

The Relevancy Ring

ESP Buyer's Guide 2018, Enterprise Edition

Research, Writing and Analysis by
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**The
Relevancy
Group**

The Relevancy Ring – ESP Buyer's Guide 2018, Enterprise Edition



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Foreword: About the Research

Welcome to The Relevancy Ring, a quantifiable measurement of six leading enterprise class Email/Everychannel Service Providers (ESPs). These vendors are all leaders. If you have read this research in the past you may be familiar with a Relevancy Ring graphic that plotted all vendors against functionality and satisfaction measurements. Many buyers told us that this graphic was too confusing and desired more granular detail. We agree.

This year the Relevancy Rings are specific to each vendor which measures their functionality and satisfaction against participant and industry averages. The functionality highlighted relate to three key themes that are most important to enterprise marketers. They are — Automation, Analysis/Attribution, and Real-time

During the three-month research process, we spoke to marketers about their needs and aspirations. Then we evaluated how the vendor solutions are poised to eradicate marketer challenges and meet these aspirations. The report details the aspirations and hurdles that marketers face, the most desirable vendor features and attributes, as well as in-depth analysis of these six vendors.

The report combines data from a February 2018 executive survey of 401 email marketers and documented ESP demos related to three key themes. We also utilized vendor questionnaires and our near two-decades of knowledge of the providers in this sector. One-on-one phone interviews with several of the marketers who use these tools and our executive survey clients provided satisfaction data. The methodology details our entire recipe, but readers can feel confident in knowing that our vendor evaluation process is objective and does not stem from one analyst's singular point of view. This guide also includes our analysis and perspective on vendors that did not for a variety of reasons participate in this research.

An excerpt of this research is presented in our digital magazine for marketers by marketers, [The Marketer Quarterly](#). Available for free with registration online, as well as via the [MQ App](#).

I hope you find this research useful and enlightening.

All the Best,



David Daniels,
CEO & Founder, The Relevancy Group, LLC
Publisher & Founder, The Marketer Quarterly, LLC

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Related Reading

- [Email Marketing Mobile Readiness in 2018](#)
- [Inbox Evolution: Consumer Email Marketing Trends and Behaviors](#)
- [The Connected Companion: The Implications of Mobile and Smartphone Ubiquity, 2018](#)
- [The Relevancy Ring - Email Agency Buyer's Guide, 2017](#)

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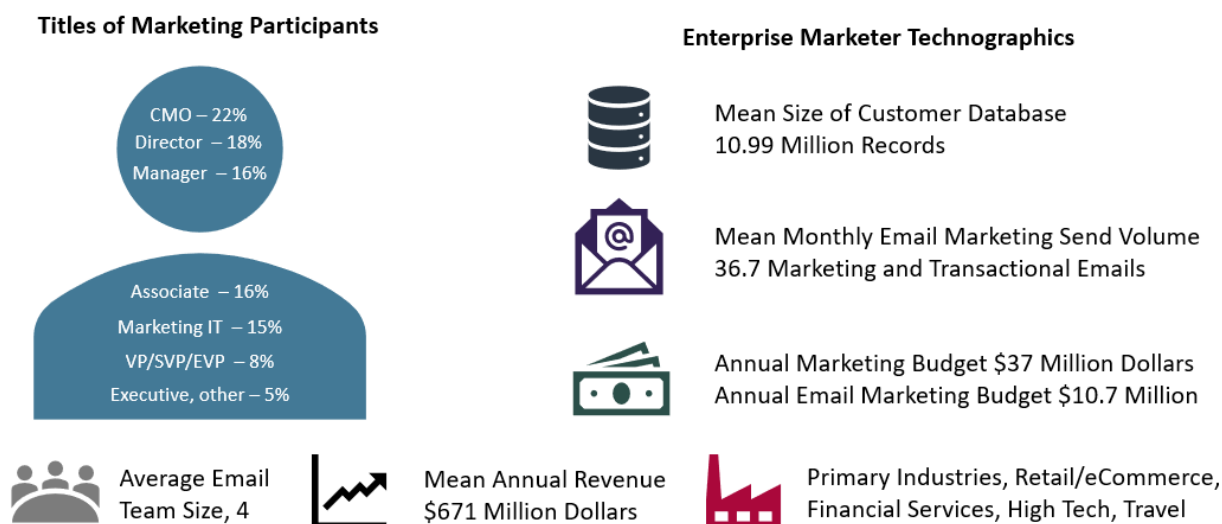
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SECTION I – The Enterprise Email Marketing Landscape and Outlook

Introduction: The Enterprise Email Marketer

The Relevancy Group conducted an executive survey in February 2018 that delivered 401 qualified responses. Among those surveyed, 241 self-identified as an enterprise organization, which is defined as having 1,000 employees or more and marketing internationally. These organizations are larger email senders and email marketing was the primary marketing channel for these survey respondents (Figure 1).

Figure 1: Enterprise Executive Marketer Survey Participants Profile



Source: The Relevancy Group Executive Marketer Survey n=401 2/18, Enterprise n=241 2/18, U.S. Only

The ESP Has Matured and Continues to Adapt to Meet Marketer Aspirations

Over the last few years, the traditional Email Service Provider (ESP) has adapted to become an “Everychannel Service Provider.” The market has more recently morphed again to introduce solutions that deliver extensible, explorable, experience-focused, everychannel tools (Figure 2). These technological advancements align well with marketers’ challenges and priorities, which are highlighted in this section.

The New ESP Delivers The “E” That is Most Important to Marketers, Typically “Experience”

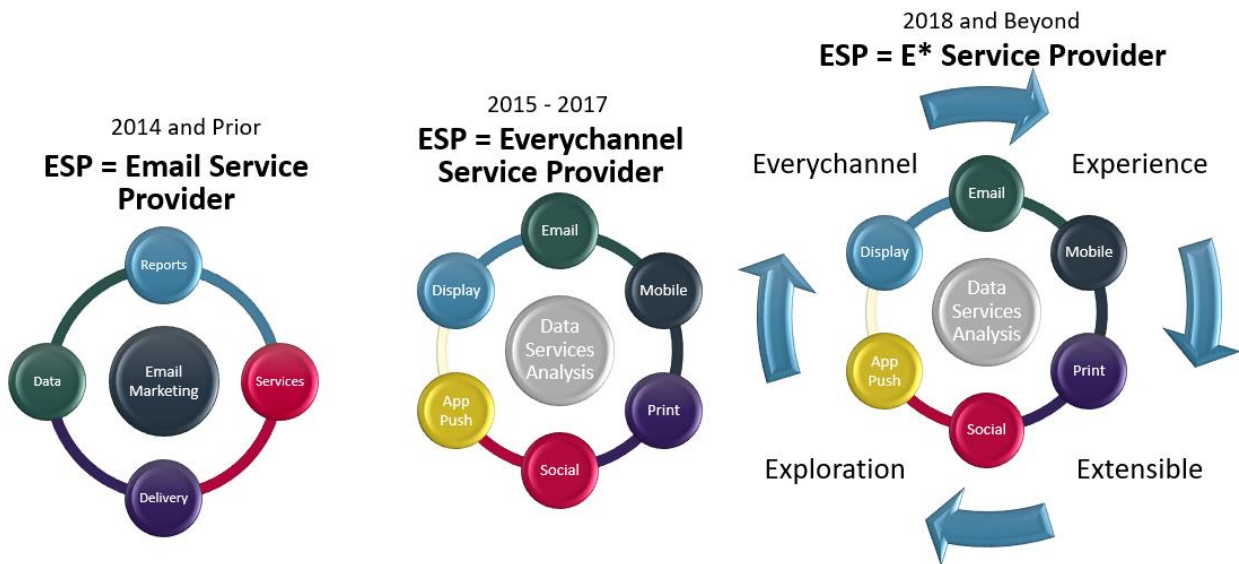
Since The Relevancy Group introduced the “Everychannel Service Provider” concept in 2015, we have witnessed marketers attempt to centralize their messaging and everychannel marketing needs and platforms into one solution. Email remains the most profitable marketing channel and when compared to other channels, email has the greatest marketer adoption. As such, email remains central to these “E” Solution Provider offerings. Understanding the evolution:

- *Email Service Provider* – For these companies, it is all about email execution, inbox placement (deliverability), wrapped with services and some level of reporting that often falls short of multi-dimensional analysis. Data is not centralized and often represents a pain point of integration or constant uploading, requiring the marketer to chase the ever-transient data exchange. From a data

exchange perspective, this process makes many email marketing solutions no more elegant than something like Dropbox with an mail transfer agent (MTA) stapled to it.

- *Everychannel Service Provider* – Data, services, and analysis are central to the offering of these providers. Data lives in or is fed into the solution via restful, real-time, smart integration tactics, taking the burden off of the marketer. These providers focus on real-time optimization, as well as services, and machine-based learnings in order to predict the best customer offers and paths across multiple channels. These companies can fulfill nearly every channel: email, mobile, app push, social, display, digital variable print, video, and in some cases even addressable TV. These channels can be further enriched with data service and analysis. Attribution is central to this deployment option, not an afterthought. In this scenario, intelligence is centralized and execution channels act from the combined knowledge the marketer or automation tools prescribe. Lastly, the Everychannel Service Provider addresses identity management either natively or via partnerships. This is the ability to tie anonymous data with known CRM data to enable people-based marketing (PBM). One such example is a marketer's ability to turn off display ads delivered to customers that have purchased a specific SKU, or targeting the prospect in the channel where they are most likely to engage. Email remains key to the identity management riddle as our email address is our digital fingerprint and will continue to be for the foreseeable future.
- *Experience Service Provider* – These offerings take the Everychannel Service Provider solution set and embellish it with the following advancements:
 - *Experience*: This approach transcends relevance to deliver a unified and contextually accurate customer experience across channels and disciplines, such as sales, marketing and service. This requires a broader customer data set often involving identity management, social listening and digital creative consistency across marketing and advertising assets. These goal-oriented practices deliver experiences that are good for both the company and customer, such as a mobile app that simplifies checkout.
 - *Everychannel*: Channels rely more on automated journeys, but increasingly triggers based off real-time contextual-rich information that mechanized the delivery of an improved customer experience. This data-driven approach to automation across every channel can embody location, preference, behavioral, attitudinal and other data important to the customer experience.
 - *Extensible*: The solution can easily and rapidly accommodate changes. Driven by marketer will, partner and/or customer demand, these innovations and integrations are based on open standards and offer functional enhancements. The best providers have a partner marketplace or ready-to-go extensible suite solutions.
 - *Exploration*: This embodies the ability to use advanced attribution to analyze results, apply AI/machine learning, as well as leverage services to explore strategic and tactical optimizations. Exploration is the stepping off point for innovating marketing programs, as opposed to catching up to a peer group.

Figure 2: The ESP Evolution



Source: The Relevancy Group, LLC 2/15 - 2/18

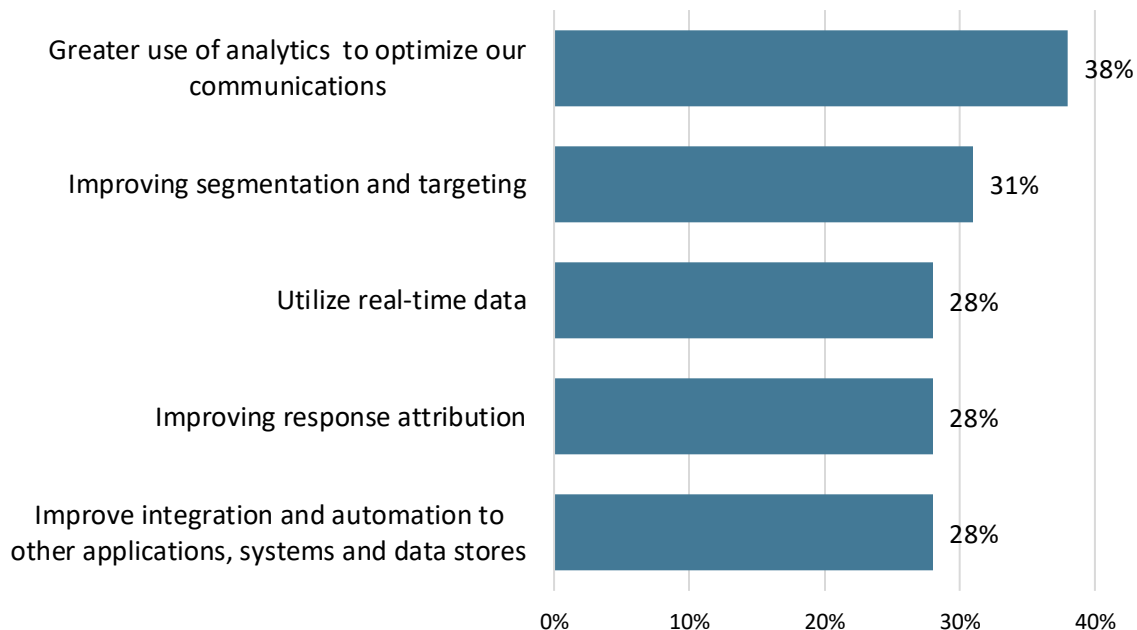
In 2018 Enterprise Marketers Are Focused on Attribution, Real-Time Data and Improving Automation

Enterprise marketers' 2018 aspirations indicate that they will challenge service providers to improve analytics, segmentation/targeting and real-time data access (Figure 3). The top five priorities for improving the ROI of enterprise email marketing programs in 2018 are:

- *Analytical Optimization:* ESPs and marketers are well aligned here, as both are making significant investments in their analytical prowess. From services-driven deliverables to improved analytical tools, marketers have many robust ESP offerings to select from in 2018 (Section III).
- *Driving Relevancy via Segmentation and Targeting:* A perennial priority, marketers seek to improve segmentation and targeting in order to improve the relevancy of their messages. This is aided by the second priority, utilizing real-time data.
- *Utilizing Real-Time Data:* In marketing it has often been said that the best predictor of future behavior is past behavior. Utilizing real-time data dramatically improves upon that notion since past behavior is now compromised of minutes, hours or a day at most. Our research continues to prove that those that leverage real-time data in the customer experience have better results than those that do not.
- *Attribution Accuracy:* Marketers are focused on the need to improve response attribution. While many attribution methods exist, we have witnessed ESPs that include multiple attribution models and an intense focus on cross-channel attribution. These companies include: Adobe, Epsilon Agility Harmony, Cheetah Digital and Zeta Global.

