

Magic Quadrant pour les plateformes d'automatisation du marketing B2B

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Les plateformes d'automatisation du marketing B2B constituent un outil essentiel pour l'orchestration du parcours client à l'appui des objectifs d'acquisition, de fidélisation et de croissance des clients B2B. Les leaders du marketing numérique devraient utiliser cette recherche pour évaluer quelles solutions de fournisseurs sont les mieux adaptées à leurs besoins.

Définition/description du marché

Gartner définit les plates-formes d'automatisation du marketing B2B comme des logiciels qui soutiennent la pratique de la génération de la demande. Cela inclut la sensibilisation, la génération et le développement de prospects de haute qualité, l'orchestration de l'engagement multicanal pour guider la progression du parcours client et l'utilisation de l'analyse pour mesurer et optimiser les performances.

L'objectif principal de ces systèmes est de capturer, qualifier et nourrir les prospects et les comptes, de les aligner sur le(s) membre(s) approprié(s) de l'équipe de vente, puis de poursuivre l'engagement axé sur les ventes et / ou le marketing pour parvenir à une transaction conclue. Les plates-formes d'automatisation du marketing B2B aident au nettoyage des données en éliminant les informations incomplètes ou redondantes sur les prospects, ainsi qu'à l'augmentation des prospects en fournissant des données supplémentaires sur les prospects.

Les plates-formes d'automatisation du marketing B2B sont conçues pour prendre principalement en charge les cas d'utilisation B2B, mais elles peuvent également s'appliquer aux organisations B2C vendant des produits hautement considérés et / ou des modèles B2B2C avec des processus de vente indirecte plus complexes.

Les fournisseurs de ce Magic Quadrant prennent en charge les fonctionnalités de base suivantes des plateformes d'automatisation du marketing B2B, notamment :

- Possibilité de saisir, synchroniser, nettoyer et activer les données de première partie, ainsi que d'augmenter les données de contact existantes avec des sources de données tierces et des

données pertinentes provenant d'autres systèmes de marketing, de vente, de gestion des données et de commerce numérique

- Possibilité de faire correspondre les prospects aux comptes
- Fonctionnalité de notation des prospects pour prendre en charge la création et la gestion des processus de qualification des prospects à l'aide de règles métier et/ou d'intelligence artificielle (IA) et d'apprentissage automatique (ML)
- Fonctionnalité de flux de travail des prospects permettant aux organisations de gérer le cycle de vie des prospects, de la génération / collecte à la conversion, à la rétention et à la vente croisée / incitative, à l'aide d'une interface utilisateur graphique adaptée aux utilisateurs non techniques
- Capacité à déployer et à gérer un programme coordonné d'engagement client sur plusieurs canaux
- Possibilité de personnaliser l'engagement client par segment, compte, persona ou étape du parcours
- Capacité à suivre, mesurer et rendre compte des KPI tactiques, stratégiques et opérationnels pour surveiller et guider la génération de revenus, y compris des conseils et des informations sur les revenus basés sur les volumes et la qualité actuels des prospects et des comptes
- Accès à des rapports préconfigurés prêts à l'emploi et à des fonctionnalités de visualisation/tableau de bord des données adaptées aux utilisateurs marketing, commerciaux et exécutifs

Les fonctionnalités optionnelles des plateformes d'automatisation du marketing B2B incluent :

- Analyse prédictive soutenant l'automatisation des activités marketing, telles que la conception de parcours, le contenu et les recommandations de prochaine action et l'optimisation autonome des campagnes
- Analyse prescriptive qui spécifie un plan d'action préféré pour l'organisation de l'utilisateur final
- Analyse du parcours client soutenant la capacité de suivre et d'analyser la façon dont les clients et les prospects utilisent une combinaison de canaux disponibles pour interagir avec une organisation au fil du temps
- Fonctionnalité de notation au niveau du compte pour prendre en charge les processus de priorisation des comptes à l'aide de règles métier et/ou d'IA et de ML

Magic Quadrant

Figure 1 : Magic Quadrant pour les plateformes d'automatisation du marketing B2B





Source : Gartner (septembre 2022)

Forces et mises en garde des fournisseurs

Agir

Act-On est un challenger dans ce Magic Quadrant. Son produit d'automatisation du marketing vise à aider les équipes marketing à renforcer la sensibilisation, à orchestrer les points de contact du parcours de l'acheteur, à convertir des prospects de haute qualité et à entretenir les relations avec les clients. Ses activités sont concentrées en Amérique du Nord et ses clients vont des petites et moyennes entreprises (PME) aux entreprises des secteurs des services aux entreprises, des services financiers, de la fabrication, de la technologie et de la vente au détail. Les développements récents de produits comprennent des fonctionnalités améliorées de personnalisation des e-mails et des SMS, des tableaux de bord de reporting améliorés et le lancement d'e-mails déclenchés par des événements commerciaux, qui peuvent déclencher des e-mails à l'aide d'API avec des systèmes externes. Act-On a également investi pour améliorer les intégrations CRM/SFA, y compris une nouvelle intégration native avec Zendesk Sell.

Forces

- **Facilité d'utilisation globale** : la plate-forme d'Act-On permet aux utilisateurs d'effectuer des tâches de gestion des prospects et d'engagement client via une interface utilisateur simple, ce qui permet une adoption rapide des produits. Act-On communique également les mises à jour de produits effectuées pour améliorer l'expérience utilisateur au moins toutes les deux semaines.
- **Modèle de tarification** : Le modèle de tarification d'Act-On est largement basé sur le nombre de contacts actifs. Cela signifie que les clients ne paient que pour le nombre de contacts qu'ils engagent activement, par opposition à la taille de leur base de données de contacts plus large.
- **Exécution du marketing par e-mail et SMS** : Act-On permet aux utilisateurs de créer et de distribuer des e-mails et des SMS qui intègrent une personnalisation dynamique basée sur les champs de données de contact de la plate-forme ou les données collectées à partir d'intégrations avec des applications tierces. Sa capacité d'envoi adaptatif utilise l'historique d'engagement cross-canal précédent d'un contact pour optimiser le temps d'envoi d'e-mails.

Précautions

- **Scoring/qualification des leads** : Les capacités de lead scoring d'Act-On sont limitées aux règles métier, par opposition à la modélisation prédictive basée sur l'IA/ML disponible auprès de tous les autres fournisseurs de cette recherche. Cela peut obliger les utilisateurs à élaborer des hypothèses pour créer et valider des modèles de notation des prospects, au lieu d'utiliser une prise de décision plus accélérée axée sur les données.
- **Innovation produit** : Bien qu'Act-On produise un flux constant de mises à jour de produits, ces améliorations sont généralement de nature incrémentale. Il n'a pas produit d'innovations de produits en IA / ML à l'appui de la notation des leads, des meilleures actions suivantes ou des capacités de création d'audience depuis la dernière itération de cette recherche.
- **Visibilité sur le marché**: Les clients de Gartner se renseignent rarement sur ce fournisseur, et il génère un trafic de site Web de marque inférieur à celui de la plupart des autres fournisseurs, selon l'analyse Gartner des données de Similarweb. Il peut être difficile d'embaucher des talents en marketing ayant une expérience de la plate-forme Act-On, de sorte que les acheteurs potentiels devraient explorer la mise en œuvre et / ou le service client et les partenaires de support.

