FORRESTER®

# Vendor Landscape: Marketing Resource Management

**Leverage MRM To Drive Customer-Obsessed Marketing Operations**

by Rusty Warner
October 20, 2017 | Updated: November 29, 2017

## Why Read This Report

B2C marketers in the throes of modern marketing transformations need to rethink the role of marketing resource management (MRM). A tranche of new marketer-friendly tools replaces legacy MRM solutions with more agile alternatives. But the current MRM market is fragmented and many vendors offer overlapping functionality. This report categorizes solution providers that address the most common MRM use cases and provides recommendations for B2C marketers considering MRM investments.

## Key Takeaways

**MRM Addresses Core Marketing Operations**
B2C marketers incorporate MRM functionality into their enterprise marketing technology (EMT) ecosystems to manage four critical workstreams: money, people, content, and brand.

**Today's MRM Vendors Focus On Agility**
First-generation MRM platforms were expensive to implement and cumbersome to use. B2C marketers are ditching legacy platforms in favor of new tools that provide a modular, easy-to-use approach to specific MRM use cases.

**The MRM Market Is Crowded And Confusing**
B2C marketers responsible for marketing operations have a wealth of available alternatives. But they must navigate a jam-packed field of overlapping vendor capabilities to select the right MRM tools to meet their requirements.

# Vendor Landscape: Marketing Resource Management

## Leverage MRM To Drive Customer-Obsessed Marketing Operations

by Rusty Warner

with Mary Pilecki, Christian Splaine, and Christine Turley

October 20, 2017 | Updated: November 29, 2017

## Table Of Contents

## Related Research Documents

Q&A: Top Five Marketing Resource Management Questions Answered

Rethink Your Approach To MRM

**Share reports with colleagues.**
Enhance your membership with Research Share.

## MRM Is Evolving To Address Core Marketing Operations

A new breed of MRM vendors has emerged to help B2C marketing pros in their quest to better win, serve, and retain customers. Today's MRM tools address the shortcomings of their monolithic forebears and provide a modular, marketer-friendly approach to managing money, people, content, and brand strategy.[1] Each of these four workstreams is critical to successful marketing operations, and B2C marketers must integrate the requisite MRM tool sets into their EMT ecosystems (see Figure 1).

**FIGURE 1** MRM Uses Systems Of Insight To Manage Marketing Operations And Enable Systems Of Engagement
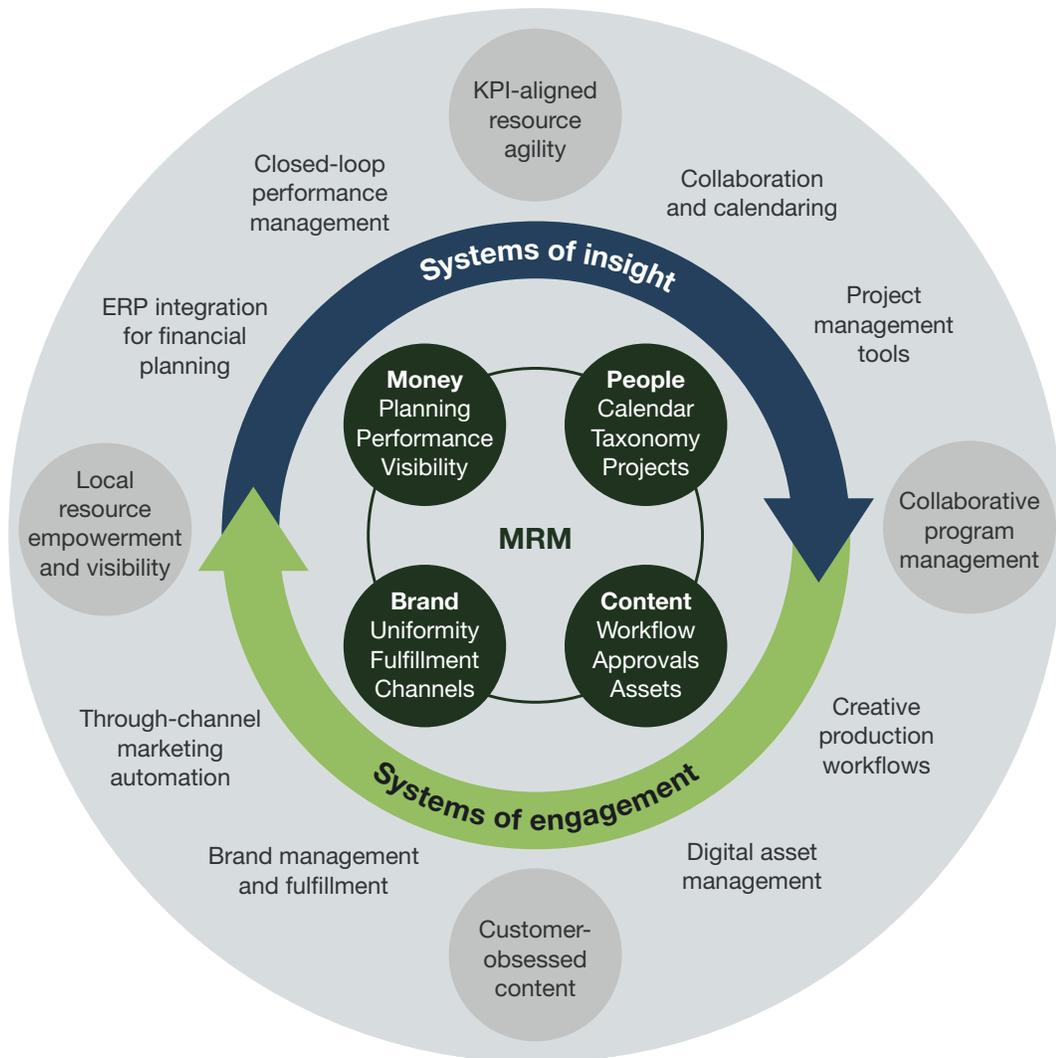
## MRM Vendors Deliver An Uneven Spectrum Of Capabilities

Customer-obsessed modern marketing requires a new approach to marketers' three core responsibilities — customer understanding, brand strategy, and brand experience.[2] MRM tools that facilitate insight-driven customer engagement are essential to drive the requisite transformation of day-to-day B2C marketing operations. As all-inclusive, on-premises MRM platforms give way to best-of-breed, software-as-a-service (SaaS)-based point solutions, B2C marketers profit from a diverse range of competitive solutions. But their good fortune quickly dissolves into confusing overchoice when they find themselves reviewing vendors that compete — and partner — based on overlapping offers with differences in core functionality (see Figure 2). This complex selection process is further complicated because:

› **Enterprise MRM solutions offer comprehensive — yet modular — capabilities.** Most big-name MRM vendors gained their capabilities via acquisition.[3] These historically on-premises platforms now usually come with SaaS options. The vendors package their various tools as fully integrated solutions but also offer them as separately purchased modules. Their existing customers must consider ongoing on-premises investments versus migrations to new deployment models. At the same time, they may wish to procure tools from alternative vendors — including those with whom their incumbent vendors now partner.

