product bundling, usage caps and entitlements. Vendors in this segment provide subscription management platforms either as stand-alone offerings or as an integrated part of a broader digital commerce platform.

Vendors include:

- Apttus
- Aria Systems
- Avangate
- Chargify
- cleverbridge
- Digital River
- Elastic Path
- Ericsson (MetraTech [Metanga])
- FastSpring
- NetSuite
- Oracle
- Recurly
- SAP
- Transverse
- Vindicia
- Zuora

Configure/Price/Quote

Configure, price and quote (CPQ) application suites provide an integrated set of software applications that support the CPQ generation of activities that accompany solution and negotiated selling. CPQ application suites are deployed to support self-service sales environments, including B2C and B2B sales environments. CPQ systems typically include pricing engines, proposal generators, quoting systems, and rules or constraint engines, and are complemented by approval and authorization workflows.

Vendors include:

- Apparound
- Apttus
- Autodesk (Configure One)
- Axonom
- BlueprintCPQ
- CallidusCloud
- Cincom
- CloudSense
- Configit
- Configura
- Determine
- Endeavor Commerce (EndeavorCPQ)
- Experlogix
- FinancialForce
- FPX
- IBM (Sterling Configure, Price, Quote)
- Infor Configure Price Quote
- Intelliquip
- KBMax
- Luxent (iQ CPQ)
- Model N
- nChannel
- New Energy Group (bit2win)
- Oracle (CPQ Cloud — formerly BigMachines)
- Pros (Smart CPQ — formerly Cameleon Software)
- Quosal
- Salesforce (SteelBrick Quote-to-Cash)
- SAP Configure, Price and Quote

- Sigma Systems
- Sofon (Guided Selling, Guided Configurations)
- Solidify
- Tacton Systems
- Vlocity

Master Data Management

Master data management (MDM) solutions are software products that support the global identification, linking and synchronization of master data domains across heterogeneous data sources. For example, these solutions support semantic reconciliation of master data; create and manage a central, database-based system of record or index of record for master data; enable the delivery of a single view of master data domains (for all stakeholders) in support of various business processes and benefits; and support ongoing master data stewardship and governance requirements through workflow-based monitoring and corrective action techniques.

MDM of customer data focuses on management of the data domain relating to customers, though the solutions can be used to govern other "party"-type data (for example, supplier master data). By contrast, MDM of product data technology focuses on the domain relating to "thing" data.

Vendors include:

- Agility Multichannel
- Ataccama
- EnterWorks
- IBM (InfoSphere Master Data Management)
- Informatica (Product 360 [PIM], Master Data Management [MDM])
- Oracle (Siebel Universal Customer Master [UCM]; Product Hub)
- Orchestra Networks
- Riversand Technologies
- SAP (Master Data Governance for Customer [MDG-C]; Master Data Governance for Material [MDGM]; SAP Hybris Product Content Management [PCM])
- SAS
- Stibo Systems
- Talend
- TIBCO Software

- VisionWare

Warehousing, Logistics and Fulfillment Service Providers

Third-party warehousing, logistics and fulfillment service providers perform one or more physical logistics functions as a fee-based service on behalf of their digital commerce clients. Their services typically include inventory management; warehousing, distribution and customer order fulfillment; transportation and shipping management; and, for digital commerce companies operating globally, international logistics management, freight forwarding and customer brokerage. Several logistics service providers also offer extended services, including customer service call center operations, returns and repair processing, assembly and kitting, packaging, postponement, shipment consolidation and cross-docking.

Vendors include:

- Amazon
- DHL Supply Chain
- Digital River
- FedEx (Genco)
- IDS (Order Fulfillment)
- Ingram Micro (Shipwire)
- ModusLink Global Solutions
- OHL
- PFSweb
- Radial (formerly eBay Enterprise)
- Rakuten Super Logistics (formerly Webgistix)
- UPS Supply Chain Solutions

Marketing Automation

Marketing automation is a broad category of CRM and commerce applications that includes email marketing, multichannel campaign management and lead management, and that provides support for structured marketing initiatives that drive traffic to digital commerce sites. Marketing automation is often integrated with CRM and sales force automation applications, but is increasingly being used to promote brands, products or special offers to increase digital commerce traffic and, ultimately, buying transactions. Campaign management applications are used most commonly in B2C industries; lead management is used frequently in B2B and B2B2C applications, or by consumer-facing brands that are promoting and selling complex or large financial products or services; email marketing tools are common across all these use cases.

