

Magic Quadrant pour les plateformes d'automatisation du marketing B2B

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Les plateformes d'automatisation du marketing B2B permettent aux équipes marketing de gérer les programmes de génération de demande et d'orchestrer l'engagement client. Les responsables des opérations marketing peuvent utiliser cette recherche pour évaluer l'état actuel du marché, y compris les avancées de l'IA, et évaluer les plateformes des fournisseurs appropriés.

Définition/Description du marché

Gartner définit les plateformes d'automatisation du marketing B2B (B2B MAP) comme des applications logicielles qui prennent en charge les processus de génération de demande à grande échelle. Les B2B MAP aident les spécialistes du marketing à capturer et à qualifier les prospects et les comptes, à orchestrer l'engagement axé sur le marketing tout au long du parcours client et à utiliser l'analyse pour optimiser et mesurer les performances.

Les MAP B2B permettent aux spécialistes du marketing d'automatiser un large éventail d'activités destinées à favoriser l'acquisition, la fidélisation et la croissance de nouveaux clients. Pour soutenir la recherche de nouvelles opportunités commerciales (auprès de clients actuels ou potentiels), les spécialistes du marketing utilisent les MAP B2B pour générer, hiérarchiser et gérer les prospects et les équipes d'achat tout au long du cycle de vie des revenus. Cela comprend la distribution des prospects générés et qualifiés par le marketing aux équipes de vente pour une poursuite ultérieure.

Les MAP B2B sont également utilisées pour orchestrer et mesurer les campagnes et programmes d'engagement client multicanal. Les MAP B2B permettent aux spécialistes du marketing de concevoir et d'activer certains canaux de communication de manière native (notamment les e-mails et les pages de destination Web) et d'orchestrer l'engagement client via d'autres canaux via des intégrations avec d'autres outils/plateformes.

Enfin, les spécialistes du marketing utilisent les MAP B2B comme un outil de collecte, d'analyse et de reporting des analyses de performance. Les analyses de performance permettent à la fois des mesures tactiques, telles que les mesures d'engagement des canaux marketing, et des mesures stratégiques, telles que l'attribution des activités marketing aux résultats commerciaux.

Les plateformes d'automatisation du marketing B2B sont similaires aux plateformes de marketing multicanal, mais alors que les plateformes de marketing multicanal sont optimisées pour les cas d'utilisation B2C, les plateformes d'automatisation du marketing B2B sont optimisées pour les cas d'utilisation du marketing B2B. Elles peuvent également s'appliquer aux organisations B2C qui vendent des produits à forte considération avec des besoins de gestion des leads ou des modèles B2B2C.

Caractéristiques obligatoires

Les capacités indispensables pour ce marché incluent la capacité à :

- Saisissez et synchronisez les données de contact et de compte client dans un profil client unifié .
- Créez des parcours en plusieurs étapes pour les contacts (par exemple, des campagnes goutte à goutte, des mouvements d'intégration des clients) à l'aide d'une interface utilisateur de flux de travail graphique adaptée aux utilisateurs non techniques.
- Deploy and manage coordinated customer engagement programs across multiple channels, including native email and landing page execution.
- Score leads to evaluate quality based on profile-fit and behavioral criteria using business rules and/or predictive analytics capabilities.
- Measure the performance of marketing touchpoints and communicate results using data visualization/dashboarding capabilities.

Common Features

The standard capabilities for this market include:

- Ability to create segmented and dynamic lists of contacts or accounts using business rules and/or predictive analytics.
- Functionality to enable one-to-one personalized customer communications based on a combination of persona, account and/or behavioral attributes.
- Functionality for account-level scoring to support account prioritization processes using business rules and/or predictive analytics.
- Ability to use lead workflow functionality for enabling organizations to manage and measure the lead-to-revenue life cycle, from lead generation/collection to conversion.
- Ability to use multitouch attribution capabilities for allocating conversion credit, such as lead creation or closed-won revenue, to certain touchpoints or interactions across the buying journey.

The optional capabilities for this market include:

- Ability to segment the platform for users in distinct business units, brands or regional marketing teams.
- Functionality for next-best-action orchestration (e.g., next best offer, next best channel) using AI.
- Ability to create content components (e.g., email copy) using generative AI.

Magic Quadrant

Figure 1: Magic Quadrant for B2B Marketing Automation Platforms



Vendor Strengths and Cautions

Act-On Software

Act-On Software (Act-On) is a Niche Player in this Magic Quadrant. Its product focuses on operating as a simplified marketing automation solution as an alternative to larger vendors. Act-On's operations focus on North America and the U.K. Its core client segment is midmarket

organizations, with some clients in the small business and large enterprise segments. Act-On has made progress in advancing AI capabilities, which includes machine-learning-enabled look-alike audience segmentation and a new advanced analytics package, which is a more powerful reporting solution that includes natural language querying.

Act-On 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.

Strengths

- **Focused product vision:** While all other vendors in this market balance MAP investments with investments in other marketing, CRM and/or other business products, Act-On's resources are dedicated to improving and extending the value of its MAP solution. It is focused on maintaining usability, and applies this approach to recent AI investments that make it easier to conduct activities like segmentation and reporting.
- **Email marketing:** Act-On's Adaptive Sending feature analyzes cross-channel contact behavior to identify when a contact is most engaged with a brand to recommend the optimal email outreach time. It also offers a generative AI (GenAI) email development tool, allowing users to quickly create email content based on intended marketing objective, desired tone and preferred length.
- **Ease of reporting:** Act-On's new advanced analytics package enables marketing users to quickly create custom reports, see performance insights (using natural language searches) and identify anomalies in marketing performance.

Cautions

- **Business viability:** Act-On is one of the smallest vendors in this Magic Quadrant, and it competes with very large vendors with more resources to invest in innovation, attracting/retaining top talent and withstanding future macroeconomic disruptions. It also has the lowest Glassdoor rating among vendors in this Magic Quadrant at the time of this analysis, suggesting lower employee satisfaction.
- **Regional footprint:** Act-On's direct sales and support presence is limited to the U.S. and the U.K., and it lacks an indirect sales presence in Asia/Pacific and many regions in continental Europe. Organizations with marketing teams based outside of the U.S. and the U.K. should assess the extent to which they require region-specific support and evaluate Act-On's ability to support those regions accordingly.
- **Integrations:** Act-On offers free, native integrations with many third-party CRM/sales force automation (SFA) vendors; however, it does not offer the same breadth of native integrations with other types of marketing technology vendors. Additional effort is required to create custom integrations, often through partnership with integration platform as a service (iPaaS) vendors at added cost.