Adobe

Adobe est l'un des leaders de ce Magic Quadrant. Adobe Marketo Engage se concentre largement sur la prise en charge de parcours clients complexes grâce à l'exécution de campagnes multicanaux basées sur les prospects et les comptes. Ses activités sont diversifiées à l'échelle mondiale, tandis que ses clients sont principalement en Amérique du Nord et ont tendance à être des organisations à l'échelle de l'entreprise et du marché intermédiaire dans les domaines de la haute technologie, de la fabrication, des services financiers et des soins de santé. Adobe intègre la notation prédictive des prospects et des comptes optimisée par Adobe Sensei AI pour déterminer la propension des acheteurs. La feuille de route d'Adobe comprend des intégrations plus solides avec d'autres applications d'Adobe Experience Cloud (y compris Adobe Real-Time

CDP), en lançant un flux de travail visuel guidé pour faciliter la création de campagnes et le développement d'une nouvelle expérience globale avec une productivité accrue.

Forces

- **Infrastructure de campagne modulaire** : Adobe a simplifié la création de processus complexes en créant des éléments standardisés tels que des processus de nettoyage des données ou des flux de vente qui peuvent être réutilisés dans plusieurs campagnes. Ces blocs de construction peuvent être mis à jour, et ces mises à jour seront appliquées à toutes les campagnes dans lesquelles ils sont utilisés.
- **Étendue des fonctionnalités** : Adobe propose un éventail de fonctionnalités utiles pour les petites entreprises ainsi que pour les grandes entreprises les plus complexes. Toute organisation peut commencer par le courrier électronique, la segmentation, l'automatisation et la mesure, et peut étendre l'utilisation du logiciel par son équipe à mesure que sa sophistication et sa maturité marketing s'améliorent pour inclure le marketing basé sur les prospects et les comptes, l'analyse du parcours, la personnalisation et l'attribution basées sur l'IA.
- **Fonctionnalité basée sur les comptes** : Adobe fournit la prise en charge ABM la plus robuste de tous les fournisseurs examinés dans cette recherche, qui est disponible dans son package Prime milieu de gamme et supérieur. Les spécialistes du marketing peuvent gérer l'ensemble de leur programme ABM avec Adobe Marketo Engage, de la création de profils clients idéaux et de listes de comptes cibles à la notation et à l'enrichissement des comptes, en passant par l'activation par la publicité ciblée, la mesure et l'attribution.

Précautions

- **Assistance supplémentaire recommandée** : Adobe recommande à ses clients de payer pour une variété de services professionnels afin de prendre en charge le processus de mise en œuvre de trois à six mois, y compris l'engagement stratégique, le conseil commercial, l'intégration technique et la délivrabilité. Les clients peuvent choisir parmi des forfaits de services de démarrage, des services personnalisés ou un engagement continu de services pour les grandes entreprises.
- **Courbe d'apprentissage abrupte** : les fonctionnalités d'Adobe Marketo Engage permettent aux clients de gérer l'engagement de leurs prospects et de leurs comptes à l'aide de diverses approches efficaces. Cependant, les spécialistes du marketing auront probablement besoin de se familiariser avec les concepts et processus avancés d'automatisation du marketing pour utiliser efficacement certaines des fonctionnalités avancées de la plate-forme.
- **Les fonctionnalités avancées nécessitent des achats supplémentaires** : Adobe exécute les fonctions de base natives et prêtes à l'emploi qu'un spécialiste du marketing attend d'une plate-forme d'automatisation du marketing. Cependant, à mesure que les organisations marketing mûrissent et ont besoin de fonctionnalités plus avancées, d'autres programmes doivent être achetés. Il peut s'agir notamment d'Adobe Marketo Measure pour l'attribution

avancée et d'Adobe Real-Time CDP, B2B Edition, pour des sources de données étendues afin de créer des audiences complexes à intégrer dans Adobe Marketo Engage.

Creatio

Creatio is a Leader in this Magic Quadrant. Marketing Creatio is focused on automating the end-to-end revenue cycle and managing customer journeys, helping marketers achieve cross-functional alignment and process automation for marketing, sales and service. Its operations are mostly focused in EMEA and North America, and its clients are largely midmarket and large enterprise organizations, coming from a diverse range of industries, led by financial services, manufacturing and high tech. Creatio has continued to invest in its ability to support multichannel campaign management with AI-assisted campaign design capabilities, along with additional investments in ABM workflows and enhancements in the Creatio Marketplace.

Strengths

- **Flexibility for vertical needs:** Users can leverage composable elements for automating unique and complex lead management workflows and CRM use cases, often applied to the demands of particular verticals. The composable approach allows users to browse the Creatio Marketplace for applications, connectors and templates to configure workflows to desired micro use cases.
- **Robust AI models:** Marketing Creatio offers a wide selection of out-of-the-box AI models, including product recommendations, predictive lead scoring, best-day-of-communication predictions, preferred communication channel predictions and propensity-to-buy assessments. Each of these models can be woven into the design of a campaign, and they can be relied upon to simplify complex customer journeys.
- **Design tools for marketers:** Marketing Creatio provides no-code design tools for building and automating custom lead workflows, based on segment, persona and journey stage. This enables nontechnical marketers to maximize the value from the platform with less IT involvement and support from professional developers.

Cautions

- **Product complexity:** Gartner Peer Insights users report that it is difficult, and sometimes overwhelming, to figure out the sheer volume of Marketing Creatio's functionality. Prospective buyers should assess the Creatio University Program and other vendor- or partner-provided support resources as part of the buying process to determine if this supplemental support can enable users to drive successful marketing outcomes.
- **Partner-centric approach:** Nearly all Marketing Creatio customers use third-party system integrators for implementation. Given Creatio's reliance on partners for implementation, prospective buyers should weigh partner availability against their implementation and support needs in their given geography.
- **North American visibility:** Nearly two-thirds of Marketing Creatio customers are concentrated in EMEA. Gartner client awareness is low. North American Creatio clients should expect fewer

opportunities to engage with other clients regionally, and additional challenges when seeking to hire local marketers with Creatio experience.

CRMNEXT

CRMNEXT is a Niche Player in this Magic Quadrant. CRMNEXT's marketing automation module, a component of CRMNEXT's broader CRM suite, is mainly focused on enabling marketers to apply AI and predictive analytics to a range of activities, including value-based customer segmentation, lead scoring and next-best-offer recommendations. Its operations are mostly focused in APAC, as are its clients, which are primarily large enterprise banking and insurance organizations.

CRMNEXT recently developed an AI studio where users can design and test AI models.

CRMNEXT's product roadmap is heavily focused on helping users gather, analyze and act on customer data. It plans to launch a customer data platform, COSMOS 360, in the second half of 2022, which is designed to unify data across customer-facing applications.

Strengths

- **AI model visibility and flexibility:** CRMNEXT offers users visibility into the accuracy of predictive analytics models, including insight into the data categories that the platform incorporates into its models. Users can build new AI models in the platform to address distinct organizational needs and use cases.
- **Third-party data enrichment:** CRMNEXT enables the enrichment of customer or account profiles using a wide range of firmographic data, among other data sources, especially those relevant for financial services clients. Integrations with intent data providers, such as Bombora, provide customer insights at scale, such as top keywords searched and a buying intent score.
- **Client retention:** CRMNEXT boasts a very high customer retention rate in comparison to most other vendors in this research. This allows marketing teams to optimize the scale of implementation over time and avoid the disruptions associated with implementing a new marketing automation platform.