- *Improving Integration and Automation:* Marketers seek to move data quickly between their data stores to their ESP and desire to automate that process. Some ESP integrations, such as Adobe and Epsilon Agility Harmony, leverage AI/machine learning by automatically tagging content assets upon upload. Others including Adobe, MessageGears and Zeta Global offer hybrid and data mapping solutions that hasten the data exchange between the organization and the ESP.

Figure 3: Top Five Email Marketing Priorities, Enterprise – 2018



Question: What are your top five priorities for improving the ROI of your email marketing programs in 2018? (Select one)

Source: The Relevancy Group Executive Survey n=215 2/18 U.S. Only.

Marketers Are Challenged by Lack of IT Support, Data Integration, Coordination and Inbox Placement

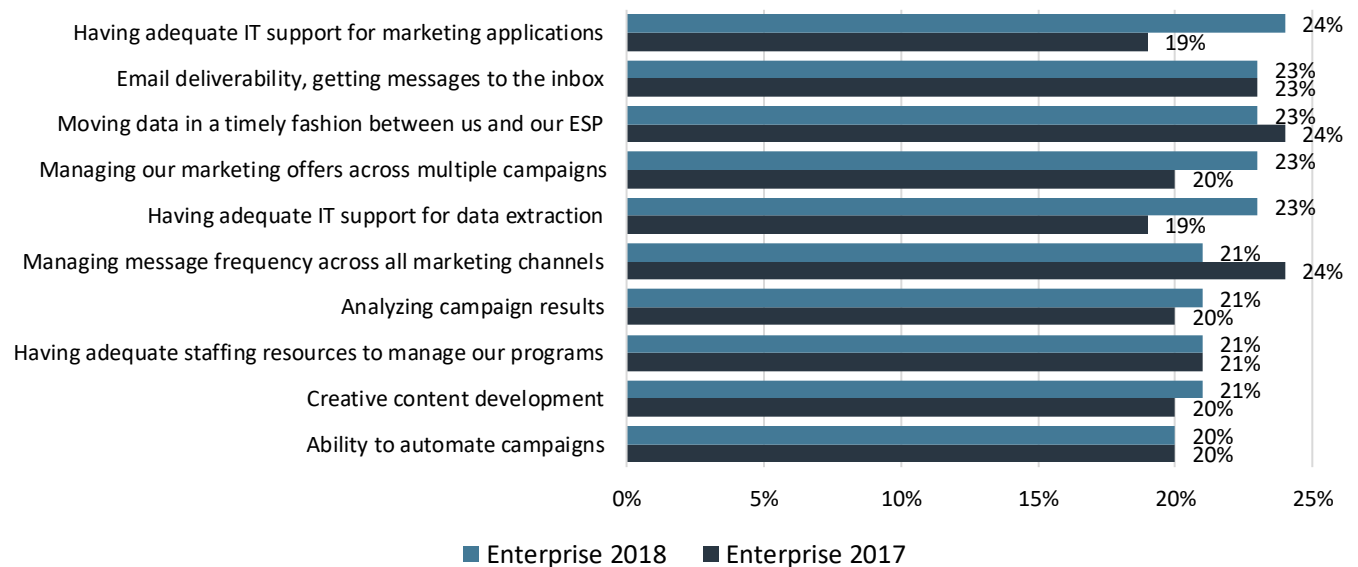
Top 2018 marketer priorities largely reflect the challenges that continue to frustrate enterprise marketers' year after year. These hurdles fall into three buckets:

- *IT Support and Data Integration:* Twenty-four percent cite having adequate IT support for marketing applications, up from 19 percent in 2017 (Figure 4). Almost an equal number that stated moving data in a timely fashion between their servers and their ESP was a challenge. There was also a similar year-over-year rise in the number of those citing adequate IT support for data extraction. In 2018, ESP offerings must be better at addressing these data challenges. Without the necessary fast access to data, improving the customer experience is simply a dream.
- *Lack of Automation and Resources:* There is a direct correlation between those marketers that state the lack of automation is challenge to those that cite lack of staff, creative, analysis and campaign coordination channels challenges. Automation, specifically through the utilization of AI/machine learning, is a vital tool and one that a handful of leading ESPs recognize. Without

innovations in automation, marketers are doomed to wrestle with labor-intensive processes again and again.

- **Email Deliverability, Getting Messages into Inboxes:** This is a perennial challenge for marketers, which has been cited as a top 10 challenge for the last 20 years. ISPs continue to adapt their algorithms, a quarter of consumers continue to change their email address each year, and marketers often fail to embrace hygiene or a rigorous investigation into dormant subscribers. All of the advancements in relevancy and the customer experience are meaningless if the message is not delivered. The leading ESPs are integrated with the best deliverability software and services providers, such as 2500K and Return Path.

Figure 4: Top 10 Challenges When Developing Email Campaigns, Enterprise – 2017 vs. 2018



Question: What are your greatest challenges when developing email marketing campaigns? (Select all)
Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=255 1/17, n=215 2/18 U.S. Only.

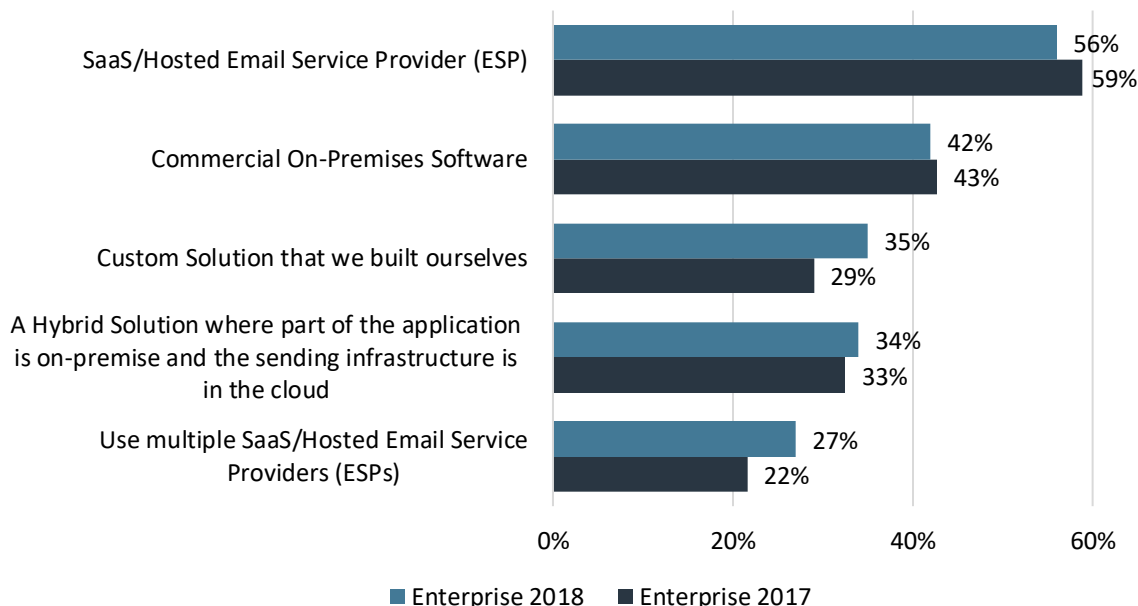
Some Enterprise Marketers Are Turning to Multiple ESPs and Programmatic Custom Solutions

Marketer utilization of multiple ESPs and custom solutions built on programmatic senders, such as Send Grid and SparkPost, have increased in 2018 among enterprise senders. Hybrid solutions, such as MessageGears and Adobe, have also held their ground year-over-year. Hybrid solutions are where one part of the application is on-premise/customer's cloud and the sending infrastructure is in the cloud. These solutions are not wildly different from what some are building with custom code on top of programmatic solutions. The reasons for these changes in adoption are as follows:

- **Redundancy:** With some exceptions, ESPs still have not perfected the art of uptime. Even Amazon's cloud service was not immune to this in 2017. As evidenced in the following section, enterprise marketers place great emphasis on reliability in the vendor selection process. This redundancy can also be a fallback for deliverability, both in terms of keeping the primary mail stream going, and utilizing a secondary provider for acquisition or underperforming lists.
- **Closer to the Source:** As enumerated above, enterprise marketers are challenged to integrate

and exchange data with ESPs. This 2018 solution adoption trend indicates that modern ESP solutions, such as hybrid or custom integration via open standards, are becoming more popular than legacy solutions, which require every bit of marketer data to be replicated in an ESP cloud.

Figure 5: Email Marketing Technology Utilized, Enterprise Senders – 2017 vs. 2018



Question Asked: What technology do you currently use to manage your email marketing? (Select all)

Source: The Relevancy Group, LLC/Executive Marketer Survey n=401 2/18, Enterprise n=255 1/17, n=215 2/18 U.S. Only

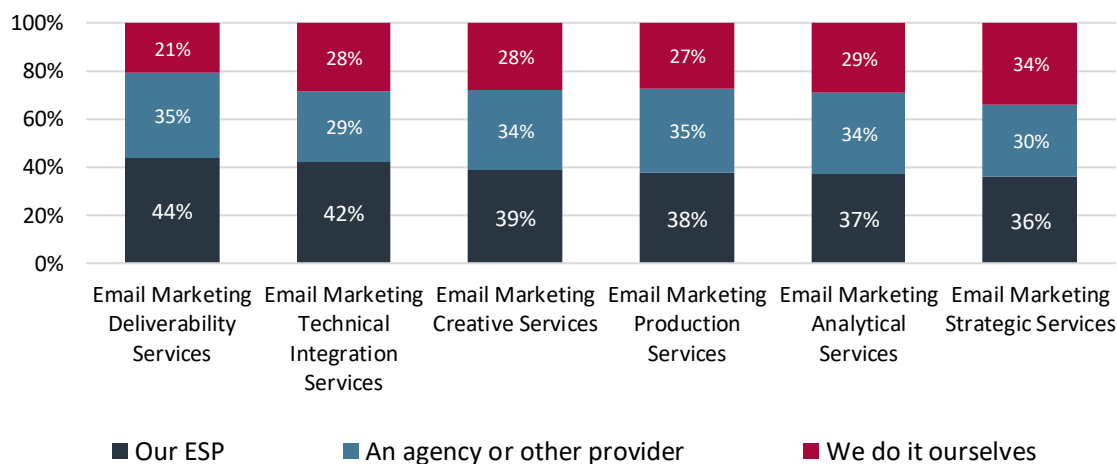
Marketers Are Embracing Services and Many Utilize Agencies Outside of Their ESP

Given the enterprise marketer's resource constraints and 2018 aspirations, it is no surprise that they continue to require and utilize specialized services. It is interesting that more marketers are turning to experts outside of their ESP (Figure 6). Over the past few years, many enterprise ESP marketing cloud providers only service their largest accounts with internal teams and rely on external expert agencies, such as Merkle, Epsilon, BrightWave or Trendline Interactive, as a go-to-market strategy. This is a massive shift from a decade or longer ago when full-service ESPs were the norm. Three participants in this guide — Cheetah Digital, Epsilon Agility Harmony, and Zeta Global — remain committed to the full-service model. Services are necessary and vital to innovating and optimizing the customer experience. Adoption is as follows:

- **Analytical Services:** Aligning with marketer goals and challenges, 60 percent of enterprise marketers are adopting analytical services, such as reporting, measurement, and attribution. Thirty-seven percent of marketers utilize their ESP, 34 percent use an agency and 29 percent do this with internal resources.
- **Production Services:** The need to stitch campaigns together and get them out the door remains labor intensive, particularly for those that have shunned automation and AI/machine learning. Overall, 59 percent utilize services, with slightly more utilizing their ESP (38 percent) compared to an agency (35 percent).

- **Creative Services:** Improving the customer experience via a consistent digital experience across every channel is a must for enterprise marketers. It should also be noted, that ESP services are often contracted to named agency partners such as Merkle, BrightWave and Trendline Interactive. That said, some full-service ESPs have fantastic creative capabilities, namely Cheetah Digital, Epsilon Agility Harmony and Zeta Global.
- **Strategic Services:** Overall, 53 percent of enterprise marketers adopt these services. Strategy is one of the most critical services categories, as it is necessary to drive innovation and optimization. Thirty-six percent utilize their ESP, 30 percent an agency partner and another 34 percent keep this to themselves.
- **Technical Integration Services:** Those marketers challenged by a lack of resource drives 52 percent of enterprise marketers to adopt these necessary services. Forty-two percent utilize their ESP for these services, the second highest only to deliverability. There are many worthy agency solutions, of which 29 percent have adopted.
- **Deliverability Services:** Deliverability is the sixth highest adopted service by enterprise marketers at 52 percent. Most marketers, 44 percent, rely on their ESP, while another 35 percent utilize excellent third-party providers that include 2500K and Return Path, as well as firms such as Email on Acid and Litmus. Twenty-one percent are the bravest, as these marketers state they go it alone and do this internally, presumably with the deliverability vendor tools built into their ESP.

