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

The 11 Providers That Matter Most And How They Stack Up

by Rusty Warner
July 29, 2015

Why Read This Report

In Forrester's 35-criteria evaluation of real-time interaction management (RTIM) vendors, we identified the 11 most significant technology providers in the category — Adobe, Experian, IBM, Infor, Oracle, Pegasystems, Pitney Bowes, Salesforce, SAS Institute, SmartFocus, and Teradata — and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help customer insights (CI) professionals select the right partner for their RTIM needs.

Key Takeaways

Pegasystems And Teradata Lead A Diversified Pack

We uncovered a fragmented market in which marketing cloud vendors focus on digital channels, while vendors with analytically driven campaign tools or decision engines lack widespread adoption. Pegasystems and Teradata distinguish themselves as enterprise leaders for both their marketer-focused analytics and cross-channel orchestration.

Digital And Offline Channel Integration Remains A Challenge

The RTIM market is evolving rapidly, as CI pros seek to leverage analytics to deliver contextually relevant, real-time experiences across both digital and offline channels. Unfortunately, vendors that excel at digital execution lack seamless integration with offline channels, and vice versa.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the model to your specifications.

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by Rusty Warner
with Srividya Sridharan, Olivia French, and Matthew Izzi
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Notes & Resources

Forrester conducted product evaluations in April 2015 and interviewed 10 vendor companies, including Adobe, Experian, IBM, Pegasystems, and Pitney Bowes. We also surveyed 74 end user companies.

Related Research Documents

Brief: Demystifying Real-Time Interaction Management

Market Overview: Real-Time Interaction Management

RTIM Fuels The Contextual Marketing Engine

CI professionals strive to deliver contextually relevant experiences across the customer life cycle.[1] They work with their business technology (BT) counterparts to integrate enterprise marketing technologies that manage customer data, provide real-time analytics and insights, and automate cross-channel interactions.[2] Enter RTIM, a system of engagement that leverages systems of insight to enable contextual marketing.[3] Forrester defines RTIM as:

> *Enterprise marketing technology that delivers contextually relevant experiences, value, and utility at the appropriate moment in the customer life cycle via preferred customer touchpoints.*

Vendors Approach The RTIM Market From Multiple Angles

CI pros, cross-channel marketers, and others responsible for customer-facing operations must prioritize their RTIM investments based on how, when, and where customers interact with their brands. They must further ensure contextual relevance and consistency across appropriate digital and offline channels, whether inbound or outbound. Customer-driven business requirements for email communications, eCommerce, service centers, or location-specific operations dictate starting points for RTIM.[4] As a result, vendors that address different aspects of RTIM compete for mindshare in a crowded market, where:

› **Embedded advanced analytics drives the quality of decision-making.** All of the vendors in this study offer the ability to manage customer profiles, create predictive models, and deploy self-learning algorithms; but all analytics tools are not created equally. Digital marketing vendors with an enterprise marketing software suite (EMSS), such as Adobe, IBM, and Salesforce, lead with digital intelligence, multivariate testing, and personalization for online channels. EMSS vendors with cross-channel campaign management (CCCM) solutions like SAS Institute and Teradata or business process management (BPM) vendors like Pegasystems build their RTIM solutions on analytically driven decision engines.

› **Channel diversity influences the extent of real-time decisions.** EMSS vendors like Adobe, IBM, and Salesforce focus on digital requirements, and the majority of their customers use components of their RTIM solutions to personalize email, web, and social media interactions. Although these interactions occur in real time, the solutions typically execute offer analysis and content assembly beforehand, in anticipation of a customer's behavior. By contrast, customers implement real-time decision engines from vendors like Pegasystems, SAS Institute, and Teradata to arbitrate multiple offers and manage two-way interactions simultaneously across inbound and outbound channels.

› **The scale of real-time customer interactions keeps growing.** Digital business transformation and the mobile mind shift are driving both the volume and diversity of customer interactions across a multitude of touchpoints.[5] Although three-quarters of vendor references surveyed for this study reported interaction volumes in the tens to hundreds of millions, 15% execute billions of interactions

annually.[6] Interaction volumes will continue to increase dramatically, leading organizations to leverage RTIM solutions to address anonymous customer interactions in addition to interactions with known customers.[7]

› **Data and workflow integration determines successful deployment.** Vendor reference customers tell us that integrating real-time data from digital and offline sources is a significant challenge, and they are looking to their vendors to help them minimize the effort.[8] RTIM customers also want integration capabilities within their vendor's respective portfolios, as well as with third-party technologies and channels. As deployment shifts from on-premises to cloud-based or hybrid models, customer demand will further drive vendor development efforts for more manageable data and application integration.[9]

Real-Time Interaction Management Evaluation Overview

To assess the state of the real-time interaction management market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top RTIM vendors.

