

February 3, 2006

# The Forrester Wave™: Enterprise Marketing Platforms, Q1 2006

by Elana Anderson

TECH CHOICES



February 3, 2006

## The Forrester Wave™: Enterprise Marketing Platforms, Q1 2006

Unica Leads The Pack, While Siebel Is Best For B2B In Our Lab-Based Evaluation

by **Elana Anderson**

with Chris Charron, Sally M. Cohen, and Jennifer Joseph

### EXECUTIVE SUMMARY

More than three out of four marketers say that marketing needs a comprehensive, integrated application suite to improve its effectiveness. Forrester refers to this broader suite as the Marketing Technology Backbone, and we call its application layer the enterprise marketing platform (EMP). To assess the state of the EMP market, Forrester evaluated the strengths and weaknesses of top EMP vendors across 168 criteria. We found that while there are pockets of excellence in areas like campaign management and process management, solutions fall short of delivering a comprehensive suite. To help firms select the right product, this report includes an interactive vendor comparison tool that provides detailed product evaluations and customizable rankings.

### TABLE OF CONTENTS

#### 2 **Marketers Want A Comprehensive Application**

Three Vendor Categories Converge On EMP

#### 4 **Enterprise Marketing Platforms Evaluation Overview**

Criteria: Product, Strategy, And Market Presence

Methodology: Surveys, On-Site Labs, And References

Vendors Evaluated

#### 7 **There Are Pockets Of Excellence, But All Vendors Have Shortcomings**

#### 11 **Vendor Profiles**

#### RECOMMENDATIONS

#### 13 **How To Use This Forrester Wave Analysis**

#### 15 **Supplemental Material**

### NOTES & RESOURCES

Forrester conducted lab-based evaluations in October and November 2005. We surveyed 373 marketers about marketing technologies and interviewed nearly 50 vendor and user companies, including: Autodesk, Bank of America, Home Depot, Kimberly-Clark, Limited Brands, L'Oréal, Pfizer, and Washington Mutual.

#### **Related Research Documents**

["The Forrester Wave™: Database Marketing Service Providers, Q1 2006"](#)

January 10, 2006, Tech Choices

["The Forrester Wave™: Email Marketing Service Providers, Q4 2005"](#)

December 22, 2005, Tech Choices

["The Marketing Technology Backbone"](#)

September 30, 2004, Forrester Big Idea

## MARKETERS WANT A COMPREHENSIVE APPLICATION

In December 2005, Forrester surveyed 300 marketers about their technology adoption plans and approach to purchasing technology. More than three-quarters of our respondents said that they want a more comprehensive, integrated application suite to boost effectiveness (see Figure 1). With that as backdrop, we set out to evaluate the progress that marketing automation leaders — most of whom have historically focused on campaign management — are making toward extending their capabilities to meet these broader needs.

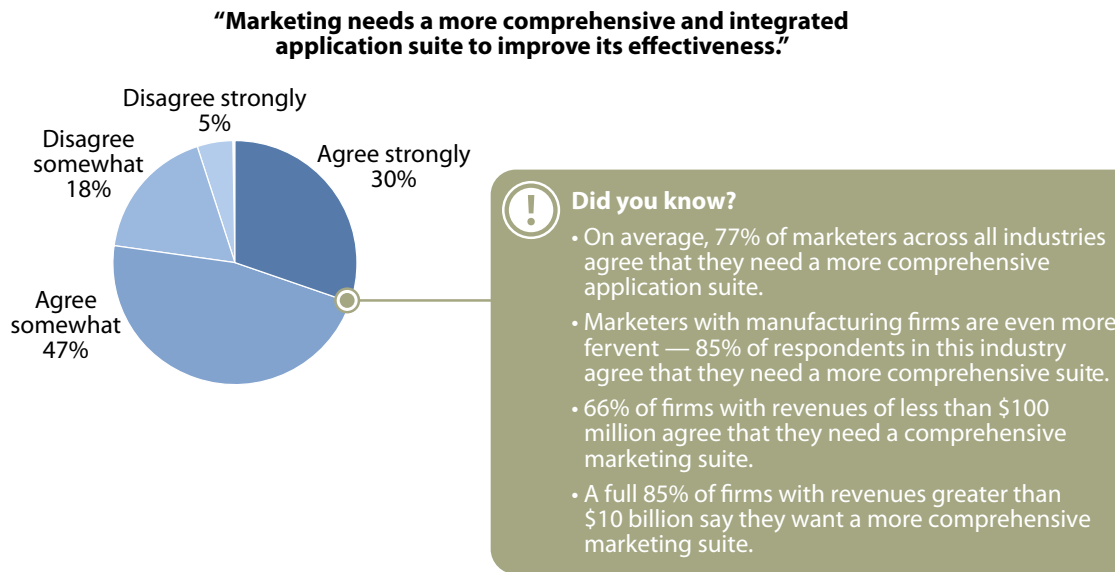
Forrester calls this integrated marketing infrastructure the Marketing Technology Backbone.<sup>1</sup> The backbone: 1) integrates marketing programs across channels and lines of business; 2) optimizes customer contacts; 3) tracks customer data; and 4) measures performance across the marketing mix. The EMP is the application layer of the Marketing Technology Backbone — and is an evolution from what many have previously called marketing automation (see Figure 2).