Cautions

- **Industry focus:** CRMNEXT's product capabilities, team expertise and market positioning are heavily linked to the financial services and insurance industries. Organizations in other industries should validate that the vendor can support necessary use cases.
- **User experience:** While CRMNEXT invests to make it easy for users to apply AI/ML to marketing activities, some Gartner clients report that its user experience is challenging for certain activities. These include lead scoring and audience creation when using business rules as opposed to AI/ML functionality.
- **Geographic market presence:** Less than a quarter of CRMNEXT's customers are outside of APAC. Prospective buyers should ensure that they can source the necessary local expertise to manage the product in their region(s) of operations.

Freshworks

Freshworks is a Niche Player in this Magic Quadrant. Its Freshsales Suite is broadly focused on attracting, engaging and converting buyers by automating campaigns across digital channels. Its operations are geographically diversified, and its clients tend to be SMBs in high tech, retail and manufacturing. So that clients can communicate with their prospects on their preferred channels, Freshworks has evolved its native communications in the software to include web chat, SMS, WhatsApp and Apple Business Chat, along with email. Additionally, to improve the quality of marketers' activities, Freshworks added a number of new AI functions to its roadmap, including next best actions for leads, communication frequency optimization, subject line optimization and a journey design helper.

Strengths

- **Transparent and easy-to-understand AI:** Freshsales Suite incorporates its AI across the platform to make tactical recommendations with the reason for the guidance. The platform's predictive lead scores include an explanation for the score, a suggested next best action based on the score and a simple thumbs-up or thumbs-down for users to indicate the accuracy of the recommendation. This instant feedback helps train and improve the AI-based recommendations.
- **Easy-to-use analytics:** Freshsales Suite provides a number of out-of-the-box reports that visualize the most important metrics for marketers. Reports and dashboards can be customized or built from scratch to track specific metrics for marketing teams.
- **Tailored onboarding, training and services:** Freshworks offers a range of services, from free and digital resources to comprehensive plans based on the complexity of the client's requirements and the level of assistance needed. Its Premier Advisory Services package includes onboarding, training, optimization, admin services and strategic reviews to ensure clients' success.

Cautions

- **Business model:** Freshsales Suite goes to market with a strategy that requires an integrated marketing and sales suite to meet the functional capabilities of a marketing automation platform. While the Freshmarketer module is available separately, it is designed to be part of an integrated suite that appeals to SMBs rather than enterprise organizations that may require different CRM/SFA solutions.
- **Support for programmatic advertising:** Marketers expect to build custom audiences in their marketing automation platform and use those audiences to advertise on multiple channels, including social media. This function is not currently part of Freshsales Suite, although social ad management is on its roadmap for 2023.
- **Integrations for ABM:** Freshsales Suite has basic support for marketers who have adopted an ABM go-to-market strategy. Marketers who choose this platform will not have access to integrations with third-party intent data providers or ABM platforms.

HubSpot

HubSpot is a Leader in this Magic Quadrant. Its Marketing Hub product focuses on providing an intuitive UI, giving marketers access to real-time customer data and offering integrated, relevant performance reporting. Its operations are geographically diversified, and its clients tend to be SMBs. But it has made progress in its efforts to expand its large enterprise client base, which it serves through its Marketing Hub Enterprise package. Most of its clients are in high tech and professional services. HubSpot is investing in improving its reporting (including journey visualization, workflow and data quality automation) and channel access (including mobile messaging).

Strengths

- **Support, education and community:** When implementing and using Marketing Hub, clients have access to resources from HubSpot and other customers through traditional support paths and a worldwide community that HubSpot has built. HubSpot provides ongoing support, education and certification through HubSpot academy, and more than 150 user groups throughout the world.
- **User interface:** HubSpot offers a consistent, intentional user experience across all aspects of the product and suite, largely driven by the fact that it has built (not bought) all of its platform components. Other vendors evaluated in this research present different UIs for different capabilities, often due to legacy integrations.
- **Integration with other applications:** Marketing Hub is well-positioned to integrate with a range of third-party applications, in addition to other relevant products in HubSpot's broader product suite. It supports integrations with many CRM/SFA applications (including Salesforce Sales Cloud and Microsoft Dynamics 365 Sales), Demandbase for ABM program management and multiple digital commerce platforms. It also maintains a large app marketplace.

Cautions

- **Advanced capabilities may require advanced skill sets:** While HubSpot maintains an intuitive UI for common tasks, advanced capabilities, such as logic that rotates lead assignment, must be implemented via custom code, which typically requires developers. Prospective buyers should be prepared to supply or contract those skill sets to take advantage of those capabilities.
- **AI/ML implementation:** While HubSpot has invested in machine learning for lead scoring, the UI does not explain why individual leads received higher or lower scores. Users trust AI-generated lead scores more when they see the "why" next to the score (e.g., "this lead has a similar title and industry to others who have purchased"). Other vendors evaluated in this research have adopted this technique for their predictive lead scoring.
- **SMB heritage:** For years, HubSpot focused on the SMB market, where it has demonstrated tremendous success. Prospective buyers at large enterprise organizations should define specific complex use cases and request proofs of concept (POCs) to confirm that HubSpot's

Marketing Hub Enterprise package can support their specific detailed workflow and complex governance requirements.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its Dynamics 365 Marketing is focused on creating segment-based, event-triggered journeys to acquire prospects and customers with personalized content across multiple channels. Its operations are geographically diversified, and its clients tend to be large enterprise and midmarket organizations in financial services, manufacturing, retail, healthcare and government. Microsoft has invested in connecting additional out-of-the-box channels and providing new triggers and analytics dashboards. Its roadmap is geared toward creating customer engagement with AI-based next best offers to provide the most relevant and personalized content, custom industry entities and journey testing and simulation.

Strengths

- **Common data platform:** Microsoft Dynamics 365 Marketing is built using a common data platform – called Dataverse – that flows across its Dynamics suite of products, including sales, service, commerce and ERP. This simplifies native integration among products and improves data quality across an organization.
- **Implementation partner network growth:** Microsoft has grown its Dynamics partner program by 50% year over year to include more than 1,000 partners, leading digital agencies and global system integrators (GSIs) selling the solution. This provides added flexibility and options for marketers who need implementation support.
- **Customer success programs:** Microsoft offers two customer success programs to support implementation and continuous adoption: FastTrack for Dynamics 365 and the Business Applications Customer Success Program. The first includes the product engineering team, intended to deliver on-time implementations with higher customer satisfaction, and the second is provided to enterprise customers at no cost and drives more active usage of the product.

Cautions

- **CDP dependencies:** Microsoft considers its CDP product, Dynamics 365 Customer Insights, a key component of its integrated B2B marketing automation solution. Customers may be able to achieve their desired marketing automation use cases using only Dynamics 365 Marketing. However, some prospective buyers may need to purchase the separate CDP product to handle heavy data lifting for functions such as creating unified profiles combining leads and accounts, as well as enhancing those profiles with internal and external data.
- **Product packaging:** While most other Leaders offer multiple marketing automation product tiers with escalating, additive functionality, Dynamics 365 Marketing is offered as a single version, with flexibility to purchase additional contacts and/or interactions. This may be less attractive for prospective buyers with modest needs, given that most organizations using a marketing automation platform say they aren't using all available functionality.

- **CRM/SFA integrations:** Dynamics 365 Marketing is optimized to operate within the Dynamics 365 environment with Dynamics 365 Sales as its connected CRM, while connections to third-party applications appear as data source imports in the CDP. The only other SFA it integrates with is Salesforce Sales Cloud, and that integration requires additional cost. This reduces the desirability of Dynamics 365 for marketers who use Salesforce or other SFA platforms.