Adobe

Adobe is a Leader in this Magic Quadrant. Its Adobe Marketo Engage product is broadly focused on helping B2B marketing teams orchestrate complex customer journeys, in part, through the platform's flexibility and extensibility. Adobe's operations are geographically diversified, with customers concentrated in the technology, professional services and financial services industries. Adobe is investing to extend the value of Marketo Engage through other B2B-focused products, such as Adobe Real-Time CDP B2B Edition, its B2B customer data platform; Adobe Marketo Measure, its marketing attribution product; and Adobe Journey Optimizer B2B Edition.

Strengths

- **Product flexibility and extensibility:** Marketo Engage's product capabilities, packaging and pricing are intended to address diverse customer needs, ranging from small businesses to large, complex enterprises. Its extensible data model with custom objects and activities allow users to bring a variety of data sources into the product.
- **B2B marketing vision:** Adobe demonstrates a strong grasp of the needs of B2B marketing teams for orchestrating complex, multistakeholder buying journeys through partnership with sales. Its vision for Adobe Journey Optimizer B2B Edition is to help users manage buying group roles and orchestrate journeys for buying groups in target accounts.
- **Integrations:** Marketo Engage offers native CRM/SFA integrations with Salesforce Sales Cloud and Microsoft Dynamics 365 Sales as part of its base offering. Through Sales Insight, an add-on module, Salesforce and Microsoft sales users can access relevant marketing data about specific leads and accounts to support prioritization and engagement personalization.

Cautions

- **Pricing visibility:** Adobe is the only Leader in this market that does not offer online pricing for its B2B MAP product. Similarly, granular line-item pricing wasn't disclosed in proposals reviewed by Gartner experts. This pricing opaqueness may frustrate prospective customers that seek to understand cost implications and communicate them to business partners when evaluating an Adobe purchase or renewal.
- **Product interdependencies:** While the product operates as a stand-alone B2B MAP, Adobe's enterprise strategy emphasizes the extension of its value through add-ons and additional products. For example, Adobe Journey Optimizer B2B Edition is designed for clients who also have Marketo Engage and Real-Time CDP B2B Edition, two separate products.
- **Inconsistent UI:** For some functionality, Marketo Engage's user interface remains dated, as Adobe continues its work to make the look and feel of the product match that of the broader Adobe Experience Platform. From a Leader in this market, customers should expect a consistent UI that can enable relatively easy use and adoption.

BUSINESSNEXT

BUSINESSNEXT is a Niche Player in this Magic Quadrant. Its CRMNEXT offering is positioned as a CRM solution that includes B2B MAP capabilities, focusing on AI-driven-guided selling with self-adjusting models, personalized offers and playbooks. Its customer base is concentrated in

Asia/Pacific, primarily in financial services and insurance. It is investing in AI-assisted automation, including its WORKNEXT assistant for generative content creation and a natural language prompt tool for enhanced analytics capabilities. To expand AI-powered workflow automations, it plans to introduce a campaign flow designer to build customer journeys that include drag-and-drop elements composed of personalized content.

Strengths

- **AI commitment:** BUSINESSNEXT's generative pretrained transformer (GPT) functionality is a prompt-based assistant with a conversational interface that identifies improvement opportunities by automatically scouring campaign analytics. Its continued investment in no-code AI tools will enable personalized content, including language translation and page design layouts via natural language commands, simplifying campaign creation steps for marketers.
- **Market responsiveness:** BUSINESSNEXT demonstrates an approach centered on listening and applying customer feedback, which may be a factor driving its high revenue retention rate. For example, BUSINESSNEXT is making strides in adopting GenAI functionality, but it has adopted a targeted approach to addressing the needs of its customer segments with out-of-the-box AI models designed for high-priority industries.
- **Customizable AI:** Users can build customized machine learning models with menu-driven field choices to assign model weights based on unique business needs and insights. This focus on customization enables users to configure solution elements like lead workflow designs or next-best-action intelligence.

Cautions

- **Industry concentration:** CRMNEXT's product capabilities, expertise and market positioning are strongly linked to credit unions, banking and insurance industries. Prospective clients in other market segments should confirm the vendor can support the required use cases in their industries.
- **Regional footprint:** Concentrated in the Asia/Pacific region, BUSINESSNEXT's limited presence and visibility in North America, and especially Latin America and Eastern Europe, means it does not offer comparable local resources and support that Leaders in this market offer. Potential customers must assess their local support needs when considering the market presence of BUSINESSNEXT as a provider.
- **Testing campaigns:** Marketers seeking to leverage CRMNEXT's multichannel marketing capabilities to amplify campaign content across SMS, WhatsApp, social media and email may struggle with testing campaigns. In particular, CRMNEXT has a limited UI to support email marketing A/B testing, which may lead to extra effort to manage email tests.

Creatio

Creatio is a Leader in this Magic Quadrant. Its Marketing Creatio product offers a no-code and modular approach to automation for both customer journey design and lead revenue cycle management. Creatio's operations are focused in Europe and North America, and it primarily

serves midmarket and large enterprise organizations in financial services, business services and manufacturing. It recently released Creatio Copilot, which includes GenAI capabilities across all Creatio products. Creatio Copilot uses natural language prompts to execute activities like content generation and contact record analysis. Planned investments include enhancements to lead attribution and account-based marketing (ABM) capabilities, as well as expanded Creatio Copilot use cases.

Strengths

- **User experience:** Marketing Creatio's composable, no-code platform allows clients to assemble product components and apps, as well as customize UI/user experience, such that the solution aligns with the distinct business requirements of marketing users. Creatio Copilot's natural language assistance prompts make it easier for marketers to execute common activities.
- **Pricing model:** Creatio's flat pricing structure, with no consumption model plus availability of components, makes the platform cost-competitive with high value. It offers users full automation features in every package, which users can expand with additional modules.
- **Lead workflow design:** Creatio Copilot suggests the best channel for preferred communications, recommends a next action or task, and suggests branching logic users can add in customer journey design. AI-embedded intelligence empowers marketers to easily integrate data-based decisions into lead workflows.

Cautions

- **Partner support and network:** Creatio depends on third-party partners for nearly all implementations, providing services to help safeguard successful implementation for some accounts. Despite this approach, its range of partners for industry and geographic reach, as well as implementation support, is relatively limited when compared with other Leaders in this Magic Quadrant.
- **Global market visibility:** Creatio has achieved success in expanding its presence in North America, but other Leaders have a more expansive presence in the region. Creatio's footprint in Latin America and Asia/Pacific remains small. Prospective clients should assess whether local teams have sufficient access to direct or indirect support to address any regional needs.
- **Measurement and reporting:** Although Marketing Creatio offers standard reporting capabilities that enable users to track campaign, channel and pipeline performance, the product lacks advanced capabilities in customer journey analytics and offers undifferentiated attribution analytics.