Figure 6: Resources That Service Email Marketing, Enterprise – 2018



Question Asked: What types of vendors supply the services that your organization currently utilizes to execute your email marketing campaigns? (Select one)

Source: The Relevancy Group, LLC/Executive Marketer Survey n=401 2/18, Enterprise n= 215 2/18, U.S. Only

More Email Marketers Are Leveraging Mobile Apps and Online Ad Retargeting Than Testing

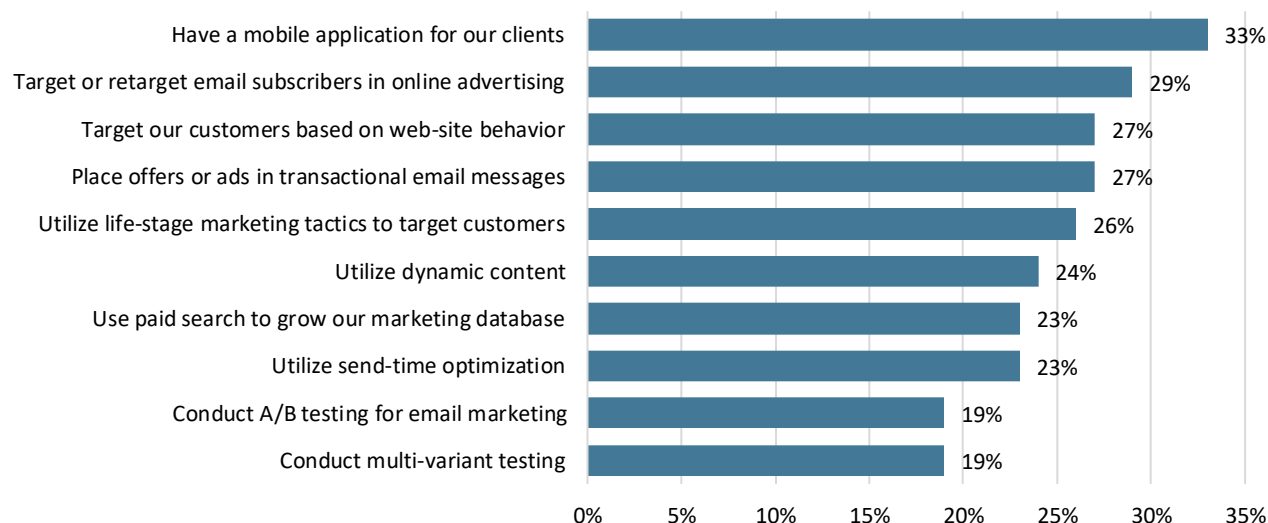
One third of enterprise marketers report that they have a mobile app, which requires deep and deferred deep linking (a.k.a. universal linking) to ensure that the email creative and experience is optimal and drives app consumption. See The Relevancy Group's [Email Marketing Mobile Readiness Guide – 2018](#), for insight on this topic and a comparison of ESP capabilities in this regard.

Targeting and retargeting email subscribers in online advertising and utilizing website behavior is also a highly utilized tactic (Figure 7). This increasingly popular tactic to target or retarget abandoned visitors

has become easier over the last year given the rise of people-based marketing, identity management, as well as via a crop of boutique vendors that offer such targeting solutions. While this method is efficient and effective, email marketers are implementing retargeting more than proven email tactics including: testing, dynamic content, live/adaptive content and triggered lifecycle messages. Last year The Relevancy Group (TRG) stated, “As ESPs prioritize product investments they must be realistic in regards to the utilization of such features and have an eye towards site advertising targeting and retargeting solutions.” Many vendors took this advice and either acquired or integrated with such Adtech companies. We compare the enterprise ESP capabilities in more detail in Section III of this research. TRG maintains that the mashup of Martech and Adtech, which we refer to as Madtech, will continue to grow beyond the nascent group of early adopters. Adoption growth of these solutions is well documented in [TRG’s Madtech Research](#).

These relevant email marketing tactics are being implemented not because of a lack of tools, but instead due to constraints on time, resources, and data. Testing and dynamic mailings imply access to data, additional content, time, and rework. The complexity of these staff and data issues underscores the need to seek out an ESP with experienced services and comprehensive product functionality.

Figure 7: Top 10 Email Marketing Tactics Utilized, Enterprise – 2018



Question Asked: From the following list, please select the statement or statements that best describe the email marketing tactics that you regularly utilize? (Select all) Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=215, 2/18 U.S. Only.

SECTION II – ESP Selection Criteria

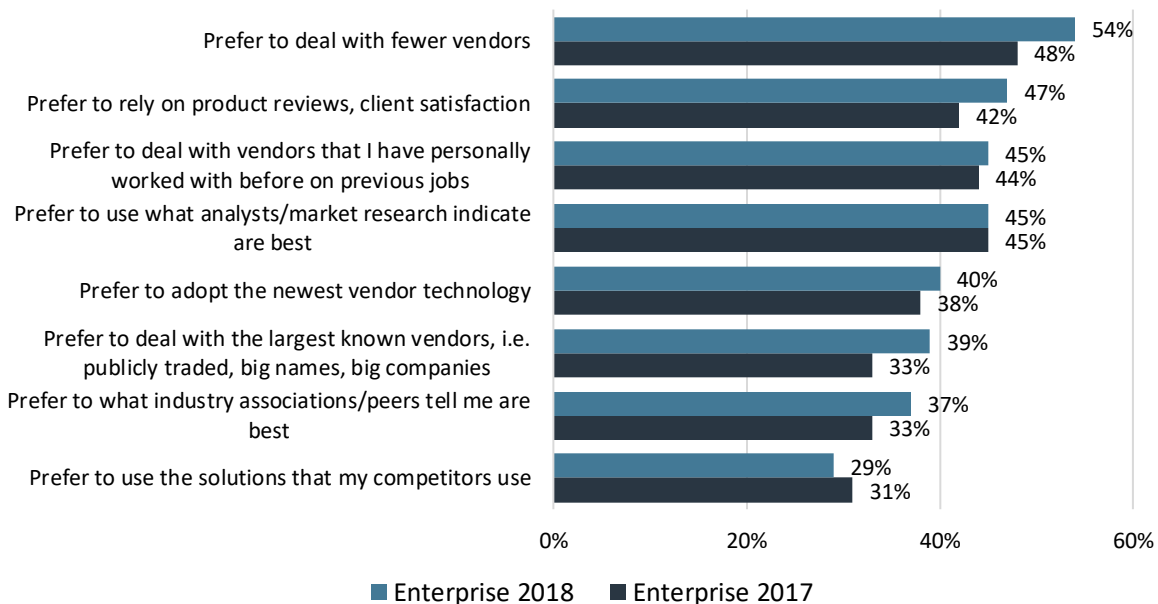
Section Introduction: The Email Marketer Evolution Manifests in New Vendor Selection Priorities

Despite the fact that email marketers are not embracing proven marketing tactics such as testing, their requirements and interest in selecting an ESP partner reveal new priorities and platform functionality. Enterprise marketers are keenly interested in vendors with experience in their industry, reliability and high customer satisfaction marks.

Prior Vendor Experience Drives Vendor Selection

Just as the customer experience is important to consumers and drives their retailer selection, prior vendor experience is a chief factor in marketing technology selection. Forty-five percent of marketers state that a previous working relationship with a vendor is a strong influence on their purchasing decision. There are many people that have been in this industry for 15 years or more, increasing the potential that the marketer has worked on multiple ESP platforms and has formed distinct opinions. That said, 47 percent, a slightly larger percentage, state they are influenced by customer reviews, underscoring the importance of understanding the prospective vendor's customer satisfaction rankings (See Section III). Despite marketers utilization of multiple solutions, they seek to work with fewer vendors (Figure 8). While this is a universal wish, marketers work with multiple solutions due to the reality of complex legacy infrastructure and the need for innovation. Beyond these considerations, analyst market research reports, such as this one, continue to influence 45 percent of enterprise marketer vendor selection.

Figure 8: Influences on Marketing Technology Selection, Enterprise – 2018 – ‘Strongly Agree’



Question Asked: Thinking about when you purchase or influence the technology that you use for marketing and advertising, please indicate how much you agree with the following statements. ‘Strongly Agree’ Summary Table

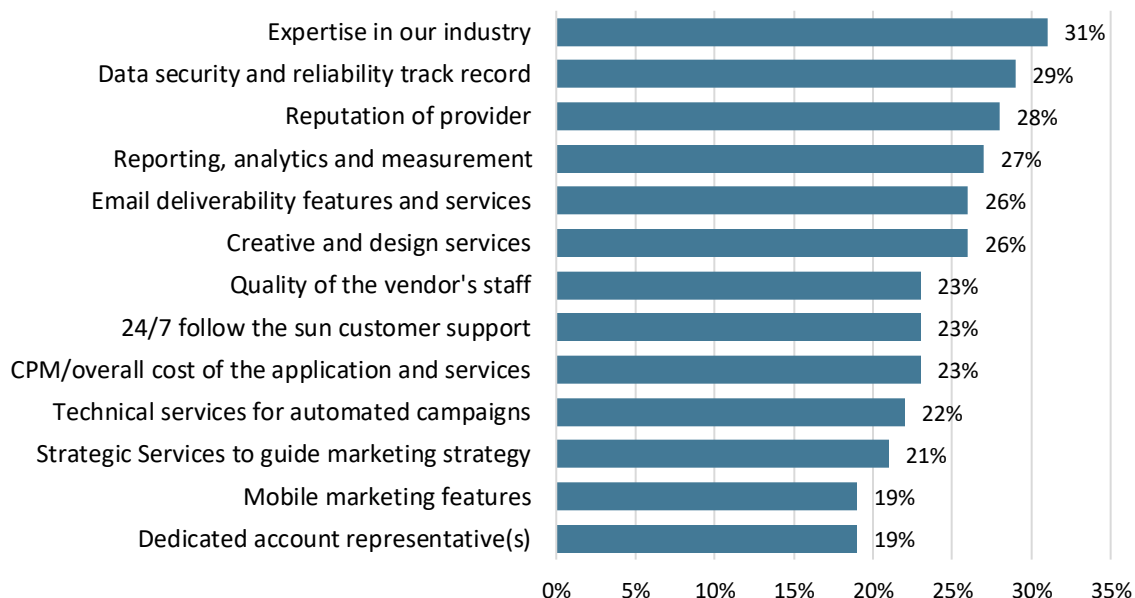
Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=300 1/17, n=241 2/18 U.S. Only.

Industry Expertise, Security, Reliability and Reputation Drive ESP Vendor Selection

When beginning to assess ESPs, marketers' top criteria are based on the vendor's expertise in the prospective buyer's industry (Figure 9). Vendors should not underestimate this consideration. When asked what their most important considerations are when selecting an ESP, marketers specifically cite the vendor's industry expertise, followed closely by data security, reliability, reputation and analytic capabilities.

- **Industry expertise:** This is the fourth consecutive year that industry expertise has topped the vendor selection criteria. Anecdotal evidence suggests that ESPs benefit by going to market with an industry-focused approach.
- **Data security and reliability:** Buyers have a greater attentiveness to this aspect of a vendor's offering, given the unfortunate news of data breaches across the internet and vendor outages. Buyers and vendors alike must ensure that they are well prepared to investigate such platform stability in the procurement process.
- **Reputation is driven by the quality of the vendor's staff, reliability and innovation:** A near equal number of buyers cited the reputation of the provider and quality of their staff as important attributes. Marketers must seek vendors with high customer satisfaction marks (See Section III).
- **Feature set transcends email:** Included in the top 10 criteria for selecting an ESP are analytical, mobile marketing features, creative and strategic services that transcend basic email marketing functionality. The most competent vendors will not only be judged by their core email components, but their ability to deliver experience functionality across every channel.

Figure 9: Top 10 ESP Selection Criteria, Enterprise – 2018



Question Asked: What are your most important considerations when selecting an email marketing service provider (ESP) application? (Select all) Top 10 Selected, 11 shown because of two answers that tied for number ten, at 19%.

Source: The Relevancy Group Executive Survey n=215 2/18, US Only.

Workflow Collaboration, Scalability, Reliability and Analytics Top ESP Feature List

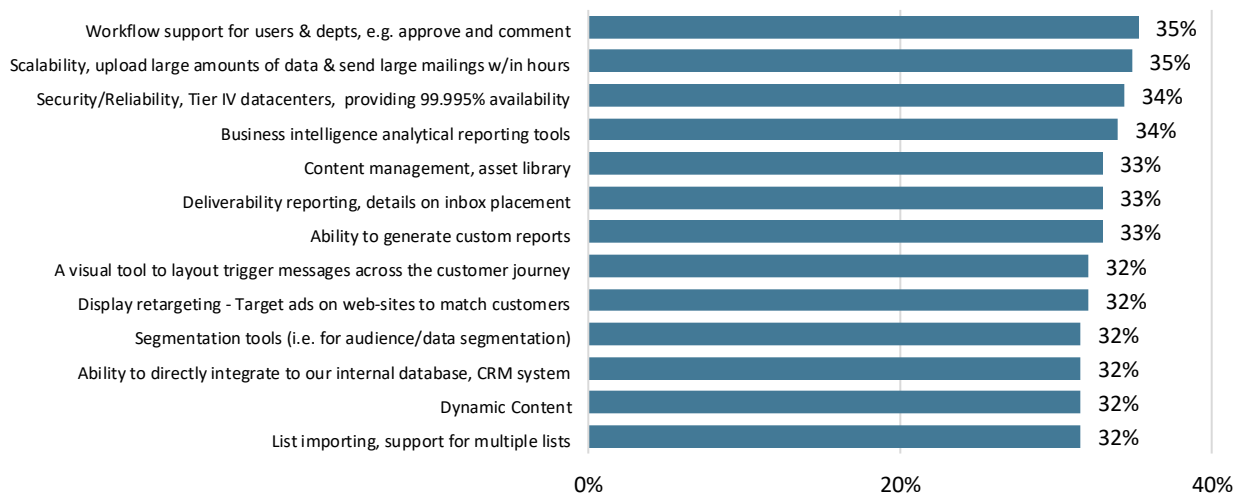
When selecting an ESP, team workflow collaboration, scalability, reliability and analytical reporting tools and a content asset library top ESP features for enterprise marketers (Figure 10). While other key features surface in the top 10, such as deliverability, journey automation tools and data integration, marketers are mostly influenced by these top three features:

- **Team workflow collaboration** – Enterprise marketers seek a customizable workflow tool that allows team members to collaborate and mark-up and revise content while in production. Marketers are seeking to make their processes more efficient, which again underscores the

forementioned labor and resources challenges. These tools are particularly important when working with an ESP services team or a standalone agency. In our demos we have found that agency Trendline Interactive and ESP Zeta Global had some particularly unique and useful tools to address this need.