Evaluation Criteria Emphasize Breadth Of Offering And Depth Of Integration

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 35 criteria, which we grouped into three high-level buckets:

› **Current offering.** Forrester's evaluation criteria are oriented toward the needs of enterprise customers. We evaluated each vendor against four dimensions for its current offering: RTIM capabilities (customer recognition, contextual understanding, decision arbitration, offer orchestration, and measurement and optimization); user experience; integration (customer data environment, content, channels, native applications, and partner technologies); and scale of deployments.

› **Strategy.** For this set of criteria, Forrester examined each vendor's strategy to understand how the vendor approaches the creation of its solution, as well as how its vision positions the vendor for future success. We used the vendor's go-to-market strategy, technology road map, and customer references for the analysis and scored on four dimensions: solution strategy, sales and service strategy, partnership strategy, and customer satisfaction.

› **Market presence.** To determine the size of each vendor's RTIM business, we evaluated its installed base of enterprise customers that are deploying RTIM across at least two channels, customer distribution across geographies and industries, and revenue and financial growth linked to RTIM deployments.

Evaluated Vendors Support Enterprise RTIM Needs

Forrester included 11 vendors in the assessment: Adobe, Experian, IBM, Infor, Oracle, Pegasystems, Pitney Bowes, Salesforce, SAS Institute, SmartFocus, and Teradata. Each of these vendors has (see Figure 1):

› **A broad array of functionality covering all five RTIM core requirements.** RTIM depends on recognizing customers across channels and devices; understanding the current context merged with detailed customer history; determining the appropriate decision, offer, or message; orchestrating delivery of content across multiple digital and offline channels; and capturing interaction data for measurement and optimization.[10] We weighted analytical capabilities required for decision arbitration and cross-channel offer delivery capabilities more highly, based on their importance to successful RTIM deployments.

› **The ability to integrate digital and offline channels with multiple content types.** RTIM covers various use cases, including decision management for contact centers, next-best-action or next-best-offer, proximity-based marketing, eCommerce recommendations, ad targeting and retargeting, and personalization for email, websites, mobile apps, and social media.[11] We therefore measured each solution's breadth of functionality across dynamic, interactive, multimedia, and advertising content, spanning both digital and offline channels.

› **Strong enterprise B2C and global focus.** Although RTIM also has B2B use cases, this evaluation focused on B2C implementations. We limited inclusion to vendors with at least 50 B2C implementations at enterprise organizations above $1 billion USD in revenue. We further qualified vendors based on their direct sales presence in at least two geographic regions. Our scoring favored vendors with enterprise B2C customers that deploy RTIM across at least two channels.

The RTIM Market Is Fragmented And Evolving At A Rapid Pace

The evaluation uncovered a market in which (see Figure 2):

› **EMSS vendors claim mass RTIM deployments despite limited channel proof points.** Analytically driven dynamic email content and personalized web sessions are the most pervasive RTIM use cases. Marketing cloud vendors — Adobe, IBM, Oracle, and Salesforce — excel at these capabilities, and they dominate the market in terms of the number of deployments. However, their RTIM prowess for mobile apps and social media is still evolving, and they lack integration points to drive consistent RTIM across offline channels. All four vendors must expand their vision for digital personalization to encompass contextually relevant, channel-agnostic RTIM.

› **Campaign- and BPM-focused vendors offer compelling options.** Vendors with CCCM solutions (IBM, Pitney Bowes, SAS Institute, and Teradata) as well as BPM vendors (Infor and Pegasystems) have developed predictive analytics and business rules functionality to drive real-time decision engines. While they integrate online and offline channels, they lack the widespread adoption of

the marketing cloud vendors for digital personalization (except IBM, which competes in both categories). In particular, Pegasystems and Teradata offer enterprise-class, marketer-friendly analytics, as well as cross-channel orchestration — critical deliverables for others in this category.

› **Newcomers reinvent themselves to focus on RTIM requirements.** SmartFocus rebranded from Emailvision in 2013, and Experian launched its marketing solution in 2014. Both focus heavily on the retail market with RTIM solutions that address digital interactions and eCommerce recommendations. Experian differentiates with its consumer insights data, while SmartFocus integrates advanced analytical algorithms and an innovative approach to beacon technologies. As with the marketing cloud vendors, neither fully integrates offline channel execution via contact centers.

