The Forrester Wave™: Enterprise Marketing Software Suites, Q2 2016

The Nine Providers That Matter Most And How They Stack Up

by Rusty Warner

May 31, 2016

Why Read This Report

In our 40-criteria evaluation of enterprise marketing software suites (EMSS) providers, we identified the nine most significant ones — Adobe, Experian Marketing Services, IBM, Marketo, Oracle, Salesforce, SAP, SAS, and Teradata Marketing Applications — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals make the right choice.

Key Takeaways

Three Vendors Lead With Comprehensive EMSS Offerings

Forrester's research uncovered a market in which Adobe, Oracle, and Salesforce lead the pack. SAS, IBM, and Experian offer competitive options. Marketo, Teradata Marketing Applications, and SAP lag behind.

No Single EMSS Vendor Addresses 100% Of B2C Marketing Needs

Despite confusingly similar "marketing cloud" branding, EMSS offerings are not created equal. Each has strengths and weaknesses depending on specific vendor priorities, and none covers the full spectrum of enterprise marketing technology requirements. This study evaluates the breadth of each vendor's portfolio to help B2C marketers compare and choose the solutions best suited to their needs.

Leading Solutions Offer Multiple Systems Of Insight And Engagement

EMSS offerings are not platforms; they are portfolios of loosely integrated components — usually based on acquired assets — that provide customer insight and engagement functionality. B2C marketers find value in working with EMSS vendors that enable them to assemble their own unique enterprise marketing technology ecosystems.

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The Nine Providers That Matter Most And How They Stack Up

by Rusty Warner
with Srividya Sridharan, Christian Austin, and Tyler Thurston
May 31, 2016

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Notes & Resources

Forrester conducted product evaluations in February 2016 and evaluated 9 vendor companies: Adobe, Experian Marketing Services, IBM, Marketo, Oracle, Salesforce, SAP, SAS, and Teradata Marketing Applications.

Related Research Documents

The Forrester Wave™: Enterprise Marketing Software Suites, Q4 2014

The Forrester Wave™: Real-Time Interaction Management, Q3 2015

The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016

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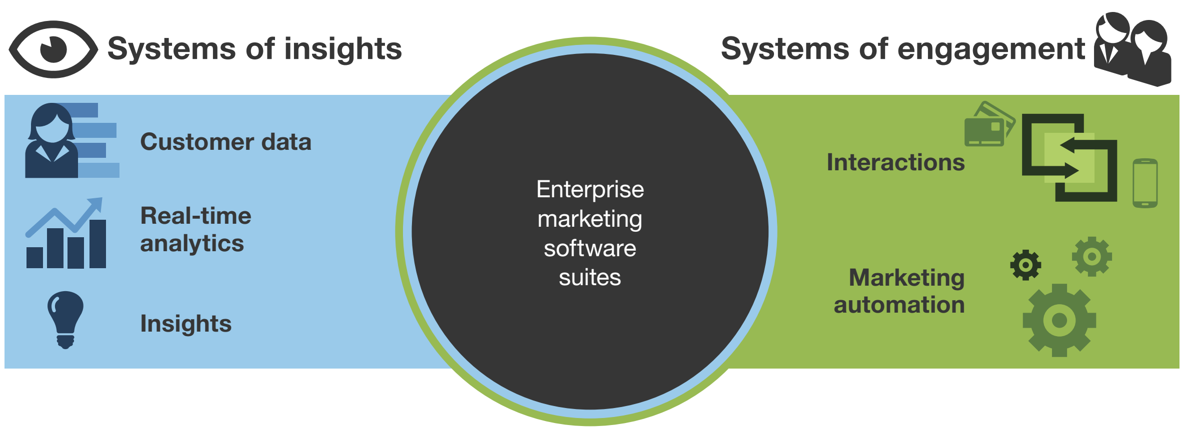
EMSS Vendors Provide Portfolios, Not Platforms