## Three Vendor Categories Converge On EMP

The vendors we evaluated fall into three segments:

- **Marketing specialists.** Two of the vendors we assessed cater exclusively to marketing organizations but bring different legacies to this evaluation. Aprimo is known for its strength in marketing process and resource management. Unica got its start in customer analytics and campaign management functionality designed to meet the needs of sophisticated, high-volume direct marketers. Today, both vendors are expanding their suites into the other vendors' historical turf.<sup>2</sup>
- **Data and analytics specialists.** SAS and Teradata have long track records as successful and stable technology providers. SAS is famous for its advanced analytical tools, which are used by nearly 40,000 clients worldwide, including most of the high-end, direct-to-consumer marketing organizations we interact with. SAS first threw its hat into the marketing automation ring in 2001. Teradata, a division of NCR, is best known for its high-end enterprise data warehouse technology. Teradata entered the marketing automation market in 1999.
- **Enterprise application vendors.** Four vendors — Oracle, SAP, Siebel Systems, and SSA Global (Epiphany) — fall into this segment. Each casts its net beyond marketing and considers marketing to be one of the pillars of a broader CRM suite. With SSA Global's recent acquisition of Epiphany and Oracle's just-closed acquisition of Siebel, the major CRM applications have also now been consolidated into enterprise suites that extend from the front office to the back office. Of the vendors in this group, SSA Global is the only vendor that initially focused on customer analytics and marketing. The others focused first on operational CRM and later added analytics and marketing.

**Figure 1** Marketers Want A More Comprehensive Application To Improve Effectiveness



Base: 302 marketers

Source: Forrester’s Q4 2005 Marketing Panel Online Study

Source: Forrester Research, Inc.

**Figure 2** The Enterprise Marketing Platform Is An Evolution Of Marketing Automation

	Marketing automation	Enterprise marketing platform
Scope	Function, line-of-business, or direct marketing focus	Corporate governance, traffic coordination, and process management
Users	Small group of power users	Large group of distributed users, highly varied skills and roles
Programs	Fixed schedule, few segments, batch -and-blast	Higher volume and velocity, new types (e.g., event-triggered, interactive)
Channels	Outbound: direct mail, telemarketing	New outbound (e.g., triggers, transactional messages, targeted television) and inbound
Data	Customer data warehouse (CDW)	CDW and other sources, more timely access
Analytics	Separate environments	In-line integration (e.g., real-time propensity scores, optimization)
Measurement	Response analysis, campaign ROI	Marketing KPIs, market mix analysis, return on marketing investment

Source: Forrester Research, Inc.

## ENTERPRISE MARKETING PLATFORMS EVALUATION OVERVIEW

To assess the state of the enterprise marketing platform market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of the top EMP vendors against our definition of the growing breadth of capabilities required to adequately address the needs of marketing organizations.

### Criteria: Product, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 3). We evaluated vendors against approximately 168 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each vendor's application suite along eight dimensions: marketing planning and resource management, campaign management, interaction management, lead management, analytics and reporting, other functional and vertical capabilities, application usability, and architecture.
- **Strategy.** We compared the product and go-to-market strategies of each vendor with Forrester's forward-looking vision of the enterprise marketing platform market to assess how well each vendor is positioned for future success. We also evaluated solution costs and vendor delivery models.
- **Market presence.** Nearly 60% of marketers say their firms prefer to buy best-of-breed technologies to support their marketing efforts.<sup>3</sup> With this in mind, we balanced between information about the company overall and about the company's penetration in enterprise marketing software. We combined information about each vendor's installed base, recent sales momentum, revenues, employee numbers, and partnerships to determine current market presence.