- **Scalability** – The second most important product feature for enterprise marketers is a solution that can upload large amounts of data swiftly that does not contend for resources while sending large mailings in a few hours. The vendors evaluated in this report have a demonstrated ability to meet this requirement. While the deployment options vary, it is critical that marketers thoroughly investigate this capability via sandbox testing and customer references.
- **Security/Reliability** – The ability to offer zero down time in a redundant infrastructure. Our interviews and work with buyers confirms these survey results. This is not an aspirational need, but rather a shift to the most complex marketing we have ever witnessed. Marketers are appropriately focused on features such as data integration, redundancy (i.e. Tier IV), and data center security. There have been unfortunate examples of system outages and data breaches at crucial times of the year. Some enterprise cloud vendors that opted not to participate in this research have been impacted by such outages. Clearly the industry has taken notice and is properly prioritizing infrastructure proficiency in the vendor selection process.

Figure 10: Top 10 Most Important ESP Product Features, Enterprise – 2018



Question: What are the 10 most important product features when selecting an ESP application (select 10).

Top 13 shown, multiple ties for number 10.

Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=215 2/18 U.S. Only.

ESP Infrastructure Features Are Driving Marketing Purchase Decisions

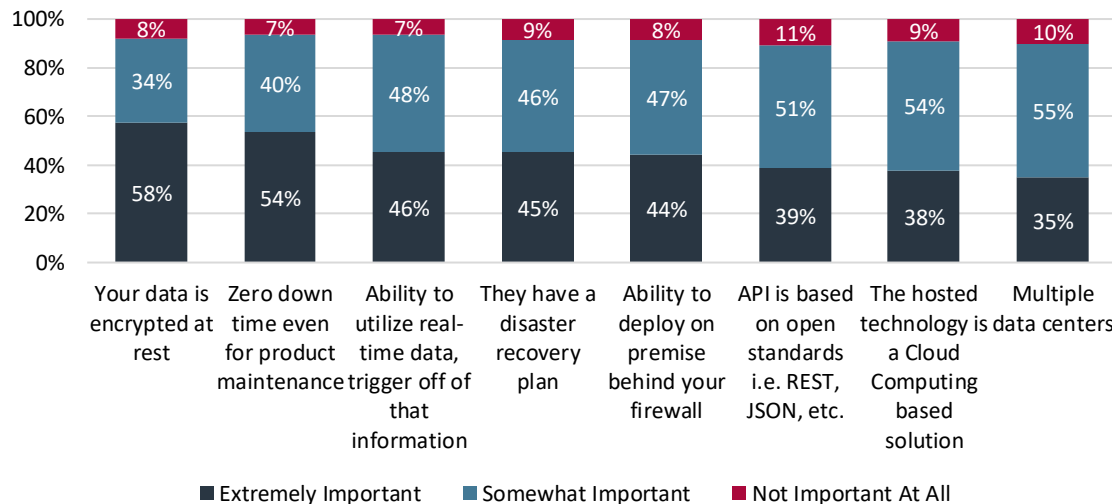
Enterprise email marketers are increasingly sensitive to uptime, security and overall disaster recovery planning. Accordingly, marketers are sensitive to the following infrastructure capabilities:

- **“Cloud” and Data Encrypted at Rest:** While 58 percent of marketers cite this as extremely important in their ESP purchasing decision, only 38 percent of respondents state that having the hosted technology as a cloud computing-based solution is just as important. Buyers are often confused as this rest encryption feature is typically exclusive to true a cloud computing

infrastructure. This indicates that marketers love the idea of data encryption at rest but don't fully grasp the technical underpinnings necessary. This situation is driven by the misplaced use of the word "cloud," which is compounded by the many ESPs and vendors that tack the word "cloud" on the end of their branding when in fact none or very little of their solution is actually cloud computing. Marketers should understand that if ESPs use that word, it is necessary to investigate those claims fully. The ability to encrypt data at rest is not a trivial task and often one that marketers would need to pay extra for. Some vendors such as Zeta Global include this capability.

- **Zero Maintenance:** Just as with any relationship, ESP-marketer relations that are high maintenance often get booted. Fifty-four percent of marketers state zero down time including maintenance is extremely important.
- **Disaster Recovery Plan:** The 45 percent of marketers that prioritize a disaster recovery plan further underscore the aforementioned reliability point. Marketers expect redundancy: 35 percent expect ESPs to have multiple data centers (Figure 11).
- **Behind Firewalls and APIs:** Marketers emphasize these features too. We often hear from ESPs that they can meet a particular client need if all of the data resides in their platform. Vendors that win can demonstrate extensible, elegant, scalable, efficient and effective capabilities based on current scalable open API standards (i.e. SOAP, REST, JSON). ESPs have massively different capabilities in these all-important areas and must remove integration illusions and demonstrate real-time open API integration and flexible deployment options.

Figure 11: Importance of ESP Infrastructure Features in Purchase Decision, Enterprise – 2018



Question: When selecting an Email Marketing Solution how important are the following features in your purchasing decision? (Select one for each option) Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=215 2/18 U.S. Only.

ESP Services Attributes Can be Equally as Important in Purchase Decisions as Infrastructure Features

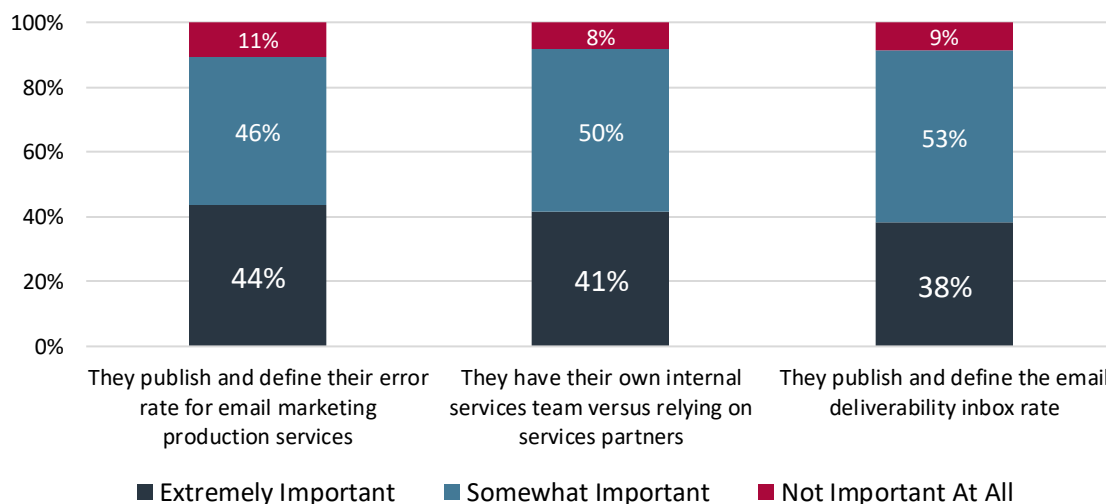
We have documented that services, a vendor's reputation, and staff quality are top criteria in the ESP selection process, but for many marketers service deployment is of equal importance to infrastructure features. When asked about the importance of these attributes the following attitudes arose:

- **Marketers demand that the ESP define and be transparent about quality:** Marketers are so enamored with the need for services that 44 percent said it is extremely important that the ESP

publish their error rate for email production services. Our research indicates that the mean reported error-free rate for email agencies (on a campaign, not message level) is 99.17 percent. It is critical for marketers to understand what constitutes an error and the mathematics behind the error rate.

- *Marketers would rather work with a vendor that had their own services team:* Forty-one percent of marketers stated that it is extremely important to work with a vendor that has their own internal services team versus relying on services partners. Another 50 percent stated they somewhat agree (Figure 12). This makes a huge difference when it comes to ESP selection as large software cloud-oriented vendors such as Salesforce and Oracle that push the servicing relationship to one of many qualified services firms (see [The Relevancy Ring – Email Agency Buyers Guide, 2017](#)). This reaffirms the notion that marketers want to work with fewer firms (Figure 2). The importance of sourcing services directly from the ESP in the selection process is good news for the enterprise services-oriented vendors such as Epsilon Agility Harmony, Cheetah Digital and Zeta Global.
- *Marketers want their ESP’s overall mean deliverability rate published and defined:* Sixty-two percent of marketers stated they had knowledge of how their ESP calculates their deliverability and inbox placement rates, indicating that 38 percent were unaware of what went into this all-important measure. Thirty-eight percent stated that it is extremely important to them that the ESP publish and define the email deliverability inbox rate, 53 percent stated it was somewhat important. Given the importance that buyers are putting on deliverability tools, ESPs that transparently publish this information will likely benefit over those that do not.

Figure 12: Importance of ESP Services Attributes in ESP Purchase Decision, Enterprise – 2018



Question Asked: When selecting an Email Marketing Solution how important are the following features in your purchase decision? (Select one for each option)

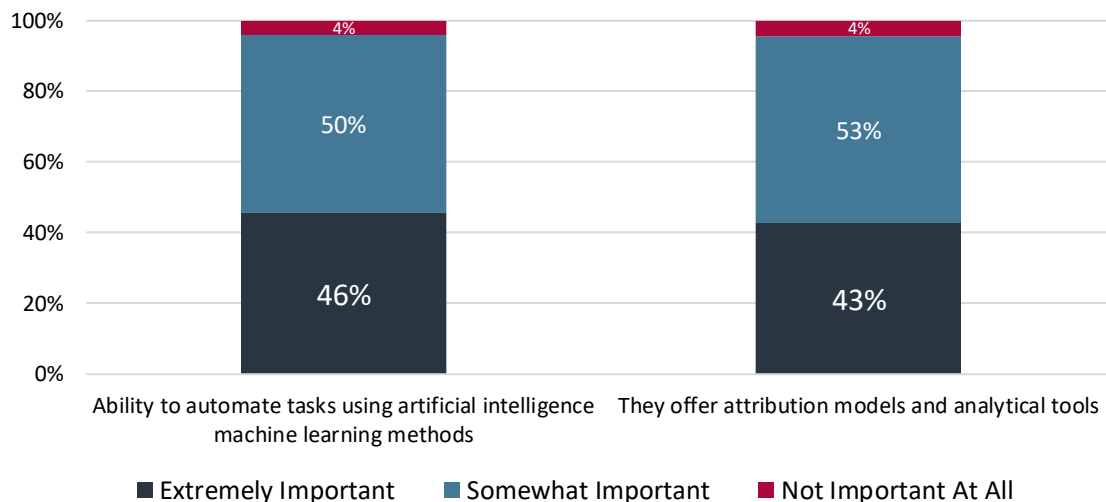
Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=215 2/18 U.S. Only.

Automation Via AI/Machine Learning and Attribution Tools Are Extremely Important in ESP Selection

Enterprise marketers single out the ability to automate processes, recommendations, and tasks via AI/machine learning and attribution capabilities as extremely important in the ESP selection (Figure 13). This data underscores TRG’s new definition and capabilities of ESP (Section I). These attitudes signal

enterprise marketer maturation and validates the product development, as well as acquisitions of vendors that have accelerated development of these product features.

Figure 13: Importance of AI Automation and Attribution in ESP Purchase Decision, Enterprise – 2018



Question Asked: When selecting an Email Marketing Solution how important are the following features in your purchasing decision? (Select one for each option)

Source: The Relevancy Group Executive Survey n=401 2/18, Enterprise n=215 2/18 U.S. Only.

SECTION III – Evaluation of ESP Vendors, Enterprise

Section III Introduction: The Relevancy Ring Evaluation and The Relevancy Group Approach

The six vendors reviewed include: Adobe, Cheetah Digital, Epsilon Agility Harmony, MessageGears, Salesforce Marketing Cloud and Zeta Global. These vendors are all leaders. These companies serve enterprise and mid-market senders. In this evaluation we are focused on enterprise marketers.

This year the Relevancy Rings are specific to each vendor which measures their functionality and satisfaction against participant and industry averages. The functionality highlighted relate to three key themes that are most important to enterprise marketers. They are — Automation, Analysis/Attribution, and Real-time

During the three-month research process, we spoke to marketers about their needs and aspirations. Then we evaluated how the vendor solutions are poised to eradicate marketer challenges and meet these aspirations. The report details the aspirations and hurdles that marketers face, the most desirable vendor features and attributes, as well as in-depth analysis of these six vendors. For more details, consult the methodology at the end of this report.

An excerpt of this section appears in the digital magazine, [The Marketer Quarterly](#) and in the [MQ App](#).

ESPs Satisfy Everychannel Needs

Central to the ESP functionality are everychannel capabilities (Figure 14). With few exceptions these enterprise vendors can address nearly every channel and most have attribution and AI/machine learning capabilities. Note that the features marked below as native may incur additional costs.