It's nearly impossible to discuss enterprise marketing technology without someone raising chiefmartec.com's "supergraphic," which consists of 3,874 individual marketing technology solution logos.[1] Forrester's own classification of the enterprise marketing technology landscape focuses on product categories to help marketers align solutions with their requirements; enterprise marketing software suites (EMSS) is our designation for portfolios that combine multiple systems of insight and engagement in a single vendor offering (see Figure 1).[2] We define EMSS as:

> *An integrated portfolio of marketing technology products that provide analytics, automation, and orchestration of insight-driven customer interactions to support inbound and outbound marketing.*

In the age of the customer, B2C marketers must assemble their own unique marketing technology ecosystems that drive contextually relevant customer experiences.[3] There is no off-the-shelf, one-size-fits-all platform that can address each marketing organization's unique requirements.

FIGURE 1 EMSS Portfolios Combine Systems Of Insight And Engagement



Acquisition Hype Does Not Help Marketers

Some industry pundits credit IBM with firing the first shots in the so-called "marketing cloud wars" when it acquired Unica in 2010.[4] True, IBM may have triggered the acquisition free-for-all we have seen in the last five years. But there were smaller skirmishes 10 years earlier when SAS and Teradata acquired Intrinsic and Ceres, respectively, or even larger battles like Oracle's $5.85 billion acquisition of Siebel in 2005.[5] Forrester believes that B2C marketers don't care; nor should they. Mergers and acquisitions are a fact of life in the EMSS space, not an epic war among opposing armies. What B2C marketers actually care about is whether EMSS vendors have the requisite vision to integrate their acquired assets to solve strategic marketing challenges. In particular, B2C marketers want EMSS vendors to help them:

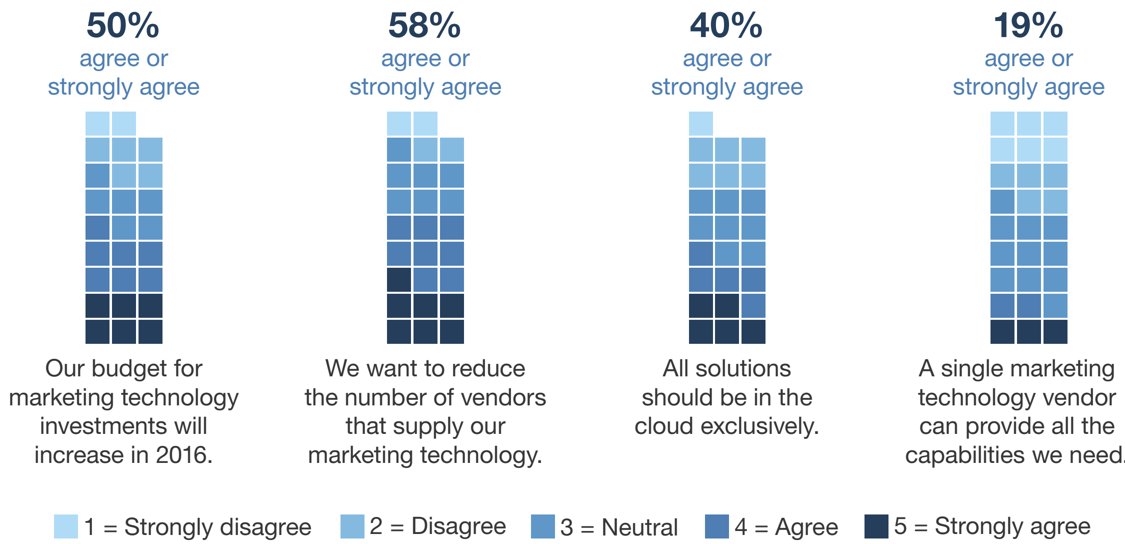
› **Assemble an enterprise marketing technology ecosystem.** B2C marketers recognize the value of understanding their customers with systems of insight and orchestrating contextually relevant interactions with systems of engagement. Nearly two-thirds of customer references for the EMSS vendors in this study told us that they have an established marketing technology strategy (see Figure 2). Unfortunately, more than 40% also told us their technology environments are too complex, and that separate teams often purchase redundant capabilities. There is a big opportunity for EMSS vendors that can help marketers reconcile these issues.