› **Best-of-breed point solutions have erupted to meet demand.** B2C marketers looking to switch vendors (or pursue their first MRM implementation) will find no shortage of vendors to answer their requests for proposal (RFPs). Vendors have appeared across the globe, taking advantage of cloud-based deployment models to provide a diverse range of MRM solutions. Some offer enterprise solutions with multiple native or partner modules, while others focus on specific MRM use cases including general marketing needs, as well as vertical, regional, or distributed variations.

› **EMSS vendors augment basic MRM capabilities via partnerships.** B2C marketers must integrate MRM into their existing EMT ecosystems to realize their full benefit; often that means looking for tools that complement strategic investments with enterprise marketing software suites (EMSS) providers.[4] While a few EMSS vendors offer enterprise MRM solutions (IBM, SAP, and SAS), others package basic capabilities with one or more marketing cloud modules (Adobe, Marketo, Oracle, and Salesforce) and rely on partners to cover MRM gaps in their portfolios. Many best-of-breed MRM vendors partner with EMSS vendors, but it's imperative to understand where these integrations fit, and how seamlessly.

› **MRM tools co-exist (and overlap) with adjacent EMT components.** Functionality and vendor convergence impacts all aspects of EMT, and MRM is no exception. Not only do MRM tools themselves overlap, but B2C marketers need to understand MRM's relationship with adjacent tool sets. For example, financial planning and performance management share goals with unified marketing impact analysis (UMIA).[5] There is even more commonality with content and brand tools, including web content management (WCM) and product information management (PIM), but especially digital asset management (DAM), content marketing platforms (CMPs), and through-channel marketing automation (TCMA) (see Figure 3).[6]

**FIGURE 2** MRM Vendors Offer Diverse Native And Partner Capabilities To Address Marketing Operations



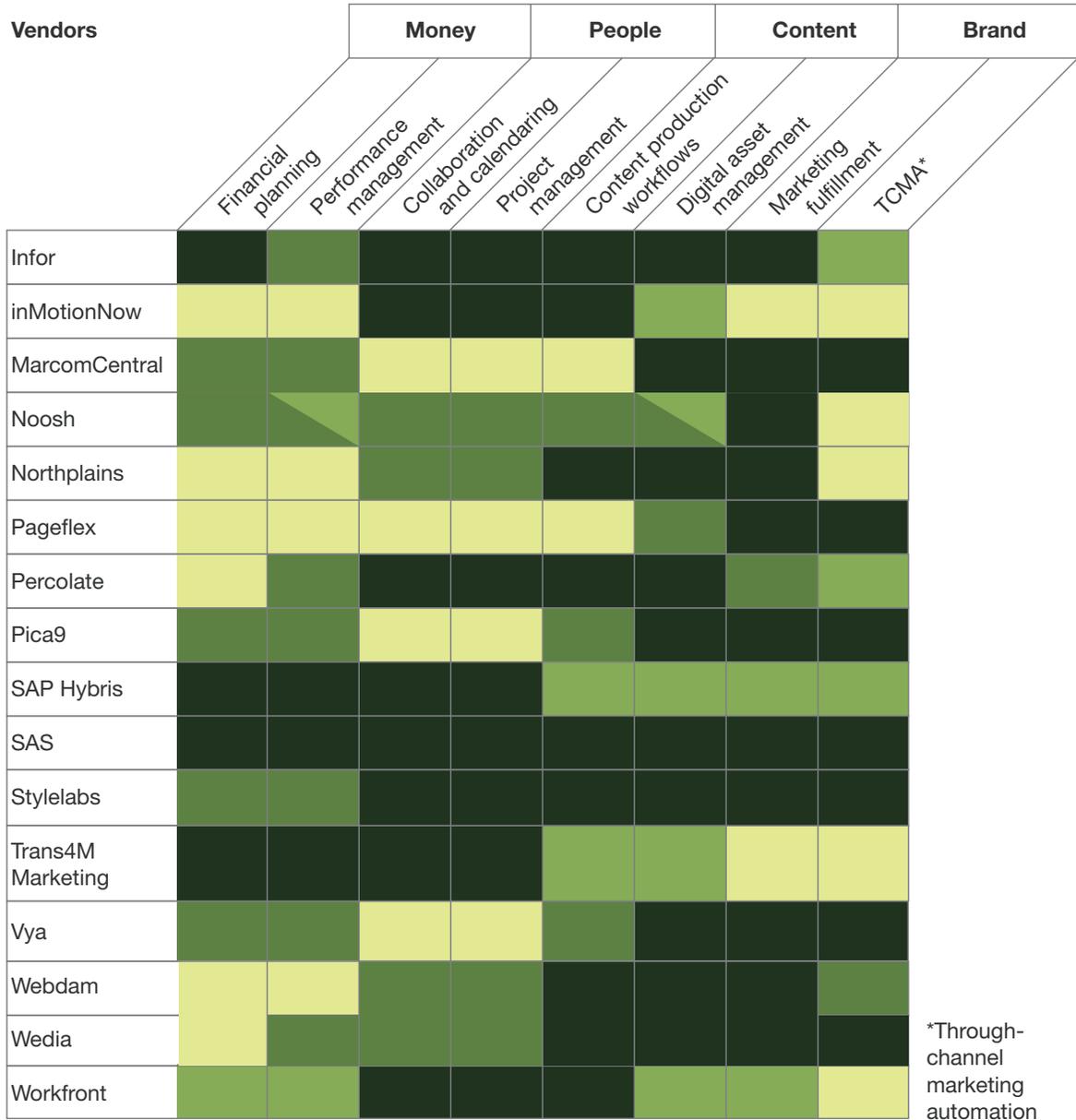| Vendors | Money | | People | | Content | | Brand | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| | Financial planning | Performance management | Collaboration and calendaring | Project management | Content production workflows | Digital asset management | Marketing fulfillment | TCMA* |
| Allocadia | | | | | | | | |
| Anaplan | | | | | | | | |
| Ansira | | | | | | | | |
| Aprimo | | | | | | | | |
| BrandMaker | | | | | | | | |
| BrandMuscle | | | | | | | | |
| BrandSystems | | | | | | | | |
| Broadridge | | | | | | | | |
| Bynder | | | | | | | | |
| Capital ID | | | | | | | | |
| censhare | | | | | | | | |
| Code Worldwide | | | | | | | | |
| ConceptShare | | | | | | | | |
| Contentserv | | | | | | | | |
| DemandBridge | | | | | | | | |
| Elateral | | | | | | | | |
| Hive9 | | | | | | | | |
| Huddle | | | | | | | | |
| IBM | | | | | | | | |