Figure 14: ESP Everychannel Capabilities Evaluated

Channel/ Vendor	Adobe	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global
SMS/MMS	●	●	●	●	●	●
Push App Messages	●	●	●	●	●	●
Mobile Deep Linking	●	●	●	●	●	●
Social Publishing	○	●	●	●	●	●
Social Listening	○	●	●	○	●	●
Display Advertising	●	●	●	○	●	●
Recommendation Engine	●	●	●	●	●	●
Email Hygiene	●	●	●	●	●	●
Data Enrichment	●	●	●	●	●	●
DMP/Identity Management	●	●	●	●	●	●
Multichannel Attribution	●	●	●	●	●	●
Predictive Modeling	●	●	●	●	●	●

● = Native ● = Partner, Separate Login &/or Fees ● = Partial Offering &/or Extra Fees ● = Custom ○ = Not Offered

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 2/18

Despite Differences in Success Metrics, Great Parity Exists with Testing Functionality Across ESPs

Traditional testing methods imply rework: after learning what is successful, marketers must go back and recast the winning version. All ESPs evaluated have the capability to deploy automated tests, which feature the ability to automatically send the winning version (Figure 15).

Figure 15: ESP Testing Capabilities Evaluated

Testing/ Vendor	Adobe	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global
Hold Out a Specified Percentage, Uses Random Selection	●	●	●	●	●	●
Automated A/B Testing	●	●	●	●	●	●
Automated Deployment of the Winner	●	●	●	●	●	●
Metrics that can Determine the Automated Winner	Open, Clicks Unsubscribe Rate.	Opens, Clicks, Any Metric the Marketer Desires	Opens, Clicks, Conversion	Opens, Clicks	Opens, Clicks, Conversion	Opens, Clicks, Conversion, Revenue
Multivariate Testing	●	●	●	●	●	●
Testing Consistent with Mailings and Lifecycle Campaigns	●	●	●	●	●	●

● = Native ● = Partner, Separate Login &/or Fees ● = Partial Offering &/or Extra Fees ● = Custom ○ = Not Offered

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 2/18

Place Emphasis on Vendor Reputation, Infrastructure Security and Uptime Performance

As evident in Section II, ESP infrastructure features are driving marketing purchasing decisions. Given the mission-critical nature of email marketing, particularly in many industries such as financial services, retail and travel, none of the technical prowess or user experience of an application matters unless it is running 24/7 365 days a year. Marketers must ensure that they are working with a vendor that has redundancy and can guarantee redundant secure data centers.

Such peace of mind not only makes for good sleep, but also ensures that email messages (which may dictate industry compliance for some and revenue for others) will continue to manifest. All the enterprise vendors evaluated meet the necessary infrastructure requirements. Real differences exist based on data center numbers, types and the ability to be fully redundant (Figure 16). Related to prospective vendor's data infrastructure is their ability to comply with the EU General Data Protection Regulations (GDPR). While not detailed here, buyers must investigate the ESP's GDPR capabilities.

Figure 16: ESP Data Center and Maintenance Details

Function/ Vendor	Adobe	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global
Active or Passive	Active/Passive	Active/Passive	Active/Passive	Active/Active	Active/Passive, can do Active/Active for a fee	Active/Active
Number of Data Centers	Multiple including Americas, Europe and Asia. In each region, there are multiple data centers	2 Sites, Tier 4 & Tier 3 co-located in the U.S.	3 Sites, automated failover, 2 in US, 1 in EU	3 Sites, U.S., 1 - Amazon Web Services, 2 - TX, CA	4	5, located in the U.S.
Maintenance Windows	Guarantee 99% availability. The maintenance has no impact on emails deployed/sent. Scheduled maintenance will be performed at an agreed upon time. Platform performance will not be compromised.	Pre-Planned, application updates are performed monthly. Hotfixes are performed as needed to cure known bugs (typically on weekends and off hours)	Releasing every 2 weeks. 100% uptime deploy. For maintenance windows, they reserve the right of one per quarter, but only take it when required	Never had to schedule downtime for maintenance or software upgrades	Due to our high availability throughout the technology within the platform, we do not typically take 'downtime' for maintenance windows.	Planned maintenance is coordinated solely on client demand 24/7/365. Schedule is followed by approval from each client for a given window of time needed to perform maintenance.
Reported Uptime	In the past four years, Adobe has never had an unplanned outage that affected their customers globally.	Not Disclosed	Harmony's primary site maintains a 99.9% uptime. The few interruptions in service were resolved in minutes	4 hours of unplanned downtime in the past 36 months for API access (> 99.99% uptime), and 0 hours for Click/Open tracking. No noticeable impact to customers	99.99%	3 unscheduled outages over the last 36 months, which were all restored in under 4 hours, none of which impacted any client's customers

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 2/18

Not All Email Service Providers Offer Services

The majority of marketers utilize services in some fashion. Most of the enterprise vendors evaluated offer some services, will many partner with outside agencies (Figure 17).

- *ESPs that offer full services and technology approach include:* Cheetah Digital, Epsilon Agility Harmony and Zeta Global
- *ESPs that offer services internally or via partnership include:* Adobe and Salesforce Marketing Cloud. Both have internal services, but also work with external partners.

- *ESPs that lead with technology first:* Beyond deliverability and technical/integration services, MessageGears is focused on their technology solution first. While they offer excellent customer support, they go to market as a self-service solution.

For an in depth look at email marketing agencies, get TRG's [Email Agency Buyer's Guide](#).

Figure 17: ESP Services Details

Service/ Vendor	Adobe	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global
Percentage of clients that are Full Services	Approximately 10% including service partners	45% Full Service, 90-95% Utilize Some Services	66% Full Service, 100% Utilize Some Services	Via Partners, 1 Client uses Services	Support clients how they want to be serviced	54% Full Service, 46% Utilize Some Services
Hours of support for Full Services	24/7 for most services, some are 24/5	24/7	24/7	Business hours (8-5), 24/7/365 for critical issues	24/7, Platinum Support	24/7
Creative Services Headcount	Not Disclosed	Included in Strategic Services	700	None	Not Disclosed	16, majority are U.S. based
Strategic Services Headcount	Not Disclosed	About 130, 25% are outside U.S.	200, 10% are email specialists	None	Not Disclosed	10, majority are U.S. based
Production Services Headcount	Not Disclosed	About 600, 40% are outside U.S.	165	2	Not Disclosed	175, majority are outside of U.S.
ESP/Client Collaboration and Approval Tools	Native and external applications	Native and partner applications	Native to their application	None	Native and partner applications	Native and partner applications
Frequency of Client Meetings	Customer Success Managers are assigned to every customer	Clients get a dedicated acct manager, monthly	Provide agile structure to ensure clients are supported	N/A	Depends on client engagement but all clients engage with a Client Success Manager	On-Demand, Weekly, Monthly and Quarterly
Error Free Rate	0.1% error rate	98-99%	99.89%	N/A	Not Disclosed	99.68%
How is Error Free/Accuracy Rate Calculated?	based on the number of campaigns with errors per total number of sends in a year	Calculates their service error rate in the following manner: total # campaigns / # annual platform messages over # errors	Total number of units produced – total number of units deployed in error / total number of units produced * 100. (41,098-45)/41,098 * 100 = 99.89%	N/A	Not Disclosed	Number of error free camps launched / number of total campaigns launched. This is calculated on a monthly and yearly basis and applies only to full service, ad hoc sends.

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 2/18

Some Variance in Delivery Tools & Services – All Are Robust

All vendors in the report offer the basic services required to register, authenticate, and 'warm' or 'ramp' IPs, as well as provide some level of ongoing delivery support and mitigation services. However, the following items stand out (Figure 18):

- *Pre-send rendering and inbox placement reporting:* Every platform reviewed offers some level of pre-send rendering. Most vendors partner with either Return Path, 2500K, or both, to provide additional delivery insights such as inbox rate, and domain-level delivery metrics. One or two of these solutions are fine, as methodologies of inbox placement measurement differ widely from providers that rely on panels versus seed lists. Marketers must ensure that they are familiar and comfortable with the methodology of such inbox placements and confirm that the measure has significant implications in guiding optimization strategies.

- *Delivery metric methodologies are mixed:* There seems to be a lack of a consistent measure for deliverability across these ESP participants. Marketers must investigate the metric methodology before making choices on the merit of an ESP's stated deliverability rate.

Figure 18: ESP Deliverability Details

Service/ Vendor	Adobe	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global
In-house Deliverability Services	Yes	Yes	Yes	Yes	Yes	Yes
Deliver Messages Based on Relative Campaign Priority That is Set by The Marketer	Yes, Native Feature	Yes, Achieved via Business Rules	Yes, Native Feature	Yes, via account selection and account priorities	Yes via custom queries	Yes, Native Feature
Performance Alerts if Metrics Falls Below Pre-set Criteria	Yes, email and in product alerts	No	Yes, Delivered, Non-Delivered, Open, Click Thresholds	No	Yes via custom report that can be triggered at a threshold	Yes, Open/Click regardless of medium. SMS alerts can be sent.
Deliverability Partner	Return Path, 250OK	Return Path	Return Path, eDataSource, Litmus	Return Path, 250 ok	Return Path	eDataSource, Email on Acid, Litmus, IBM Email Optimization, Return Path
Rendering Partner	Litmus	Return Path, Litmus	Return Path, Litmus	Return Path, 250 ok	Return Path	See above
Authentication Standards	DKIM, SPF, DMARC	SPF, DKIM; DMARC via a partner w/ fees	SPF1&2, DKIM, DMARC – No additional fees	SPF, DKIM, DMARC, SenderID – No additional fees	SPF, Sender ID and Domain Keys, DKIM, DMARC	rDNS, SPF, DK, DKIM, DMARC – No additional fees
Competitive Intelligence Partner	eDataSource	eDataSource, Custom Benchmark reports	eDataSource, Return Path, Benchmark reports	Not Offered	Return Path	eDataSource, Benchmark reports
Delivery/Privacy Associations	ESPC, CSA, M3AAWG	ESPC, CSA, IAPP	ESPC, M3AAWG, OTA,	M3AAWG	ESPC, MAAWG, OTA, Spam Haus, DDV, Signal Spam	ESPC, M3AAWG, OTA
Delivery Rate Calculation	all email sent minus errors, exclusions and hard bounces. All formulas are public	Number of messages sent, minus the number of bounced messages	Messages Delivered divided by Messages Sent	Seed list results weighted by list composition	Total attempted, less all failures, divided by the total attempted	Total attempted, less all failures, divided by the total attempted

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 2/18

Reporting and Analysis Features Are Critical to Optimizing Marketing

Reporting and analytics is a top priority in 2018, and it remains a key feature that often drives ESP purchasing selection. In most industries these features are the top consideration. We see relatively wide variance in the vendors we reviewed in this area (Figure 19).



































































Many of the providers who are focused on campaign management and everychannel integration support multi-touch, cross-channel attribution models. Adobe, Cheetah Digital, Epsilon Agility Harmony and Zeta Global have the most sophisticated attribution analysis tools. Many of the other vendors can meet this functionality through custom work and partnerships.

There have been exciting developments in data visualization over the last year. Several vendors are allocating resources to make our troves of email data easier to analyze, understand, and act on, through more powerful data visualization tools. Adobe, Cheetah Digital, Epsilon Agility Harmony and Zeta Global have offerings that allow for some data manipulation and visualization. MessageGears revealed their new reporting interface, a significant improvement over their previous offering. The firm provides lovely

visualizations for engagement data. Salesforce Marketing Cloud has Google analytics 360 integration, which will make data from Google Analytics 360 visible in Salesforce Marketing Cloud reporting UI for a more complete understanding of campaign performance.

All of the vendors offer a rich set of APIs that allow marketers to pull reporting data into other in-house analytics tools.

Figure 19: ESP Reporting and Analytics Details

Function/ Vendor	Adobe	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global
In-house Analytic Services						
Crosschannel Attribution Reporting						
Export in These Formats	Excel, PDF	Excel, PDF, CSV, DOCX, RTF, XLSX, PPTX and SFTP.	CSV	CSV, XML	CSV, ZIP, PDF, Excel, TIFF, XML, MHT	PDF, Excel, CSV, DOCX, RTF, ODT, ODS, XLSX, PPTX
Ability to Generate Custom Reports in the Application						
User Generated Custom Dashboards						
Reporting is available within 24 hours of send time						
Subscriber Level Reporting						
Report that lists campaigns delivered over a specific time with KPIs						
Device Level Reporting						
Link Level Reporting						
Creative Level Performance Reporting						
Distribute Repots to list at specific times						
Other Information	Offers drag and drop interface for dynamic content reporting	Clients can customize reports and dashboards, and select many visualizations	Via their strategy and analytics team they can provide any client requested custom report	All data is delivered back to customers and can be used to perform ad hoc reporting on their own	All native and non-native data sources are available for reporting in real time	At no additional cost users can utilize their out of the box analytics to generate custom visualizations.

 = Native  = Partner, Separate Login &/or Fees  = Partial Offering &/or Extra Fees  = Custom  = Not Offered

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 2/18

AI/Machine Learning Are Making ESPs Easier to Use and More Valuable

The ability to leverage machine learning to improve offers, predict the best journey, automate data integration, and simply take over tasks that a marketer used to have to do are present in many of the enterprise ESPs that we reviewed. The stand-outs we saw are as follows:

- **Adobe** – Central to Adobe’s Experience Cloud is their AI tool Sensei, which is a framework and set of intelligent services which dramatically improve the design and delivery of digital experiences. Adobe is using AI to handle attribution by algorithmically determining the impact of specific marketing touch points, enhancing personalization by recommending relevant content, and ultimately, driving more valuable customer experiences.
- **Cheetah Digital** – Cheetah Digital is hyper-focused on marketers, specifically asking “how do they create revenue generating outcomes for their clients?” They utilize AI for descriptive, predictive, and prescriptive outcomes, as well as build their predictive models via academic algorithms. The company also uses AI to build data associations based on predictive inferred

affinity. This has created new efficiencies for their clients, as it has accelerated the data onboarding and data table relationships. The company doesn't use third-party tools.