› **Align investments with the firm's business technology agenda.** B2C marketers must collaborate with their business technology (BT) counterparts to fully understand whether various components from their EMSS vendor's portfolio fit into the firm's BT agenda in terms of both functionality and implementation requirements.[6] Half of the B2C marketers we surveyed expect their technology budgets to increase in 2016 (see Figure 3). They want to have their cake and eat it, too, as 58% want to minimize the number of vendors involved, but less than one-fifth believe they can get everything they need from a single provider, and only 40% believe they can rely exclusively on cloud-based deployments.

› **Integrate technologies to drive enterprisewide customer obsession.** A critical element of this evaluation is how EMSS vendors integrate their own technology with third-party solutions, customer data, and content to satisfy B2C marketing requirements. More than two-thirds of EMSS customer references told us that the ability to integrate — both within and outside a suite — is the most important feature of marketing tools and 41% said they would sacrifice best-of-breed functionality in favor of better integration capabilities.[7] B2C marketers are also thinking outside their own purview: More than half are looking to integrate direct marketing and digital advertising technologies, and two-thirds prioritize marketing integration with enterprise resource planning (ERP) and CRM.[8]

FIGURE 2 B2C Marketers Struggle To Implement Enterprise Marketing Technology Strategies

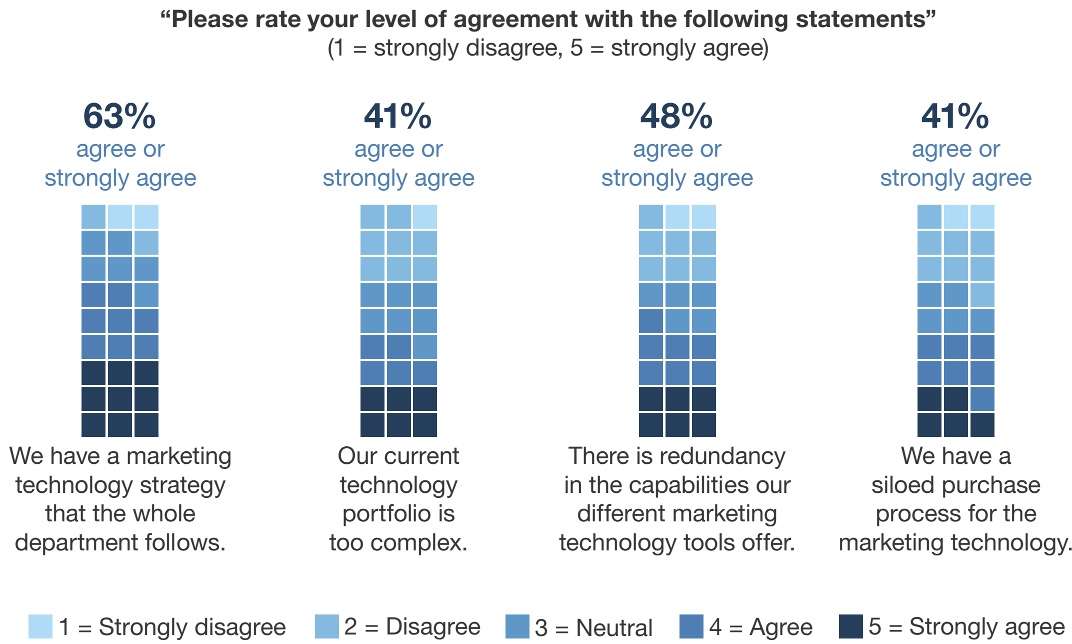
"Please rate your level of agreement with the following statements."
(1 = strongly disagree, 5 = strongly agree)



Base: 27 marketing professionals

Source: Forrester's Q1 2016 Global Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey

FIGURE 3 B2C Marketers Must Reconcile EMSS Investments With The Firm's BT Agenda



Base: 27 marketing professionals

Source: Forrester's Q1 2016 Global Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey

Enterprise Marketing Software Suites Evaluation Overview

To assess the state of the EMSS market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top EMSS vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 40 criteria, which we grouped into three high-level buckets:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave™ graphic indicates the strength of its current EMSS offering. We looked at the breadth and depth of each vendor's functionality for customer data management and analytics, campaign and interaction management, online advertising, marketing resource management, content and asset management, customer experience, and measurement and optimization, as well as integration capabilities for data, content, native components, and third-party technologies.

