



NUCLEUS
RESEARCH

MARKETING AUTOMATION TECHNOLOGY VALUE MATRIX 2021

ANALYST

Jason Blackthorne

THE BOTTOM LINE

As the COVID-19 lockdowns continue to lift across the globe, companies of all sizes have found that the fully digital customer is here to stay. Cloud-based marketing automation solutions saw a dramatic increase in user adoption, as a solution's ability to rapidly adapt and maintain operations while users were remote became mission-critical. With the phase-out of third-party cookies also on the horizon, companies need to ensure their marketing automation solutions have the necessary tools to collect and leverage first-party data across their technology stack. Within the last year, vendors have provided newfound levels of connectivity and customer visibility, expanding their value message and moving one step closer to the goal of a turnkey customer experience solution.



MARKET OVERVIEW

The Nucleus Research Marketing Automation Value Matrix provides an assessment of the market based on how vendors deliver value to customers through the usability and functionality of their solutions (Nucleus Research v67 – *Understanding the Value Matrix*, April 2021). The arrows indicate the vendor’s perceived momentum and are informed primarily by conversations with end-users, as well as with recently released capabilities, features, and other areas of investment. This research is intended to deliver a relevant

snapshot of the current market, rather than an empirical ranking of the vendors, and give an examination of what one can expect from the marketing automation solution space moving forward.

This year, companies of all sizes and industries saw a disruption in the way they market to both consumers and businesses. The COVID-19 pandemic and stay-at-home lockdowns pushed consumers online and caused the customer journey to become almost exclusively digital. As companies shifted their entire marketing team online, marketing technology vendors also adapted their solutions to meet the new demands of the market space. To assist their users' transition, vendors prioritized integrating web conferencing and collaboration solutions, including Zoom, Slack, and Microsoft Teams, into their app ecosystems and user interface. In order to keep customers engaged and reduce customer burnout while spending more time online, vendors also increased the number of campaign and touchpoints templates available for marketers.

Never before has there been more online customer data to collect for companies to optimize campaigns and increase personalization. However, hyper-targeted advertisements and campaigns became increasingly noticeable to the public, and opinions of how companies tracked users online and their data privacy rights began to change. Whether it was planned years in advance or a reaction to public notoriety, Google's announcement to phase out of third-party cookies on Google Chrome and the similar announcements of other web browsers, including Apple Safari and Mozilla Firefox, was a shock to advertisers and marketers. This shift to a cookieless world will heavily impact the marketing efforts of companies that rely on third-party data to target audiences and effectively run campaigns. Although Google made it clear that cookie alternatives won't reduce the practicality of the customer data, some companies are wary of this promise and are looking for more in-house data collection options. Marketing automation vendors are mitigating these issues by developing first-party focused customer data platforms that collect and utilize data from landing pages, surveys, and, more recently, loyalty management solutions to increase personalization and improve the customer experience.

Moving more in line with expected marketing automation trends was the continued advancement of AI and machine learning capabilities in workflow automation, analytics, and asset management. Workflow automation has steadily improved with time-saving from not only executing segmented omnichannel campaigns but when building the workflows themselves. Many marketing automation vendors have expanded their AI workflow offerings this year to include automatic segmentation and next best action recommendations. Leaders in the market space have also integrated AI and machine learning within their marketing analytics solutions with predictive analytics for adaptive lead scoring, buying propensity, and other actionable insights to improve marketing efforts and influence marketing decisions. AI-powered asset management and creation tools like auto-cropping assets to fit across various channels and automatic asset tagging have also allowed users to reduce the time spent on these low-value add tasks.

With the rise of online shopping, marketing automation vendors also responded this year with new ecommerce products and tools to better connect businesses' front and back-end systems to promote operational visibility and enhance the overall customer experience with order fulfillment and returns. Vendors whose focus isn't primarily on ecommerce still met user demand and developed built-in integrations with notable ecommerce platforms, including Shopify, WooCommerce, and BigCommerce.

The idea of providing a one-to-one customer experience has been the goal of both marketing technology vendors and marketers for decades. Within this last year, end-users have achieved newfound levels of connectivity and customer visibility which will continue to rise as AI advances with machine learning and eventually deep learning capabilities. As vendors expand their solution and integration offerings to seamlessly connect the entire marketing technology stack and ultimately the necessary back-end solutions, the first iterations of true end-to-end customer experience solutions are bound to be on the horizon.

LEADERS

Leaders in the Value Matrix include ActiveCampaign, Adobe, HubSpot, Oracle, Salesforce, and SharpSpring.

ACTIVE CAMPAIGN

The ActiveCampaign Customer Experience Automation Platform provides both SMBs and enterprise-level companies access to the tools necessary to orchestrate, segment, personalize, and automate the entire customer journey across web, email, social, and SMS. The solution is flexible and works for both B2B and B2C businesses and offers over 40 native integrations with multiple ecommerce platforms and other third-party apps. ActiveCampaign commits to three core standards of value, service, and trust and differentiates itself from vendors with extensive automation tools and pre-built automation recipes. Overall, the solution gives users a good balance of functionality, usability, customer service, and price. ActiveCampaign is a Leader on this year's Value Matrix for its emphasis and execution of personalized customer experience automation.

Recent product updates and announcements include:

- In March, ActiveCampaign launched its ActiveCampaign Community to better unite and support both users and the ActiveCampaign Team on one platform with discussion forums, educational resources, and other relevant information. In the future, the ActiveCampaign Community will post updates for new features, events, and educational resources to expand users' knowledge of ActiveCampaign.