Freshworks

Freshworks is a Niche Player in this Magic Quadrant. It offers its B2B MAP solution in the Freshsales Suite, with AI-powered marketing automation for optimizing workflows and customer journeys across multiple channels. Freshworks' geographically diverse operations serve small and midsize businesses (SMBs) in high tech and manufacturing. Its recent AI-first campaign creation innovations enable target segment identification and tailored content based on campaign themes

and goals. Freshworks' platform features tone modification and send-time optimization and targets custom audiences through ideal customer profile matching. Additionally, it includes look-alike audience expansion for relevant and effective ads. Freshworks plans to launch a marketing campaign planner, predictive segmentation and push notifications.

Strengths

- **Product roadmap:** Freshworks' roadmap showcases a clear and well-defined path for product evolution and market parity. The company is actively investing in AI-based journey orchestration, query-based segmentation and AI suggestions to enhance marketing campaigns through next best actions.
- **Market dynamics and customer feedback:** Freshworks demonstrates its agility in accommodating customer and market dynamics through iterative product development and a focus on AI. Its targeting, personalization and journey orchestration capabilities enable a faster time to market and the ability to pivot more nimbly, ensuring efficient fulfillment of customers' needs.
- **Strategic focus of Freddy AI:** Freshworks continues to build on and improve Freddy AI, adding features such as campaign creation, audience customization, send-time optimization, journey creation and optimization, and predictive segmentation. By refining and expanding Freddy AI, Freshworks aims to provide businesses with powerful tools to drive their marketing efforts and achieve better results.

Cautions

- **Limited B2B integrations:** Available third-party platform integrations primarily cater to B2C users, such as Shopify and WooCommerce, which may be less beneficial for B2B users. Additionally, the integrations with other CRM systems are quite restricted and not bidirectional.
- **Lack of differentiated offerings:** Freshworks currently lacks any significant product differentiation points that set it apart from other providers in the market. Recent added capabilities focus on maintaining parity with other vendors.
- **Scalability:** Freshworks primarily focuses on small marketing teams, which results in a lack of certain capabilities, such as revenue attribution and bidirectional third-party CRM integrations, which are often necessary to support the needs of large, complex marketing organizations. Consequently, the platform is somewhat limiting for teams rapidly advancing in marketing automation usage and sophistication.

HubSpot

HubSpot is a Leader in this Magic Quadrant. Its Marketing Hub manages marketing campaigns and data with its integrated CRM platform. HubSpot's operations are geographically diversified, primarily serving small businesses and some enterprise clients in IT, business services and real estate. For its more mature customers, HubSpot is improving advanced forms of measurement, such as identifying steps in customer journeys that lead to conversion and upgraded revenue attribution. Its focus on AI includes the recent release of a content assistant for text ideation and

creation. HubSpot plans AI recommendations for customer fit and engagement via machine-learning-based scoring and AI agents to automate various marketing jobs.

Strengths

- **Significant addition of AI capabilities:** HubSpot's expanded AI across its platform simplifies tasks and improves marketing efficiency. These AI capabilities include a content assistant to generate and modify copy, images and tone; a blog post generator; translations; and a chat assistant that combines OpenAI's ChatGPT with HubSpot CRM data and out-of-the-box job templates.
- **Market responsiveness:** HubSpot demonstrates agile product development by collecting and applying customer feedback. This approach has resulted in product enhancements like a revamped call-to-action (CTA) builder (with templates) that allows marketing users to quickly customize the CTA experience, as well as functionality for reusable workflow elements, allowing users to quickly apply previously created workflow actions.
- **More native channel publishing:** HubSpot excels in its native ability to create and publish content across multiple channels, such as social media and blogs. Its dedicated ad tool allows users to select the audience by channel, create the ads and measure performance.

Cautions

- **Emerging large enterprise presence:** HubSpot's heritage is in the SMB market, and today, large enterprises make up a very small portion of its customer base. As such, HubSpot has fewer stories of successful implementation among large enterprise customers when compared with many other Leaders. Prospective clients in large organizations should be prepared to test and validate complex use cases or desired customizations during the evaluation process.
- **Unclear package pricing:** HubSpot pricing can confuse prospective buyers, with different product versions featuring different numbers of users and contacts. Prices vary for add-on users and add-on hubs. A recent pricing change gives core users access to the base customer platform and other purchased hubs, while some marketing tools are free. The web pricing tool does not instill confidence that the correct selections were made.
- **Segmentation:** Marketing Hub can create segments based on expected data, such as contacts, accounts, deals or any custom object, but reaches its limit at 2,000 active and 2,000 static lists. Enterprise users may run out of list space quickly if third-party integrations automatically create lists on a regular basis.

LeadSquared

LeadSquared is a Niche Player in this Magic Quadrant. Its marketing automation product is broadly focused on attracting, nurturing and qualifying leads using multiple channels. Its operations are mostly focused in India, with a growing presence in North America and Europe. LeadSquared clients tend to be large enterprises in education, financial services, healthcare, pharmaceuticals, manufacturing and business services. Recent investments have focused on improving email template functionality, such as tagging, cloning, hiding and adding attachments,

as well as editable send-name fields. Future investments will focus on leveraging GenAI to prequalify leads in dynamic landing pages and customer portals, to create intelligent workflows, and to evolve its chatbot for more personalized engagement.

Strengths

- **Combined solution model:** LeadSquared provides customers with a combined marketing and sales solution beyond just an MAP. These complementary products support inbound lead management, SFA, sales performance and field marketing. Most of its customers are large enterprises, but this integrated approach is comparable to how other vendors primarily serve SMBs.
- **Customer-requested capabilities:** LeadSquared has expanded its MAP product feature set based on user feedback to include a chatbot to automate initial customer communication, a conversational inbox to centralize customer conversations and a tool for field marketing. These requested features allow users to streamline interactions with their customers.
- **Account profile management:** An individual lead or contact is automatically added to the account profile page in LeadSquared, where information about all leads or contacts in that account is aggregated. Users can also associate a lead with an account when manually entering a new lead or contact. Users can further enrich account profiles with third-party data.

Cautions

- **Lack of AI:** LeadSquared's B2B MAP does not include any AI or GenAI features. GenAI functionality is promised on its roadmap, so prospective clients will need to set appropriate expectations with their teams of future delivery of these features.
- **No published pricing:** LeadSquared publishes its package configuration on its website, but buyers are unable to determine pricing without talking to a sales rep. This arrangement creates a challenge for buyers that don't know if the MAP solution meets their budget, especially when they have other product add-ons or solutions to consider.
- **Limited additional channels:** LeadSquared focuses on email, landing pages and, more recently, chat. Social media is on the roadmap, but the product currently lacks the ability to engage customers with organic or paid content. The solution does offer retargeting advertising on Facebook and Google, and additional social media capabilities are available through its partner network.