- **Strategy.** A vendor's position on the horizontal axis indicates Forrester's assessment of its strategy and approach to the market. We compared the company and product strategies of each vendor in the context of Forrester's vision for the EMSS market to assess how well each vendor is serving current customer needs, as well as anticipating future needs through product investments, supporting services, and partnership strategies.

› **Market presence.** To determine the size of each vendor's EMSS business, we evaluated the vendor's target market, total revenue for its EMSS offering, and the number of its current enterprise customers using at least three components of its EMSS portfolio.

Evaluated Vendors Focus On Enterprise Marketing Technology Ecosystems

Forrester included nine vendors in the assessment: Adobe, Experian Marketing Services, IBM, Marketo, Oracle, Salesforce, SAP, SAS, and Teradata Marketing Applications. Each of these vendors (see Figure 4):

› **Provides a broad EMSS portfolio.** Each vendor included in this Forrester Wave™ evaluation has a suite of branded proprietary technologies that enables B2C marketing professionals to: manage customer data, perform customer analytics, orchestrate customer campaigns and interactions, manage marketing resources and content, and measure marketing performance for ongoing optimization.

› **Enables contextually relevant customer interactions.** The vendors we included in this Forrester Wave™ evaluation deliver technologies and services to help marketers assemble their own enterprise marketing technology ecosystems. Each one integrates its own software, partner solutions, customer data, and content, to support customer-obsessed, contextual marketing strategies.

› **Serves large enterprises in multiple geographies and verticals.** Each vendor included in this Forrester Wave™ possesses a significant base of enterprise-class customers that are using three or more modules of its EMSS portfolio across at least two geographic regions and at least two vertical sectors.

FIGURE 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Date evaluated
Adobe	Adobe Marketing Cloud	Q1 2016
Experian Marketing Services	Experian Marketing Suite	Q1 2016
IBM	IBM Marketing Solutions	Q1 2016
Marketo	Engagement Marketing Platform	Q1 2016
Oracle	Oracle Marketing Cloud	Q1 2016
Salesforce	Salesforce Marketing Cloud	Q1 2016
SAP	SAP Hybris Marketing	Q1 2016
SAS	SAS® Customer Intelligence	Q1 2016
Teradata Marketing Applications	Teradata Integrated Marketing Cloud	Q1 2016

Vendor selection criteria
1. The vendor has an extensive portfolio of enterprise marketing technology that spans requirements for customer data management, analytics, measurement, optimization, automation, campaign management, and interaction management.
2. The vendor offers the ability to integrate customer data, content, and both native and partner technologies to help marketers assemble an enterprise marketing technology ecosystem.
3. The vendor has a strong enterprise B2C and global focus, with at least $200 million in revenue across at least two geographic regions and at least 50 enterprise B2C customers using multiple solution modules.

Vendor Profiles

This evaluation of the EMSS market is intended to be a starting point only (see Figure 5). We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