- In December, ActiveCampaign announced Predictive Next Steps in its Automation Builder that uses data based on intelligence from ActiveCampaign's 120,000 customers. Other predictive solutions that the vendor added include win probability for leads, predictive sending for emails, predictive content that uses a Natural Language Processing model to deliver more relevant content, and entire predictive recipes on the ActiveCampaign Marketplace.
- Also, in December, ActiveCampaign introduced a subject line generator to save users time and improve customer engagement and experience. Users only have to pick a keyword category and a keyword while the solution generates a subject line.
- In September, ActiveCampaign announced its customer service automation solution, CXA for service, that assists users with connecting to their customers across channels to deliver one-to-one communication and personalization in order to build and maintain relationships.
- Also, in September, ActiveCampaign introduced its landing page tool, Pages, which was one of ActiveCampaign's most-requested features. Pages provide users with pre-made and customizable templates, a drag-and-drop builder with images, social media links, subscription forms, buttons, videos, and custom domains to increase personalization and generate more leads.
- In July 2020, ActiveCampaign announced CXA for Marketing, a suite of automation and personalization marketing tools to help businesses orchestrate connected customer experiences across various marketing channels, including web, email, social, and SMS. The vendor also announced several notable third-party integrations to its platform featuring Shopify, Twilio, Slack, and Typeform.
- In May 2020, ActiveCampaign announced major updates to both of its mobile apps. The updated ActiveCampaign mobile app gives users clearer access to marketing reports and analytics, CRM and sales automation, and Lead and contact management tools. The ActiveCampaign Conversations mobile app updates offer users a unified inbox across live chat and email as well as new chat and message notifications to better connect to customers and audiences.

ADOBE

Adobe Experience Cloud is an enterprise-level customer experience platform designed to manage, customize, and optimize omnichannel campaigns. It uses a SaaS delivery model and offers various applications such as Adobe Marketo Engage, Adobe Campaign, Adobe Target, Adobe Commerce, Adobe Analytics, and Adobe Experience Manager. Adobe Experience Cloud also includes newer solutions such as Adobe Customer Journey Analytics and Adobe Journey Optimizer. Adobe Experience Platform is the foundational architecture for Adobe Experience Cloud and has a strong lineup of third-party vendor integrations. Adobe Experience Cloud comes equipped with Sensei artificial intelligence that utilizes machine learning algorithms to deliver automation for repeatable tasks, predict customer

behavior, support editing capabilities for creative assets, and identify scaling requirements for one-to-one marketing campaigns. Adobe Experience Cloud also easily connects to Adobe's well-known creative products like Illustrator, Premiere Pro, and Photoshop as part of Creative Cloud, which enables marketers to focus more time on content creation and less time on content transferring. Overall, Adobe Experience Cloud allows both SMB and enterprise-level customers to bring data and content together to produce personalized omnichannel campaigns and advanced automatic workflows that elevate the customer experience to new levels. With the future of third-party cookies in potential jeopardy, Adobe is leading the way forward with its Real-time Customer Data Platform that's focused on first-party data and data collaboration. Adobe continues to demonstrate its flexibility as consumer demands shift and is a Leader on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In April 2021, Adobe announced an update to its Real-time Customer Data Platform (CDP) to bring together varying types of first-party event and attribute data to form a complete view of the customer. Adobe Real-time CDP allows users to leverage known and unknown customer data without third-party cookies to manage customer profiles and journeys seamlessly in one solution. A new feature of the platform called Segment Match lets companies partner with one another to expand their own first-party data sets to enrich matching profiles with segment metadata for better insights and improved personalization. Adobe also announced a B2B edition of Real-time CDP that is currently in beta and will enable customers to unify and activate account-based profiles in real-time.
- In July 2020, Adobe, IBM, and Red Hat announced a strategic partnership to better enable companies to deliver personalized experiences across the customer journey to drive improvements to engagement, profitability, and loyalty. The partnership will offer clients the flexibility to host, access, and leverage data in the environment of their choice, whether in a cloud, on-premise, or hybrid solution. Adobe will also partner with IBM to provide CX solutions for the IBM Cloud for Financial Services. In turn, IBM iX will extend its offerings across Adobe's core enterprise applications.
- In December 2020, Adobe acquired Workfront, a leader in work management. Now a part of Adobe Experience Cloud, Adobe Workfront provides organizations with the ability to create and manage content and experiences across the full marketing lifecycle while providing executives with a single source of truth for all work. With Adobe Workfront, marketing organizations can optimize workflow and delivery across creative and marketing efforts and ensure greater alignment across functional teams to deliver personalized customer experiences at scale.

HUBSPOT

HubSpot is a customer relationship management platform that offers five interconnected cloud-based hubs in marketing automation, sales, customer service, content management, and operations. These hubs have a four-tiered pricing system with varying degrees of functionality, and HubSpot offers its base level for free. The vendor services B2B and B2C companies with inbound marketing strategies and integrates with over 750 applications on its marketplace to improve data accessibility and acts as a single source of truth. HubSpot also differentiates itself from competitors with HubSpot Academy, its free training platform that provides millions of users with easy-to-follow guides that increase users' knowledge and efficiency. Marketing Hub's leading UX design and intuitive features assist users with managing, scaling, automating, and optimizing multichannel campaign efforts in order to increase personalization, convert more prospects into customers, and transform data into valuable insights. Nucleus considers HubSpot Marketing Hub a premium choice for any sized company seeking to unify their marketing technology stack and capitalize on the recent shift to the all-digital customer experience. HubSpot is a Leader on this year's Marketing Automation Value Matrix for its superior usability and ever-expanding list of product offerings.