Oracle

Oracle is a Leader in this Magic Quadrant. Oracle Eloqua Marketing Automation is mainly focused on cross-channel digital orchestration, marketing execution and personalization through its ability to deliver end-to-end journeys throughout the customer life cycle. Its clients are mainly midmarket and large enterprise organizations in North America and EMEA, coming from a diverse range of industries, with an emphasis on communications and media, high tech, manufacturing, and financial services. Oracle Eloqua has made significant investments in integrating its B2B marketing automation offering with applications across Oracle's CX suite, which includes solutions for sales, data enrichment, digital commerce, loyalty and content management.

Strengths

- **Personalization:** Oracle Eloqua offers robust audience creation capabilities, which enable users to create segmented contact lists based on account data, first- and third-party intent data, and ML capabilities, such as contact fatigue analysis. This, along with the product's ability to dynamically personalize experiences across multiple marketing channels, enables users to deliver highly relevant information to target customers.
- **Advanced AI/ML models:** Oracle Eloqua users can leverage AI/ML to measure propensity to buy, conduct fatigue analyses, optimize send time, optimize subject lines, execute predictive lead and account scoring, and measure churn propensity. Engagement activity details contribute to scoring models that can be manually modified or driven and adapted by AI/ML to identify when opportunities are ready to be handed off to sales.
- **Partner ecosystem:** Oracle's partner ecosystem consists of a diverse range of global partners, including system integrators, agencies, independent software vendors (ISVs) and resellers across various market segments. Oracle uses them to drive customer success, through complementary features, functionality, robust integrations, technical or strategic expertise and/or system management.

Cautions

- **Product complexity:** Some Gartner Peer Insights users report that certain product features, such as reporting and dashboard capabilities, are difficult to use. Also, some Gartner Peer Insights users have expressed frustration with sporadic communication about product updates and usage guidance.
- **Product bundling required for advanced functionality:** Prospective buyers should evaluate whether additional products are needed to address desired use cases during the purchase process to avoid postimplementation surprises. For example, complex segmentation, data

enrichment and AI/ML use cases may require Oracle's Unity Customer Data Platform at additional cost.

- **Educational fees:** Training can be purchased via a year-long subscription that offers access to educational content. Some Gartner clients lament that the system isn't more like other vendors in this research that include the bulk of their user training resources within the core subscription.

Pega

Pega is a Visionary in this Magic Quadrant. Its Customer Decision Hub (CDH) is mainly focused on supporting one-to-one customer engagement by applying AI to identify and deliver next best actions in real time. Its operations are geographically diversified, with a focus in North America and EMEA. Its clients are primarily large enterprise B2C organizations in the financial services, insurance and telecommunications industries. Its product investments are largely focused on optimizing its next-best-action capabilities, such as enhancements to its Customer Profile Viewer, which shows customer-specific insights about next-best-action opportunities, including insights into what factors are driving the recommendations.

Strengths

- **Robust AI:** CDH's Next-Best-Action Designer enables users to design complex, one-to-one, next-best-action models intended to drive desired commercial and/or customer engagement objectives. The platform can prescribe next-best-offer recommendations, as well as assess a customer's propensity to buy specific offers.
- **Product vision:** CDH is optimized to support automated customer journey orchestration. Its ongoing investments in AI and real-time decisioning position the product to help marketers elevate above the simple automation of business rules.
- **Analytics and measurement:** CDH's customer journey analytics capabilities allow users to see how customers engage across multiple channels and content assets as they progress across journey stages. It also notifies users of statistical anomalies, such as next-best-action motions performing significantly better or worse than the norm.

Cautions

- **Ability to support pure B2B use cases:** Pega's CDH operates in a fundamentally different way than any other vendor in this research. While other vendors' marketing automation products are optimized to support B2B demand generation use cases, Pega's CDH offers more of an AI engine that can be trained to support a range of marketing use cases. This may lead to added effort by clients in setting up the platform for standard use cases.
- **Learning curve:** While CDH offers stepwise functionality to support the design of AI-driven next-best-action motions, operating this functionality will likely require deep analytical skills that extend beyond the talent sets of most B2B marketing teams. Prospective buyers should make a concerted effort to determine likely next-best-action use cases, learn about the steps required

to develop those motions and determine whether they have the talent necessary to effectively utilize the product's advanced capabilities.

- **Integrations with other applications:** CDH only offers native CRM/SFA integrations with Salesforce Sales Cloud and Pega's own SFA product, Pega Sales Automation. CDH also lacks native integrations with ABM platforms, such as 6sense, Demandbase or Terminus.

Pega did not respond to requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its Marketing Cloud Account Engagement product (recently renamed from Pardot) is broadly focused on all aspects of multichannel B2B demand generation. Salesforce's operations are geographically diversified, and its clients tend to be midmarket and large enterprises in a variety of industries. It continues to invest in improving ease of use and its UI to support comprehensive marketing automation functionality, including a journey designer tool that allows users to see and test the proposed journey in real time. Salesforce also continues to enhance Einstein AI capabilities, including new functionality for optimizing marketing email frequency.

Strengths

- **User interface:** Marketing Cloud Account Engagement's user interface has been continually developed and is now class-leading in its appeal. It offers solid functionality in an intuitive interface.
- **Partner ecosystem and community:** Salesforce provides a large ecosystem of ISV and implementation partners in its AppExchange partner ecosystem. Most vendors in the marketing and broader CRM technology landscape prioritize integrations with Salesforce, particularly data providers, ABM platforms, event management platforms, direct mail solutions and predictive modelers. All products in the AppExchange undertake a security test.
- **Market presence:** Salesforce continues to generate relatively high awareness in the market compared to most of the other Leaders. It demonstrated a 20% year-over-year growth rate in its Marketing and Commerce Cloud in 2021, becoming the second highest vendor within the broader marketing software market, in terms of annual revenue, close behind Adobe.

Cautions

- **CRM/SFA integrations:** While Salesforce offers its own SFA product, Salesforce Sales Cloud, Marketing Cloud Account Engagement does not provide native integrations with third-party SFA solutions. Marketers in organizations that use other SFA solutions will not be able to benefit from deep integrations with Marketing Cloud Account Engagement.
- **Lead workflow management:** The platform's lead workflow design tool is quite functional, but it can lead to the development of large, complex journeys without careful planning. This can

result in additional effort needed to build, manage and optimize the resulting user journeys, particularly given the limited sophistication in the product's AI/ML-driven next-best-action logic.

- **Pricing model:** While Salesforce offers transparent pricing for Marketing Cloud Account Engagement, costs vary significantly among its tiers with different capabilities and add-ons with advanced functionalities. Prospective buyers with modest needs should consider how their requirements might evolve as their maturity advances, and factor potential escalating costs into their long-term budget plans.

SugarCRM

SugarCRM is a Niche Player in this Magic Quadrant. Its Sugar Market product is mainly focused on being an alternative to more well-known products in this market, particularly those offered as part of an integrated CRM suite, at a more competitive price. Sugar Market operates as part of a unified SugarCRM suite, covering marketing, sales and service. Its operations are geographically diversified, and its clients tend to be midmarket organizations in a variety of industries. This year, SugarCRM is developing a new user experience intended to help marketers build efficient campaigns and deliver faster results. Next year, its vision includes revamping its event management platform to reflect the increased need for physical and virtual events, as well as extensions to native social media capabilities.