FIGURE 5 Forrester Wave™: Enterprise Marketing Software Suites, Q2 2016

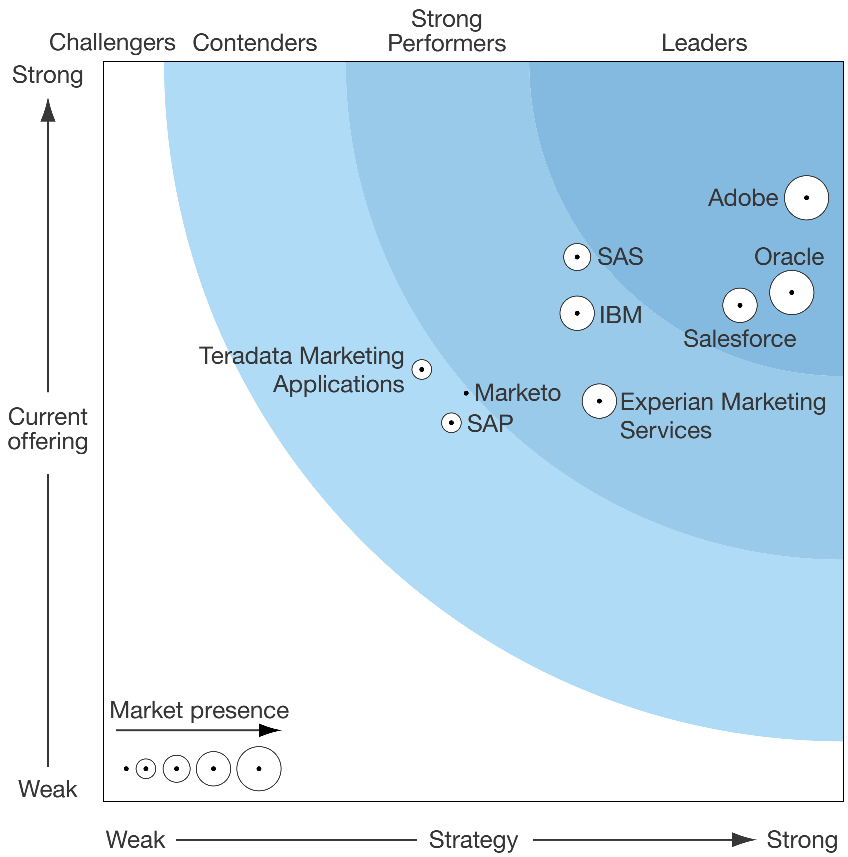


FIGURE 5 Forrester Wave™: Enterprise Marketing Software Suites, Q2 2016

	Forrester's Weighting	Adobe	Experian Marketing Services	IBM	Marketo	Oracle	Salesforce	SAP	SAS	Teradata Marketing Applications
CURRENT OFFERING	50%	4.08	2.71	3.30	2.76	3.44	3.35	2.56	3.68	2.92
Customer data management	10%	4.40	3.05	2.00	3.50	4.75	3.55	3.10	3.40	2.35
Customer analytics	10%	3.80	1.90	4.30	1.60	1.60	2.20	3.20	4.40	2.40
Campaign and interaction management	25%	3.80	2.35	3.90	2.30	3.75	4.00	1.60	3.55	3.15
Online advertising	5%	5.00	4.40	2.00	3.00	4.40	2.70	2.00	3.40	4.40
Marketing resource management (MRM)	5%	3.00	2.00	4.00	4.00	2.00	1.00	3.00	5.00	5.00
Content and asset management	5%	5.00	1.00	2.00	2.00	3.00	1.00	3.00	5.00	5.00
Customer experience capabilities	5%	2.00	1.00	3.00	1.00	5.00	2.00	4.00	1.00	1.00
Measurement and optimization	10%	4.60	3.10	3.90	3.20	3.00	3.40	2.80	4.40	2.40
User experience	5%	5.00	5.00	3.00	3.00	3.00	5.00	1.00	3.00	1.00
Integration	20%	4.25	3.25	3.00	3.50	3.50	4.25	3.00	3.50	3.00
STRATEGY	50%	4.75	3.35	3.20	2.45	4.65	4.30	2.35	3.20	2.15
Vision	25%	5.00	3.00	4.00	1.00	5.00	4.00	1.00	3.00	1.00
Road map	25%	5.00	3.00	4.00	2.00	4.00	4.00	2.00	2.00	1.00
Performance	15%	4.00	4.00	0.00	3.00	5.00	5.00	3.00	4.00	2.00
Supporting services	10%	5.00	4.00	4.00	2.00	5.00	5.00	3.00	3.00	3.00
Partner ecosystem	10%	5.00	3.00	4.00	5.00	5.00	5.00	3.00	3.00	5.00
Commercial model	10%	4.00	3.00	2.00	4.00	5.00	4.00	3.00	5.00	3.00
Delivery models	5%	5.00	5.00	4.00	3.00	3.00	3.00	5.00	5.00	5.00
MARKET PRESENCE	0%	5.00	4.00	4.00	1.00	5.00	4.00	1.50	2.50	1.50
Revenue	50%	5.00	4.00	3.00	1.00	5.00	3.00	1.00	2.00	1.00
Customers	50%	5.00	4.00	5.00	1.00	5.00	5.00	2.00	3.00	2.00