Recent product updates and announcements include:

- In April, HubSpot announced the release of its Operations Hub to provide operations teams with a unified platform to proactively remove friction between departments and place operations at the forefront of companies' customer experience strategy. HubSpot built Operations Hub out of PieSync, which it acquired back in November 2019. The solution features sophisticated data sync and workflow automation tools to eliminate internal data silos and repetitive tasks that operation teams typically face.
- In February, HubSpot acquired The Hustle, a media company, to enhance its ability to deliver additional educational, business, and tech trend content across various media.
- In October 2020, HubSpot introduced a new pricing model that allows companies to only pay for the contacts they want to market to. Aptly named marketing contacts, companies can quickly identify marketing contacts for future campaigns and save up to one million non-marketing contacts in their database for free to achieve greater flexibility.
- In April 2020, HubSpot launched its Content Management System (CMS) Hub that scales proportionally with a business's growth and enables marketers to create personalized website experiences. The CMS Hub offers nontechnical users a drag-and-drop editor and a large library of website themes to increase webpage development. It also features SEO recommendations, A/B/n webpage testing, and

contact attribution reporting to optimize web-based content and drive lead generation.

ORACLE

Oracle is an enterprise-level vendor that provides cloud-based applications in ERP, EPM, SCM, HCM, and Advertising and Customer Experience for core industries comprising of communications, financial services, manufacturing, retail, and the public sector, to list a few. Oracle Advertising and Customer Experience offers a connected suite of applications across advertising, marketing, sales, commerce, and service to build a complete view of the customer and allow users to create, manage, serve, and nurture lasting customer relationships. Oracle provides both B2B and B2C marketing automation solutions for primarily enterprise-level companies with Eloqua and Responsys respectfully as well as Datafox for data management, CrowdTwist for loyalty management and engagement, Infinity for behavioral intelligence, Maxymiser for testing and optimization, Unity for its customer data platform, and Oracle content management. These product offerings provide marketing teams with a highly customizable and comprehensive marketing technology solution that unifies customer data to deliver optimized one-to-one digital experiences in real-time, improving marketing KPIs and expanding revenue streams. Based on its expansive marketing capabilities and ability to adapt to the needs of any large-scale deployment, Oracle is a Leader on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In Oracle's Spring 2021 update, the vendor announced predictive lead scoring capabilities in Eloqua that utilize machine learning models to better target customers who are most likely to buy based on the previous attributes and patterns of successful conversions.
- Oracle also announced its new predictive outcome tool for Responsys Campaign Management that predicts the open and click rate of each channel and message based on past campaigns. This tool allows marketers to eliminate testing and optimization cycles and identify opportunities to add or eliminate touchpoints in order to save users time and maximize the value of campaigns.
- In Oracle's Winter 2021 update, Oracle noted its Infinity Behavioral Intelligence solution that captures customers' and prospects' interactions with campaigns, offers, and content in real-time to deliver relevant and personalized digital experiences across all channels to increase engagement and accelerate marketing ROI.
- Oracle also announced its next-best offers feature with Oracle Unity that recommends the most relevant and timely offer for each customer by using AI and machine learning to increase up-sell and cross-sell opportunities. Similarly, Oracle also announced real-time product recommendations within Oracle Responsys.

- Oracle released bi-directional data flows between Oracle CrowdTwist and Oracle Unity to assist marketers with building richer data sets and audience segments that support more personalized offers, content, and campaigns. The vendor also announced polling capabilities and a Households Reward Program feature within Oracle CrowdTwist to drive interactions with loyalty program members.
- Oracle integrated Zoom, Webex, and Microsoft Teams with Eloqua to better assist remote users in maintaining collaboration and connecting with customers. With these integrations, marketers can also deliver digital events with more confidence and improve webinars by collecting and analyzing engagement and registration data.
- Oracle also expanded its content management offerings with the release of pre-configured and reusable content blocks for landing pages and emails to save marketers time and allow them to focus on higher-level marketing duties. Furthermore, Oracle added subject line optimization and a fatigue analysis dashboard to improve open rates and helps marketers minimize opt-outs.

SALESFORCE

Salesforce Marketing Cloud is part of the Salesforce Customer 360 platform and under the Digital 360 brand, which combines Marketing Cloud, Commerce Cloud, and Experience Cloud. Marketing Cloud offers mid-market and enterprise-level companies a suite of marketing technology solutions needed to create data-first and highly personalized automated omnichannel campaigns to engage audiences with relevancy and optimize overall marketing impact with AI-powered analytics. Marketing Cloud is comprised of several product modules with Einstein AI built-in, including Email Studio, Mobile Studio, Interaction Studio, Advertising Studio, Social Studio, Journey Builder, Datarama, Pardot, and Salesforce CDP, in order to assist users with creating meaningful customer relationships throughout the customer journey.

With Salesforce's new Customer Data Platform, users can unify both first and third-party data sources to produce personalized customer identities and engage customers with optimal messaging on a one-to-one level. With Pardot Premium, Salesforce's full suite of marketing automation tools for enterprises, users can close more deals with intelligent lead nurturing, automatically send personalized messages with dynamic content, and set up alerts in real-time to eliminate repetitive and low value-add tasks with Einstein AI. Overall, Salesforce Marketing Cloud allows customers to increase productivity, accelerate campaign production, and focus on higher-level duties to maximize marketing campaign ROI.