**FIGURE 2** MRM Vendors Offer Diverse Native And Partner Capabilities To Address Marketing Operations (Cont.)

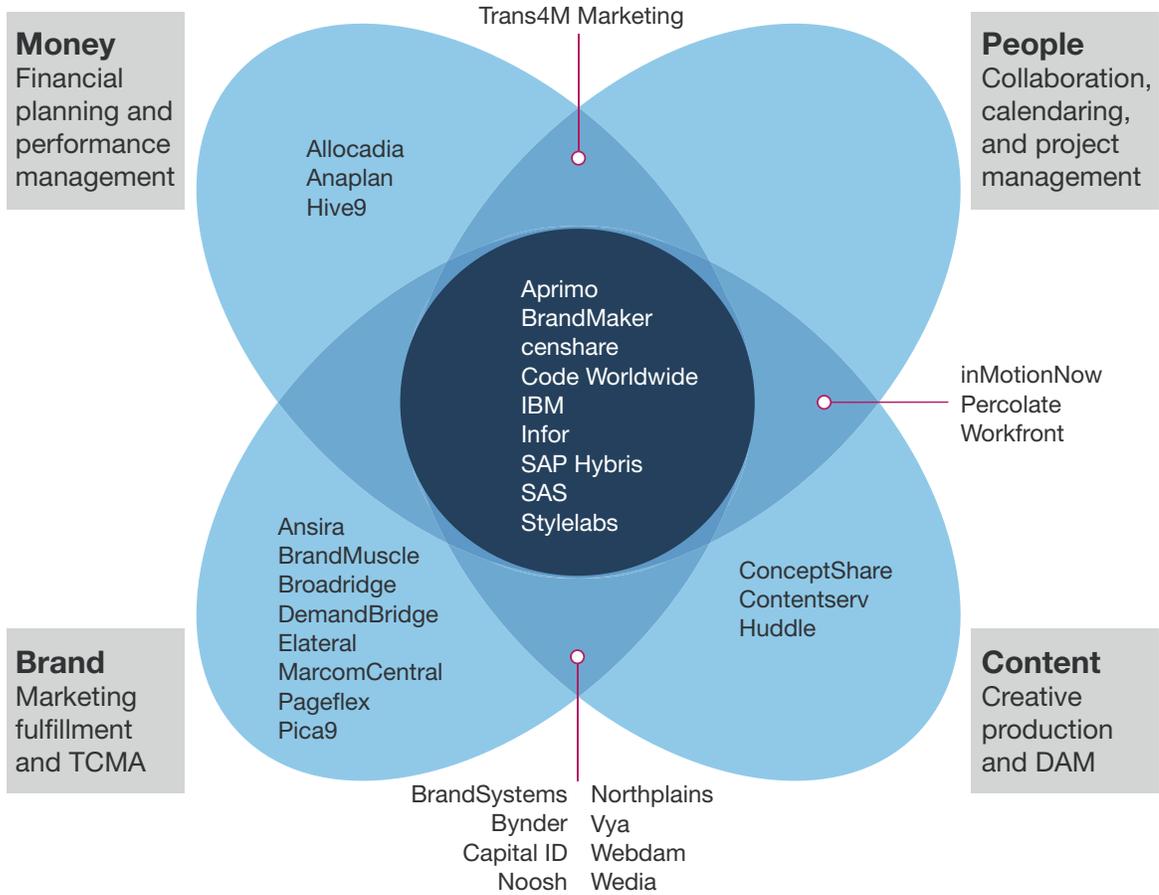| Vendors | Money | | People | | | Content | | Brand |
|---|---|---|---|---|---|---|---|---|
| | Financial planning | Performance management | Collaboration and calendaring | Project management | Content production workflows | Digital asset management | Marketing fulfillment | TCMA* |
| Infor | Strong | Basic | Strong | Strong | Strong | Strong | Strong | OEM or partner |
| inMotionNow | Limited | Limited | Strong | Strong | Strong | OEM or partner | Limited | Limited |
| MarcomCentral | Basic | Basic | Limited | Limited | Limited | Strong | Strong | Strong |
| Noosh | Strong | Basic/OEM | Basic | Basic | Basic/OEM | Strong | Strong | Limited |
| Northplains | Limited | Limited | Basic | Basic | Strong | Strong | Strong | Limited |
| Pageflex | Limited | Limited | Limited | Limited | Limited | Basic | Strong | Strong |
| Percolate | Limited | Basic | Strong | Strong | Strong | Strong | Basic | OEM or partner |
| Pica9 | Basic | Basic | Limited | Limited | Basic | Strong | Strong | Strong |
| SAP Hybris | Strong | Strong | Strong | Strong | OEM or partner | OEM or partner | OEM or partner | OEM or partner |
| SAS | Strong | Strong | Strong | Strong | Strong | Strong | Strong | Strong |
| Stylelabs | Basic | Basic | Strong | Strong | Strong | Strong | Strong | Strong |
| Trans4M Marketing | Strong | Strong | Strong | Strong | OEM or partner | OEM or partner | Limited | Limited |
| Vya | Basic | Basic | Limited | Limited | Basic | Strong | Strong | Strong |
| Webdam | Limited | Limited | Basic | Basic | Strong | Strong | Strong | Basic |
| Wedia | Limited | Basic | Basic | Basic | Strong | Strong | Strong | Strong |
| Workfront | OEM or partner | OEM or partner | Strong | Strong | OEM or partner | OEM or partner | Basic | Limited |