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

Leaders

- **Consider Adobe to exploit martech and adtech convergence.** Adobe balances its direct response marketing capabilities (Campaign, Social, and Experience Manager) with advertising capabilities (Audience Manager, Media Optimizer, and Primetime), and ties them together with insights (Analytics and Target) and its core services offering. Individual elements like email or real-time interaction management are not absolute best-of-breed, but Adobe has assembled a comprehensive portfolio, and B2C marketers have integrated multiple Adobe modules into sophisticated, large-scale marketing technology ecosystems.

One Adobe reference commented that integration outside the Adobe Marketing Cloud takes some work, "but inside things work natively." Other customer references echoed the need for better third-party integration and said that Adobe could do some work to simplify its pricing structure. References provided otherwise overwhelmingly positive feedback, particularly for user experience (UX), digital intelligence, content management, and cross-channel consistency. One commented, "I could get nitpicky, but we're overall extremely pleased with their attention to detail."

› **Consider Oracle for managing audiences to drive digital engagement.** The Oracle Marketing Cloud addresses B2C marketers with Responsys and B2B marketers with Eloqua. It supports audience management for both with a comprehensive data aggregation strategy based on acquisitions of BlueKai, Datalogix, and AddThis. Oracle's SaaS-only strategy and almost exclusive focus on digital channels may not meet requirements for all marketers, but Oracle effectively addresses multiple B2C and B2B use cases with native functionality and an impressive partner network.

Both B2C and B2B customer references gave Oracle high marks across the board, but called out third-party integration as an area for improvement. They would further like to see more functionality to support cross-channel interactions and better integration for direct marketing and advertising technologies. From a business perspective, one reference said, "Oracle has some amazing people," but there were negative comments about contracts and procurement. Customers told us they wanted Oracle to "adapt more quickly to market changes, especially after acquisitions."

› **Consider Salesforce for high-volume, SaaS-based digital marketing.** The Salesforce Marketing Cloud offers modules for email/mobile/web, social, advertising, and B2B marketing, and its innovative UX provides multiple "builders" for contacts, audiences, journeys, and content. It offers separate tools for B2C and B2B marketers, but with a common email backbone for delivery services. Salesforce does not provide the deep analytics or offline channel capabilities of other vendors, but its Personalization Builder does address digital personalization and optimization requirements.

Customer references were extremely positive about the Salesforce UX and technology capabilities in general. They did mention the need to improve third-party integration and to develop more cross-channel interaction capabilities. One reference called Salesforce "a single shop" for digital marketing requirements; another admitted "they have many capabilities we haven't tapped into yet." In addition to email and mobile messaging in use today, customers plan to deploy Salesforce for mobile app, social media, and online advertising, but the majority uses other technologies to support offline requirements.

Strong Performers

- **Consider SAS for advanced customer analytics and enterprise MRM.** SAS's reputation for advanced analytics extends to its marketing portfolio. Although it lacks the digital marketing sophistication its marketing cloud rivals, SAS excels at customer data management, analysis and insights, predictive analytics, real-time interaction management, measurement, and optimization. The road map for its Customer Intelligence 360 solution promises to make advanced analytics more accessible to marketers, while it refines its integration with digital marketing technologies for execution and delivery.