Strengths

- **Integrated suite for midmarket:** SugarCRM targets midmarket organizations that want an integrated suite, as an alternative to more premium and complex offerings. Sugar Market's functionality is moderated to ensure ease of use within its broader SugarCRM platform. Sugar Market also offers native integrations with third-party SFA applications.
- **Pricing model:** Sugar Market offers a straightforward pricing model, with its entry-level pricing encompassing all product features, unlimited users, unlimited emails and 10,000 marketing contacts. Clients can purchase additional contacts and professional services for additional fees.
- **Application marketplace:** SugarCRM revamped its partner ecosystem after acquiring SugarOutfitters, which previously maintained the SugarCRM marketplace. The marketplace includes approximately 200 curated and validated apps that extend SugarCRM, as well as connectors that integrate it with other tools.

Cautions

- **Analytics and AI:** Applications of AI are largely limited to predictions on lead likeliness to convert, and the platform offers limited capacity to customize predictive models. Customer journey analytics and attribution modeling are also limited compared to Leaders in this Magic Quadrant. Users with sophisticated requirements and expectations in this important area may be disappointed.
- **Native channels for customer engagement:** Gartner research shows that social media is a key channel for demand generation and excellent for lead generation, but Sugar Market uses a

third-party product to support this capability – Oktopost. Potential users should evaluate SugarCRM’s product roadmap and integration arrangements to ensure the product sufficiently supports social media requirements.

- **Market presence:** SugarCRM’s market presence is significantly lower than many vendors in this research that serve midmarket clients, and it has a comparatively smaller network of third-party implementation and support partners. Prospective buyers should ensure they have identified necessary in-house talent and/or partner support before committing to this vendor.

Zoho

Zoho is a Niche Player in this Magic Quadrant. Its B2B marketing solution is a component of Zoho CRM Plus, which is mainly focused on offering users a general, simplified set of B2B marketing automation capabilities that are easy to learn. Its operations are geographically diversified, and its clients vary in size across a range of industries, with a slight concentration in high tech, insurance, education, healthcare and manufacturing. Its roadmap focuses on various types of lead scoring and machine learning implementations, including AI-driven segmentation, emotion-based lead scoring and prescriptive analytics.

Strengths

- **Customizable, role-based UIs:** Canvas for Zoho CRM provides a WYSIWYG editor for the Zoho interface. This enables clients to create multiple, role-specific versions of the Zoho UI to surface relevant information for different roles, and to increase adoption.
- **ML model transparency:** Zia, Zoho’s AI assistant, explains predictive lead scores and recommendations of specific campaigns for specific leads using key similarities and other attributes of both leads and campaigns. This level of transparency builds end-user confidence in ML models when compared with a “black box” approach.
- **Pricing model:** Zoho offers a transparent model, allowing buyers to purchase relatively granular product components (e.g., email execution) separately or as part of an integrated product, Zoho CRM Plus, which combines marketing, sales and service. Clients can elect for monthly billing, without a requirement for an annual or multiyear contract.

Cautions

- **Industry generalists:** Zoho does not currently offer industry-specific templates or configurations for buyers needing a specific quick-start program. Buyers choosing Zoho should plan to either define and document their own use cases or find a third-party provider, such as a solution available in Zoho’s application marketplace.
- **Account-based functionality:** Zoho provides limited support for organizations deploying ABM programs in comparison to many vendors in this research. For example, it offers limited account-level scoring functionality and does not integrate with any ABM platforms.
- **Web personalization:** Zoho’s website personalization capabilities rely on device-based attributes (e.g., browser, referring channel, date/time). Website personalization based on CRM

attributes (e.g., funnel stage, type of account, lead score) is only supported via API using custom field definition in Zoho Marketing Automation.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors were added to this Magic Quadrant.

Dropped

The following vendor was dropped from this year's Critical Capabilities and its companion Magic Quadrant due to its strategy adjustment to focus on B2C marketing:

- BSI

Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts believe are necessary for inclusion in this research.

To qualify for inclusion, vendors needed to demonstrate that they met the following criteria as of 12 May 2022:

- Proven ability to deliver B2B marketing automation functionality as defined below in the Functionality section.
- At least 20 customers using their B2B marketing automation solution(s).
- A minimum of 12 new customers within the past 12 months (not new contracts sold to an existing customer) that have successfully deployed the B2B marketing automation solution in a production implementation. A successful deployment is defined as being able to show production capability of more than one functionality from the Functionality criteria listed below.
- Demonstrated sales and customer support presence in a minimum of two of the following four regions: North America, Latin America, EMEA, Asia/Pacific. Presence is defined as regional coverage for three of the seven following industries:
 - High tech
 - Banking, financial services and insurance
 - Education
 - Healthcare (including providers, pharma and life sciences)

- Manufacturing
- Services
- Transportation
- Demonstrated business viability – for example, through three or more years of revenue growth; outside funding, such as venture capital, private equity or other sources of investment; or a reference list of successful customer implementations.
- An ecosystem of partners that can provide technology extensions or services such as system integration services, third-party applications, digital agency services or consulting and implementation services for the above selected geographic areas.
- At least \$25 million in FY21 revenue from the B2B marketing automation solution and enough cash on hand to fund a year of operations at the current rate of cash depletion.

Functionality

Customer Profile Management: Organizations seek to unify and synchronize their prospect, customer and account data across multiple channels, devices and life cycle stages for orchestration of lead workflows and engagement. Vendors should enable organizations to input, synchronize, cleanse and activate their own first-party data while augmenting existing contact data with third-party data sources. This functionality includes:

- An ability to aggregate, store and segment unqualified leads from other marketing, sales, data management and digital commerce systems.
- Support for integrated data cleansing capabilities to eliminate incomplete, redundant or duplicative lead information, or to associate valid data with known customer profiles, based on criteria set by the end-user organization.
- An ability to enrich leads and accounts with value-added information in real time or at time of entry and in batch. Examples include firmographic, intent and technographic data.
- An ability to support account-level profile management, such as functionality for:
 - Matching leads to accounts.
 - Maintaining distinct records for individuals and accounts.
 - Collecting and building firmographic, demographic and behavioral history for qualified and unqualified accounts as they mature through the lead management process.

Lead Scoring/Qualification: The ability to create multiple lead qualification and scoring processes using business rules and/or ML, including account-level scoring. Vendors should be able to support profile-based scoring criteria (e.g., demographics, firmographics) and behavioral-based scoring criteria (e.g., campaign engagement). Scoring may also be based on criteria such as

product ownership or usage, ideal customer profile, lead data fields, estimated customer value, opportunity value or seasonal criteria. Emphasis is given to systems that can create and manage multiple lead and account qualification and scoring processes simultaneously.

Lead Workflow: This functionality enables the creation and execution of multiple lead management workflows. These include helping organizations manage the lead life cycle from generation/collection to conversion and retention/upsell, and using a graphical UI suitable for nontechnical users. Lead workflow functionality dynamically routes leads and/or accounts through scoring, qualification, nurture, augmentation and sales team distribution processes, based on criteria such as geography and seller capacity. These criteria can be set by business rules and/or determined by ML-based predictive models. Vendors should be able to pass qualified leads to an SFA system, call/contact center application, sales engagement application or digital commerce platform for sales execution.

Multichannel Lead Management: The ability to execute a coordinated strategy across multiple channels or platforms, thus maximizing opportunities to interact with and engage prospective and existing customers. Vendors must be able to orchestrate at least three basic channels/endpoints and one advanced channel/endpoint within the same campaign. Emphasis is given to native channel support over direct connections with third-party applications, except where noted.