*Through-channel marketing automation

**Key:**
- Strong capabilities
- Basic capabilities
- OEM or partner capabilities
- Limited or no capabilities

FORRESTER®

**FIGURE 3** MRM Vendors Cover Multiple Use Cases, But Many Focus On Content And Brand Management

Trans4M Marketing

**Money**
Financial planning and performance management

Allocadia
Anaplan
Hive9

Aprimo
BrandMaker
censhare
Code Worldwide
IBM
Infor
SAP Hybris
SAS
Stylelabs

**People**
Collaboration, calendaring, and project management

inMotionNow
Percolate
Workfront

Ansira
BrandMuscle
Broadridge
DemandBridge
Elateral
MarcomCentral
Pageflex
Pica9

ConceptShare
Contentserv
Huddle

**Brand**
Marketing fulfillment and TCMA

**Content**
Creative production and DAM

| BrandSystems | Northplains |
|---|---|
| Bynder | Vya |
| Capital ID | Webdam |
| Noosh | Wedia |

**Additional TCMA vendors**

Averetek
Balihoo
Bridgeline Digital
Distribution
EarthIntegrate
partnermarketing.com
SproutLoud
Standard Register
StructuredWeb
TIE Kinetix
Zift Solutions

**Additional CMP vendors**

Contently
Kapost
NewsCred
Opal
ScribbleLive
Skyword
Spredfast
Sprinklr

**Additional DAM vendors**

| Adobe | OpenText |
|---|---|
| Canto | Orange Logic |
| CELUM | Picturepark |
| Cognizant Technology-Solutions | Razuna |
| Hogarth | THRON |
| MediaBeacon | WAVE Corp |
| MerlinOne | Widen |
| Nuxeo | WoodWing |
| | Zetico |

## Shortlist Potential MRM Vendors Based On Capabilities And Coverage

Most players in the MRM market are relatively small specialists with revenues under $50 million, with vastly different regional coverage and vertical expertise (see Figure 4). A handful of enterprise vendors offer comprehensive end-to-end MRM solutions, and a few focus exclusively on financial planning and performance management. Most address content and brand requirements, with varying capabilities for content production workflows, DAM, brand management, marketing fulfillment, or TCMA. Nearly all partner with other vendors that likely already supply technologies for your EMT ecosystem. Some representative MRM vendors for your consideration include:

› **Allocadia.** Allocadia Marketing Performance Management focuses on financial management for marketers and also provides marketing taxonomies, planning, and performance measurement. It offers three modules: Invest for budgeting, Align for integrating with ERP, and Optimize for measuring results, as well as enablement services via Allocadia Assist. Allocadia is expanding its business both directly and via partnerships with IBM, Marketo, and Workfront. Marketers looking to refine their financial planning and measurement techniques should evaluate Allocadia's SaaS-based approach to closed-loop performance management.

› **Anaplan.** Anaplan for Marketing complements Anaplan's planning solutions for finance, sales, IT, supply chain, and workforce teams. It focuses on connecting data, people, and plans within its collaborative platform. It integrates its solution with enterprise applications using application programming interfaces (APIs), extract, transform, and load (ETL) tools, and its own Anaplan Connect. Marketers should consider Anaplan for connecting their plans with the rest of the business, as well as its complementary solutions for trade and promotion planning, account-based marketing and territory planning, customer segmentation and scoring, and price optimization.

› **Ansira.** The Ansira Edge Technology Suite — packaged with Ansira's collaborative or full services — provides MRM enablement for brands and their channel partners. Its Distributor, Localizer, and Influencer modules provide planning, content production, DAM, and fulfillment, its Orchestrator addresses TCMA, and its Insighter and Investigator analyze and report on marketing performance. Marketers looking for technology and services to support their channel or franchise marketing needs should consider Ansira.

› **Aprimo.** The Aprimo Marketing Operations Hub provides an extensive MRM portfolio with modules for financial management, planning and optimization, marketing productivity, DAM, distributed marketing, and cross-channel campaign management (CCCM). Funded by Marlin Equity Partners, Aprimo has consolidated offerings it acquired from ADAM Software, Revenew, and Teradata.[7] Marketers should consider Aprimo for the enterprise breadth and depth of its scalable and modular MRM offering, as well as its integrations with enterprise resource planning software (ERP) (Oracle and SAP) and EMSS (Adobe and Salesforce).

› **BrandMaker.** The BrandMaker Marketing Efficiency Cloud offers a suite of MRM tools — available as a hub or separate modules — for planning, project management, DAM, PIM, and fulfillment (with web-to-publish and language capabilities). Beyond its MRM tools, marketers should evaluate

BrandMaker's capabilities to add lead management functionality (Customer Engagement Cloud) and its integrations with social media (Facebook, LinkedIn, Twitter, and YouTube), search (Bing and Google), web analytics (Adobe, Google, and Webtrekk), data warehouses (Microsoft and Teradata), and EMSS (Adobe and Salesforce).

› **BrandMuscle.** BrandMuscle combined its native local marketing automation platform with Saepio's distributed marketing management solution when the companies merged in 2016.[8] Its BrandBuilder, ChannelBuilder, and LocationBuilder solutions enable brands to manage market development and co-op funds, create and customize local brand-compliant content, and execute individual location-based marketing plans. It also integrates with Salesforce. Marketers with complex distributed models should consider BrandMuscle.

› **BrandSystems.** BrandSystems offers two MRM solutions that are available separately or as an integrated solution. Its Marcom manager provides planning, reporting, and project management tools for creative projects, and its Creative DAM addresses media storage and brand management. Marketers at midmarket and smaller enterprise firms should consider BrandSystems as an alternative to larger MRM providers, especially if their needs center on marketing communications or creative production management.

› **Broadridge.** Broadridge Financial Solutions, a spin-off from Automatic Data Processing (ADP), acquired Direxxis in 2015 to create the Broadridge Distributed Marketing Platform. Broadridge focuses on DAM, brand management, and TCMA to enable centralized marketing teams to collaborate with affiliates to orchestrate personalized local campaigns. It partners with QuickPivot to provide integrated email capabilities. Marketers with regional, channel, or franchise marketing requirements should consider Broadridge.

› **Bynder.** Bynder was a Strong Performer in Forrester's 2016 DAM evaluation.[9] Its marketing capabilities also create opportunities in the MRM space, especially for creative project management, brand management, and fulfillment. Partnerships with Adobe Creative Cloud, Drupal, Magento, Salesforce Commerce Cloud, and Sitecore expand Bynder's market coverage. Beyond the company's DAM-focused MRM capabilities, marketers should consider Bynder for its web-to-print and web-to-web publishing capabilities.

› **Capital ID.** Capital ID focuses on marketing, branding, and communication processes, with core MRM capabilities for designing, creating, managing, governing, and publishing content to common media channels. It integrates with third-party content relationship management (CRM), business insights (BI), and enterprise resource planning (ERP) tools, and it further offers enterprise DAM, digital publishing, web-to-print, creative and production workflow management, event management, marketing webshop, and reputation management. Marketers looking to streamline their content workflows from creation to publishing should consider Capital ID.