This evaluation of the RTIM market is intended to be a starting point only. 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 1 Evaluated Vendors: Real-Time Interaction Management Information And Selection Criteria

Vendor	Product evaluated	Evaluated date
Adobe	Adobe Marketing Cloud	Q2 2015
Experian	Experian Marketing Suite	Q2 2015
IBM	IBM Marketing Solutions	Q2 2015
Infor	Infor Interaction Advisor	Q2 2015
Pegasystems	Pega Customer Decision Hub	Q2 2015
Pitney Bowes	Pitney Bowes Customer Engagement Suite	Q2 2015
Salesforce	Salesforce Marketing Cloud	Q2 2015
SAS Institute	SAS Customer Intelligence	Q2 2015
SmartFocus	SmartFocus Message Cloud	Q2 2015
Teradata	Teradata Integrated Marketing Cloud	Q2 2015

Selection criteria

A broad portfolio of functionality covering all five RTIM core requirements: customer recognition, contextual understanding, decision arbitration, offer orchestration, and measurement and optimization.

The ability to integrate digital and offline channels with multiple content types, including dynamic, interactive, multimedia, and advertising content.

Strong enterprise B2C and global focus, with at least 50 direct RTIM enterprise B2C customers across at least two geographic regions.

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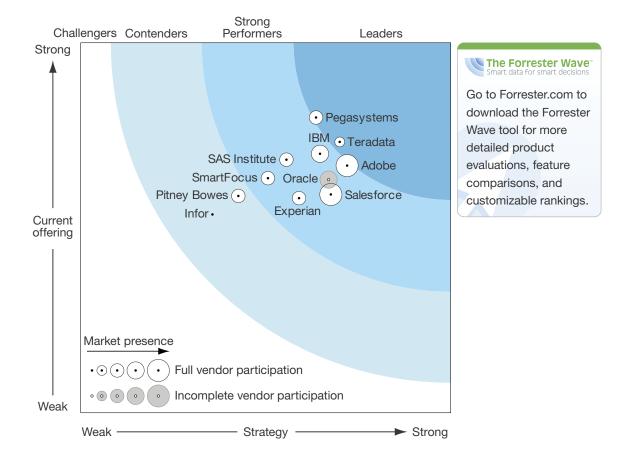**FIGURE 2** Forrester Wave™: Real-Time Interaction Management, Q3 '15

FIGURE 2 Forrester Wave™: Real-Time Interaction Management, Q3 '15 (Cont.)

	Forrester's Weighting	Adobe	Experian	IBM	Infor	Pegasystems	Pitney Bowes	Salesforce	SAS Institute	SmartFocus	Teradata
CURRENT OFFERING	50%	3.34	2.90	3.50	2.68	3.99	2.93	2.95	3.42	3.17	3.66
Solution information	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Capabilities	60%	3.61	2.96	3.76	2.74	3.96	3.07	3.55	3.89	3.29	4.08
User experience	10%	3.00	4.00	2.00	2.00	4.00	3.00	2.00	3.00	3.00	3.00
Integration	25%	3.10	2.70	3.40	2.75	4.05	2.75	1.90	2.75	3.20	3.05
Scale of current deployments	5%	2.00	1.00	4.00	3.00	4.00	2.00	3.00	2.00	2.00	3.00
STRATEGY	50%	3.60	2.95	3.23	1.78	3.18	2.13	3.38	2.78	2.53	3.50
Solution strategy	50%	4.00	2.00	4.00	1.00	3.00	2.00	4.00	3.00	3.00	4.00
Sales and services strategy	15%	3.00	5.00	3.00	4.00	4.00	2.00	4.00	3.00	3.00	3.00
Partner strategy	10%	4.00	2.00	4.00	3.00	2.00	2.00	4.00	2.00	2.00	3.00
Customer satisfaction	25%	3.00	4.00	1.50	1.50	3.50	2.50	1.50	2.50	1.50	3.00
Pricing structure	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	4.25	2.50	3.75	0.75	2.25	3.00	4.25	2.50	3.00	2.00
Installed base	50%	4.50	2.00	4.50	1.50	1.50	4.00	4.50	3.00	4.00	3.00
Financials	50%	4.00	3.00	3.00	0.00	3.00	2.00	4.00	2.00	2.00	1.00
Employees	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

Vendor Profiles

Leaders Balance Decision Arbitration With Cross-Channel Orchestration

› **Pegasystems moves from the back office.** Merging powerful analytics with business rules management, Pegasystems has expanded its next-best-action capabilities from the contact center to address sales, service, and marketing channels. There is room for improvement with regard to digital channels and advertising content, but Pegasystems demonstrates consistent decision-making and cross-channel offer delivery, especially for telecommunications and financial services firms. References from the growing Pega Customer Decision Hub user base represent some of the largest RTIM environments in this study and provide favorable reviews for customer data management, recommendation engine functionality, and offer optimization.