Basic channels/endpoints include:

- Email marketing (creation, send and response tracking)
- Web (landing pages, microsites and brand sites)
- Organic social media marketing (on platforms such as LinkedIn, Twitter and Facebook)
- Online webinars (native fulfillment not required)
- Direct mail marketing management (incorporation and management of direct mail campaigns; native fulfillment not required)

Advanced channels/endpoints include:

- Programmatic advertising/retargeting (including paid advertising on social networks)
- Conversational marketing apps (e.g., chatbots; native fulfillment not required)
- Digital commerce sites
- Video/interactive applications (e.g., YouTube, Instagram, TikTok; native fulfillment not required)
- Tradeshows/seminars/events (virtual and/or in-person)

Analytics and Measurement: Vendors must provide organizations with the ability to track, measure and report on operational, tactical and strategic KPIs to monitor and guide revenue

generation, including revenue guidance and insight based on current lead and account volumes/quality. They must also give organizations access to a set of preconfigured, out-of-the-box reports and data visualization/dashboarding capabilities appropriate for marketing, sales and executive users. These should include account-level metrics that go beyond a roll-up of lead data as well as access to reports on mobile devices (via web and/or app) used by customer-facing sales teams.

Marketers increasingly expect that vendors will offer AI-related technologies such as ML frameworks and support for predictive and/or prescriptive analytics and A/B testing as natively embedded capabilities. Accordingly, vendors should support at least one of the following advanced analytics functionalities:

- Predictive analytics/modeling that support automation of other marketing activities, such as journey design, content and next-best-action recommendations and autonomous campaign optimization.
- Prescriptive analytics that specify a preferred course of action for the end-user organization, including personalized content recommendations.
- Attribution – rule-based or algorithmic; multitouch attribution.
- Customer journey analytics – The ability to track and analyze the way customers and prospects use a combination of available channels to interact with an organization over time. It should cover the full scope of the lead management process, including human interactions such as with a call center, digital marketing (e.g., website, email and mobile app), customer service (e.g., live chat) and touchpoints with a limited two-way interaction (e.g., display advertising).

Integration With Other Applications: The ability to support bidirectional integration with CRM/SFA applications, call/contact center applications, sales engagement applications, digital commerce platforms and ABM platforms.

Vendors must support integration with CRM/SFA applications, including the ability to pass qualified leads on to a sales organization as an automatic function of the lead management process. Vendors must also support integrations with additional adjacent solutions in a minimum of two of the following platform categories as a standard, documented capability:

- Digital commerce
- Web content management
- Sales engagement
- ABM
- Customer data platform (CDP)

We also look for vendors to have integration libraries/marketplaces that enable marketing business users to add new data sources and/or execution channels to their B2B marketing automation solution.

Evaluation Criteria

The evaluation criteria and weights describe the specific characteristics and their relative importance that support Gartner's view of the market. These criteria are used to comparatively evaluate B2B marketing automation providers in this research.

Ability to Execute

Product or Service

The vendor's core goods and services that compete in and/or serve the defined market. These include current product and service capabilities, quality, feature sets, skills, etc. These can be offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

We specifically look for:

- Execution of the functionalities noted above in the Functionality section
- Evidence of a consistent product release/update cadence indicating the overall health of the B2B marketing automation solution
- Perceived ease of use of the B2B marketing automation solution

Weighting: *High*

Overall Viability

An assessment of the vendor's overall financial health, as well as the financial and practical success of its business unit. This criterion examines the likelihood of the vendor to continue to offer and invest in its B2B marketing automation platform, as well as its position in the vendor's current product portfolio.

We specifically look for:

- The health of the line of business offering B2B marketing automation solutions, as evidenced by a consistent ability to generate revenue in the B2B marketing automation market
- The vendor's history of success in developing world-class B2B marketing automation products
- Steady or improving customer retention rates

Weighting: *High*

Sales Execution/Pricing

The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the vendor's sales channels.

We specifically look for:

- The number of new customers acquired in the past year
- Cost and pricing competitiveness as they relate to competitors with comparable capabilities. This includes the published list price of the vendor's product (licensed or SaaS); any optional modules needed to meet the minimum product requirements defined above; annual maintenance fees (if any); and any required services, training, implementation fees, customization or related services
- Customer satisfaction with contracting and negotiation processes

Weighting: *Medium*

Market Responsiveness and Track Record

The vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness to changing market demands.

We specifically look for:

- The vendor's success in creating and meeting a consistent demand for the product, as measured by continuing client wins and product use among the vendor's installed base
- Demonstrated investment of resources in product development in new areas directly related or adjacent to B2B marketing automation platforms in response to market demand or need
- Consistent delivery of functionality specifically requested by customers

Weighting: *High*

Marketing Execution

The clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message in order to influence the market, promote the vendor's brand, increase awareness of products and establish a positive identification in the minds of customers. This awareness and positioning can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities.

We specifically look for:

- The vendor's ability to execute tactical and strategic marketing campaigns that drive a growing customer base

- The vendor's ability to create and extend its brand as a leading B2B marketing automation platform vendor and visionary in the space
- Evidence of the vendor's overall momentum and presence in the market

Weighting: *Medium*

Rationale for change from "High": *With many other high-priority criteria in this evaluation, Gartner believes a medium weighting is more appropriate for this criterion relative to its impact on marketers' use of vendor offerings.*

Customer Experience

Products, services and/or programs that enable the vendor's customers to achieve anticipated results with the B2B marketing automation platform were evaluated. Specifically, these include quality interactions by technical support or account support teams. They may also include ancillary tools, customer support programs, availability of user groups, service-level agreements, etc.

We specifically look for:

- The availability and viability of internal customer service and support capabilities, including support resources, systems, policy and global scope
- Accessibility of external resources, including partnerships with global system integrators, consulting organizations, technology partnerships and related internal or external resources such as third-party tools or consulting methodologies, customer-led social networking initiatives and the availability of user groups and SLAs
- Demonstrated ability to proactively help customers achieve positive business value

Weighting: *High*

Rationale for change from "Medium": *Gartner research shows low utilization of B2B marketing automation platform capabilities, suggesting increased importance of customer experience support.*

Operations

The vendor's ability to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

We specifically look for:

- The vendor's allocation of employees across key categories, including research and development, customer service and support, and sales

- The breadth of the vendor’s customer base, spanning geographic regions, industry verticals and implementation sizes
- Demonstrated ability to drive sustained user adoption of B2B marketing automation solution(s)

Weighting: *Low*

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	Low

Source: Gartner (September 2022)

Completeness of Vision

Market Understanding

The vendor’s ability to demonstrate a clear vision of their market, understand customer needs and translate them into products and services. We evaluate the vendor’s ability to listen, understand customer demands and shape or enhance market changes with their added vision.

We specifically look for:

- The vendor’s value proposition to the market

- A comprehensive vision of external market forces (e.g., B2B buying trends, changing regulatory landscape)
- Alignment with customer experience, digital business and execution optimization objectives

Weighting: *High*

Marketing Strategy

The vendor's ability to provide clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements.

We specifically look for:

- How effectively the vendor accentuates any unique functionality or value proposition
- How effective the vendor is at reaching the buying center(s) for companies purchasing B2B marketing automation solutions
- How effectively the vendor conveys differentiation and vision via virtual events, thought leadership programs and overall visibility

Weighting: *Medium*

Sales Strategy

The vendor's strategy for using appropriate networks including direct and indirect sales, marketing, service, and communication to sell its B2B marketing automation platform. We also look at a vendor's ability to partner with customers to extend the scope and depth of their market reach, expertise, technologies, services and customer base.