› **Censhare.** The "universal smart content hub" solution from censhare manages campaign life cycles, from brief through production to publishing, with budgeting, resource tracking, and reporting. The company offers on-premises, SaaS, and hybrid deployment options. In addition

to numerous agency relationships, censhare partners with Hubspot, Magento, Marketo, and Salesforce. Marketers looking to connect media planning and creative content workflows to their marketing automation ecosystems should consider censhare.

› **Code Worldwide.** Code Worldwide prefers to describe its adZU solution as a "marketing operating system" versus MRM. Its extensive portfolio differs from other offerings because it focuses primarily on advertising and media use cases, with additional tools for managing audiences, localizing content, ordering merchandise, and connecting to global media partners. Marketers with brand and franchise management needs should consider Code Worldwide's adZU capabilities for media management, content versioning, and campaign localization.

› **ConceptShare.** ConceptShare focuses exclusively on creative workflow solutions for proofing, reviews, and approvals. It integrates with an extensive partner ecosystem to address end-to-end MRM content production requirements, including: Adobe Creative Cloud, Advantage Software, Aprimo, Avid, JIRA, Mavenlink, OpenText, Oracle (and Netsuite), Slack, and Trello. Marketers should consider ConceptShare to augment the creative production management aspects of their MRM environments.

› **Contentserv.** Contentserv was a Strong Performer in Forrester's 2016 PIM evaluation.[10] It also competes in the DAM space and offers calendaring and creative production capabilities for MRM users. Contentserv provides ERP connectors to Microsoft and Navision, and it partners with Acquia, Adobe Creative Cloud, Magento, Salesforce Commerce Cloud, and SAP. Marketers looking to integrate MRM with PIM and DAM should consider Contentserv, and they should also evaluate its channel automation and marketing shop.

› **DemandBridge.** DemandBridge bundles its MRM capabilities as its Enterprise offering, but also offers individual modules like Alliance, Connect, and Distributor. It focuses on brand management and fulfillment that enable firms to service distribution networks. DemandBridge partners with IBM, Microsoft, Pageflex, and RedPoint Global, as well as fulfillment suppliers. Marketers in complex channel environments should consider DemandBridge, particularly if they need quoting, ordering, billing, procurement, and inventory management tools.

› **Elateral.** Elateral primarily focuses on brand management and marketing fulfillment. It provides a marketing hub and DAM capabilities to manage access to content, localization, and version control, and briefs for new creative production. Elateral partners with several large agencies that leverage its platform, as well as EMSS vendors like IBM and Oracle. Marketers with sophisticated distributed, affiliate, channel, or franchise marketing requirements should consider Elateral.

› **Hive9.** Hive9's SaaS solution for marketing performance management includes multiple revenue and attribution models, plus customizable views of waterfall stages, conversion rates, and trends, with built-in predictive capabilities. In addition to its analytical approach to planning, performance management, and business alignment, B2B marketers — and B2C marketers with lead-to-revenue management or considered-purchase use cases — should consider Hive9 for its integrations with Eloqua, Marketo, Salesforce, and Workfront.

› **Huddle.** Huddle provides a document collaboration platform for in-house marketers and agencies. Its workflow and asset management tools include security features and audit trails (half of its end user clients are in the public sector). Huddle integrates with more than 30 content management and file sharing platforms such as Box, DropBox, and OneDrive, as well as productivity tools like Google G Suite and Microsoft Office. Marketers should consider Huddle for MRM with document management and version control requirements.

› **IBM.** IBM addresses MRM with its on-premises IBM Marketing Operations for calendaring, project management, workflow, collaboration, creative production, DAM, PIM, and brand management. Its SaaS-based IBM Watson Campaign Automation adds financial planning (via an OEM relationship with Allocadia) and collaboration (IBM Journey Designer). IBM Watson Content Hub and IBM Digital Commerce complement DAM and PIM, respectively. IBM Distributed Marketing offers TCMA, and partnerships with BrandMuscle and Elateral provide marketing fulfillment. Marketers should review IBM's broad MRM portfolio and deployment options.

› **Infor.** Infor packages its MRM portfolio within the Infor Customer Experience Suite, integrated with its CCCM and real-time interaction management (RTIM) offerings. Infor natively addresses requirements for financial planning, collaboration and calendaring, creative production workflows, DAM, and brand management, but it has de-released its distributed marketing module and now partners for TCMA. Marketers should consider Infor for its enterprise MRM capabilities, and its partnership with Marketo (announced in early 2017) will open Infor to further opportunities.

› **InMotionNow.** Workflow management from inMotionNow primarily focuses on content production for marketing and creative teams, including project briefing; project management; and a module for proofing, reviews, and approvals. It partners with multiple DAM vendors including Canto Cumulus, Webdam, and Widen. B2C and B2B marketers looking for dedicated creative workflow management tools should consider inMotionNow. Planned integrations (scheduled for late 2017) with the Adobe Creative Cloud and Salesforce Marketing Cloud will extend its market opportunities.

› **MarcomCentral.** Ricoh acquired PTI Marketing Technologies in 2014 to form MarcomCentral, which provides brands with a centralized content repository and user-based permissions for access, customization, and distribution.[11] It integrates with Marketo, Oracle (Eloqua), and Salesforce (Marketing Cloud and Sales Cloud), and its partnership with Birst provides analytical reporting for portal usage. Marketers should consider MarcomCentral for brand management, marketing fulfillment, and distributed marketing.

› **Noosh.** Noosh connects marketing teams with finance, operations, and sales to manage workflows for material production and vendor procurement via a network of printers, paper manufacturers, promotional goods vendors, and warehousing and distribution partners. Noosh also partners with vendors like Aprimo, Ariba, BaaN, callas software, Canto, Oracle, Salesforce, SAP, Webdam, and Workfront. Marketers tasked with supplier interactions should consider Noosh for its bidding models, rate cards, ratings, and collaboration tools.

> **Northplains.** Northplains has reconciled its DAM and MRM products. Its new SaaS-based NorthplainsNEXT focuses on content life-cycle management, including ideation, production workflow management, creation, distribution, and analytics, while its Xinet provides on-premises DAM with cloud integration to NEXT. Northplains extends its offering via partnerships with Wave2 for content personalization, Pond5 for multimedia stock content, and Capture Integration for direct photographic uploads. Marketers who need to quickly leverage visual content for cross-channel engagement should consider Northplains.