Recent product updates and announcements include:

- In June 2021, at Salesforce's Connections event, the company announced several improvements and updates to their Marketing Cloud, including integrations with Snapchat Ads and WhatsApp. Salesforce also announced Customer Data Platform connections to Interaction Studio, Commerce Cloud, Loyalty Management, Mulesoft, and Tableau. During the event, Salesforce also strengthened its partnership with Google and announced new Customer Match capabilities for targeted advertising with first-party data through Google Analytics.
- In January 2021, Salesforce introduced its new Loyalty management product for the Marketing Cloud. This solution will enable users to build omnichannel loyalty programs with rewards and other incentives to increase customer engagement and satisfaction. At the same time, the solution will also collect first-party data and feedback from customers to increase personalization.
- In December 2020, Salesforce announced its acquisition of Slack to combine the communications platform and its Customer 360 platform to better provide customers with a unified source of truth for real-time communications and collaboration. This move is predominantly based on companies' need to deliver connected experiences for their customers across digital touchpoints as well as enable their personnel to work seamlessly when remote.
- In September 2020, Salesforce announced the Digital 360 brand to help businesses optimize marketing and commerce activities for the all-digital customer journey. Notable offerings include Salesforce CDP, which allows marketers to unify, segment, and activate all of their relevant customer data and become a single source of truth for marketers. Salesforce also released Commerce Cloud Payments as a built-in payment solution powered by Stripe and Experience Cloud for creating CRM-powered digital experiences.
- In February 2020, Salesforce acquired Evergage, a CDP and personalization platform, for its cross-channel personalization and machine learning capabilities. Evergage's machine learning algorithms will enhance Salesforce's CDP offering as well as Interaction Studio and provide one-to-one personalized experiences for product and content recommendations throughout the entire customer journey.
- In December 2019, Salesforce expanded its Marketing Cloud analytics offerings with Datorama integration, activation, and developer tools. Datorama is an AI-powered marketing intelligence and analytics platform with a large library of marketing APIs and AI-powered connectors that collect, interpret and categorize marketing data. By connecting disparate data pools into one unified view, users can analyze and report on marketing campaigns to make more informed decisions.

As companies continue to consolidate their marketing and customer experience technology stacks, Salesforce is well-positioned as a market leader to capitalize on this development with its expansive list of customer-facing solutions and native app integrations. In the last couple of years, Salesforce has focused on its Customer 360 approach that connects and

manages customer data across all Salesforce applications, including marketing, sales, commerce, service, and analytics, in order to differentiate itself from competitors and better promote cross-cloud visibility. Furthermore, Salesforce's AppExchange continues to expand its offerings and allows marketers to connect with data wherever it exists, and enables a more complete view of company operations by facilitating the connection of hundreds of third-party applications. Einstein AI's marketing automation features which include engagement scoring, send-time optimization, and workflow recommendations, have also significantly reduced the time it takes to produce campaigns with the same number of marketers. As AI for marketing continues to develop and increase user productivity, Salesforce will likely remain a strong leader either through in-house R&D or company acquisitions. With these updates and trends in mind, Salesforce Marketing Cloud is an attractive offer for current and prospective customers who require a reliable solution that is functionality robust and can also scale to meet customer demands. Salesforce is a Leader on this year's Marketing Automation Value Matrix for its timely product improvements based on its customer's needs for an all-digital personalized marketing strategy.

SHARPSRING

SharpSpring is a cloud-based marketing and sales automation and CRM platform that focuses on driving revenue for SMBs and marketing agencies. The platform offers nontechnical users an intuitive and modern user interface with drag-and-drop capabilities to easily create cross-channel marketing campaigns. SharpSpring's visual workflow builder provides custom triggers and filters for every step in the buyer's journey to increase personalization and improve conversion rates.

The platform delivers a balance of market-based analytics and content management for its users. Its analytics solution provides both a macro and micro view of an organization's digital marketing efforts from entire multichannel campaigns to single touchpoint interactions. The collection of end-to-end customer and campaign data also allows marketers to measure current success, forecast future performance, and find other actionable insights. The platform assists with marketing content and provides users with a landing page and blog builder with templates and adaptable views and layouts depending on the audience or customer viewing the page.

This balance of content and analytics is best exemplified with SharpSpring Social. Users can develop, schedule, and manage social media posts and social presence across Facebook, Twitter, LinkedIn, and recently Instagram, directly on the platform. At the same time, the solution collects customer data and customer feedback with social listening tools, tracks and scores leads, and displays end-to-end social ROI to increase customer engagement and find new leads and customer advocates. Overall, SharpSpring provides companies with a solution geared toward maximizing ROI and increasing revenue. New features are

thoroughly considered before implementation and are usually at the request of SharpSpring's customers and not for the sake of being trendy. SharpSpring is a Leader on this year's Marketing Automation Value Matrix, staying one step ahead of its similar-sized competitors.

Recent product updates and announcements include:

- In May 2021, SharpSpring released its sync with Instagram, allowing users to connect their Instagram for Business accounts directly with SharpSpring. Customers can track mentions and trending topics for brand awareness, schedule posts with the Content Calendar, and review and approve team member posts. This sync will make it easier for customers to grow their following and nurture brand advocates without leaving the SharpSpring platform.
- In October, SharpSpring released its multi-touch attribution tool to assist companies in tracking the end-to-end ROI of their marketing campaigns. The multi-touch attribution tool captures every instance of a user interacting with multiple campaigns and their touchpoints and distributes attribution across them. The new feature also provides several different attribution models, including Primary, First Touch, Last Touch, Linear, Time Decay, and U-Shaped, to determine which campaigns and touchpoints have the greatest contribution to conversion events and revenue.
- In May, SharpSpring announced chatbot capabilities to its platform. SharpSpring Chatbots capture leads, schedule meetings, send content, and are customizable to perform a variety of other automated functions to assist website visitors. SharpSpring Chatbots also utilize CRM data to address visitors by name and determine if they are a new or returning visitor, an open lead, or a current customer to deliver a more relevant experience.
- In March, SharpSpring released free built-in video calling and screen sharing to assist its users during the COVID-19 pandemic. Users can simply open a contact record and immediately start a video call and share their screen in order to virtually connect with leads, support current customers, and increase team collaboration.
- In November 2019, SharpSpring announced the acquisition of Perfect Audience, a digital advertising platform, and rebranded as SharpSpring Ads. This feature uniquely offers multichannel retargeting and targeted advertising tools within its sales and marketing automation platform. These tools assist marketers with creating, managing, and optimizing their ad campaigns using Google and Facebook's ad exchanges and partner networks. Ads placed through the platform are dispersed and measured across the major advertising networks, including Google, Facebook, Yahoo, AppNexus, Rubicon, and Smaato, to drive leads, sales and track ROI. The acquisition also allowed SharpSpring to become an official Facebook Marketing Partner, and in turn, added Instagram to its existing social media management tool.