Microsoft

Microsoft is a Leader in this Magic Quadrant. In 2023, Microsoft combined its B2B MAP product (Dynamics 365 Marketing) with its customer data platform (CDP) product into a single offering: Dynamics 365 Customer Insights. Microsoft focuses on delivering optimized customer experiences and cohesive journeys, leveraging its Copilot's GenAI-powered content creation capabilities and AI-based channel selection and segmentation. Its operations are geographically diversified, serving primarily midsize and large enterprises in retail, healthcare, financial services, manufacturing and nonprofit. Microsoft's roadmap includes generative content validation and

journey testing, the ability to create events using Copilot, and always-on optimizations and outcome-based analytics.

Strengths

- **Continued GenAI innovation:** Dynamics 365 Customer Insights offers advanced GenAI capabilities for end-to-end cross-channel campaign execution. Its capabilities include content asset creation and edits; automatic brand profile extraction; automatic image recommendations and tagging; and built-in support for natural language prompts for journey creation, audience selection and channel selection.
- **Customer data unification:** Microsoft's new offering aligns customer data across marketing, sales and service functions, and can translate that data into marketing execution. All Microsoft Dynamics products are built on the same data platform, enabling better data connectivity across business applications.
- **Regional support and partnerships:** Dynamics 365 Customer Insights offers worldwide support in 42 languages, direct sales and support presence in the Americas, EMEA and Asia/Pacific; a global network of 7,000+ resellers; and 350+ distributors and channel partners.

Cautions

- **Usability:** Some Gartner clients and Peer Insights reviewers report that the platform is not intuitive enough for nontechnical marketing users. For example, developing custom dashboards often requires technical expertise. Other vendors have more drag-and-drop functionality, while Microsoft uses integrations with a separate product in its suite, Data Fabric, to enhance reporting usability.
- **Peer community:** An active peer community provides a space for extensive user support, feedback and collaboration. Microsoft Dynamics 365 Customer Insights offers an open peer community for user collaboration, but its user base is relatively small when compared with other vendors, and issues like spam and unanswered questions impact its effectiveness.
- **Third-party CRM/SFA integrations:** Dynamics 365 Customer Insights is primarily designed as a marketing automation solution to be used in tandem with Dynamics 365 Sales. It can integrate with Salesforce Sales Cloud; however, Salesforce Sales Cloud users may not achieve the same marketing and sales alignment benefits as Dynamics 365 Sales users. Most other Leaders offer a broader range of third-party CRM/SFA integrations.

Oracle

Oracle is a Leader in this Magic Quadrant. Oracle Eloqua Marketing Automation broadly focuses on providing B2B marketers with the tools to orchestrate multichannel marketing campaigns across various buying journeys and customer use cases. Oracle's operations are geographically widespread, and its clients tend to be midmarket to large enterprises in banking, IT, manufacturing and business services. Oracle invests in customer experience, focusing on UI improvements and

expanding its Guided Campaigns tool to allow users to more easily execute multitouch nurture campaigns and social ads.

Strengths

- **Interface enhancements:** Oracle has improved Eloqua's interface and tools, including search, contacts, accounts, campaign settings and email group setup. It plans to enhance Eloqua's social platform, CRM platform and other integrations to make it more like a consumer-friendly app that is easier for new users to fully utilize.
- **Customer listening and feedback:** Oracle collects customer feedback through surveys, user testing, interviews, advisory boards and sales' interactions with customers. Platform users can access a user community that enables collaboration with other users and instruction from product experts. Marketers can provide feedback, which can then be translated to Eloqua's product roadmap, and access advice from their peers.
- **Guided Campaigns enhancements:** Oracle has enhanced its Guided Campaigns tool by adding new use cases, including events and multistep nurture campaigns, giving frontline marketers more options and reducing the burden on power users. Oracle plans to expand its Guided Campaigns tool into targeted account selling and extend it into customer reference stories and social ads.

Cautions

- **GenAI vision and roadmap:** Oracle focuses on delivering AI-driven productivity gains, but its GenAI roadmap is less complete than peer vendors. It plans to add audience segmentation and content recommendation features, but lacks planned features that other vendors have in production or already released, like prompt-driven journey design. Prospective buyers should consider whether Oracle's GenAI roadmap meets their present and future GenAI needs.
- **Integration-dependent capabilities:** Oracle requires integration with Oracle Unity Customer Data Platform or Oracle Fusion Data Intelligence Platform for some functionalities (e.g., predictive lead scoring, predictive account scoring, many predictive next best action features and advanced customer journey analytics). Prospective buyers need to buy a suite of separate products to use features that come prepackaged by some other providers.
- **Package pricing:** Gartner's cost-of-ownership analysis and Peer Insights indicate Eloqua is expensive when compared with peer vendor products. Eloqua's pricing and product packaging details are only listed in Oracle's Marketing Cloud global price list – not on its webpage. Prospective buyers should carefully review Oracle's price list and ensure they are only purchasing the configuration and add-ons they need.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its Marketing Cloud Account Engagement solution focuses on generating and capturing prospect and account engagement closely connected to sales and service platforms. Salesforce's operations are geographically diversified and its clients range from small to large enterprises primarily in high tech, manufacturing, healthcare and

financial services. Its roadmap includes digital buying group optimization, data cloud advertising across major ad platforms, personalization for buying committee detail tied to CRM behaviors and enterprise data, and GenAI capabilities, such as a single-prompt capability for end-to-end campaign creation.

Strengths

- **Innovative platform capabilities:** Salesforce's AI-based approach supports the need for data-based campaign designs and intelligence, coupled with on-target creative assistance. Its overall product strategy supports complex B2B marketing needs (e.g., addressing a buying committee with customization and data insights).
- **Market responsiveness:** Salesforce facilitates value creation for customers and enables users to work more effectively in their roles by advancing product functionality with API enhancements and improvements to Einstein AI, its assistant for content creation or workflow improvements.
- **Lead workflow design:** Marketing Cloud Account Engagement offers an intuitive interface to help users create multistep leads/journey workflows, including a journey testing/simulation feature to help predict success. Additionally, leads can be routed via traditional "round robin," geography or sales team's level of expertise, or capacity.

Cautions

- **Platform-centric vision:** Capitalizing on Marketing Cloud Account Engagement's product vision depends on potentially costly investments in Salesforce Sales Cloud (its SFA platform) and Salesforce Data Cloud (its CDP). The product is designed as a B2B MAP specifically for Salesforce Sales Cloud users and doesn't natively integrate with other CRM/SFA platforms. Many planned releases on the Marketing Cloud Account Engagement roadmap depend on clients also having Salesforce Data Cloud, such as some features related to personalization and GenAI.
- **Sales execution:** Some Gartner clients with primarily B2B-oriented business requirements report that Salesforce sales team members recommended Marketing Cloud Engagement (Salesforce's multichannel marketing hub product, intended primarily for B2C use cases) rather than Marketing Cloud Account Engagement. Prospective customers should do their due diligence, including using online and third-party resources, to identify which solution best addresses their use cases.
- **Account qualification:** Marketing Cloud Account Engagement can score accounts based on completed actions and offers machine-learning-based scoring. However, scores cannot be modified based on product usage, which can limit marketers in retention campaigns.