We specifically look for:

- The vendor's overall strategy in using direct and indirect sales channels to sell its B2B marketing automation platform to business and IT stakeholders
- Marketing, customer support and service or communication affiliates that extend the scope and depth of the vendor's market reach, skills, expertise, technologies and services of its customer base
- Depth of demonstrated system integration, technology, application, strategy consulting and distribution partnerships

Weighting: *Medium*

Offering (Product) Strategy

The vendor's approach to product development and delivery. We evaluate how well a vendor is able to emphasize market differentiation, functionality, methodology and features as they map to current and future requirements.

We specifically look for:

- The vendor's product vision relative to the functionalities noted above in the Functionality section
- A consistent product release/update cadence indicating the overall health of the B2B marketing automation platform
- Planned growth into new areas, such as improving marketing-sales execution, ABM, analytics, digital optimization or new technology directions such as AI/ML

Weighting: *High*

Business Model

The design, logic and execution of the vendor's business proposition to achieve continued success.

We specifically look for:

- The alignment of the vendor's go-to-market and sales strategies, including channel and reseller partnerships for particular industries, geographies and delivery models
- A product strategy that supports the business model
- A product license model (such as SaaS versus one-time license fee) that effectively supports the target market

Weighting: *Medium*

Vertical/Industry Strategy

The vendor's strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals.

We specifically look for:

- How effectively the vendor's solution(s) targets the current market
- The vendor's ability to direct resources, skills and investment to meet the specific marketing and sales needs of new market segments, users or vertical industry groups
- The vendor's scope of third-party partnerships with ISVs that offer industry-specific capabilities

Weighting: *Medium*

Innovation

The direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.

We specifically look for investment of financial, management or technology resources; expertise; or capital in the following areas intended to expand the scope, capabilities or global presence of the vendor and its products for its customers:

- Product development in new areas directly related or adjacent to B2B marketing automation
- Sales and support infrastructure
- Third-party and partner relationships
- Mergers and acquisitions

Weighting: *Medium*

Geographic Strategy

The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

We specifically look for:

- The percentage of employees allocated to different regions where the vendor has a sales and/or support presence
- The depth and scope of partners available in those regions
- Ability to tailor go-to-market strategy for regional differences

Weighting: *Medium*

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	Medium

Evaluation Criteria ↓	Weighting ↓
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	Medium
Geographic Strategy	Medium

Source: Gartner (September 2022)

Quadrant Descriptions

Leaders

Leaders provide functionality that support all assessed B2B marketing automation functional capabilities, most notably customer profile management, lead scoring/qualification, analytics and measurement, and integrations with other applications. This broad support enables Leaders to consistently meet client needs across all three core B2B marketing automation use cases (new customer acquisition, customer retention/upsell and account-based marketing). They are also designed to address the needs of global, large enterprise clients. Leaders provide deep integrations with complementary systems, such as CRM/SFA, ABM and digital commerce platforms, whether they be third-party applications or solutions within each Leader's broader product suite. Leaders have expansive product roadmaps, demonstrating commitment to helping customers unify customer data and manage a consistent experience across the customer life cycle.

Challengers

Challengers offer support across all of the assessed B2B marketing automation functional capabilities, but they may lack the depth of Leaders. Similarly, they have not demonstrated commitment to product innovation that is on par with Leaders. Their limited functional

capabilities depth, in comparison to Leaders, could have its benefits, in that clients may enjoy a more simplified product experience. This might be attractive for marketing teams that have struggled to drive adoption of complex marketing automation tools in the past.

Visionaries

Visionaries have a strong and unique vision for delivering B2B marketing automation capabilities. They excel in offering emerging functionality, including AI/ML to support next-best-action decisioning, that can help shape the direction for how this market enables clients to engage with their customers. Their ability to execute may be hampered due to a limited focus on the common use cases of B2B marketing teams.

Niche Players

Niche Players provide a basic set of B2B marketing automation functions, typically to a narrow market segment. Niche Players may excel in supporting clients of certain industries, geographic regions or business sizes, but they typically lack the operations, partners, product capabilities or vision to expand their reach. Niche Players demonstrate a commitment to product innovation, such as AI/ML to support predictive lead scoring. They maintain quite low market visibility in comparison to Leaders. Niche Players appeal to marketing leaders who value the segment-aligned support that many Niche Players offer, or marketing leaders who have constrained budgets.

Context

This research highlights marketing teams' increasing reliance on B2B marketing automation platforms to support demand generation planning, execution and measurement. Marketing automation platforms not only support intelligent, automated, marketing-led customer engagement, but also serve as a key tool in bridging marketing and sales teams. Marketing automation platforms support the generation/collection and qualification of leads, and they offer lead routing functionality to enable marketing to pass those leads to the most appropriate sales team member.

Given the role that B2B marketing automation platforms can play in supporting the end-to-end revenue life cycle, be sure to engage business stakeholders who play a role in customer engagement, especially sales leaders, in your evaluation of vendors within this market. Even the most effective marketing programs won't succeed without alignment with other stakeholders who support customer engagement later in the journey.

As a digital marketing leader considering a B2B marketing automation platform, you should:

- Study the evaluation criteria by which we determined each vendor's Ability to Execute and Completeness of Vision.
- Evaluate the vendors' Strengths and Cautions.
- Assess vendors in any of the four quadrants, with a focus on those that align with your requirements and goals.

- Use this Magic Quadrant research in conjunction with our companion [Critical Capabilities for B2B Marketing Automation Platforms](#) research, other publications related to B2B marketing best practices and our analyst inquiry service.

As you build your business case and RFPs or POCs, factor in the time, cost and complexity of integrating your B2B marketing automation solution with complementary solutions in your martech stack and core organizational systems, most notably CRM/SFA.

Ensure that you have identified a specific set of use cases to guide your evaluation. Also, validate not only that vendors can support those use cases but that you're confident in your team's ability to operate each evaluated vendor's platform to fulfill those use cases. Similarly, ensure that your organization develops a comprehensive plan to upskill end users of your B2B marketing automation solution on key functionality. Explore vendor support packages, educational resources and third-party managed service providers to help with onboarding, training and ongoing education.

Market Overview

In Gartner's 2022 CMO Spend and Strategy Survey, when B2B CMOs were asked what are the ways marketing can add the most unique value to successfully execute organizational strategy, the No. 1 response was demand generation. However, achieving high demand generation performance is difficult for many organizations, given that 60% of B2B CMOs say that managing customer journeys is more complex and difficult than a few years ago.

A major reason why customer journey management can be so difficult is buyer complexity. B2B buying groups consist of an average of four to 10 stakeholders, each of whom consume information to support the purchase process from four to 10 sources, according to Gartner's 2021 B2B Buyer Survey. Buyers are engaging with a blend of online and offline channels, using a mix of sales rep assistance and self-navigation to complete key tasks along their buying journey.

There is no silver bullet for B2B marketing leaders looking to overcome the complexities of managing customer journeys. Success is dependent on a range of organizational capabilities, ranging from talent and process management to customer insight collection and content development. That said, B2B marketing automation platforms offer potential as a powerful tool to help organizations orchestrate customer engagement across the customer life cycle, gather and activate customer data, and measure the effectiveness of marketing programs.