**Figure 3** Evaluation Criteria

CURRENT OFFERING	
Background information	What product modules and versions were evaluated?
Marketing planning and management	How well does the product support marketing planning and management activities?
Campaign management	How robust and flexible are the product's tools for defining marketing communications?
Interaction management	How strong are the product's capabilities for making marketing communications decisions within the context of a customer interaction?
Lead management	How strong are the product's lead scoring and routing tools, for use in conjunction with a direct sales force?
Analytics and reporting	How strong are the product's reporting, analysis, data mining, and predictive modeling tools?
Other functional and vertical capabilities	What vertical capabilities and other major related functions does the vendor offer?
Application usability	How easy to use and consistent is the vendor's solution?
Architecture	Does the system provide a scalable, extensible, standards-based environment, including support for international data and common operating systems, programming environments, and databases?
STRATEGY	
Product strategy	How strong is the vendor's product strategy?
Corporate strategy	How committed is the vendor to delivering technology to improve the marketing process?
Cost	What is the cost of this product?
MARKET PRESENCE	
Installed base	How strong is the vendor's installed base of customers for this product and for all products?
Customer references	How strong are the vendor's references?
Financials	How strong is the vendor's financial position?
Employees	How many engineers does the vendor have dedicated to this product? How big is the vendor's sales presence?
Partnerships	How strong are the vendor's partner relationships?

Source: Forrester Research, Inc.

## Methodology: Surveys, On-Site Labs, And References

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls, where necessary, to gather details of vendor qualifications.
- **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenarios, creating a level playing field by evaluating every product on the same criteria.
- **User surveys.** Forrester surveyed vendor clients and executives from our marketing, database marketing, and interactive marketing panels about their technology needs. The responses to this survey informed our criteria weightings.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with five to eight of each vendor's current customers.

## Vendors Evaluated

Forrester included eight vendors in the assessment: Aprimo, Oracle, SAP, SAS, Siebel Systems, SSA Global (Epiphany), Teradata, and Unica. Each of the vendors:

- **Offers a broad-based marketing application suite.** All support the full marketing life cycle, are focused on multichannel marketing solutions, and have some level of functionality to address each of the functional dimensions we evaluated.
- **Integrates with the customer data infrastructure.** As mass media approaches lose effectiveness and new addressable and interactive channels become mainstream, direct marketing will become the prevalent marketing communication tactic.<sup>4</sup> Since customer data is fundamental to driving effective direct marketing communications, we only included vendors that have strong inherent data management capabilities or the ability to seamlessly integrate with an existing customer data infrastructure.
- **Targets large enterprises with complex marketing needs.** The vendors that we included focus on — and have solid references with — Fortune 1000 enterprises with large marketing organizations and complex requirements.

Our evaluation methodology depends on significant input from the vendors, including lab evaluations, questionnaires, and customer references. Although SAP participated in much of the process, it was unable to commit to the full lab day and provided a two-hour demo in lieu of the lab

evaluation. Oracle declined to participate in the formal evaluation process. In these two cases, our analysis is based on a partial set of inputs, including information that the vendors have shared with us, client conversations, and our general understanding of the industry.<sup>5</sup>

### THERE ARE POCKETS OF EXCELLENCE, BUT ALL VENDORS HAVE SHORTCOMINGS

Firms with different business models in different industries have diverse requirements, so the vendors that are best suited for some customers may be a poor fit for others. To illustrate this, we scored the vendors against two scenarios:

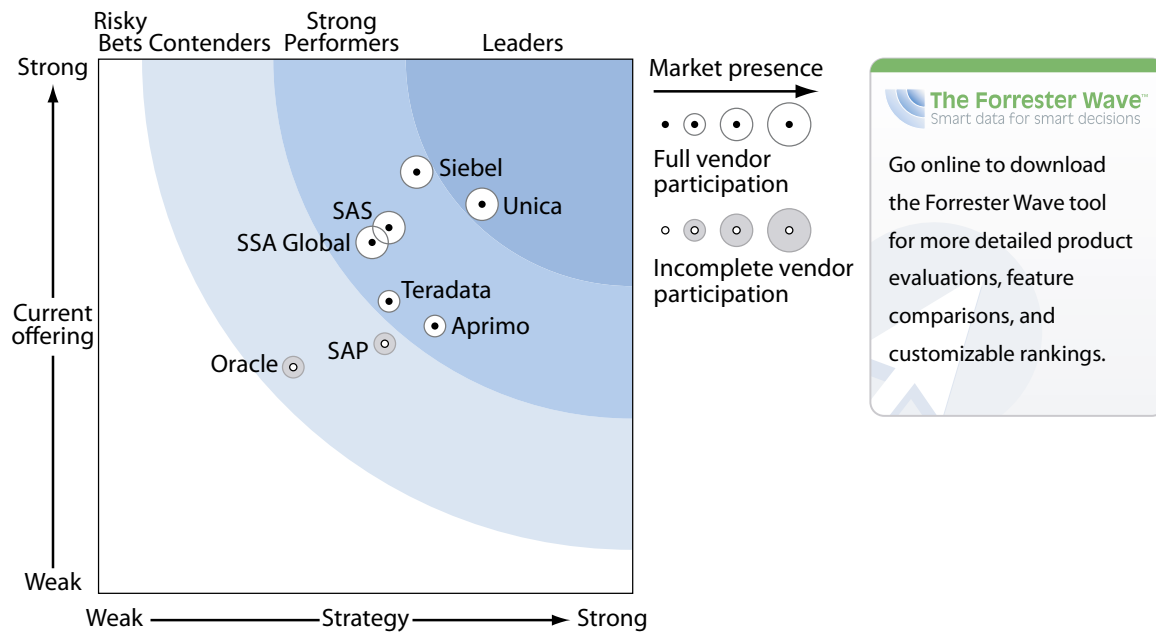
1. **B2C marketing.** Many of the firms that have traditionally adopted enterprise marketing technology are direct-to-consumer marketers that implement the technology to help build, manage, and execute complex direct marketing campaigns against very high volumes of customer data.
2. **B2B marketing.** Most B2B firms don't need tools optimized for complex customer segmentation and high-volume direct marketing. Rather, B2B marketers need capabilities that enable them to track, qualify, and nurture leads until they become viable opportunities that warrant a handoff to sales. They also need marketing measurement that can close the loop and help rationalize marketing's contribution in a sales cycle that includes many players and interactions over a long period of time.

The evaluation uncovered a market in which (see Figure 4 and see Figure 5):

- **No single vendor gets top marks across the board.** Although Aprimo, SAS, SSA Global, and Unica each rise to the top as best-in-class for specific functional areas that we assessed, every vendor has shortcomings, given the scope of our evaluation.
- **Unica leads the pack in the B2C scenario.** Unica's legacy in campaign management pays off in the B2C scenario. Clients praise Unica's flexibility and its interface that "works like a marketer thinks." We hear from clients and service providers alike that Unica is the "gold standard" when it comes to meeting the needs of sophisticated, high-volume direct marketing organizations. Unica pairs its best-in-class campaign management with capable marketing planning and resource management, interaction management, lead management, and well-integrated analytics.<sup>6</sup>
- **Siebel has the broadest overall solution and wins the B2B scenario.** According to the clients we spoke with, Siebel's v7.7 release in the spring of 2004 was a "huge leap forward," and the solution scored well in both of our evaluation scenarios. The campaign design and segmentation tools are very strong and worthy of consideration by B2C marketers, particularly those that already use other Siebel applications. But clients agree that out of the box, the product is more

hardwired for B2B firms. In addition to strong campaign management, the product offers very capable functionality for marketing planning and resource management, lead management, event management, and partner relationship management. The product also incorporates top-notch analysis tools. These capabilities, along with tight integration with Siebel Sales, make for a very competitive B2B marketing solution for large enterprises.

**Figure 4** Forrester Wave™: Enterprise Marketing Platforms, B2C, Q1 '06



Source: Forrester Research, Inc.

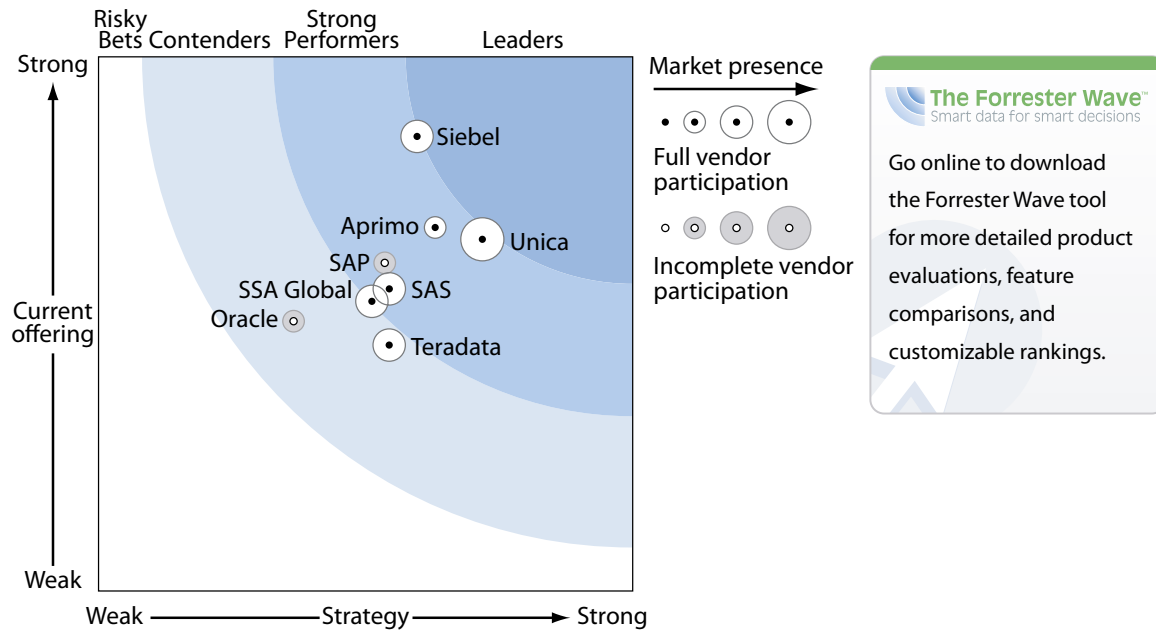
**Figure 4** Forrester Wave™: Enterprise Marketing Platforms, B2C, Q1 '06 (Cont.)