SugarCRM

SugarCRM is a Niche Player in this Magic Quadrant. Its Sugar Market product focuses on campaign creation, measuring engagement and driving revenue growth. SugarCRM's operations are mostly concentrated in North America, Western Europe and Asia/Pacific, with clients primarily

in midmarket organizations in the high-tech, financial services and manufacturing/distribution industries. It has focused investments on improving the overall experience, with a modernized UI and the addition of single sign-on. Future investments will allow SugarCRM to meet customer needs with GenAI campaign content, multitouch attribution and the ability to serve buying groups in an ABM approach.

Strengths

- **CRM suite for midmarket organizations:** SugarCRM changed its go-to-market strategy to emphasize the fully integrated suite, rather than its stand-alone solution as a tool that connects with third-party CRM systems. This strategy aims to better support SMB and midmarket customers with a system built as an integrated solution for marketing and sales.
- **Stability and response time:** SugarCRM offers an operationally solid platform, demonstrated by exceeding its guaranteed uptime SLA of cloud availability to customers. This reliability is mirrored by its customer support case activity and response time, which achieves 97% against its SLA.
- **Intuitive lead and account workflows:** SugarCRM provides an easy-to-use canvas for marketers to build journeys for leads and accounts. The no-code interface includes clickable icons for users to specify actions and connect to contact and company data stored in the CRM/SFA platform.

Cautions

- **Status quo roadmap:** SugarCRM's recent product enhancements, including the integration of its recently acquired intelligence platform, and improvements planned into 2025, are undifferentiated and too focused on driving the suite's value proposition, rather than on enhancing MAP-specific capabilities. Prospective buyers should evaluate available features to determine if this solution meets their current and future needs.
- **Market responsiveness:** Based on its own customer data, SugarCRM has focused on improving product quality versus adding new features trending in the market. For example, many marketers already expect GenAI in their MAPs, but SugarCRM does not expect to provide GenAI in its platform until 2025, even though it has been in development for more than two years.
- **Limited email marketing capabilities:** SugarCRM offers the basic building blocks of email marketing, including prebuilt layouts and templates, a drag-and-drop interface, dynamic content and subject lines. However, it lacks more advanced features, including send-time optimization and content generation using GenAI.

Zoho

Zoho is a Challenger in this Magic Quadrant. Its Zoho CRM Plus solution broadly focuses on providing comprehensive sales, marketing and customer service tools under one platform with an approachable UI and robust third-party integrations. Zoho's operations are geographically diversified and its clients tend to be SMBs primarily in the banking, business services, IT and consumer products sectors. Zoho's roadmap emphasizes improving its marketing execution

capabilities through a recently released budget planning tool and a planned content collaboration tool. These tools will allow marketers to plan, fund and execute marketing campaigns on the platform.

Strengths

- **Value proposition for SMBs:** Zoho offers price-competitive solutions for SMBs, while accommodating more sophisticated marketing capabilities as they mature. In addition, it offers an attractive low-entry price for those new to the technology.
- **Flexible product packages and pricing:** Zoho allows customers to purchase Zoho CRM Plus as a package, configure a bundle with specific tiers for different app packages or buy individual modules. B2B marketers can work within their marketing budgets to configure a solution and expand capabilities as their marketing technology (martech) budget increases.
- **MAP-native social media posting:** B2B marketers can use Zoho's social media module to post content to Facebook, Instagram, X and LinkedIn natively from Zoho CRM Plus. Marketers can also easily schedule posts, use GenAI to generate posts and predict reach without leaving the platform. This module enables more efficient multichannel campaign management.

Cautions

- **GenAI offerings:** Zoho was an early GenAI adopter, but Zoho CRM Plus does not currently include or plan to integrate a natural language customer journey builder in the next 12 months. Prospective buyers that want to use this feature may consider other B2B MAP providers.
- **Limited lead-journey automation tools:** Zoho CRM Plus lacks next best channel recommendations or other automated lead-journey functions that help B2B marketers scale their campaigns. B2B marketers can personalize journey orchestration on Zoho CRM Plus with a manual process.
- **Integration limitations:** Zoho CRM Plus lacks native bidirectional integration with many other CRM platforms and lacks native ABM integrations, which prospective buyers may adopt as their business grows. It offers B2B marketers an extensive ecosystem, but it requires a number of third-party integrations if customers wish to use it with other CRM/SFA or ABM platforms.

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

LeadSquared

Dropped

No vendors were dropped from this Magic Quadrant.

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, providers needed to demonstrate they met the following criteria as of 10 May 2024:

- B2B MAP products must be generally available, which is defined as something a vendor's clients have in a production environment, rather than something they are testing or evaluating.
- Proven ability to deliver B2B MAP functionality. B2B MAPs are defined as software applications that support demand generation processes at scale. They help marketers capture and qualify leads and accounts, orchestrate marketing-driven engagement across the full customer journey, and use analytics to optimize and measure performance.
- Proven ability to deliver B2B MAP functionality within a single product offering (as opposed to requiring clients to purchase multiple products to satisfy minimum functional requirements).
- At least 25 customers (i.e., logos) using its B2B marketing automation solution(s), including at least 10 customers with \$50+ million in fiscal 2023 revenue and/or 100+ employees.
- At least \$50 million in calendar year 2023 revenue, or, \$25 million in calendar year 2023 revenue and a minimum of 12 new customers when compared to calendar year 2022.
- Demonstrated sales and customer support presence in a minimum of two of the following four regions: North America, EMEA, Latin America, Asia/Pacific.
- A client portfolio that includes existing customers in at least three of the seven following industries:
 - High tech
 - Banking, financial services and insurance
 - Education
 - Healthcare (including providers, pharma and life sciences)
 - Manufacturing
 - Services
 - Transportation

At a minimum, B2B MAP software must offer functionality with the ability to:

- Input and synchronize customer contact and account data into a unified customer profile. Create multistep journeys for contacts (e.g., drip campaigns, customer onboarding motions) using a graphical lead workflow UI suitable for nontechnical users.
- Deploy and manage coordinated customer engagement programs across multiple channels, including native email and landing page execution.
- Score leads to evaluate quality based on profile-fit and behavioral criteria using business rules and/or predictive analytics capabilities.
- Measure the performance of marketing touchpoints and communicate the results using data visualization/dashboarding capabilities.