- *Epsilon Agility Harmony* – Epsilon is using AI in remarkable ways. The company is using AI to optimize machine learning to improve deliverability. They use AI for asset meta-tagging, to automate the creative assembly, including: subject line, pre-header text, content assets. They are also taking site behavior, tags, identity transactions and mapping that back to an individual person. The creative assembly is done in real time. The client gives Epsilon the assets and data, and the engine assembles it.
- *Salesforce Marketing Cloud* – Salesforce offers an email engagement prediction engine, which determines who is likely and least likely to engage. For example, this data is then used for targeting in the appropriate channel, such as guiding less engaged customers into a display ad campaign. Their AI engine, Einstein, is used throughout the application and across all Salesforce Clouds.
- *Zeta Global* – Last year, Zeta acquired AI/machine learning firm Boomtrain, and have done an excellent job of integrating it throughout the ZetaHub 2.0. Their website beacon collects and informs machine learning allowing for real-time offers and messaging across every channel. They use AI for asset meta-tagging classification and send-time optimization via their tool Prime Time, as well as in the analytics to look at next best channel. It was one of the more tightly integrated and robust AI offerings that we encountered.

Progressive Profiling and Real-Time Segmentation Is an Important New Reality for Marketers

Progressive profiling had related to capturing customer preferences over time. Now in the age of site tags to capture customer signals and apply AI/machine learning, it is possible to target and segment customers at the individual level in real-time. This is different than historical CRM and RFM (recency, frequency, monetary) segmentation. While this is still necessary and the approach that most marketers take, many marketers and ESPs are moving to an approach that utilizes real-time data and automations to deliver highly relevant individualized experience. This is now possible and many of the ESPs evaluated in this report have orchestrated their products to ensure that marketers utilize this new approach to personalization. ESPs including Adobe, Epsilon Agility Harmony and Zeta Global led their demos with this approach.

Scoring ESPs To Marketer Aspirations, Challenges and 2018 Themes – The Relevancy Rings

We asked the participants in this guide to demo their capabilities on the following themes that encapsulate 2018 marketer aspirations, challenges and themes. They are as follows:

- *Automation*: Automations including triggered campaigns, and the ability to automate routine marketer tasks which may leverage AI/machine learning, are necessary to address the aspiration of improving automation (Figure 3) and resource-related challenges (Figure 4).
- *Real-Time*: Marketers aspire to implement more real-time marketing and improve data and system integrations. Progressive profiling, real-time segmentation, and individual targeting is now possible. These tactics are often more efficient and effective than traditional RFM and historical segmentation. These improvements rely on the AI/machine learning technologies and innovations in hybrid ESP infrastructure.
- *Analysis/Attribution*: This theme relates directly to measurement challenges and the analysis aspirations including improved attribution for the everychannel marketer. We also reviewed the traditional reporting tools including custom report and business intelligence visualizations.

Attributes Measured. We scored each vendor on three areas for each one of these themes.

- **Completeness:** A measure of how complete this functionality is within the vendor's platform. For example, did they apply to every channel and system events and were they native to the application.
- **Uniqueness:** A measure of how unique the functionality is from their industry peers. For example, is the vendor utilizing AI/machine learning, repeatable playbooks or a framework.
- **Quality:** A measure of the quality of the user interface of this functionality. Functionality that was particularly usable and intuitive scored higher.

Understanding the scoring.

- Each analyst scored each of the themes and each of the attributes. Those scores were then averaged and in the following Relevancy Rings.
- Scoring: 0-5 points for each attribute scored.
 - 0=No capability
 - 1=Significantly below expectations and/or requires customization
 - 2=Below expectations and/or requires customization or partner
 - 3=Meets expectations, similar to peer group. This is a baseline and not a bad score
 - 4=Above expectations, better than most
 - 5=Significantly exceeds expectations, best in class

View the Relevancy Rings in the Vendor Profiles. The scorecard data is below (Figure 20).

Figure 20: The Relevancy Ring Scorecard Data – ESPs 2018, Enterprise

	Adobe Campaign	Cheetah Digital	Epsilon Agility Harmony	MessageGears	Salesforce Marketing Cloud	Zeta Global	All Participant Average
Automation Completeness	4	4.5	4	4	5	4	4.3
Automation Uniqueness	4.5	3.5	5	4	3.5	4	4.1
Automation Quality	4.5	4	4	3	4	4.5	4.0
Real-Time Completeness	4.5	3.5	4	4	4	4	4.0
Real-Time Uniqueness	5	4	4	4	3.5	5	4.3
Real-Time Quality	4	4	4	4	3	4.5	3.9
Analysis Completeness	3.5	4	3.5	3	3.5	4	3.6
Analysis Uniqueness	3.5	5	4	3	3.5	4	3.8
Analysis Quality	4	4	4	3.5	3.5	4	3.8

Source: The Relevancy Group, 3/18

The Relevancy Ring Client Satisfaction Awards

Client satisfaction can't be simulated. The Relevancy Group spoke with a sample of reference clients from several vendors and leveraged our email marketer survey panel to collect anonymous satisfaction data from buyers of these solutions. While we weight this panel data in our final analysis, this data highlights the customer's pure voice. The Relevancy Group is proud to present the Gold and Silver

Relevancy Ring Client Satisfaction Awards, which is a measure of client satisfaction across 15 categories (Figure 21). These client affirmations signal client trust and respect for ESP vendor partners in these categories.

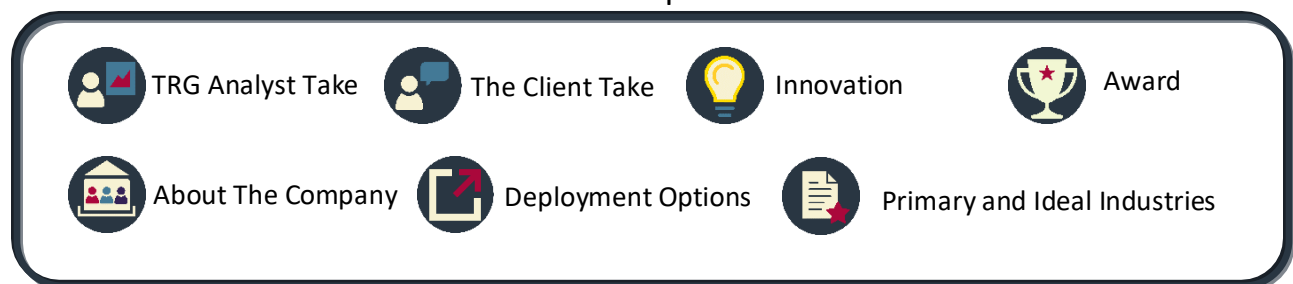
Note that there are ties, as in some cases the mathematical differences were so slight in the Number 1 Gold position or in the Number 2 Silver position that we couldn't distinguish a clear winner. We find that client satisfaction and overall vendor reputation often drives vendor selection.

Figure 21: The Relevancy Ring Client Satisfaction Awards – ESPs 2018, Enterprise

The Relevancy Ring Client Satisfaction Award Categories	Gold Award	Silver Award
Product Innovation	MessageGears, Zeta Global	Salesforce Marketing Cloud
Infrastructure/Stability	MessageGears	Cheetah Digital
Campaign Execution	Cheetah Digital	MessageGears
Deliverability Tools & Services	Zeta Global	MessageGears
Deliverability Support	Adobe, Zeta Global	Cheetah Digital
Educational Resources	Epsilon Agility Harmony	Cheetah Digital
Account Management	Cheetah Digital, MessageGears	Epsilon Agility Harmony
Strategic Services	Cheetah Digital, Epsilon	Salesforce Marketing Cloud
Production Services	Epsilon Agility Harmony	Zeta Global
Technical Services	MessageGears	Adobe
Creative Services	Epsilon Agility Harmony	Zeta Global
Omnichannel Marketing	Adobe	Epsilon Agility Harmony
Integration Capabilities	MessageGears	Salesforce Marketing Cloud
Technical and Customer Support	MessageGears	Epsilon Agility Harmony
Usability	Epsilon Agility Harmony	Cheetah Digital
Overall Value	Cheetah Digital	MessageGears
Industry Expertise	Epsilon Agility Harmony	Cheetah Digital

Source: The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18
The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

Vendor Profiles - Vendor Profile Icon Map



Adobe – <https://www.adobe.com/marketing-cloud/campaign.html>



Adobe's vision is 'changing the world through digital experiences.' Adobe Campaign is a comprehensive solution for the orchestration, launch and measurement of personalized cross-channel marketing campaigns, that fuel meaningful customer experiences. Adobe Campaign experienced phenomenal growth in 2017, bringing on 200 new clients, sending 150 billion emails and growing their revenue by 35 percent. Their clients are everychannel marketers, 67 percent utilize three or more channels and almost a quarter utilize six or more channels. Adobe Campaign has demonstrated that they can effectively scale and deliver valuable customer experiences across every channel. While Campaign is part of the larger Adobe Marketing and Experience Clouds, it can also be deployed in a hybrid manner where the data elements reside in the customer's data center or cloud, and the sending and message assembly portions reside in Adobe's cloud. One area that impressed us was their passion and ability to push the marketer to improve the sophistication of their marketing efforts. Adobe has hooks into the application allowing them to understand how clients are utilizing the tool. If the client is not using parts of the application, then they provide playbook for the customer success manager to have a conversation with the client. This ensures that the marketer iterates, identifies new objectives and moves along the marketing maturity curve. The solution makes excellent use of real time data providing progressive profiling to address that addresses the customer experience across every channel. Their Sensei AI tool is a framework that optimizes content tagging, dynamic content, offer management and analytics. Marketers that utilize Dreamweaver will love the ability to launch email from within Dreamweaver. The content is synched between the creative and marketing clouds. We like their user interface which is tremendously intuitive. Adobe Campaign can easily tap into other parts of their marketing cloud including their DMP and analytics. If you are utilizing other aspects of the Adobe Experience Cloud you should give Adobe Campaign strong consideration.



Adobe earned universally high customer satisfaction marks in virtually all areas that The Relevancy Group Measures. They earned especially high scores in the areas of Deliverability, Technical Services, Omnichannel Marketing, and Industry Expertise, but received exemplary scores across the board. Customers we spoke with had high praise for the Adobe technical teams and remarked that "implementation has been a ten out of ten," and that "there's never been a time that we haven't been able to find a quick solution to any [implementation] issues." One potential driver of those positive customer experiences is a training/onboarding program that customer report as being "extremely helpful." Customers also expressed love for the Adobe account teams and appreciate "extremely quick turnaround times," and reported that the team "anticipates needs ahead of time" and ensures programs run "smoothly and efficiently."



What's innovative for the marketer? If underutilized, the application and services team will inform the marketer of areas for optimization pushing them to become more sophisticated.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Deliverability Support, Omnichannel Marketing; Silver: Technical Services



About The Company – 8 North America locations: San Jose, CA, Boston, Washington D.C., New York, Seattle, Salt Lake City, San Francisco, and Ottawa. EMEA: Belgium, Denmark, France, Germany, Austria, Ireland, Switzerland, Italy, Netherlands, Scotland, Republic of Moldova, Poland, Romania, South Africa, Spain, UK, Sweden. APAC: China, Japan, Hong Kong, Korea, Singapore, India, Australia, New Zealand. South America: Brazil

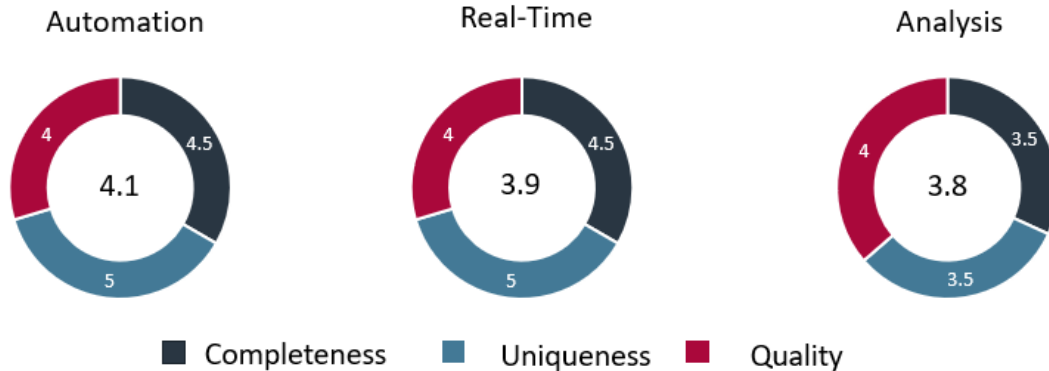


Deployment Options – Software-as-a-Service (SaaS), Managed Service, Hybrid, On Premise



Primary and Ideal Industries – Retail, Financial Services, Media/Entertainment, Manufacturing, Telecommunication, Insurance, eCommerce, Services, Printing and Publishing

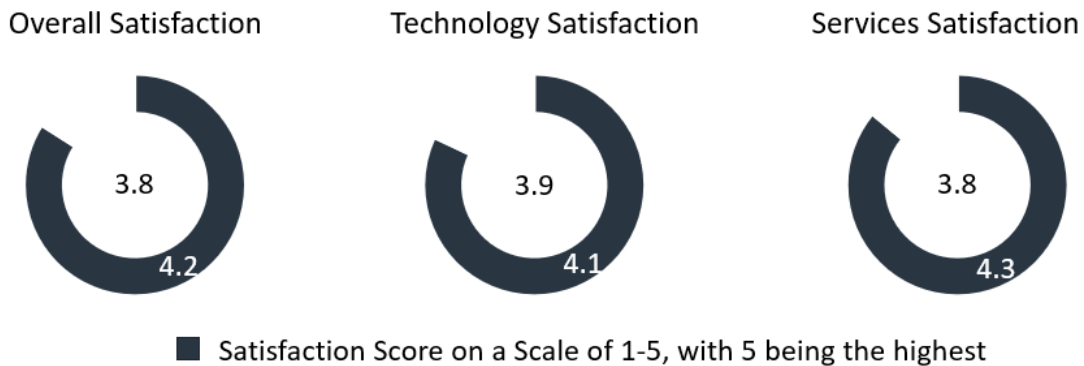
Adobe Campaign Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 3/18