	Forrester's Weighting	Aprimo	SAS	Siebel	SSA Global	Teradata	Unica
<b>CURRENT OFFERING</b>	50%	2.48	3.40	3.92	3.26	2.71	3.62
Background information	0%	0.00	0.00	0.00	0.00	0.00	0.00
Marketing planning and resource management	10%	4.74	1.93	3.99	1.85	1.09	3.40
Campaign management	25%	2.10	3.52	3.88	3.34	3.27	4.09
Interaction management	10%	0.75	2.35	3.75	4.20	1.25	3.80
Lead management	5%	4.75	0.75	4.75	1.25	1.75	3.00
Analytics and reporting	20%	1.40	4.91	3.87	3.30	3.78	3.15
Other functional and vertical capabilities	0%	1.55	1.75	3.75	1.50	1.45	1.95
Application usability	10%	3.30	3.40	3.30	3.30	1.90	4.40
Architecture	20%	2.78	3.66	4.18	3.83	3.13	3.27
<b>STRATEGY</b>	50%	3.15	2.72	2.98	2.56	2.72	3.59
Product strategy	50%	2.90	2.90	3.10	2.53	2.90	3.25
Corporate strategy	40%	3.50	2.50	3.00	2.50	2.50	4.00
Cost	10%	2.95	2.65	2.30	2.95	2.65	3.60
<b>MARKET PRESENCE</b>	0%	2.91	3.36	3.44	3.48	2.89	4.00
Installed base	30%	2.40	3.45	3.85	3.65	2.80	4.15
Customer references	30%	4.00	2.50	3.00	4.00	2.50	4.00
Financials	15%	3.20	4.45	3.15	2.40	3.00	4.70
Employees	15%	2.70	5.00	4.40	3.30	4.60	3.20
Partnerships	10%	1.00	1.60	2.50	3.30	1.60	3.70

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

**Figure 5** Forrester Wave™: Enterprise Marketing Platforms, B2B, Q1 '06



Source: Forrester Research, Inc.

**Figure 5** Forrester Wave™: Enterprise Marketing Platforms, B2B, Q1 '06 (Cont.)

	Forrester's Weighting	Aprimo	SAS	Siebel	SSA Global	Teradata	Unica
<b>CURRENT OFFERING</b>	50%	3.38	2.81	4.23	2.69	2.28	3.27
Background information	0%	0.00	0.00	0.00	0.00	0.00	0.00
Marketing planning and resource management	15%	4.78	1.93	4.09	1.85	1.09	3.40
Campaign management	20%	2.75	3.25	4.33	2.76	2.38	3.28
Interaction management	3%	1.20	2.35	3.60	4.05	1.70	3.95
Lead management	20%	4.75	0.75	4.75	1.25	1.75	3.00
Analytics and reporting	12%	2.04	4.79	4.38	3.27	3.49	2.41
Other functional and vertical capabilities	0%	1.55	1.80	3.80	1.40	1.35	1.90
Application usability	10%	3.30	3.40	3.30	3.30	1.90	4.40
Architecture	20%	2.78	3.66	4.18	3.83	3.13	3.27
<b>STRATEGY</b>		3.15	2.72	2.98	2.56	2.72	3.59
Product strategy	50%	2.90	2.90	3.10	2.53	2.90	3.25
Corporate strategy	40%	3.50	2.50	3.00	2.50	2.50	4.00
Cost	10%	2.95	2.65	2.30	2.95	2.65	3.60
<b>MARKET PRESENCE</b>		2.91	3.24	3.44	3.48	3.07	4.03
Installed base	30%	2.40	3.55	3.85	3.65	2.90	4.25
Customer references	30%	4.00	2.00	3.00	4.00	3.00	4.00
Financials	15%	3.20	4.45	3.15	2.40	3.00	4.70
Employees	15%	2.70	5.00	4.40	3.30	4.60	3.20
Partnerships	10%	1.00	1.60	2.50	3.30	1.60	3.70