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/Service

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

We specifically look for:

- Execution of the functionalities noted in the market definition.
- Perceived ease of use of the B2B marketing automation solution.

Overall Viability

An assessment of the vendor's overall financial health, as well as the financial and practical success of the business unit. Views the likelihood of the organization to continue to offer and invest in the product, as well as the product position in the current portfolio.

We specifically look for:

- The health of the line of business offering B2B marketing automation solutions.
- The vendor's demonstration of a steady cadence of product updates.
- Steady or improving customer retention rates.

Sales Execution/Pricing

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

effectiveness of the vendor's sales channels.

We specifically look for:

- Pricing transparency.
- Cost competitiveness in relation to competitors with comparable capabilities.
- Ability to help buyers reach smart, confident purchasing decisions.

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:

- Vendor's investments in collecting customer feedback.
- Evidence of application of customer feedback to enhance B2B marketing solution offerings.
- The vendor's ability to quickly respond to changing market conditions.

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 "mind share" 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 overall visibility within the market.
- The vendor's ability to execute tactical and strategic marketing campaigns that drive a growing customer base.
- The vendor's ability to create compelling and helpful marketing content.

Customer Experience

Products, services and/or programs that enable the vendor's customers to achieve anticipated results with the B2B MAPs evaluated. Specifically, these features include quality supplier/buyer interactions, technical support or account support. They may also include such things as ancillary tools, customer support programs, availability of user groups and SLAs.

We specifically look for:

- The vendor’s resources for delivering technical and account support.
- The vendor’s collection of training materials to help users maximize value.
- Onboarding and customer success programs to enable customers to quickly achieve business value.

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 ability to limit gaps in service and downtime.
- The vendor’s talent investments.
- Vendor capabilities to protect the data of its customers’ customers.

Table 1: Ability to Execute Evaluation Criteria

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

Evaluation Criteria ↓

Weighting ↓

Source: Gartner (September 2024)

Completeness of Vision

Market Understanding

The vendor's ability to 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 its added vision.

We specifically look for:

- Understanding of market needs.
- Forward-looking plans to address market conditions.
- Vision for future evolution of the market.

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:

- Articulation of competitive differentiators.
- Communication of a clear value proposition.
- Vendor's own use/application of B2B MAP capabilities.

Sales Strategy

The vendor's strategy for using appropriate networks, including direct and indirect sales, marketing, service, and communication, to sell its B2B MAP. We also look at the vendor's partners that extend the scope and depth of its market reach, expertise, technologies, services and customer base.

We specifically look for:

- The vendor's overall strategy to sell to businesses and IT decision makers.
- The vendor's strategy for using third-party sales partners.

- The depth and scope of the vendor's distribution, implementation and support partners.

Offering (Product) Strategy

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

We specifically look for:

- The vendor's ability to deliver differentiated B2B MAP functionality.
- A clear, well-defined path for product development and evolution.
- Investments in the vendor's B2B MAP that improve ease of use and implementation.

Business Model

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

We specifically look for:

- The vendor's ability to align its business model to changing market conditions.
- The vendor's availability of complementary products to extend the value of its B2B MAP solution.
- The vendor's ability to extend the value of its B2B marketing automation product via integrations with third-party products.

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:

- The ability of the vendor's B2B MAP to meet the needs of target industry verticals.
- The vendor's ability to direct sales and support resources to industry-specific needs.
- The vendor's ability to meet industry-specific needs using third-party partners.

Innovation

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

We specifically look for:

- The vendor’s organizational commitment to innovation.
- Investments in product innovation via acquisitions or strategic partnerships.
- Demonstrated commitment to integrating AI capabilities into product offerings.

Rationale for change from “medium” to “high”: In the past year, Gartner has witnessed a spike in vendor innovations in product capabilities and roadmaps.

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 vendor’s ability to support non-English speakers.
- The vendor’s ability to direct sales and support resources to different regions.
- The depth and scope of partners available in different regions.

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Low

Evaluation Criteria ↓	Weighting ↓
Innovation	High
Geographic Strategy	Medium

Source: Gartner (September 2024)

Quadrant Descriptions

Leaders

Leaders possess capabilities that enable them to provide deep support across nearly all B2B MAP product requirements, generally separating themselves from other vendors most significantly across the following capabilities: lead workflow, account prioritization, email marketing and integrations. This broad support enables Leaders to consistently meet client needs across all four core B2B MAP use cases (lead acquisition, lead management, customer journey orchestration and account-based marketing). They demonstrate the ability to address the needs of large enterprise clients, in part, due to their strength in managing integrations. Leaders' product roadmaps balance continued investments in AI with other enhancements that aim to improve customer engagement and demand generation effectiveness and efficiency. While Leaders may offer powerful product capabilities, Gartner clients often report higher burdens on training and enablement. Buyers should plan to invest in training and enablement to mitigate the risk that higher total cost of ownership (TCO) does not translate into business impact.

Challengers

Challengers offer functionalities across all of the assessed B2B MAP product capabilities, but they may lack the depth of Leaders in certain places, particularly in terms of their ability to integrate with third-party SFA/CRM platforms, which may be a non-negotiable for enterprise organizations. While they may show signals of innovation, they have not demonstrated commitment to adapting their product roadmap to align with emerging market needs, including new applications of AI, on par with Leaders. This situation may, in part, be a reflection of a desire to maintain ease of use.

Visionaries

Visionaries have a strong vision for delivering B2B MAP capabilities. They excel in offering emerging functionality, including AI, which can help shape the direction for how this market enables clients to optimize how they engage their customers. Their ability to execute may be hampered due to less robust investments in go-to-market functions, like sales or marketing, in comparison to Leaders.

Niche Players

Niche Players satisfy the product requirements of B2B MAPs, often through a basic set of functions, and generally to a narrower market segment in comparison to other vendors. Niche Players may excel in supporting clients of certain industries, certain geographic regions, and most commonly small to midsize businesses. They typically lack the operations, partners, product capabilities or vision to expand their reach. Their limited functional capabilities' depth, in comparison to Leaders, could have its benefits in that clients may enjoy a more simplified product experience. This approach might be attractive for marketing teams particularly concerned about driving adoption of complex marketing automation tools within resource constraints.

Context

B2B MAPs serve as the primary hub for orchestrating prospective and current customer engagement and managing demand generation operations for most B2B marketing teams. Seventy-nine percent of B2B marketing technology leaders have a B2B MAP, according to Gartner's 2023 Marketing Technology Survey. ¹

This is a mature market. B2B marketing automation solutions have been available for more than 20 years. All of the vendors evaluated in this Magic Quadrant offer the basic capabilities required by most low- to mid-maturity marketing teams. However, in the last two years, the market has experienced promising signals of innovation, largely driven through the incorporation of GenAI and broader AI capabilities.