EXPERTS

Experts in the Value Matrix include Acoustic and SAP.

ACOUSTIC

The Acoustic Marketing Cloud offers customers a full suite of marketing technologies that best accommodate marketers changing needs and growth. The Marketing Cloud provides companies with a platform to collect and utilize in-depth customer data to create campaigns that resonate with people to accelerate conversions, build loyal followings, and drive revenue. The Marketing Cloud's solutions are split up into Campaign, Tealeaf, Personalization, Content, and Analytics, and assist marketers with their specific campaign strategies from start to finish. With Tealeaf, Acoustic differentiates itself as the solution captures, analyzes, and replays tracked details of customers' webpage visits to identify user struggles, detect failures, and optimize future experiences. Overall, the Acoustic Marketing Cloud allows customers to save time with process automation tools, make data-informed decisions, and drive more conversions all on one platform. Acoustic is an Expert on this year's Marketing Automation Value Matrix with a potential for future positive movement in the market as its products develop and mature in the coming years.

Recent product updates and announcements include:

- In December 2020, Acoustic announced it selected Amazon Web Services (AWS) as its preferred cloud provider and migrated more than 90 percent of its workload to AWS. This move allowed Acoustic and its customers to see notable improvements in its platform's scaling capabilities when executing marketing campaigns.
- In July 2019, Centerbridge Partners and IBM's marketing and commerce solution officially launched Acoustic. The focus of Acoustic's product development strategy is listening closely to marketers' needs and relying on in-house R&D, and not acquisitions, to develop an entirely connected platform. Acoustic's goal is also to help customers re-establish the personal approach to marketing by investing in solutions with collaboration and creativity in mind.

SAP

SAP is a well-known German multinational technology company specializing in ERP and offers solutions in other areas of business operations and customer experience. The SAP Customer Experience Portfolio comprises several ecommerce, customer data, sales, service, and marketing solutions that users leverage to create personalized omnichannel engagements as well as deliver on brand promises to acquire and retain customers and grow revenue. SAP Marketing Cloud designs, executes, and optimizes campaigns across

multiple channels and touchpoints with dynamic customer profiling and audience targeting features. With SAP Marketing Cloud, users can also generate, nurture, and convert prospects into customers through B2B or account-based marketing strategies. Furthermore, SAP Marketing Cloud utilizes AI and machine learning to uncover insights into customer behavior and advanced analytics to increase engagement and optimize marketing efforts. With the acquisition of Emarsys, SAP is situated to expand the connectivity of its Customer Experience portfolio and deliver real-time personalized messages to customers at their preferred digital channel. SAP is an Expert on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In October 2020, SAP announced the launch of the SAP Customer Data Platform to add context and personalization to commerce, sales, marketing, and service experiences. SAP specifically engineered the platform to connect every data source in an organization, respect customer data with a holistic data privacy strategy, understand large volumes of data, and "Hyperpersonalize" engagements to increase brand reach and effectiveness.
- In November 2020, SAP completed its acquisition of Emarsys, a leading omnichannel customer engagement platform provider, to expand its Customer Experience Portfolio's connection capabilities. This move will allow SAP customers to embark on a "commerce anywhere" strategy and provide leads with "Hyperpersonalized" omnichannel commerce experiences in real-time.

FACILITATORS

Facilitators in the Value Matrix include Act-On, Keap, Klaviyo, Mailchimp, Sendinblue, and SugarCRM.

ACT-ON

Act-On is a SaaS growth marketing automation platform geared towards small and mid-sized businesses in the financial services, insurance, manufacturing, and SaaS industries. Act-On focuses on solving three main challenges of business growth, holistic digital marketing experience delivery, and driving personalized product engagement. The platform comes equipped with the necessary marketing automation tools to plan, launch, measure, adapt, and optimize multichannel campaigns that convert new prospects into revenue-generating customer advocates. Act-On also offers a full library of free educational eBooks, on-demand webinars, and training courses to assist customers in whichever way they learn best. The vendor also provides support packages in a three-tiered pricing system so that customers

only have to pay for the support they need. Overall, the major selling point of Act-On's growth marketing automation platform is coincidentally the growth it provides users. The depth of the solution's features allows most SMBs to scale their marketing efforts without fear of exceeding the solution's capabilities. Act-On is a Facilitator on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In April 2021, Act-On announced the launch of its SMS automated marketing solution, allowing marketers to send fully tracked messages to customers instantaneously and create data-driven SMS campaigns. With this move, Act-On users have access to an additional channel for direct and personalized engagement to improve their customer's experience as well as access to recipient behavioral data to improve targeting, segmentation, and SMS best practices.
- In October 2020, Act-On announced its integration with Zoom and the creation of its embedded workflow for webinar marketing automation solution. With native Zoom integration, users can build webinar campaigns that enable targeted messaging, identify and invite individual contacts based on their behaviors, scores, and segments, and automatically export relevant contact records within the Act-On platform.
- Also in October 2020, Act-On released its Automated Journey Builder for marketers to better visualize and map out customer journeys across multiple channels. With this tool, marketers can better identify successful strategies or major issues to save time and optimize campaigns.
- In June 2020, Act-On re-launched its brand with a new product interface and realigned its focus on growth marketing. During this time, Act-On also announced new features, notably event triggers based on consumer interactions in third-party systems, transactional emails, and expanded integrations with Zapier.