> **Pageflex.** Pageflex provides content and campaign automation tools for field marketers, partners, and sales teams, while maintaining brand standards and regulatory compliance. Its TCMA capabilities include personalized communications via print, email, landing pages, social media, and branded web portals. Pageflex partners with print equipment providers such as Canon, Fuji Xerox, Heidelberg, and HP, as well as Authorize.NET, FedEx, LeadsPlease, Salesforce, SendGrid, and UPS. Marketers with marketing fulfillment needs should consider Pageflex.

> **Percolate.** Percolate was a Leader in Forrester's 2017 CMP evaluation.[12] It competes in the MRM space with its marketing calendar, collaboration tools, project management capabilities, content workflows, and DAM. Percolate partners with Red Oak to address audit and compliance requirements in regulated industries, as well as with other MRM, DAM, and WCM vendors including Adobe, Allocadia, Drupal, Sitecore, and WordPress. Marketers should consider Percolate for its content governance and can leverage its integrations with Marketo and Oracle (Eloqua).

> **Pica9.** Pica9's CampaignDrive focuses on executing marketing activities at the local level. It provides customizable content templates across traditional and digital channels, order management for print and merchandise items, and TCMA. It further offers permission-based DAM and PIM repositories for brand-approved content, budgeting across distributed networks, and reporting against performance goals. Integrations with platforms like Salesforce, SendGrid, and Widen extend its capabilities. Marketers should consider CampaignDrive by Pica9 for managing distributed marketing for franchisee, dealer, or agent networks.

> **SAP Hybris.** SAP Hybris bundles MRM for financial planning, calendaring, performance analysis, and optimization with SAP Hybris Marketing. It integrates its tools with SAP ERP. SAP Jam adds collaboration tools, SAP Hybris Commerce addresses PIM, and an original equipment manufacturer (OEM) relationship with OpenText provides DAM, brand management, and TCMA. Marketers — especially those with complex distribution networks, extensive product portfolios, and eCommerce operations — should consider SAP Hybris for integrated MRM, ERP, and trade promotions.

> **SAS.** SAS Marketing Operations Management provides an integrated MRM solution — also available as separate modules for planning, project collaboration, creative development, and asset management. SAS's MRM tools complement other SAS Customer Intelligence offerings including Campaign Management. SAS also embeds MRM capabilities in SAS 360 Engage. It integrates with Adobe for creative production and Microsoft for Excel import/export. Marketers should consider SAS for performance-driven planning and execution, offer and approval management, and customer-specific content production workflows.

› **Stylelabs.** The Stylelabs Marketing Content Hub focuses on planning, producing, and publishing creative content for marketing campaigns. It offers both DAM and PIM capabilities, and integrates with eCommerce platforms for ordering printed materials and merchandise. Stylelabs partners with Magento, Marketo, Microsoft, Salesforce, SAP, Sitecore, Sprinklr, and WordPress. Marketers looking to augment their marketing or eCommerce environments with creative workflows should consider Stylelabs.

› **Trans4M Marketing.** The Trans4M Marketing Productivity Cloud offers a modular approach to enable marketers to plan, create, approve, execute, and measure their campaigns. It focuses on budget control, calendaring, and collaboration tools to augment offerings from technology and services partners like Agap2, Alterian, Blue Group (Blue Sheep and BlueVenn), Cheetah Digital, MarketDeveloper, and TwentyCi. Marketers with campaign planning requirements should consider Trans4M Marketing.

› **Vya.** Vya provides marketing production services, including print and fulfillment, direct mail, email, design and data management services, and promotional products. Its MRM solution covers budgeting for marketing development and co-op funds, turnkey campaign enrollment, social media and ad exchange, and industry-specific needs for financial services, manufacturing, and various franchise markets. Vya partners with Cake Mail for email and OneAll for social media publishing. Marketers looking for full-service local marketing should consider Vya.

› **Webdam.** Webdam, a Shutterstock company, was a Contender in Forrester's 2016 DAM evaluation.[13] Its Brand Connect module provides a portal for brand management, and its new Workstream module provides creative workflow management. Webdam partners with ConceptShare for proofing tools, Silicon Publishing for its Adobe Creative Cloud connector, and PrintUI for web-to-print and web-to-publish. Marketers should consider Webdam's integrated offering or separate modules for DAM-centric MRM requirements.

› **Wedia.** Wedia offers four MRM modules that address content production workflows, DAM and PIM, distributed marketing, and content scoring to assess the performance of creative assets. It partners with Brightcove for video content, Emarsys for CCCM, and Hootsuite for social media publishing. Marketers whose MRM requirements include a central content hub should consider Wedia — especially if they are looking to measure content performance or if they need easy-to-use access tools for distributed resources.

› **Workfront.** Workfront is an online work management solution that helps marketers collaboratively manage requests, projects, workflows, and resources. Its 2015 acquisition of ProofHQ provides online proofing, review, and approval capabilities, and its OEM relationship with Webdam powers Workfront DAM. Workfront has an extensive partner ecosystem, including Adobe (Creative Cloud and Marketing Cloud), Allocadia, Microsoft (Office 365), Oracle (Eloqua) and Slack. Marketers should consider Workfront's project management and content production workflow capabilities.

**FIGURE 4** MRM Vendors Vary In Size, Regional Coverage, And Vertical Focus

| Vendors | MRM revenue* | Headquarters | Regional coverage | Vertical focus | Reference customers |
|---|---|---|---|---|---|
| Allocadia | $10 million to $15 million | Vancouver | NA, EMEA, LA, AP | Technology, financial services, consumer goods, healthcare, manufacturing | Microsoft, Philips Lighting, Pitney Bowes |
| Anaplan | $5 million to $10 million | San Francisco | NA, EMEA, AP, LA | Retail, consumer goods, financial services, technology, manufacturing | Fidelity, Netflix, Tableau |
| Ansira | $50 million to $55 million | St. Louis | NA, EMEA, AP, LA | Automotive, retail, technology, sports and leisure | The North Face, Schneider Electric, Subaru |
| Aprimo | $80 million to $85 million | Chicago | NA, EMEA, AP, LA | Consumer goods, financial services, technology, life sciences, retail, manufacturing, telecommunications | Bank of America, Dell, Dick's Sporting Goods |
| BrandMaker | $20 million to $25 million | Karlsruhe, Germany | EMEA, NA | Manufacturing and automotive, financial services, life sciences, telecom, technology, retail and wholesale | Oerlikon, Volkswagen Financial Services, Volvo Car Corporation |
| BrandMuscle | $40 million to $45 million | Chicago | NA | Manufacturing, financial services, franchise (retail/restaurant), telecom, technology, healthcare | Allstate, DIRECTV, US Cellular |
| BrandSystems | $1 million to $5 million | Stockholm | EMEA, NA, AP | Not available | Not available |
| Broadridge | $45 million to $50 million | Lake Success, N.Y. | NA | Financial services, insurance | Guardian, New York Life, Wells Fargo |