In the long-term, it's reasonable to expect that many of those features will be pervasive across most (if not all) major B2B MAP vendors. For example, GenAI-supported email creation, a rare capability in this market two years ago, is now offered by the majority of the vendors in this Magic Quadrant. In the immediate- and near-term, marketing operations leaders can differentiate vendor offerings by assessing which AI-enabled features are available today, as well as based on each vendor's ability to clearly communicate how AI fits into their product roadmaps. These two factors played a role in how Gartner evaluated vendors in this Magic Quadrant.

Beyond finding differentiation in vendor offerings via product capabilities, a key source of vendor differentiation for this market will be how well each vendor's product(s), packaging and support ecosystem fit your organization's needs. Key considerations for assessing B2B MAP vendor fit include:

- The vendor's ability to integrate with other tools in your revenue technology stack (most notably, your SFA/CRM provider), measured in terms of feasibility, level of effort and any associated costs.
- The vendor's ability to satisfy your predefined use cases. Developing predefined B2B MAP use cases is a non-negotiable task for effective vendor evaluation and selection (see [Toolkit: B2B Marketing Technology Use Case Builder](#)).
- The availability of the vendor's additional marketing and/or CRM technologies, if you prefer an integrated suite approach to marketing/revenue technology management.

- The vendor’s ability to support customized product implementation via self-service modes, customer success programs included in product licensing fees, professional services for an additional cost and/or the vendor’s network of third-party implementation partners. However, marketing teams with limited resources and/or access to in-house technical expertise may prefer vendors that can satisfy basic product requirements out of the box, with minimal effort required.

The evaluation conducted in this Magic Quadrant focuses on how vendors can serve B2B demand generation use cases that are broadly applicable across marketing teams of varying levels of maturity, size, complexity and industry vertical.

Market Overview

B2B MAP vendors face dueling imperatives. On one hand, they face pressure to keep up with the recent high-pace of innovation within the market and broader martech landscape. These innovations mainly include adopting AI-driven functionality (e.g., generative content development), predictive segmentation capabilities and advanced lead/journey workflow development (e.g., next best action orchestration and generative workflow development). On the other hand, vendors need to ensure their MAPs remain easy to use among marketing end users.

The importance of the first imperative is highlighted by the fact that the application of AI is a key source of vendor differentiation in a mature market. The importance of the second imperative is highlighted by the fact that B2B marketing technology leaders estimate they’re only using 47% of the total capabilities made available by their B2B MAP solution of record. ¹

Historically, innovation in the B2B MAP market sometimes came at the expense of increased product complexity. However, AI, and GenAI in particular, has started the work of attempting to blend the best of both worlds: a more robust set of advanced product capabilities and an improved ability for low- and high-maturity marketing teams to boost effectiveness and efficiency. Does your team lack the analytical skills to sufficiently measure marketing performance? GenAI-driven, proactive performance insight notifications can help. Does your team lack the time or expertise to build dynamic lead/journey workflows? Provide your MAP tool with a description of your program objectives and it can generate an ideal workflow.

Content development is only the foremost of GenAI’s ability to improve the power of B2B MAPs. B2B CMOs seem bullish on this promise, too, as 75% of them say they expect GenAI to have a positive impact on their 2024 marketing investments and strategy. ²

While it may be hard for marketing operations leaders to not get excited about the promise of AI, B2B MAP vendors continue to work diligently to enable marketing teams to execute the fundamentals of a modern demand generation strategy. These fundamentals regularly include the ability to engage buyers across long, complex buying journeys and facilitate tighter integrations of customer data with customer-facing team processes.

Trends Shaping the B2B MAP Market

From “AI as a Tool” to “AI as an Actor”

Presently, B2B MAPs are best optimized for marketing teams taking an “AI as a tool” approach, meaning marketers use and consult AI as part of their decision-making process. However, the landscape of B2B MAPs is experiencing a significant trend toward embracing an “AI as an actor” approach, meaning AI makes and executes complex decisions that are trusted and embedded in the business. Leading platforms are actively developing AI features that can operate independently of human intervention. This transformative shift moves away from traditional workflows and processes that required human teams toward AI agents that automate tasks from strategy to execution. Incorporating AI actors or agents in marketing automation platforms raises several key implications for B2B marketers. First, it enables businesses to streamline their operations by automating repetitive and time-consuming judgements and workflows, allowing marketing teams to focus on more strategic initiatives. This enhanced efficiency translates to improved productivity and resource allocation. Moreover, AI-powered agents provide personalized insights, recommendations and intelligent actions, extending the capabilities of marketing professionals. This application of AI empowers individuals to work smarter and more efficiently, leveraging AI’s capabilities to optimize their decision-making processes and drive better results.

Additionally, AI agents play a crucial role in enhancing customer experiences. By offering real-time assistance, answering queries and providing tailored recommendations, they create seamless interactions and foster stronger customer relationships. This level of personalized engagement offers the promise of improved buying experiences and customer satisfaction, although marketing leaders should continue to monitor customer receptivity to these types of experiences. As the trend of AI as an actor continues to shape B2B MAPs, businesses can expect increased efficiency, improved productivity and enhanced customer engagement. Embracing this trend will be crucial for marketers seeking to stay competitive and deliver exceptional experiences in an evolving B2B landscape.

Vendors Aim to Address Complex Journey Orchestration

B2B marketing teams are increasingly seeking opportunities to influence the complex buying journeys of their prospects and customers. The typical buying group consists of five to 11 stakeholders, representing five different corporate functions.³ Additionally, Gartner research reveals that buying journeys are not linear (see [Improve Digital Engagement to Support B2B Buying Journeys](#)). Historically, B2B MAPs have been poorly suited to help marketers manage complex buying journeys. First, B2B MAPs were designed to support journey orchestration for individual contacts or leads, rather than accounts or buying groups. Second, the design of lead/journey workflows in B2B MAPs required a lot of manual effort — and to a certain extent, guesswork — from marketing users. Many of the vendors analyzed in this Magic Quadrant are making investments to help marketing teams manage complex buying journeys in a more automated and intelligent manner.

In recent years, vendors have released functionalities that support account-level management, in addition to contact-level management, such as the ability to maintain account scoring models, account records/profile pages and reporting on account-based performance. Looking ahead, many vendors are turning to AI to extend their support for complex journeys. Promising investments include functionality to identify buying group roles and user interfaces designed to

manage marketing programs for multiple buying group stakeholders at once. Additionally, some vendors are investing in next-best journey/workflow functionalities, based on the context of defined audiences. GenAI also offers the ability for vendors to design net new journeys/workflows based on marketing objectives and audience dynamics. Marketing operations leaders seeking to enable their teams to manage complex buying journeys should push vendors to demonstrate what supporting functionalities are available as well as seek visibility into vendor roadmaps to see what functionalities are coming in the near future – including whether those features will require additional costs.