KEAP

In 2019, Infusionsoft rebranded to Keap and launched a new product lineup of sales and marketing automation software: Keap Lite, Keap Pro, Keap Max, and Keap Max Classic (the original Infusionsoft flagship product). Keap Lite is for new businesses, Keap Pro is for growing companies with custom needs, and Keap Max is for established enterprises. Keap Max combines CRM, advanced sales and marketing automation, and ecommerce features with a modern user interface to drive predictable and repeatable marketing and sales growth. With the recent Zapier integration, users can easily connect a majority of their technology stack to increase the visibility of their operations and streamline collecting customer data from other applications. Keap distinguishes itself by providing big-ticket marketing automation features while also paying close attention to offer smaller features like

appointments and quotes that can frequently make or break a customer's experience. Keap is a Facilitator on this year's Marketing Automation Value Matrix as it continues to take pride in its new brand image while maintaining its legacy.

Recent product updates and announcements include:

- In January 2021, Keap announced Keap Max, a modern CRM solution with advanced sales and marketing automation, ecommerce, and analytics that blends Infusionsoft functionality and Keap user interface for growth-minded entrepreneurs.
- In November 2020, Keap announced its integration with Zapier, and through this, users can connect to over 2500 apps and tools that will sync Keap, trigger automation, and automate day-to-day workflow and tasks.
- In September 2020, Keap launched Easy Automation for Keap Grow and Lite, making automating tasks faster and easier with pre-built templates for small businesses to get started with sales and marketing automation. Some popular workflows include new lead and client follow-ups, appointment scheduling, and payment processing.
- In March 2020, Keap announced text message templates for mobile in order to save users time as they communicate one-on-one without having to type out or cut and paste messages.

KLAVIYO

Klaviyo's multichannel marketing automation platform provides users with the tools necessary to listen, analyze, and act in order to deliver customers relevant, personalized experiences at scale. Klaviyo's platform comes equipped with standard marketing automation features, including segmentation, predictive and dynamic personalization, triggered campaigns, workflow automation, analytics, etc., allowing ecommerce businesses to connect with their customers in engaging, relevant, and customer-centric ways. Klaviyo differentiates itself by highlighting its built-in integrations to leading ecommerce platforms such as WooCommerce, Prestashop, Shopify, and Magento. As Klaviyo gains a larger user base with more data, its new Benchmarks tool, which compares the metrics of similar brands, could potentially be a game-changer for optimizing marketing strategies. With that being said, Klaviyo is a Facilitator on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In January, Klaviyo announced its Personalized Recommendation Engine that gives users an easy way to build a product feed to increase customer engagement. Users select product categories from their ecommerce store, and the engine will base future recommendations from those chosen categories on products ordered,

products viewed, or a combination of both. Once set up, the product feed is added to any campaign and flow to increase personalization and drive new sales.

- In December 2020, Klaviyo unveiled its Benchmarks solution that compares brand performance to other similar brands anonymously. By clicking the Benchmarks Overview tab, users can view their organization's five best and worst-performing metrics. The ability for a user to drill down into not only their company's metrics but into competitors' metrics as well helps to reprioritize marketing efforts and take the guesswork out of which marketing campaigns and strategies work and doesn't work.
- In June 2020, Klaviyo announced A/B testing for signup forms that automatically end the test when the results become statistically significant. Concluding the test this way maximizes submission rates since if there is a clear winning version of a form, there's no need to show visitors the losing and less receptive version of a form.
- In January 2020, Klaviyo announced fully functional SMS marketing capabilities, adding a brand-new channel in which users can engage with leads and current customers.

MAILCHIMP

Mailchimp offers a cloud-based marketing automation solution with CRM, analytics, asset creation, and now recently commerce tools. The Mailchimp Marketing Platform helps mainly small and medium-sized companies automate and scale their marketing campaigns to reach target audiences and increase personalization. Users can build behavior-based customer journey paths and customizable templates for emails, social media posts, and landing pages to push prospects through marketing funnels and convert them into Sales Qualified Leads. Using the solution's analytics tools, marketers can also create reports and track campaign performance in real-time to gain insights and optimize marketing strategies. The solution integrates with over 50 e-commerce platforms and over 200 other applications to improve customer data accessibility and synchronize customer records and product inventory. Mailchimp distinguishes itself by offering users 24/7 technical support and over 550 guides and tutorials on its website. Mailchimp's new partner program, Mailchimp & Co, also gives users the option to connect with freelancers, developers, and agencies to assist with marketing goals. Together, these resources allow users to confidently utilize all of the solution's features and expand their knowledge over time. Mailchimp's investments in usability enable businesses to immediately carry out their digital marketing strategies and increase the solution's overall value. For these reasons, as well as its recent number of acquisitions and subsequent new product offerings, Nucleus places Mailchimp as a Facilitator on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In April, Mailchimp announced the launch of two free commerce features, Stores and Appointments. Mailchimp's Stores product allows companies to create an online storefront, add and edit products, process orders, and configure payments, tax, and shipping. The Appointments product will also enable organizations to offer online booking services and schedule management tools. These new products were in response to growing customer feedback for Mailchimp to provide users with an all-in-one marketing solution that also encompassed commerce. With these added features small-business can focus more on front-end business and marketing strategies and less on back-end logistics and configuring multiple point solutions.
- In January, Mailchimp acquired Chatitive, the Seattle-based two-way SMS marketing platform, to better assist businesses with reaching audiences. The platform uses context data to deliver personalized and time-sensitive conversational mobile messaging directly to consumers.
- In October 2020, Mailchimp launched its new partner program, Mailchimp & Co, for freelancers, developers, and agencies. The program provides partners with exclusive benefits and creates a place for small businesses to find verified professionals to assist with online growth and driving revenue. These benefits include access to specialized Mailchimp resources, training, rewards, events, premium support, and better placement on Mailchimp's partner directory.
- In July 2020, Mailchimp announced the acquisition of AI-platform Inspector 6 that examines text and visual analytics data with performance data to deliver insights and recommendations to optimize marketing content.
- In June 2020, Mailchimp acquired BigTeam, a feedback management platform, to improve its own platform's survey tools for current users.