**FIGURE 4** MRM Vendors Vary In Size, Regional Coverage, And Vertical Focus (Cont.)

| Vendors | MRM revenue* | Headquarters | Regional coverage | Vertical focus | Reference customers |
|---|---|---|---|---|---|
| Bynder | $15 million to $20 million | Amsterdam | EMEA, NA, AP | Travel and leisure, consumer goods and retail, technology and communications, manufacturing and automotive, media and agency | KLM, Randstad, Syngenta |
| Capital ID | $5 million to $10 million | Zwolle, The Netherlands | EMEA | Financial services, travel and leisure, technology, telecommunications | Achmea, Rabobank, Smurfit Kappa Group |
| censhare | $25 million to $30 million | Munich | EMEA, NA, LA, AP | Media, retail, manufacturing, agencies, financial services | Kontrast, McDonalds, Serviceplan |
| Code Worldwide | $20 million to $25 million | London | EMEA, NA, AP, LA | Automotive, retail and franchised networks, telecommunications, agencies | Castrol, Domino's, Jaguar, Land Rover |
| ConceptShare | $5 million to $10 million | Ottawa | NA, EMEA, AP | Retail, consumer goods, financial services, game developers, universities | Fifth Third Bank, Hasbro, Macy's |
| Contentserv | $15 million to $20 million | St. Gallen, Switzerland | EMEA, NA, AP | Franchise, manufacturers, retail, financial services | BMW, Miele, Sixt |
| DemandBridge | $1 million to $5 million | Norcross, Ga. | NA | Retail and consumer goods, franchise, life sciences, public sector, financial services | McCormick & Company, Pier 1 Imports, Tesla |
| Elateral | $10 million to $15 million | Westchester, Ill. | NA, EMEA | Consumer goods, technology, telecommunications, financial services | Coca-Cola, Nestle, Procter & Gamble |

**FIGURE 4** MRM Vendors Vary In Size, Regional Coverage, And Vertical Focus (Cont.)

| Vendors | MRM revenue* | Headquarters | Regional coverage | Vertical focus | Reference customers |
|---|---|---|---|---|---|
| Hive9 | $1 million to $5 million | Austin, Texas | NA, EMEA, AP | Technology, financial services, manufacturing | General Electric, Thomson Reuters, Workfront |
| Huddle | $1 million to $5 million | London | EMEA, NA, LA, AP | Agencies, retail, transportation and logistics, professional services | AKQA, Almond Board of California, STEAK |
| IBM | $45 million to $50 million | Armonk, N.Y. | NA, EMEA, AP, LA | Financial services, telecom, retail, travel and hospitality, media and publishing | Celcom, HSN, Vodafone Qatar |
| Infor | $5 million to $10 million | New York | NA, EMEA, AP, LA | Financial services, retail, media and publishing, life sciences, technology | Publix, Smith and Nephew, Wolters Kluwer |
| inMotionNow | $5 million to $10 million | Morrisville, N.C. | NA | Retail, media and entertainment, life sciences, education, financial services | LexisNexis, Starz, YETI |
| MarcomCentral | $10 million to $15 million | Solana Beach, Calif. | NA, EMEA | Retail/franchise, life sciences, financial services, education | Delta Vacations, Genworth Financial, Orlando Health |
| Noosh | $5 million to $10 million | Mountain View, Calif. | NA, EMEA, AP | Outsourced marketing services, financial services, retail | Konica Minolta Marketing Services, Point, Whirlpool |
| Northplains | $20 million to $25 million | Toronto | NA, EMEA, AP | Manufacturing, publishing, consumer goods, life sciences, food and beverage | Pernod Richard, Schneider Electric, Unilever |
| Pageflex | $5 million to $10 million | Marlborough, Mass. | NA | Financial services, retail, print services, quick service restaurants | Charles Schwab, Staples, UBS |

**FIGURE 4** MRM Vendors Vary In Size, Regional Coverage, And Vertical Focus (Cont.)

| Vendors | MRM revenue* | Headquarters | Regional coverage | Vertical focus | Reference customers |
|---|---|---|---|---|---|
| Percolate | $40 million to $45 million | New York | EMEA, NA, LA, AP | CPG, retail, technology, energy, finance | Intuit, Land O'Lakes, Mattel, Stanley Black & Decker |
| Pica9 | $5 million to $10 million | New York | NA, EMEA | Automotive, hospitality, financial services, franchise, real estate, government/nonprofit | Marriott Hotels, The Peace Corps, Polaris Industries |
| SAP Hybris | $75 million to $80 million | Walldorf, Germany | EMEA, NA, AP, LA | Consumer goods, retail, professional services, technology, wholesale and distribution | BSH, Distribuidora Alen, Samsung Electronics |
| SAS | $40 million to $45 million | Cary, N.C. | EMEA, NA, LA, AP | Communications, financial services, retail and consumer goods, life sciences, other (e.g., services, energy) | Nestle, Royal Bank of Canada, Syngenta |
| Stylelabs | $10 million to $15 million | Brussels | NA, EMEA, AP, LA | Consumer goods, retail, hospitality and travel, financial services, life sciences | Coca-Cola, Microsoft, Procter & Gamble |
| Trans4M Marketing | $1 million to $5 million | Leatherhead, UK | EMEA | Media and entertainment, technology, professional services and agencies | AmazeOne, Micron, SP Group |
| Vya | $1 million to $5 million | Cincinnati | NA | Financial services, manufacturing, franchise | Fifth Third Bank, Kumon North America, Vantiv |

**FIGURE 4** MRM Vendors Vary In Size, Regional Coverage, And Vertical Focus (Cont.)

| Vendors | MRM revenue* | Headquarters | Regional coverage | Vertical focus | Reference customers |
|---------|--------------|--------------|-------------------|----------------|---------------------|
| Webdam | $30 million to $35 million | San Mateo, Calif. | NA, EMEA, AP | Consumer goods, technology, life sciences, professional services, retail | House of Blues, Polycom, Scripps Networks Interactive |
| Wedia | $5 million to $10 million | Paris | EMEA, NA | Energy and industry, retail and consumer goods, financial services, travel and hospitality, professional services | Coca Cola, Décathlon, Estee Lauder |
| Workfront | $70 million to $75 million | Lehi, Utah | NA, EMEA, AP, LA | Professional services, manufacturing, retail, financial services, consumer goods, technology, media and entertainment, healthcare | Ameritas, Cars.com, Kiwibank |