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

## VENDOR PROFILES

Because we evaluated the vendors for two scenarios, B2B and B2C, we present these profiles in alphabetical order, rather than based on ranking.

- Aprimo.** Aprimo provides best-in-class tools for managing marketing activities and assets. But its customer data infrastructure, segmentation, and analysis capabilities are notably weak, particularly given the requirements of direct-to-consumer firms. Aprimo intends to fill this gap with a major release in Q2 2006, but we think that it will take 12-18 months before the new functionality is competitive. Today, Aprimo is a good choice for firms that want a best-of-breed marketing resource management (MRM) solution or large B2B companies seeking a full marketing suite that blends top-notch process management, dialogue marketing, lead management, and asset management.<sup>7</sup>

- **Oracle.** Oracle Marketing (v11i) is part of Oracle E-Business Suite. The functional strength of the solution lies in its overall breadth, with some functionality in virtually every dimension we considered. Though broad, the solution lacks functional depth in most areas. Clients tell us they select Oracle because they buy into its total application approach and they know that the vendor “will be around and continue to build capabilities over time.” Several clients that we spoke with told us they spent a lot of time and resources to customize the application to their needs. Clients also complained that the user interface is “not built for marketers” and that “way too many clicks” are required to define desired processes or marketing activities. Some B2C clients we spoke with question the vendor’s commitment to meeting the needs of high-end marketers, while B2B marketers are generally more satisfied. Across the board, clients are bullish about the Siebel acquisition.
- **SAP.** SAP is making legitimate headway with SAP CRM Marketing in its installed base. The marketing functionality is broad and encompasses capabilities within all of the functional dimensions we evaluated. The solution is a best fit within SAP’s installed base, and the vendor has been particularly focused on building capabilities to meet the needs of marketers in the consumer packaged goods, manufacturing, and high-tech industries. Some SAP clients complain about the number of clicks required to complete a task, but once appropriately configured, the product provides business users with a significant amount of functionality that is fairly straightforward to use. Technically savvy power users — or users that want to define logic that has not been preconfigured by an administrator — will find themselves constrained by the tool.
- **SAS.** SAS’s Customer Intelligence suite incorporates several functional applications, including Marketing Automation, Marketing Optimization, and Interaction Management. The suite stands out for its best-in-class data mining, strong integrated analytics, and solid campaign management, but it falls short on marketing planning and resource management, as well as real-time interaction management.<sup>8</sup> Previous releases of Marketing Automation and Marketing Optimization faltered on performance, although SAS’s most recent release is reported to have addressed the problems. SAS is a good fit for sophisticated direct marketers in financial services, retail, communications, and media verticals.<sup>9</sup>
- **Siebel.** Siebel Systems provides the broadest functionality in the market. But with the ink on Oracle’s acquisition of Siebel still wet, a lot of uncertainties exist regarding the future of the marketing application and how prominently it figures into Oracle’s product strategy. The application’s complexity makes installation difficult, due to the amount of IT involvement required to configure the product to fit a marketer’s desired process. The marketing suite incorporates very strong functionality for marketing planning and resource management, lead management, event management, and partner relationship management, as well as top-notch analysis tools. These capabilities, along with tight integration with Siebel Sales, make for a

very competitive B2B marketing solution for large enterprises. Although Siebel still lacks a critical mass of high-end, direct-to-consumer marketers, we find that the campaign design and segmentation tools are very strong and worthy of consideration by B2C marketers, particularly those that are Oracle RDBMS shops and also use other Siebel applications — like Siebel Service.<sup>10</sup>