SENDINBLUE

Sendinblue is a French marketing technology company that offers a cloud-based all-in-one digital marketing platform to assist SMBs with business growth through building stronger customer relationships. Sendinblue divides its features into several categories that describe their main objective and includes "Communicate" with chat, email, and SMS marketing, "Personalize" with marketing automation, CRM, segmentation, and transactional emails; and "Convert" with landing pages, signup forms, and Facebook ads. Furthermore, the vendor lists an "Improve" category with open and click-through reports, A/B testing, real-time statistics, send-time optimization, and email heat maps. Sendinblue's plugins with most major ecommerce platforms and integrations with various CMS, helpdesk, and CRM solutions work well for small businesses that need flexibility within their marketing and ecommerce stack. Sendinblue also differentiates itself from other competitors by offering more of its sophisticated features like advanced segmentation and transactional emails under its free version, as well as pricing its solution based on the number of emails sent, not

the number of contacts stored. Sendinblue is an appealing offer for companies that want to try before they buy and is a Facilitator on this year's Marketing Automation Value Matrix.

Recent product updates and announcements include:

- In April 2021, Sendinblue announced the integration between its Live Chat solution and Facebook Messenger in order to better manage all conversations in one central location. The vendor also announced a new 1-click Product Transfer feature for Shopify and Shopware. This feature enables users to select products from Shopify or Shopware stores that they want to promote and drop them directly into newsletters or email campaigns.
- In January 2021, Sendinblue announced send time optimization for automated emails to maximize marketing KPIs and better engage with customers. The vendor also added a two-factor authentication feature to improve security and reduce the risk of stolen credentials.
- In November 2020, Sendinblue made improvements for Facebook ads, including more accurate click data by tracking outbound clicks and enhanced audience targeting by selecting multiple countries for lookalike audience targeting.
- In October 2020, the vendor released a new inbox that unifies all email communications across an entire team to increase organization efficiency, both internal and external.

SUGARCRM

SugarCRM offers small and mid-market organizations a complete customer experience management platform with an emphasis on marketing, Salesforce, and customer service automation. Analytics, sales intelligence, integration, workflow automation, and predictive AI are also available as cross-platform services. SugarCRM's marketing automation capabilities enable users to orchestrate personalized campaigns and experiences, improve conversion rates, and measure business impact from acquisition to advocacy. The solution also includes social media management features, BI-grade analytics, and supports native integrations to six other leading CRM solutions. SugarCRM distinguishes itself from other marketing automation vendors by offering unlimited users, emails, technical support, and API calls. Sugar Market strikes a good balance between functionality, usability, and price for mid-market organizations looking to switch to a unified marketing technology platform. Furthermore, its recent product updates continue to churn out new features and product offerings to modernize and improve businesses' marketing efforts. SugarCRM is a Facilitator on this year's Marketing Automation Value Matrix and is steadily developing its feature list and position in the market space.

Recent product updates and announcements include:

- In April 2021, Sugar announced SugarPredict for Sugar Market. SugarPredict is Sugar's embedded AI engine that continually analyzes internal and external customer data to provide AI-driven predictions. SugarPredict is enriched with Node.ai, which Sugar acquired in August 2020, and the solution facilitates rapid marketing lead qualification and prioritization through predictive lead scoring. It creates a prediction of a lead's likelihood of convert to a marketing qualified lead based on market engagement activities and comparisons to patterns identified in previously converted leads. SugarPredict's actionable insights allow marketers to reveal hidden opportunities, optimize marketing communications through micro-segmentation, drive more sales, and improve revenue predictability.
- In November 2020, Sugar released Nurture Builder 2.0, a complete redesign of Sugar's nurture campaign creation tool. Nurture Builder 2.0 is a graphical tool for designing, testing, and executing marketing nurture campaigns. It supports drag-and-drop flow creation, conditional logic, out-of-the-box campaign templates, automated campaign validation, and support for various campaign trigger events. Integrated real-time analytics allows marketers to measure the effectiveness of their nurture programs and quickly adjust tactics to support their strategy. Other features include a visual representation of the customer journey, a heat map that provides insights into the most common path, and an individual contact search to visualize a contact's path through a nurture campaign.
- Also, in November 2020, Sugar added the Marketing Responses Module from its W-systems acquisition to enhance the handling of notifications of high-value marketing responses to sales users. Marketing responses are linked to any open leads, contacts, accounts, and opportunities and allow users more visibility and tracking of the communications of leads between teams.
- In July 2020, Sugar released an update to allow marketers to quickly create and test new lead and customer scoring models. These new features enable marketers to test the rules of a new model to determine if the model functions as expected by scoring it against specific contacts that have another well-known constructed model.
- In April 2020, Sugar Integrate was released as the company's iPaaS platform to integrate Sugar products with other business applications. It includes a library of pre-built templates and connectors, as well as a dedicated integration services team to assist in customer integration and migration projects.
- Also, in April 2020, Sugar increased user access to data-driven insights by providing more granular out-of-the-box analysis of engagement metrics across multiple channels throughout the customer lifecycle. These enhanced insights show contact and account activities through integrated market and CRM solutions and gives marketers instant insights into the status and ownership of contacts and accounts in

order to drive micro-segmentation, more personalized engagements, routing, and ABM initiatives.