The Promise and Perils of Suite-Based Vendors

B2B MAPs were originally developed as stand-alone applications with native integrations to popular CRM/SFA platforms from other vendors. Today, the vast majority of vendors in this Magic Quadrant sell additional marketing and/or broader CRM products that can extend the value of their B2B MAP offering. As noted in last year's Magic Quadrant, most of the Leaders increasingly recommend purchasing their CDP offering to provide advanced functionality beyond what the MAP provides with an attendant increase in TCO. Niche Players and Challengers have traditionally gone to market with an integrated suite of sales and marketing solutions that served a mix of SMB and large enterprise customers, sold in a variety of configurations (e.g., marketing suite, cross-CRM suite, custom selections).

Today, several vendors include a CRM platform or CDP as part of their MAP offering and have adjusted their pricing and packaging to reflect the change. This platform approach makes it possible for vendors to sell integrated enterprise editions of sales, service and other modules, in addition to the marketing suite, but creates complications for buyers, depending on their martech strategy:

- This approach may be attractive for prospective clients who prefer an integrated suite approach, looking for benefits like cost savings and improved integrations. Forty-three percent of B2B marketing technology leaders say they prefer an integrated suite approach to martech management today. ¹ CDPs can also expand the ability of revenue technology stacks to take advantage of data from cloud-based data warehouses across the suite.
- This strategy from vendors may also come with some drawbacks. For example, if organizations currently only use 47% of the capabilities included in their B2B MAP solution, including a CDP in their MAP purchase may create even more unused-but-paid-for capabilities. ¹ Marketing teams face similar utilization challenges when it comes to CDPs; B2B marketing technology leaders report using only 44% of the capabilities included in their CDP solution. ¹ Marketing teams may also find it frustrating to be on the receiving end of upsell sales pitches from vendors, suggesting they buy additional products to optimize the value of the MAP they've already purchased.

To avoid potential surprises, as you engage vendors early in the evaluation or renewal process, push for clarity in terms of which combination of products, add-ons – and in some instances, tiers

– each vendor proposes to satisfy your present-day use cases. Furthermore, identify what future purchases may satisfy your planned future use cases.

Evidence

Glassdoor was also used as a tool in Gartner's analysis of vendors; site accessed 12 April 2024.

¹ **2023 Gartner Marketing Technology Survey:** This survey aimed 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. It was conducted online from the end of May through June 2023. In total, 405 respondents were surveyed in their native languages across North America (n = 200), Western Europe (n = 173), and the Nordics (n = 32). Qualifying organizations reported in-house annual revenue for fiscal year 2022 of at least \$100 million, with 80% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 39), insurance (n = 39), manufacturing (n = 41), consumer products (n = 38), retail (n = 39), travel and hospitality (n = 34), healthcare (n = 38), pharmaceuticals (n = 31), media (n = 34), tech products (n = 34), and IT & business services (n = 38). All the respondents were required to be senior decision-makers, where the majority of their daily responsibilities mostly aligned with either business- or IT-focused marketing. Sixty-two percent of respondents were aligned to the marketing function, 18% to brand management, 11% to product marketing and management, 9% to customer services, and 2% to IT or other business units.

² **2024 Gartner CMO Spend Survey:** This survey looked at top-line marketing budgets and aimed to identify how evolving customer journeys, C-suite pressures and cost challenges impact marketing's spending priorities and channel effectiveness. The research was conducted online from February through March 2024 among 395 respondents in North America (n = 200) and Europe (n = 195). Respondents were required to be involved in decisions pertaining to setting or influencing marketing strategy/planning and to aligning marketing budget/resources, and/or they were required to lead cross-functional programs and strategies with marketing. Seventy-four percent of the respondents came from organizations with \$1 billion or more in annual revenue. Respondents came from a variety of industries: financial services (n = 46), insurance (n = 35), manufacturing (n = 48), consumer products (n = 32), media (n = 35), retail (n = 38), healthcare (n = 47), pharma (n = 37), IT and business services (n = 41), and travel and hospitality (n = 36).

³ **2022 Gartner B2B Buyer Survey:** This survey was administered in November and December 2022 and includes data from 771 B2B buyers from the U.S., Canada, the U.K. and Australia. Respondents who qualified for this survey had to be employed full time at an organization with total revenue of at least \$250 million or the equivalent and had participated in a significant B2B purchase decision. A "significant B2B purchase decision" is defined here 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 with the supplier that was used to complete the purchase. Respondents evaluated the quality of the purchase decision and provided insights into various stages of their recent purchase decision.

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.

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.

Expérience client : relations, produits et services/programmes qui permettent aux clients de réussir avec les produits évalués. Cela inclut notamment la manière dont les clients reçoivent un support technique ou un support de compte. Cela peut également inclure des outils auxiliaires, des programmes de support client (et leur qualité), la disponibilité des groupes d'utilisateurs, des accords de niveau de service, etc.

Opérations : Capacité de l'organisation à atteindre ses objectifs et à respecter ses engagements. Les facteurs pris en compte sont notamment la qualité de la structure organisationnelle, notamment les compétences, les expériences, les programmes, les systèmes et les autres moyens qui permettent à l'organisation de fonctionner efficacement et de manière continue.

Exhaustivité de la vision

Compréhension du marché : capacité du fournisseur à comprendre les souhaits et les besoins des acheteurs et à les traduire en produits et services. Les fournisseurs qui font preuve du plus haut degré de vision écoutent et comprennent les souhaits et les besoins des acheteurs et peuvent les façonner ou les améliorer grâce à leur vision ajoutée.

Stratégie marketing : un ensemble de messages clairs et différenciés, communiqués de manière cohérente dans toute l'organisation et externalisés via le site Web, la publicité, les programmes clients et les énoncés de positionnement.

Stratégie de vente : stratégie de vente de produits qui utilise le réseau approprié de ventes directes et indirectes, de marketing, de services et de communication affiliés qui étendent la portée et la profondeur de la portée du marché, des compétences, de l'expertise, des technologies, des services et de la clientèle.

Stratégie d'offre (produit) : l'approche du fournisseur en matière de développement et de livraison de produits qui met l'accent sur la différenciation, la fonctionnalité, la méthodologie et les ensembles de fonctionnalités en fonction des exigences actuelles et futures.

Modèle commercial : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

Stratégie verticale/sectorielle : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des différents segments de marché, y compris les marchés verticaux.

Innovation : Dispositions directes, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, de défense ou de prévention.

Stratégie géographique : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques situées en dehors de la zone géographique « d'origine » ou native, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, selon ce qui convient à cette zone géographique et à ce marché.

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