› **Teradata builds on cross-channel campaign management strengths.** Teradata provides an enterprise-class decision engine for digital and offline execution, with the second largest RTIM implementations in this evaluation (based on the average number of customer records). References

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praise customer profiles and segmentation, analytics, business rules, and recommendation capabilities, though they are critical of Teradata's track record for integrating third-party technologies. Teradata lacks the digital chops of other marketing cloud vendors, but it has made investments to address digital experience delivery across the retail, travel, hospitality, financial services, and telecommunications sectors.

Strong Performers Must Expand Beyond Their Core Offerings

› **Adobe packages modular components rather than offer a single solution.** Although RTIM functionality primarily resides within its Campaign module, Adobe provides supporting functionality across Analytics, Target, Experience Manager, and its other cloud modules. Strengths in both inbound and outbound digital execution, as well as content management, underpin Adobe's RTIM strategy. The majority of its reported 5,000 RTIM customers leverage web or social media personalization capabilities, with more than 1,200 deploying RTIM offers across multiple channels. However, references could not articulate use cases for mobile apps, inbound contact centers, or face-to-face offer orchestration.

› **IBM has the right components to formulate a cohesive strategy.** With its broad portfolio of (sometimes overlapping) marketing technologies, IBM addresses all of Forrester's defined RTIM requirements — receiving high marks for functionality, but losing points for consistency across solution components. Its references provide mixed reviews on predictive analytics, recommendation and optimization functionality, and execution via inbound channels, but they agree on outbound digital channel execution as a strong point. While IBM has the requisite technology, it has work to do on integration, user experience, and solution packaging, all of which feature in its RTIM road map.

› **Oracle extends its portfolio integration and partner ecosystem.** Oracle provides inbound and outbound digital capabilities, with email and mobile based on the Responsys acquisition, as well as eCommerce, contact center, and loyalty solutions in its broader portfolio. For highly customized RTIM environments, Oracle Real-Time Decisions (part of Oracle's BI portfolio) provides a workbench for enterprise recommendation engine development. Integrations with third-party personalization and recommendation tools provide more flexible cloud-based options. Oracle did not participate in the research for this report, so Forrester based its findings on past briefings, product demos, and other Forrester Wave evaluations.

› **Salesforce offers marketing-focused capabilities for digital channels.** Core strengths like its Journey Builder and marketer-friendly Predictive Intelligence make Salesforce a good choice for dynamic email content, personalized mobile app and web experiences, and eCommerce recommendations. Integration with back-office systems, offline channels, and third-party marketing tools is an area for improvement, and customer references echo this sentiment. Although Salesforce reports 7,000 customers using RTIM functionality, the majority deploy real-time email or mobile messaging, and less than 10 percent deploy RTIM offers across multiple channels.

› **SAS Institute relies on its predictive analytics leadership.** Technology-savvy users apply SAS Institute's analytical prowess to RTIM decision arbitration, customer understanding, and measurement and optimization. It provides high-speed execution for complex, high-volume algorithms and bundles event stream processing. However, SAS Customer Intelligence lags other solutions in this study for marketer-focused user experience and digital marketing execution. References say that SAS needs to minimize the effort to integrate real-time data sources, and they cite both native and third-party integration as areas for improvement.

› **Experian enters the market with a promising platform.** Rapid adoption has propelled Experian's RTIM user base to 180 customers since it launched the solution in July 2014, though references report relatively small databases with low interaction volumes. Nearly half of its customers are retailers that execute dynamic email, but the majority also deploy web personalization and eCommerce recommendations. They further leverage Experian's 12 billion rows of consumer data for identity resolution and record matching. Experian must extend its event-driven marketing capabilities with analytical and journey mapping tools that enable scalable RTIM.