CORE PROVIDERS

Core providers in the Value Matrix include, Demandbase, Drip, and Zoho.

DEMANDBASE

Demandbase One is a united B2B Go-to-market suite and distinguishes itself from other marketing automation solutions by focusing on account-based marketing and experience. Demandbase One offers companies a unified platform to display, manage, and analyze their customer data to engage the highest priority accounts with the optimal message in real-time. Demandbase One is broken down into four products, ABX Cloud, Advertising Cloud, Sales Intelligence Cloud, and Data Cloud. The clouds work seamlessly together to achieve full transparency throughout departments to enhance collaboration and increase customer retention that drives revenue growth. Demandbase One lets users build an adaptive account-based foundation for data discovery, find in-market accounts, and engage with accounts in real-time across multiple channels. Moreover, companies are able to close more deals by aligning marketing and sales, expand lifetime customer value by identifying cross-sell and up-sell opportunities, and measure ROI and other key business indicators of every interaction with analytics and attribution. Demandbase is rated a Core Provider on this year's Marketing Automation Value Matrix as it is the leading core provider of ABX. Based on its recent updates and acquisitions and current B2B marketing trends, Nucleus is confident in the future growth of Demandbase and its products.

Recent product updates and announcements include:

- In May, Demandbase announced the acquisitions of InsideView and DemandMatrix to create the Demandbase Sales Intelligence Cloud and Data Cloud. These acquisitions will further expand the functionality of Demandbase One to provide users with a complete "one-stop-shop" for quality data across firmographics, technographics, intent, account identification, and contacts to facilitate B2B go-to-market strategies.
- In April, Demandbase launched the Demandbase Academy for online training of Demandbase One. Demandbase Academy uses self-paced content like interactive guided exercises and expert-led demonstrations that engage different learning styles to accelerate user knowledge, flatten Demandbase One's learning curve, and increase user productivity.

- In November 2020, Demandbase unveiled its next-gen Account-Based Marketing Platform, Demandbase One, which brought together the capabilities of Demandbase and Engagio. The Demandbase One suite gives a complete view of customers at every step of the customer journey. Furthermore, the solution assists marketing and sales teams with prioritizing accounts that will most likely convert to future customers with AI and machine learning functionality.
- In June 2020, Demandbase acquired Engagio to reinforce its position as a leader in the ABX market space and accelerate Demandbase's product roadmap.

DRIP

Drip is a marketing automation platform built for ecommerce. The product offers customizable forms to increase engagement, email, and SMS automation that drives revenue with personalized and dynamic product recommendations and provides segmentation and reports to better view specific audiences and campaign ROI. The vendor prominently features native integrations with Shopify, Magento, WooCommerce, and a dozen other ecommerce platforms to give its users a considerable amount of flexibility when selecting the platforms of their choice. Drip also includes step-by-step how-to guides for novice users, as well as a workflow library with pre-built campaign templates to save users' time. Drip is a Core Provider on this year's Marketing Automation Value Matrix and has found its niche of providing ecommerce businesses with an intuitive marketing automation solution.

ZOHO

Zoho Marketing Automation, previously Zoho Marketing Hub, is an all-in-one marketing automation platform that successfully manages an entire organization's marketing efforts across web, email, SMS, and social media. With Zoho Marketing Automation, users can improve their top-of-the-funnel conversion rate with dynamic website personalization based not only on the customer but on segments like weather, location, and time of the day. The solution also offers event-based journeys with conditional workflows that reach contacts on their preferred channel with relevant and personal messages to increase the likelihood of conversion. Zoho Marketing Automation distinguishes itself with its connection to the Zoho Ecosystem with applications that can virtually run front-end and back-end technology verticals like HR or finance. Zoho Marketing Automation is a Core Provider on this year's Marketing Automation Value Matrix. However, due to its comprehensive product roadmap that will roll out over the next year, Zoho is poised for significant gains in positioning on the Value Matrix so long as its customers realize the value of these future offerings.

Recent product updates and announcements include:

- In February 2021, Zoho announced Web Analytics for measuring the acquisition and behavior stats of website visitors. Users can track their website's key performance indicators, including sessions, bounce rate, and defined website events across segments such as source, location, and device.
- Zoho also released Website Personalization for displaying related content to every visitor based on criteria like weather, demographics, and browsing patterns. Users also gain access to a consolidated report of experiences' reach, visits, conversion rates, and improvement in revenue.
- Furthermore, Zoho released push notifications for re-targeting visitors via mobile and web push notifications. Users can trigger a one-time, recurring, or event-based push notification.
- Zoho also announced a polling feature that runs responsive polls on targeted website visitors. Zoho users can customize and launch polls with a combination of ten questions and includes NPS, star rating, radio buttons, and checkboxes.
- In January 2020, Zoho announced integration with Google ReCAPTCHA to make website forms more resilient to spambot attacks.