- **SSA Global.** SSA Global acquired Epiphany in August 2005, rounding out its ERP capabilities with Epiphany's full suite of CRM functionality. Today, the SSA Marketing Suite provides best-in-class interaction management tools, well-integrated analytics, and a solid campaign management solution. But the SSA Marketing Suite focuses mainly on direct marketing — it lacks marketing planning and resource management functionality — and requires a proprietary data mart.<sup>11</sup> The SSA Marketing Suite is a great choice for current SSA Global customers. Inbound Marketing should be short-listed by financial services and communications firms. Outbound Marketing is a good choice for midvolume direct mailers that do not yet have a marketing data mart in the financial services, travel and hospitality, communications, media, manufacturing, and retail industries.<sup>12</sup>
- **Teradata.** Teradata CRM (TCRM) version 5.1 has strong functionality for analytics and customer segmentation, but the application focuses only on direct marketing. TCRM is dependent on the Teradata RDBMS, and the application lacks functionality, including interaction management and marketing planning and resource management. These factors, as well as the vendor's sluggish product release history — including the delay of its upcoming v6.0 release — represent room for improvement. Teradata clients seeking solid campaign management that is optimized for their database should put TCRM on their shortlists, as should any client looking to adopt Teradata for enterprise data warehousing.<sup>13</sup>
- **Unica.** The only vendor to fall into the Leader category in this evaluation, Unica is tops because of its strong campaign management and usability. Unica also has the strongest strategic vision in the market and is focused on building out its marketing suite to support relationship marketing, Internet marketing, and brand marketing. Unica is not best-of-breed across its complete offering. Its reporting, security, and user administration functionality needs improvement, and it is still evolving its planning and resource management, interaction management, and lead management capabilities.<sup>14</sup> But because its solutions are all well integrated and because it has a proven track record of continual improvement, Unica is a no-brainer for direct-to-consumer firms that want an integrated suite that will grow with them over time.<sup>15</sup>

## RECOMMENDATIONS

---

### HOW TO USE THIS FORRESTER WAVE ANALYSIS

This evaluation is intended to be a starting point only. To determine which vendors best fit your business needs, view the detailed product evaluations available through the “download Excel spreadsheets” function behind Figures 4 and 5 in the online version of this report. Three steps will help you to customize our analysis to your own core requirements:

- 1. Understand the evaluation criteria.** The “Criteria” tab in the spreadsheet includes a description and grading scale for each criterion against which we scored vendors. Examine these descriptions and mark the ones that are most important to you.
- 2. Change weightings as needed.** Forrester has weighted the evaluation criteria based on what we feel is most important to meet our clients’ needs as a whole. But every marketer is different. For example, retail banks seeking to identify and drive leads to retail branches may want to emphasize event-triggered marketing programs and lead management over some of the other criteria that we have stressed in the B2C scenario.
- 3. Determine your vendor shortlist with your customized Forrester Wave.** The “Forrester Wave” tab will automatically update the Wave graphic and vendor ranking, placing the best fits for your needs in the Leader category. You may also decide to develop your RFP based on our evaluation criteria, as these are the areas where we identified vendor differentiation.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online versions of Figure 4 and Figure 5 are Excel-based vendor comparison tools that provide detailed product evaluations and customizable rankings.

### Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we narrow our final list to those presented here. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in this document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weighting to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

### Companies Interviewed For This Document

1-800-Flowers.com	Brother Industries
Acxiom	Cendant
Adobe Systems	Cingular Wireless
Aegon	Citigroup
A-lehdet	Color Line
Ameritrade	Countrywide Financial
Autodesk	Disney
Bank of America	Hallmark
Blair	Harte-Hanks
BMW Canada	Home Depot

HSBC Mexico	Overstock.com
Informatica	Pfizer
Inforte	Parametric Technology Corporation
Kimberly-Clark	Schwan's Home Service
LifeWay Christian Resources	Sony Canada
Limited Brands	Travelocity.com
L'Oréal	VTR Globalcom
Major League Baseball	Wachovia
Meredith	Washington Mutual
NetBank	