  Customer references — most with more than five years of experience with SAS — value its global leadership in providing advanced analytics solutions. Beyond marketing automation and real-time interaction management for inbound channels, they are also using SAS for complex event processing and decision-making in areas like fraud detection and risk management. References mentioned two areas for improvement: the effort to integrate data and third-party technologies and the need for more functionality to manage cross-channel interactions.

- **Consider IBM for its breadth of data, analytics, and marketing technologies.** IBM packages its multiple acquisitions and subsequent development efforts as IBM Marketing Solutions, including IBM Marketing Software (Unica) and the IBM Marketing Cloud (Silverpop). It is beginning to reconcile overlapping functionality to formulate a coherent road map, but other marketing cloud vendors have a head-start on integrating acquired assets. Its 2015 releases of Journey Designer, Customer Experience Analytics (Coremetrics and Tealeaf), and Universal Behavior Exchange provide common elements across its portfolio.

  The majority of customer references we spoke to use IBM solutions for both outbound campaign management (IBM Campaign) and inbound interaction management (IBM Interact). One reference recently rolled out the IBM Marketing Cloud, and he told us that "integration is slower" than expected because of the need to redesign Unica email campaigns to "leverage attractive Silverpop features." Overall, customer reference feedback was below average for technology features, and references are dissatisfied with the effort required to integrate portfolio components, third-party products, and data sources.

- **Consider Experian Marketing Services for expertise in consumer-focused markets.** Experian Marketing Services has leveraged its global services capabilities to quickly expand its marketing technology footprint. Its vast consumer database makes Experian an attractive option for retail, financial services, and hospitality companies. Experian has come a long way in terms of assembling both its solution portfolio and its strategic partner network, especially in a highly competitive marketing technology landscape. It still has some work to do with advanced analytics — currently available as a services offering.

  Customer references typically initiated their Experian relationships for email, but plan to add mobile app, social, web, and eCommerce capabilities. They provided generally positive feedback on Experian's technology, and awarded their highest marks for UX and customer data management.

Areas for improvement included pricing and out-of-box integration. One reference acknowledged "multiple technical challenges" during implementation, but credited Experian's willingness to address issues via "a collaborative working relationship."

Contenders

- **Consider Marketo if you need lead-to-revenue management functionality.** Marketo has expanded its traditional B2B focus to include B2C environments that involve a considered purchase or require lead management, such as financial services, healthcare, and higher education. Its consumer marketing capabilities are not as sophisticated as those from EMSS leaders, but Marketo has repackaged its portfolio to focus on specific digital channel requirements. It has also strengthened its partnerships with advertising technology players.

  Customer references awarded Marketo high marks for its UX and native integration, but were less enthusiastic about customer data management and analytics. One reference explained that her team performs segmentation in another tool and then "passes it to Marketo." Mid-market references credited Marketo with "understanding the value of strong relationships," but enterprise users were lukewarm about its road map and its ability to understand and address business requirements. Marketing performance measurement linked to revenue goals was a common plaudit, regardless of company size.

- **Consider Teradata Marketing Applications for digital marketing and MRM.** Teradata's Q4 2015 decision to sell its marketing applications business creates an EMSS player with a largely mid-market European customer base, following its acquisitions of eCircle, Argyle Social, Appoxee, and FLXone. Its primary enterprise offer will be the former Aprimo MRM solution. Teradata will keep its Customer Interaction Manager and on-premises Real-Time Interaction Manager, so in addition to digital marketing and MRM, the "new" firm will market the former Aprimo Marketing Studio and the SaaS version of Real-Time Interaction Manager.

  Customer references balanced high marks for Teradata's MRM solution with average feedback on digital marketing. They cited room for improvement with technology components like customer analytics and content management, as well as native and third-party integration. The planned divestiture negatively impacted their feedback on account management, strategy, and technology road map. Ironically, a reference who had been using Aprimo's MRM prior to the acquisition said, "The sheer size of Teradata may have made it harder to manage the marketing operations suite, so we're optimistic about the sale." (Marlin Equity Partners purchased Teradata Marketing Applications for $90 million in April 2016.)