**Key:**
*Forrester estimates for annual revenue attributed to MRM solutions.
NA — North America
LA — Latin America
EMEA — Europe, Middle East, and Africa
AP — Asia Pacific

**Recommendations**

## Align MRM With Your Strategy For Customer Obsession

B2C marketers must create marketing programs based on a meaningful and compelling value exchange to engage customers across their preferred channels and touchpoints. MRM can improve marketing's ability to demonstrate the firm's brand promise while optimizing spend and productivity. B2C marketers considering MRM investments must:

› **Ensure MRM tools integrate seamlessly into your EMT ecosystem.** Whether you are looking for multiple, integrated MRM capabilities or you need to add (or replace) a single component, you are spoiled for choice. Even enterprise MRM solutions are modular in nature and there are myriad best-of-breed tools that address specific use cases. Some offer out-of-the-box or OEM integrations with EMSS portfolios. Don't simply evaluate MRM tools based on their functionality; consider the effort required to integrate them with other EMT components.

› **Balance processes and compliance with collaboration and empowerment.** The primary impetus behind today's multitude of MRM options is the burdensome nature of legacy platforms. When evaluating MRM tools, review not only the user experience but how new workflows will support what team members need to accomplish. Leading-edge tools will be a waste of money if people don't actively embrace and use them. Governance and control are important, but you should implement MRM to improve marketing efficiency and effectiveness.

› **Define customer-focused metrics for improving marketing operations.** Successful MRM implementations maximize marketing's impact on the business. Align MRM investments with specific customer experience (CX) goals for engagement, loyalty, revenue, or customer life-time value. If the organization does not have such key performance indicators (KPIs) in place, establish them. Hard financial metrics may be easier to define for budget optimization (money) or campaign performance (content), while softer, more emotionally compelling metrics — like meeting a project deadline or beating a competitor to market — may be appropriate for efficiency (people) or awareness (brand).

› **Focus on transforming the marketing organization for greater agility.** Empowered customers are placing increasingly heavy demands on marketers to deliver contextually relevant experiences. You should weigh any MRM investment against its ability to help you address these evolving customer expectations. Modern marketing requires B2C marketers to build an agile, customer-obsessed operating model.[14] Think of MRM as the connective tissue that can align your marketing workstreams to achieve your transformative ambitions.

## Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

### Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

Learn more.

### Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

Learn more.

### Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

Learn more.

**Forrester's research apps for iOS and Android.**
Stay ahead of your competition no matter where you are.

## Supplemental Material

### Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

| | |
|---|---|
| Allocadia | BSH Hausgerate |
| Anaplan | Bynder |
| Aprimo | censhare |
| Bayer | Code Worldwide |
| BrandMaker | ConceptShare |
| BrandMuscle | Contentserv |
| BrandSystems | EDEKA |

| | |
|---|---|
| A global car manufacturer | Pica9 |
| A global hospitality chain | Procter & Gamble |
| Hive9 | SAP Hybris |
| Huddle | SAS |
| IBM | Stylelabs |
| Infor | Thomson Reuters |
| inMotionNow | Vya |
| MarcomCentral | Webdam |
| Noosh | Wedia |
| A North American automotive manufacturer | Wells Fargo |
| Northplains | WesBanco |
| Percolate | Workfront |
| Philips Lighting | |

## Endnotes

[1] See the Forrester report "Rethink Your Approach To MRM."

[2] See the Forrester report "The Model For Modern Marketing."

[3] See the Forrester report "Q&A: Top Five Marketing Resource Management Questions Answered."

[4] See the Forrester report "Complement Your EMSS With Best-Of-Breed Point Solutions."

[5] See the Forrester report "Embrace The New Marketing Performance Measurement Standard."

[6] See the Forrester report "Vendor Landscape: Digital Asset Management, 2017," see the Forrester report "The Forrester Wave™: Content Marketing Platforms, Q2 2017," see the Forrester report "TechRadar™: B2B Marketing Technologies, Q3 2016," see the Forrester report "The Forrester Wave™: Web Content Management Systems, Q1 2017," and see the Forrester report "The Forrester Wave™: Product Information Management Solutions, Q4 2016."

[7] Forrester named ADAM Software a DAM Leader in 2016; see the Forrester report "The Forrester Wave™: Digital Asset Management For Customer Experience, Q3 2016."

Forrester named ADAM Software a PIM Leader in 2016; see the Forrester report "The Forrester Wave™: Product Information Management Solutions, Q4 2016."

Forrester named Revenew a TCMA Strong Performer in 2015; see the Forrester report "The Forrester Wave™: Through-Channel Marketing Automation Platforms, Q3 2015."

[8] Source: Chris Sledzik, "Brandmuscle Invests in Saepio, Creating a Distinct Leader in the Distributed Local Marketing Industry," Brandmuscle Blog, August 8, 2016 (http://www.brandmuscle.com/blog/brandmuscle-invests-saepio-creating-distinct-leader-distributed-local-marketing-industry/).

[9] See the Forrester report "The Forrester Wave™: Digital Asset Management For Customer Experience, Q3 2016."

[10] See the Forrester report "The Forrester Wave™: Product Information Management Solutions, Q4 2016."

[11] Source: "Ricoh Acquires PTI Marketing Technologies, Helping Customers to Expand into Marketing Services," Ricoh press release, December 9, 2014 (https://www.ricoh.com/release/2014/1209_1.html).

[12] See the Forrester report "The Forrester Wave™: Content Marketing Platforms, Q2 2017."

[13] See the Forrester report "The Forrester Wave™: Digital Asset Management For Customer Experience, Q3 2016."

[14] See the Forrester report "Leadership In The Age Of The Customer."

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

› Core research and tools
› Data and analytics
› Peer collaboration
› Analyst engagement
› Consulting
› Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

| **Marketing & Strategy Professionals** | **Technology Management Professionals** | **Technology Industry Professionals** |
|---|---|---|
| CMO | CIO | Analyst Relations |
| B2B Marketing | Application Development & Delivery | |
| › B2C Marketing | Enterprise Architecture | |
| Customer Experience | Infrastructure & Operations | |
| Customer Insights | Security & Risk | |
| eBusiness & Channel Strategy | Sourcing & Vendor Management | |

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.