Marketing automation tools have become a linchpin of the typical B2B marketing technology stack. However, full platform adoption is mixed. In Gartner's 2022 Marketing and Communications Technology Survey, among B2B respondents who indicated they are using a B2B marketing automation platform, only 37% cited their utilization as high, corresponding to between 67% and 100% use of available functionality.

This utilization gap highlights the importance of taking a strategic approach to marketing automation platform procurement and implementation. Define desired use cases early in procurement processes, which will enable you to select the marketing automation solution that

best aligns to your organization's needs and desired business outcomes. Furthermore, assess your team's strategic and technical skills to ensure that you have the internal resources to effectively utilize your marketing automation solution. Then, develop a plan to address any identified skills gaps through training, hiring new talent and/or leveraging the support of vendor services or implementation partners.

Trends Shaping the Market for B2B Marketing Automation Platforms

AI/ML to Support the Automation of Customer Journey Orchestration

B2B marketing automation solutions have been using machine learning to score leads for several years (in terms of likelihood to close and ranking across the pipeline). While nearly every vendor in this research offers ML-powered lead scoring, many of them also use artificial intelligence or machine learning to support the automation of customer journey orchestration. Gartner defines customer journey orchestration as the organization of a set of recommended interactions to create or respond to customer signals throughout the customer life cycle. Vendor capabilities in this capacity vary. Common applications of AI/ML to support customer journey orchestration in this market include next-best-channel, next-best-content and next-best-offer recommendations. They also include functionality for dynamic personalization and the management of contact lists based on predictive attributes, such as likelihood to attend an event. This space is rapidly evolving, so prospective buyers must take a use-case-based approach to assessing the potential value of different applications of AI.

Increased Transparency of Predictive Analytics Capabilities

B2B marketers are enthusiastically embracing predictive analytics capabilities that are built on top of AI/ML models. So, they are being treated to a panoply of tools developed to help assist with delivering campaigns at scale without the need for auxiliary support from data science teams. However, vendor offerings have material differences: Some solutions provide transparency about what variables are being used as inputs into specific models, while others don't. Similarly, some solutions allow users to tune the degree to which different variables are factored into the ML calculus, while others are less flexible. As marketers give preferential treatment to leads vetted by predictive AI/ML models, it's of even greater importance for the respective B2B marketing automation products to be able to demonstrate the efficacy of those models to drive more effective adoption.

Marketing Automation Offered as Part of an Integrated Suite

B2B marketing leaders have shifted recently to buy more technology components from a marketing suite provider. In Gartner's 2022 Marketing and Communications Technology Survey, 63% of B2B marketing respondents say they strongly prefer or lean toward an integrated suite approach over a best-of-breed approach. This offers the potential benefit of helping marketing leaders reduce the redundancy among different systems and to utilize more of their existing technology stack. Most vendors evaluated in this research provide additional and complementary product capabilities for marketers, and a band of vendors provides a broader CRM suite of capabilities covering sales, service, marketing and digital commerce use cases. Some even offer

a CDP. However, some vendors' B2B marketing automation products are becoming increasingly reliant on the CDP for the delivery of advanced marketing automation functionality and supported use cases.

The benefits of an integrated suite are that one vendor provides more capabilities – and hence, in theory, solves often painful integration implementation issues out of the box. The contrary view is that a user may get “second-best” functionality in some product areas, and competitive differentiation may be harder to achieve than when using a best-of-breed approach. Each organization will have its own view of this set of issues. However, where the marketing automation tool is dependent on these additional capabilities, pricing and packaging mean additional chargeable modules may be required. When evaluating marketing automation products, prospective buyers should be sure to push vendors to offer full transparency re: which features are available through their core B2B marketing automation product. Buyers also need to know which features require integration with additional products in the vendor's suite.

Distinctive Value for Both ABM Platforms and Marketing Automation

In last year's Magic Quadrant research, Gartner suggested that B2B marketing automation platforms and ABM platforms will likely merge into a new category, combining the best of what each market has to offer. Marketing automation vendors continue to make progress in supporting ABM use cases since last year's Magic Quadrant. Improvements include the development of more sophisticated account-level scoring capabilities, as well as the ability to launch campaigns and manage journeys for dynamically updated target account lists. At the same time, many of the leading ABM platform vendors added native email functionality to their roadmaps for 2022. Despite progress made by vendors in each market, both platforms still offer enough distinctive value to be evaluated independently. While B2B marketing automation platforms might offer sufficient support for some organizations' ABM needs, marketing leaders should consider the purchase of a separate ABM platform when running ABM programs for 100+ target accounts.

Integrations With Digital Commerce Platforms

Digital commerce is no longer the future of B2B buying – it is the present. In fact, 72% of B2B buyers in Gartner's 2021 B2B Buyer Survey reported completing a recent significant purchase transaction through digital commerce, as opposed to traditional rep-led procurement. Marketing automation integrations with digital commerce platforms enable marketers to run campaigns intended to drive digital commerce transactions, such as abandoned cart campaigns. Additionally, integrations with digital commerce platforms can offer another data source to support audience creation/segmentation and marketing measurement. Nearly every vendor evaluated in this research offers integrations with digital commerce platforms, although the range of available integrations varies among vendors. A handful of vendors offer their own digital commerce platform as a separate offering.

Evidence

2022 Gartner CMO Spend and Strategy Survey: The purpose of this survey was to understand the marketing organization's strategic priorities and budget allocations for 2022. The research was

conducted online from February through April 2022 among 405 respondents in the U.S. (38%), Canada (9%), France (7%), Germany (9%), the U.K. (28%), Denmark (3%), Sweden (4%) and Norway (1%). Respondents were required to have involvement in decisions pertaining to setting or influencing marketing strategy and planning, as well as have involvement in aligning marketing budget/resources. Seventy-four percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (66), tech products (38), manufacturing (49), consumer products (42), media (35), retail (40), healthcare providers (57), IT and business services (35), and travel and hospitality (43).

Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

2021 Gartner B2B Buyer Survey: This survey was administered in November and December 2021, and includes data from 725 B2B buyers from the U.S., Canada, the U.K., Australia, India, Singapore, Germany and Sweden. Respondents were required to be employed full-time at an organization with total revenue of at least \$250 million and have participated in a significant B2B purchase decision. A significant purchase decision was defined as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Respondents were instructed to answer questions based on their experience with this recent purchase and a specific supplier they considered. Respondents evaluated the quality of the purchase decision and provided insights into various stages of their recent purchase decision.

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2022 Gartner Marketing and Communications Technology Survey: The purpose of this survey was to investigate the state of technology acquisition, adoption and use, including best practices for managing the technology stack, specific technologies in use and the degree of their adoption. The research was conducted online from May through early June 2022 among 422 respondents, with 228 in North America (the U.S. and Canada), 159 in Western Europe (the U.K., Germany and France), and 35 in the Nordic region (Denmark, Norway and Sweden). Respondents were required to be senior decision makers, where the majority of their daily responsibilities are mostly aligned with either business- or IT-focused marketing (n = 324) or business- or IT-focused communications (n = 98). Seventy-eight percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (57), tech products (37), manufacturing (49), consumer products (50), media (40), retail (56), healthcare (52), IT and business services (32), and travel and hospitality (49).

This research focuses on the 324 respondents aligned with marketing. Fifty-six percent of marketing respondents reported directly in the marketing function, and the remainder reported in the marketing and communications; marketing communications; brand management; customer experience; or product marketing and management function. Sixty-five percent of these respondents were solely responsible for making decisions related to marketing technology, while the rest were either a leader of or an advisor to the group responsible for making decisions on marketing technology.

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Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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