Vendors include:

- Act-On
- Acxiom
- Adobe Campaign
- CallidusCloud
- Constant Contact
- dotmailer
- Epsilon
- Experian
- HubSpot
- IBM Marketing Cloud
- MailChimp
- Marketo
- Microsoft Dynamics Marketing
- MMIT
- NetSuite (Bronto Software)
- Oracle (Datalogix); Oracle Marketing Cloud (Eloqua, Responsys)
- Pitney Bowes
- Salesforce Marketing Cloud (formerly ExactTarget), Salesforce (Pardot)
- Salesfusion
- SAS
- SDL (formerly Alterian)
- Sitecore
- Zeta Interactive (ClickSquared)

Assisted Selling

Assisted selling provides customer sales and support capabilities via virtual customer assistants (VCAs), live chat and video chat.

A VCA simulates a conversation to deliver information, support sales and, if advanced, take action on behalf of the customer. It consists of four technology components: a natural-language

processing engine; a user interface that receives the request and delivers the response via speech or text; a search engine that can traverse big data repositories of knowledge and content; and a context engine to understand the intent of an individual.

Live chat is an assisted selling technology that looks to provide the same customer experience in the bricks-and-mortar world as in the online commerce world. It can connect a retailer to online customers via their preferred channel.

Video chat adoption is being driven by the growth of mobile devices and the urgency of delivering a superior customer experience for competitive differentiation. Video chat provides customers with a richer sense of presence and a personalized experience by helping to coordinate communication, supporting emotional expression and enabling the real-time sharing of content. Video chat is ideally supported across multiple devices and interfaces, including mobile phones and tablets, in-store kiosks and web browsers.

Vendors include:

- [24]7 Chat
- Avaya (Avaya Automated Chat)
- BoldChat
- Eudata
- Getoomi
- LiveChat
- LivePerson
- Microsoft (Dynamics CRM for Customer Service)
- Oracle (Service Cloud)
- Revation Systems (LinkLive)
- Salesforce (Sales Cloud, Service Cloud)
- TouchCommerce
- Velaro
- Vivocha

A/B and Multivariate Testing

Digital commerce sites are continually trying to improve segmentation capabilities to deliver more individualized experiences. A/B testing and multivariate testing (MVT) are often used to improve both customer segmentation and the overall customer experience. A/B testing is used to show two different versions of a piece of content to two different sets of users. The content is commonly a web page, commerce site or landing page, email or online advertisement. By comparing a desired

user action between the two variants, one variant can be declared more effective than the other. Statistical models are used by A/B testing tools to ensure the validity of the results. MVT is an advanced version of A/B testing, where multiple changes to content are tested at the same time. The changes are combined into a subset of versions and shown to different sets of users. Matrix algebra and statistical models are used to determine the most effective combination of changes in a much more efficient way than running separate A/B tests of every possible combination.

Vendors include:

- Adobe (Adobe Target)
- Google (Google Analytics)
- IBM
- Monetate
- Optimizely
- Oracle (Maxymiser)
- SiteSpect
- Visual Website Optimizer
- Webtrends

Cool Vendors in 2014 and 2015

Cool Vendors are highlighted annually by Gartner in several technology categories. The following vendors were selected as Cool Vendors in e-commerce (digital commerce) in 2014 and 2015:

- Boomerang Commerce
- BrainSINS
- Buyapowa
- BySide
- Content Square
- HotWax Systems
- Limonetik
- Mirakl
- Powa Technologies

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Magic Quadrant for Digital Commerce"

"How to Expedite Your Digital Commerce RFP Process"

"IT Market Clock for Digital Commerce, 2015"

"Forecast: Enterprise Software Markets, Worldwide, 2013-2020, 1Q16 Update"

Evidence

This Vendor Guide is based on Gartner's primary and secondary research, which includes:

- Primary and secondary research conducted and published in areas adjacent to digital commerce
- Reference user surveys and vendor surveys conducted specifically for digital commerce publications, such as "Magic Quadrant for Digital Commerce" and "Critical Capabilities for Digital Commerce"
- Gartner client interactions, inquiries and meetings
- Publicly available sources of information

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