Adobe Campaign Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18

The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

Cheetah Digital – <https://cheetahdigital.com/>



As the largest ESP, Cheetah Digital is “dedicated to marketers.” Every decision they make, from product development and services to hiring is focused on improving the day-to-day experience for marketers. They have recently hired an EVP of Client Experience to institutionalize this vision. Since our last review, Cheetah Digital has made significant investments to improve the stability, scale and speed of the platform. One of their largest clients can now process 350 customer event changes of terabytes of data in under two minutes. They have an active data model, which can accommodate structured and unstructured data, and they excel at real-time data processing. With a services staff of over 800 people, Cheetah Digital is well-known for their comprehensive global services, particularly for strategic and analytical consulting. Their services model is flexible — ranging from full service campaign support to limited strategic services for self-service clients, or somewhere in between. Cheetah Digital also offers robust global support offerings that allow for follow-the-sun, 24/7/365 support for everything from technical issues to how-to product questions. Every client gets a success manager who ensures that the client has the right resources. This individual is the steward of the relationship with Cheetah Digital. Cheetah Digital has demonstrated a consistent ability to elevate client sophistication across every channel. For example, the firm created a digital wallet offering for one of the largest eCommerce retailers selling kitchen wares and home furnishings, pushing customers into a mobile app experience instead of email. Cheetah Digital has impressive real-time data execution and AI capabilities to ensure marketers deliver relevant experiences across every channel. More importantly the company is utilizing AI to make the marketing process more efficient. Using predictive inferred affinity and a combination of filters, the solution supports dynamic email building. This is a time saver for the client. One major U.S.-based airline carrier, for example, was able to accelerate their production process by leveraging this Cheetah Digital tool. The ESP’s analytical tools, which include an integrated business intelligence tool complete with snazzy visualizations, are excellent. We love their full suite of attribution models, which were the most comprehensive that we found in this study. Marketers that seek a services-oriented partner with a highly scalable product must consider Cheetah Digital.



In the past, The Relevancy Group has witnessed customer satisfaction scores dip during times of organizational change (we witnessed quantifiable drops in ExactTarget and Responsys satisfaction scores specifically, in the immediate windows following their acquisitions by Salesforce and Oracle respectively). In the case of Cheetah Digital, who participated in this guide last year as Experian Marketing Services, The Relevancy Group has observed quite the opposite. Customer satisfaction scores for Cheetah Digital are actually up year-over-year. The customers we spoke with confirmed that positive change has been afoot. Cheetah earned top, or nearly top, marks in most of the areas we measure, including Campaign Execution, Account Management, Strategic Services, and Overall Value. Customer references validated this data by reporting extremely high levels of satisfaction and adding that they’ve “continued to grow the relationship by transitioning sister brands to the platform” who have been “highly satisfied” and noting that “the speed of innovation [at Cheetah Digital] has been impressive.”



What’s innovative for the marketer? Their updated distributed marketing tool has an improved UI and their parent-child architecture makes it ideal for multi-brand organizations with in-store marketing operations.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Campaign Execution, Account Management, Strategic Services, Overall Value; Silver: Infrastructure/Stability, Deliverability Support, Educational Resources, Usability, Industry Expertise



About The Company – Cheetah Digital has 23 offices across 15 countries. Sixty-five percent of clients are enterprise.

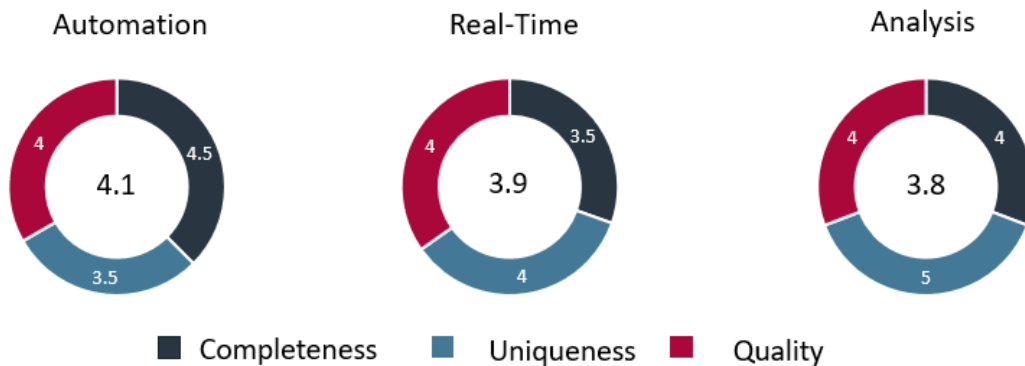


Deployment Options – Cheetah Digital can be deployed via SaaS or via Managed Service.



Primary and Ideal Industries – Retail, Travel/Hospitality, Financial Services, and Media/Publishing.

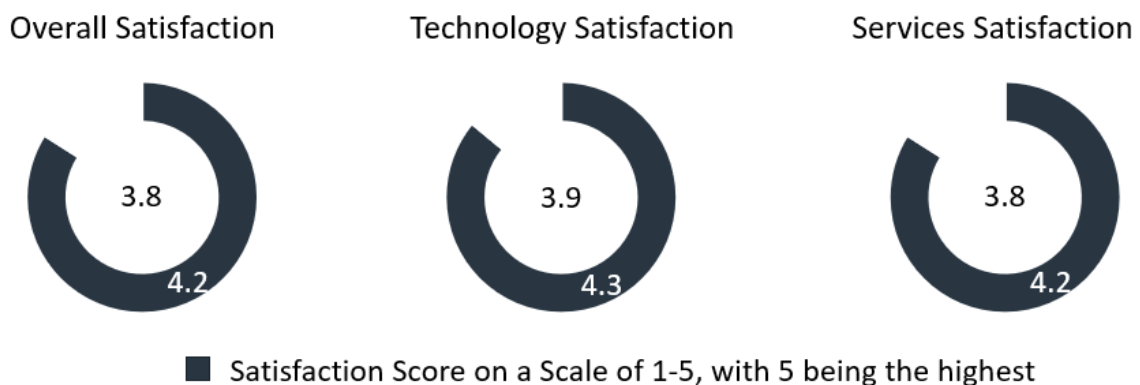
Cheetah Digital Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 3/18

Cheetah Digital Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18

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Epsilon Agility Harmony – <http://www.agilityharmony.com/>



Epsilon is focused on “Making Meaningful Connections.” They are fixated on the evolution of personalization, specifically utilizing real-time data and AI to improve the customer experience.

Epsilon has tremendous personalization and targeting capabilities at massive scale. Their Conversant engine processes over 1 billion decisions every five minutes. These capabilities are helping clients improve performance. The company has driven \$750 million in additional email revenue for their clients. Epsilon is so confident in their ability to optimize campaign performance that they are offering performance-based pricing. They have fantastic AI capabilities for assembling email content and tagging these assets, creating efficiencies for their clients and agency staff. In addition to their service-oriented ESP business, they also have a substantial agency practice supporting other ESPs. Half of their agency clients are on other ESP platforms including Salesforce and Adobe. Epsilon is actively solving automation content creation needs. Utilizing AI, the ESP allows brands to automatically code emails in a way that allows for assembly on the fly. This feature was one of the most compelling uses of AI that we saw in this evaluation. They are utilizing real-time data for progressive profiling and have good capabilities to deliver a consistent experience across every channel. Harmony provides marketers with the freedom and flexibility to use any type of data through Epsilon’s robust APIs and polyglot persistence database. They offer a single sign-on across all of their solutions, allowing marketers to easily integrate data and analytics across all of their offerings. We liked their flexible API, which allows marketers to control anything within the application. Conversion tracking is built in. The user can also easily pass data onto Adobe analytics. Agility Harmony has an excellent email archival tool, making it a perfect solution for financial services organizations. Marketers seeking a global every channel enterprise solution with high capacity agency services should consider Agility Harmony.



The Relevancy Group has quantified Epsilon customer satisfaction levels for several years; they have routinely led the pack in several key areas, and this year is no exception. Epsilon outperformed most peers in the areas of Strategic Services, Production Services, Creative Services, and Usability. In areas where they didn’t earn top satisfaction marks, they were not far behind the leader. Epsilon customers expressed high levels of satisfaction across the board but were especially effusive about the Creative Services team, which has now earned top marks for the second year in a row.



What’s innovative for the marketer? The AI utilization and a flexible template to automate the content assembly process.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Educational Resources, Strategic Services, Production Services, Creative Services, Usability, Industry Expertise; Silver: Account Management, Omnichannel Marketing, Technical and Customer Support



About The Company – The vendor has 70 office locations globally: all support email marketing. More than 1,000 employees are dedicated to email marketing offerings globally. Eighty percent of clients are enterprise.

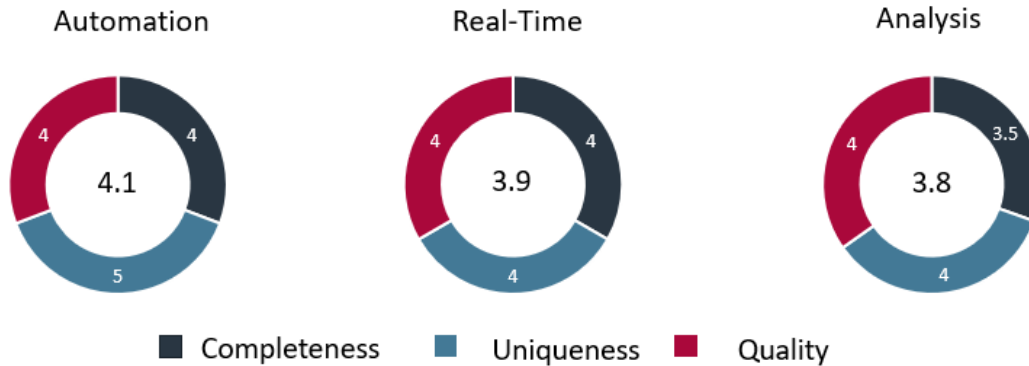


Deployment Options – Agility Harmony is deployed as a Software-as-a-Service (SaaS) solution.



Primary and Ideal Industries – Automotive, Retail, Consumer Packaged Goods (CPG), Financial Services, Telco, Technology, Travel & Hospitality and Media & Entertainment

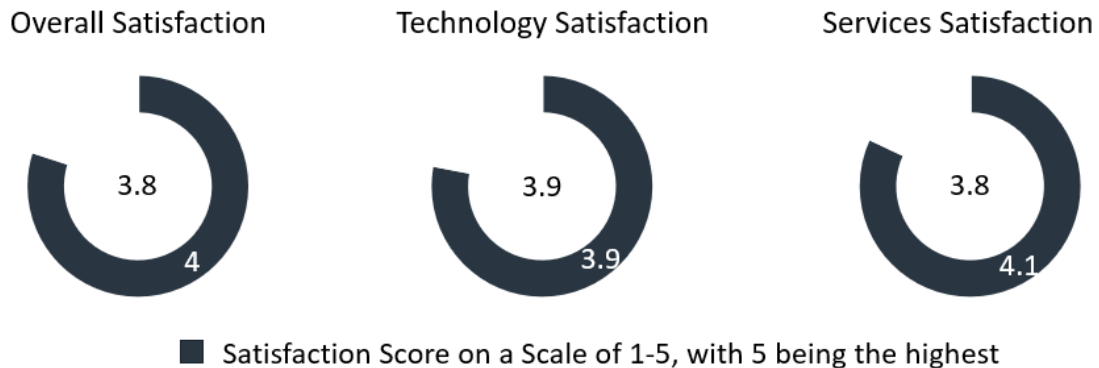
Epsilon Agility Harmony Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 3/18

Epsilon Agility Harmony Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18

The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

MessageGears – <http://messagegears.com/>



MessageGears believes that “consumers should be surprised and delighted” and that “technology should liberate not limit.” MessageGears is a hybrid solution that works off real-time live data. This hybrid solution allows clients to keep their data behind a firewall and under their control simply by connecting the on-premises application to a cloud solution. Data and campaign creation lives where the marketer’s data lives. There is no synching or moving data which makes MessageGears different than traditional ESPs. Since our last evaluation they have improved the UI, reporting and have a beautiful new drag-and-drop content editor. The updated offering is much easier to use than previous editions. They also expanded the types of data instances clients can directly connect to. The ESP always had the capability to connect to any JDBC capable database. In addition, now clients can directly connect to Hadoop, Hive, Redshift and Impala and to any of the cloud providers including: Google, AWS and Azure. MessageGears has also improved their real-time campaign performance reporting with an elegant interface. MessageGears is a developer-driven organization that is well-suited to assist enterprises in solving difficult problems. The solution is ideal for enterprise marketers that do not want to move or outsource data to an ESP. With robust APIs that are easy to set up, and a cloud infrastructure the solution is built for scale. As their name implies, MessageGears is built to address messaging challenges specifically for email and SMS. Beyond technical and delivery services, the vendor is not a services-based ESP. Marketers with internal services resources and/or database marketing investments that do not wish to replicate data should give MessageGears serious consideration. MessageGears’ hybrid email marketing solution is the answer for clients with massive amounts of ever-changing data and/or concerned with data security.