- **Consider SAP as the data layer for your marketing technology ecosystem.** SAP's traditional ERP strengths coupled with its eCommerce offering are driving adoption of its SAP Hybris Marketing solution in the consumer goods and retail sectors. SAP focuses on customer data management and analytics, but relies on its partner network for marketing and advertising execution. SAP plans to enrich its offering with the SAP Hybris Profile solution, and it further plans to develop its email and other digital channel capabilities — all welcome additions, though late-to-market compared to competitors.

We spoke to customer references who gave SAP high marks for consolidating eCommerce and other transactional data to activate marketing campaigns. But, since they must use other digital marketing tools for channel execution, they are looking for improved third-party integration while they await SAP's own development efforts. One reference acknowledged that "it's a constantly growing platform with some confusing name changes, and it requires constant updates," but SAP manages to meet her requirements in the end. Another added that his firm's five-month implementation was "not bad for an SAP product."

Supplemental Material

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by February 22, 2016.

› **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.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls and surveys with three of each vendor's current customers.

The 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 then narrow our final list. 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 the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings 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. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] Chiefmartec.com's "supergraphic" of the marketing technology landscape nearly doubled in terms of vendor logos for 2016. Source: "Marketing Technology Landscape Supergraphic (2016)," chiefmartec.com, March 21, 2016 (http://chiefmartec.com/2016/03/marketing-technology-landscape-supergraphic-2016/).

[2] Enterprise marketing technology comes in two flavors: marketers must collaborate with their business technology (BT) counterparts to implement technologies that align systems of insight and engagement to deliver contextual marketing. See the "Combine Systems Of Insight And Engagement For Contextual Marketing" Forrester report.

[3] As firms move beyond traditional campaign execution, they integrate technologies that enable them to manage real-time interactions, based on recognizing customers across channels and understanding current contextual requirements. See the "How To Build A Contextual Marketing Engine" Forrester report.

[4] IBM completed its $480 million acquisition of Unica in Q4 2010. Source: "IBM Completes Acquisition of Unica Corporation," IBM press release, October 6, 2010 (http://www-03.ibm.com/press/us/en/pressrelease/32614.wss).

[5] Teradata (before its divestiture from NCR) acquired Ceres in 2000, SAS acquired Intrinsic in 2001, and Oracle acquired Siebel in 2005.

Source: "NCR Acquires Ceres Integrated Solutions," Direct Marketing News, April 12, 2000 (http://www.dmnews.com/dataanalytics/ncr-acquires-ceres-integrated-solutions/article/65684/).

Source: "SAS Acquires Campaign Management Software Business From Intrinsic," Direct Marketing News, March 22, 2001 (http://www.dmnews.com/news/sas-acquires-campaign-management-software-business-from-intrinsic/article/71834/).

Source: "Oracle to Pay $5.85 Billion for Siebel," New York Times, September 13, 2005 (http://www.nytimes.com/2005/09/13/technology/oracle-to-pay-585-billion-for-siebel.html).

[6] B2C marketers must form a marketing technology office (MTO) to bridge the gap between marketing and technology management and create a shared business technology (BT) agenda. See the "Drive The BT Agenda With A Marketing Technology Office" Forrester report.

[7] Sixty-seven percent of EMSS customer references told Forrester that "the ability to integrate is the most important feature of marketing tools," and 41% said that "best-of-breed is less important than the ability to integrate." Source: Forrester's Q1 2016 Global Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.

[8] More than half (52%) of EMSS customer references said "We are planning to integrate our marketing technology tools with our adtech (DMPs, DSPs, and AdServer) to reduce complexity and simplify processes," and more than two-thirds (67%) said "Integration with non-marketing technology (e.g., ERP, CRM) is a priority." Source: Forrester's Q1 2016 Global Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.

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