## ENDNOTES

- <sup>1</sup> For marketing to integrate its activities, execute them more efficiently, and measure results, the marketing process must be managed and executed within an application framework and on top of an infrastructure that is itself integrated. We call this framework the Marketing Technology Backbone. See the September 30, 2004, Forrester Big Idea "[The Marketing Technology Backbone](#)."
- <sup>2</sup> Aprimo's acquisition of DoubleClick's Enterprise Marketing Solutions (EMS) business unit is a meaningful but risky step forward in its quest to deliver a comprehensive enterprise marketing solution. With this deal, Aprimo solidifies its lead in the marketing resource management (MRM) category and signals that it will make a run at high-end B2C campaign management. See the June 15, 2005, Quick Take "[Aprimo's DoubleClick Acquisition: Risky Business](#)."
- <sup>3</sup> In Forrester's Q4 2005 Marketing Panel Online Study of 313 marketers, 58% of respondents indicated that their firms prefer to purchase marketing software "as discrete best-of-breed products from multiple vendors."
- <sup>4</sup> Three technology trends — media fragmentation, addressability, and interactivity — are converging on the world of marketing and advertising. In a new era of Left Brain Marketing, analytical strategies grounded in deep audience knowledge will rise to predominance. See the April 6, 2004, Forrester Big Idea "[Left Brain Marketing](#)."
- <sup>5</sup> Since SAP and Oracle were evaluated based on a partial set of inputs, scorecard summaries and detailed scorecards are not provided.
- <sup>6</sup> On December 20, 2005, Unica announce its acquisition of MarketSoft. We did not evaluate the MarketSoft capabilities as part of this evaluation. However, the vendor offers strong event detection tools that will bolster Unica's ability to initiate campaigns triggered by changes in individual customer behavior. In addition, MarketSoft offers strong lead management tools, which Forrester expects will become the new

basis for Unica's Affinium Leads application. We also expect that Unica will initially go to market by positioning the combined solution into the retail banking vertical.

- <sup>7</sup> View the vendor summary for more detailed analysis on how Aprimo fared in this evaluation. See the February 3, 2006, Tech Choices "[Enterprise Marketing Platforms: Aprimo Shines With Marketing Resource Management.](#)"
- <sup>8</sup> For marketing planning and resource management, SAS integrates and resells Aprimo's MRM suite.
- <sup>9</sup> View the vendor summary for more detailed analysis on how SAS fared in this evaluation. See the February 3, 2006, Tech Choices "[Enterprise Marketing Platforms: SAS Successfully Integrates Analytics And Campaign Management.](#)"
- <sup>10</sup> View the vendor summary for more detailed analysis on how Siebel fared in this evaluation. See the February 3, 2006, Tech Choices "[Enterprise Marketing Platforms: Siebel Succeeds With Broad Functionality.](#)"
- <sup>11</sup> For marketing planning and resource management, SSA Global partners with Aprimo.
- <sup>12</sup> View the vendor summary for more detailed analysis on how SSA Global fared in this evaluation. See the February 3, 2006, Tech Choices "[Enterprise Marketing Platforms: SSA Global Excels At Interaction Management.](#)"
- <sup>13</sup> View the vendor summary for more detailed analysis on how Teradata fared in this evaluation. See the February 3, 2006, Tech Choices "[Enterprise Marketing Platforms: Teradata's Next Release Will Improve Its Standing.](#)"
- <sup>14</sup> On December 20, 2005, Unica announced its acquisition of MarketSoft. We did not evaluate the MarketSoft capabilities as part of this evaluation. However, the vendor offers strong event detection tools that will bolster Unica's ability to initiate campaigns triggered by changes in individual customer behavior. In addition, MarketSoft offers strong lead management tools, which Forrester expects will become the new basis for Unica's Affinium Leads application. We also expect that Unica will initially go to market by positioning the combined solution into the retail banking vertical.
- <sup>15</sup> View the vendor summary for more detailed analysis on how Unica fared in this evaluation. See the February 3, 2006, Tech Choices "[Enterprise Marketing Platforms: Unica Offers The Leading Solution For B2C Marketers.](#)"

# FORRESTER®

Helping Business Thrive On Technology Change

## Headquarters

Forrester Research, Inc.  
400 Technology Square  
Cambridge, MA 02139 USA  
Tel: +1 617/613-6000  
Fax: +1 617/613-5000  
Email: [forrester@forrester.com](mailto:forrester@forrester.com)  
Nasdaq symbol: FORR  
[www.forrester.com](http://www.forrester.com)

## Research and Sales Offices

Australia	Israel
Brazil	Japan
Canada	Korea
Denmark	The Netherlands
France	Switzerland
Germany	United Kingdom
Hong Kong	United States
India	

*For a complete list of worldwide locations,  
visit [www.forrester.com/about](http://www.forrester.com/about).*

For information on hard-copy or electronic reprints, please contact the Client Resource Center at +1 866/367-7378, +1 617/617-5730, or [resourcecenter@forrester.com](mailto:resourcecenter@forrester.com). We offer quantity discounts and special pricing for academic and nonprofit institutions.

Forrester Research (Nasdaq: FORR) is an independent technology and market research company that provides pragmatic and forward-thinking advice about technology's impact on business and consumers. For 22 years, Forrester has been a thought leader and trusted advisor, helping global clients lead in their markets through its research, consulting, events, and peer-to-peer executive programs. For more information, visit [www.forrester.com](http://www.forrester.com).