› **SmartFocus applies an algorithmic approach to interactive messaging.** SmartFocus is the amalgamation of multiple acquisitions for campaign management, social media marketing, customer intelligence, predictive analytics, big data capabilities, and beacon technologies. Its strong performance in this evaluation is due to its successful integration of acquired analytical algorithms to consistently manage retail customer interactions across email, mobile, the Web, and eCommerce. SmartFocus also offers an innovative virtual beacon approach to proximity marketing, but references could provide only limited feedback on offline channels.

Contenders Need To Make Decision Capabilities Accessible To Marketers

› **Pitney Bowes has the analytics, but it lacks focus on marketers.** With its strongest RTIM capabilities centered on decision arbitration, Pitney Bowes must expand its offer orchestration to enable marketers to execute across inbound and outbound channels. Its acquisition of RealTime Content provides personalized interactive video capabilities, but references — the smallest in this study based on average customer database size — are critical of its technology road map and partner ecosystem. Pitney Bowes needs to inject more focus on marketing users into its myriad value propositions for customer life-cycle management, billing, digital self-service, and call center transformation to effectively compete in the RTIM space.

› **Infor delivers decision engine science without marketing art.** Of the evaluated vendors, Infor has the smallest number of RTIM implementations, though its references report the largest customer databases and third highest interaction volumes in this study. Infor packages business rules and predictive analytics with the former Epiphany Interaction Advisor to provide decision management within contact centers. It also addresses agent desktops, web offers, and eCommerce recommendations, but integration with its outbound CCCM solution is on the road map. To advance its position, Infor needs to shift focus to native and third-party integration for channel execution and enhance its user experience for marketers.

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Supplemental Material

Online Resource

The online version of Figure 2 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 three data sources to assess the strengths and weaknesses of each solution:

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

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

› **Customer references.** To validate product and vendor qualifications, Forrester surveyed 74 customer references, with a minimum of five customer references per participating vendor. We also conducted reference calls 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 document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we 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

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] To achieve sustainable competitive advantage, CI pros must deliver self-perpetuating cycles of real-time, two-way, insight-driven interactions with individual customers. See the "The Power Of Customer Context" Forrester report.

[2] Digital business demands a new approach to technology management. See the "Accelerate Digital Business With A BT Agenda" Forrester report.

[3] Systems of insight extend your BT agenda and complement systems of engagement, automation, and record. See the "Digital Insights Are The New Currency Of Business" Forrester report.

[4] More than 60% of RTIM vendor references are implementing both dynamic email and web personalization today, compared with 42% for inbound contact centers, approximately 30% for mobile messaging and mobile apps, and 16% for social media channels. Source: Forrester's Q2 2015 Global Real-Time Interaction Management Customer Reference Online Survey.

[5] As a result of their perpetual mobile connections, customers' expectations have changed. See the "Marketing Strategy For The Mobile Mind Shift" Forrester report.

6 Although 58% of RTIM vendor references manage fewer than 100 million customer interactions per annum, 18% manage between 100 million and 1 billion interactions, and 15% have environments with more than 1 billion annual interactions. Source: Forrester's Q2 2015 Global Real-Time Interaction Management Customer Reference Online Survey.

7 Today, 53% of RTIM vendor references manage interactions exclusively with known customers. Only 9% leverage their RTIM solutions to manage interactions where 50% or more of the recipients are anonymous. Source: Forrester's Q2 2015 Global Real-Time Interaction Management Customer Reference Online Survey.

8 Nearly half (49%) of vendor references cite "ease of integration with other data sources and systems" as the reason for selecting their RTIM vendor, yet 34% believe their vendor needs to "minimize the effort to integrate real-time data sources" as a key improvement area. Source: Forrester's Q2 2015 Global Real-Time Interaction Management Customer Reference Online Survey.

9 One-third of RTIM vendor references have on-premises implementations and would not consider a software-as-a-service (SaaS) option. However, another 21% with on-premises solutions would consider SaaS moving forward; 19% leverage SaaS today, and 27% report hybrid deployment models. Source: Forrester's Q2 2015 Global Real-Time Interaction Management Customer Reference Online Survey.

10 There are five core components of RTIM technology: customer recognition, customer understanding, decision arbitration, offer orchestration, and measurement and optimization. See the "Brief: Demystifying Real-Time Interaction Management" Forrester report.

11 CI pros must collaborate with their BT counterparts to evaluate the various RTIM vendor categories based on their depth of capabilities and breadth of customer channel coverage. See the "Market Overview: Real-Time Interaction Management" Forrester report.

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