Customers who choose the MessageGears solution tend to run sophisticated, highly personalized, data-driven programs at scale. Virtually everyone we have ever spoken with has raved about the people and technology at MessageGears. This year, customers echoed previous sentiments about the solution’s uniqueness, again referring to it as “revolutionary technology” that enables them to create “highly personalized and valuable customer experiences” that they were not able to execute on other systems. Customers quantified their satisfaction with both the tech and services at MessageGears by awarding them more top satisfaction honors than any other ESP this year, giving them top marks in the areas of Innovation, Stability, Account Management, Technical Services, Integration, and Support.



What’s innovative for the marketer? Their ability to *_not_* replicate data offers tremendous cost savings and as such MessageGears offers unique, fair pricing packages.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Product Innovation, Infrastructure/Stability, Account Management, Technical Services, Integration, Technical and Customer Support; Silver: Campaign Execution, Deliverability Tools, Overall Value



About The Company – Based in Atlanta, GA, MessageGears began in 2010. They are focused on data-centric enterprises sending a high volume of email.

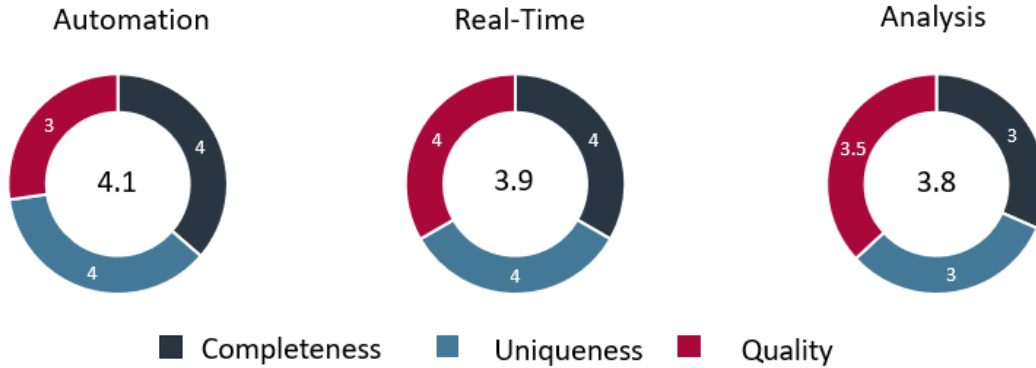


Deployment Options – Hybrid, APIs. The Hybrid integration platform combines on-premises software with cloud-based delivery.



Primary and Ideal Industries – Travel, Financial, Retail, Marketing Automation.

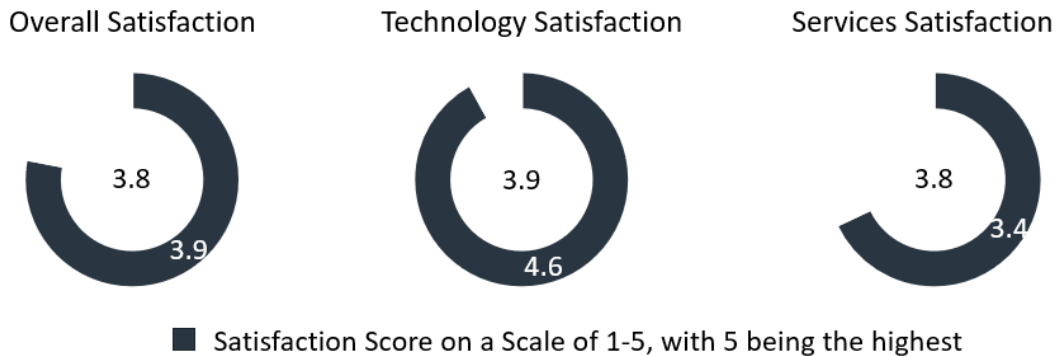
MessageGears Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 3/18

MessageGears Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18

The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

Salesforce Marketing Cloud – <https://www.salesforce.com/products/marketing-cloud/overview/>



Salesforce believes that the business world is undergoing the fourth industrial revolution: the era of AI/machine learning. The company is focused on delivering integrated experiences and transforming marketing. Salesforce has massive scale, synching 12 billion records a day and storing 43 petabytes of consumer data. Salesforce acquired Krux, which is now Salesforce DMP. Interaction Studio is their OEM partnership with Thunderhead. Marketers can tap into customer signals across every channel. Salesforce is well-equipped for the convergence of Martech and Adtech. They have also added Data Studio, a data sharing platform for second-party data. Their Journey Builder solution is more than capable and it is central to Salesforce's Marketing Cloud, as they state: "everything is a journey." They recently introduced journey templates, which are predefined journeys for common marketing automations. These customizable templates accelerate the production time for marketers. We liked their improved UI including their new Email Studio, which makes it much easier to assemble email. They have vastly improved dynamic content assembly and allow for an image carousel with adaptive live content capabilities. Their Einstein AI personalization capabilities are excellent. In addition to predicting email engagement and journeys, the tool has a drag-and-drop Einstein content block that easily inserts product recommendations into the email. For Salesforce users of Sales, Service or Commerce Clouds, the Marketing Cloud is an obvious solution, as the cross-platform integrations are robust. The platform makes it possible to quickly suppress customers with open service tickets. The real-time interaction management product, Interaction Studio, makes it possible to leverage real-time data. This tool gives marketers the ability to define their overall customer engagement strategy by configuring the business rules that arbitrate across the set of eligible journeys for a given customer and determine the best possible course of action at any given point in time. Enterprise marketers with complex journeys that seek a solution capable of massive scale must include Salesforce Marketing Cloud in their consideration set.



In the window after Salesforce acquired ExactTarget, The Relevancy Group witnessed a dip in customer satisfaction metrics across the board, as customers adjusted to a new culture, new people and, in many respects, a new way of doing business. We are pleased to report that Salesforce customer satisfaction scores are now on the rise and that they outperform the industry mean in virtually every single category we measure. Customers not only appear to be highly satisfied with the marketing cloud itself by awarding it near top marks in the area of Integration, they also quantified their pleasure in Salesforce Strategic Services with extremely high marks, as well.



What's innovative for the marketer? Einstein AI capabilities automate many marketing tasks and improve the quality of offers, journeys and recommendations.



The Relevancy Ring Award – A measure of client satisfaction: Silver: Strategic Services, Integration Capabilities



About The Company – Salesforce has many offices across the Americas, EMEA and APAC. A full list of our office locations can be found here: <https://www.salesforce.com/company/locations/>. All of these offices service Marketing Cloud.

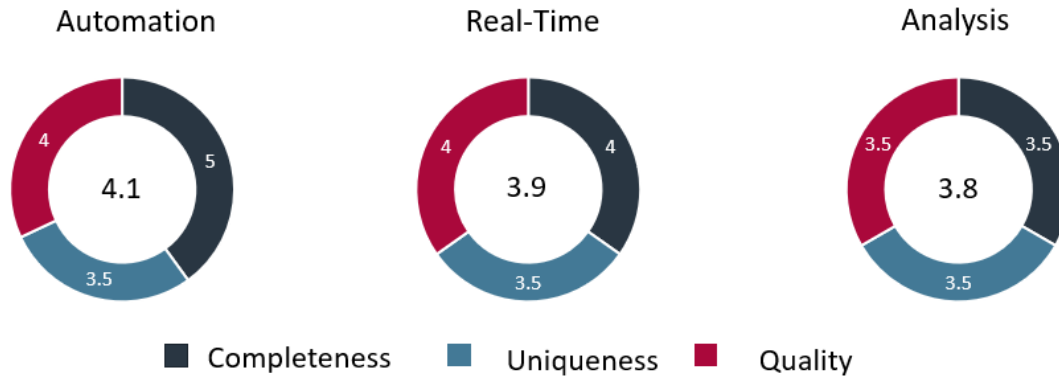


Deployment Options – Salesforce Marketing Cloud is deployed as a Software-as-a-Service (SaaS) solution.



Primary and Ideal Industries – Retail, Travel & Hospitality, Financial Services, Healthcare & Life Sciences, Media & Entertainment, and CPG & Technology.

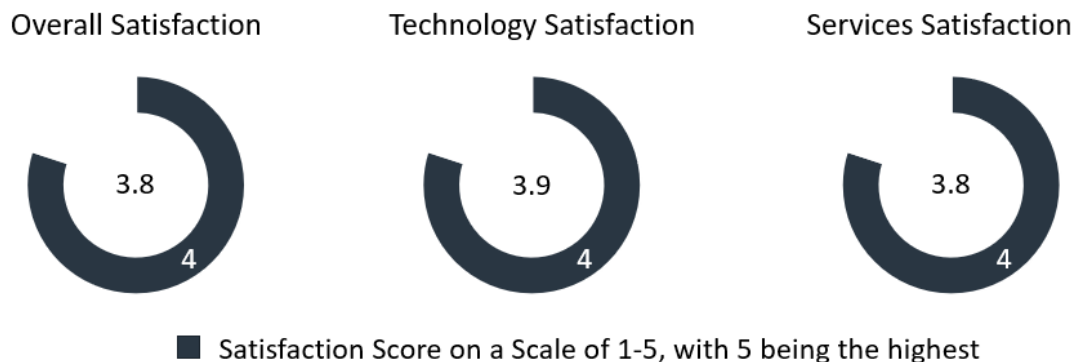
Salesforce Marketing Cloud Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 3/18

Salesforce Marketing Cloud Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18

The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

Zeta Global – <http://zetaglobal.com>



Zeta Global believes in one-to-one marketing driven by AI progressive personalization at scale. Since our last evaluation, Zeta Global has continued to acquire companies, their latest includes the AI/machine learning company Boomtrain, the audience engagement platform Disqus and an advertising trade desk Compass. In their typical fashion, Zeta Global has already integrated these solutions into ZetaHub 2.0 and have rapidly advanced its functionality. Valued at over \$1 billion, Zeta Global has all the functionality to address the needs of the everychannel enterprise marketer. Their solution provides persistent identity management and their extensive platform can listen to signals and target/re-target individuals across every channel. They demonstrated how ZetaHub 2.0 can make anonymous individuals into known consumers and then apply AI/machine learning to improve offers, automations and the entire marketing process. Zeta Global's AI/machine learning, identity resolution abilities and real-time capabilities underscore their role as a market leader. We were impressed by Zeta's continued ability to innovate, specifically their live profiling and progressive personalization to deliver the best offer at the right time via their send time optimization tool Prime Time. The solution is user friendly and more than capable. Zeta Global is one of the service-oriented ESPs and recently have made changes to where those teams are located and staffed. Since our last review the company has also update their template capabilities, all flexible and responsive, as well as have improved sending infrastructure, and progressive profiling. They have also entered into a partnership with Kitewheel, which provides very capable and usable automations for everychannel customer journeys. Zeta Global's attribution analytics and built business intelligence tools continue to be best in class. We love their AI/machine learning capabilities. Their roadmap has some truly innovative items that we are not at liberty to share, but know they are dedicated to improving marketer and customer experiences. Marketers seeking scale, rapid innovation, progressive profiling personalization, everychannel capabilities and follow-the-sun services must give Zeta Global serious consideration.



The Zeta customers we spoke with this year are all large enterprise marketers for whom email is a vitally important component of their business. These companies, without exception, expressed high levels of satisfaction. Zeta earned top, or nearly top, honors this year in the areas of Innovation, Deliverability Tools + Support, Production Services, and Creative Services. This is the second year in a row where Zeta has outshined peers in the key area of Innovation. Additionally, customers had high praise for the Zeta account teams, reporting that "they're a true extension of our team," and that they are "experts in email marketing." At least one of the customers we spoke with has stringent service level agreements in place with Zeta that they have never had to fall back on, and was pleased to report that the Zeta platform has been "exceeding even our highest expectations."



What's innovative for the marketer? Industry-specific internal modeling that offers predictive recommendations based on a massive array of customer behavior and data.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Product Innovation, Deliverability Tools and Services; Silver: Creative Services, Production Services



About The Company – Founded in 2000, Zeta Global operates in three continents with 17 offices around the globe including the UK (London, Bristol, Middlesbrough); India (Hyderabad,

Bangalore, Chennai); Czech Republic (Prague); and Singapore. Forty-nine percent of clients are enterprise.

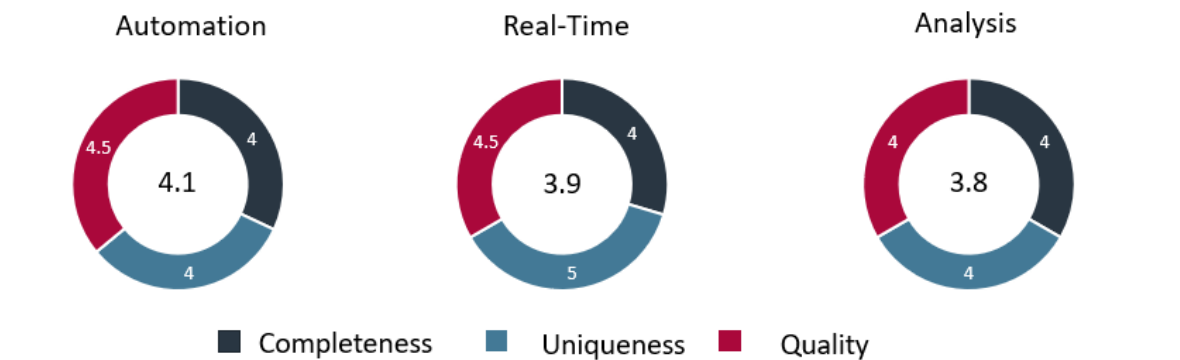


Deployment Options – Zeta offers SaaS and Managed Services solutions. They selectively consider on-premises engagements based on scale and customer requirements.



Primary and Ideal Industries – Travel & Hospitality, Financial Services, Retail, Luxury Retail, Healthcare, Media & Entertainment, Education

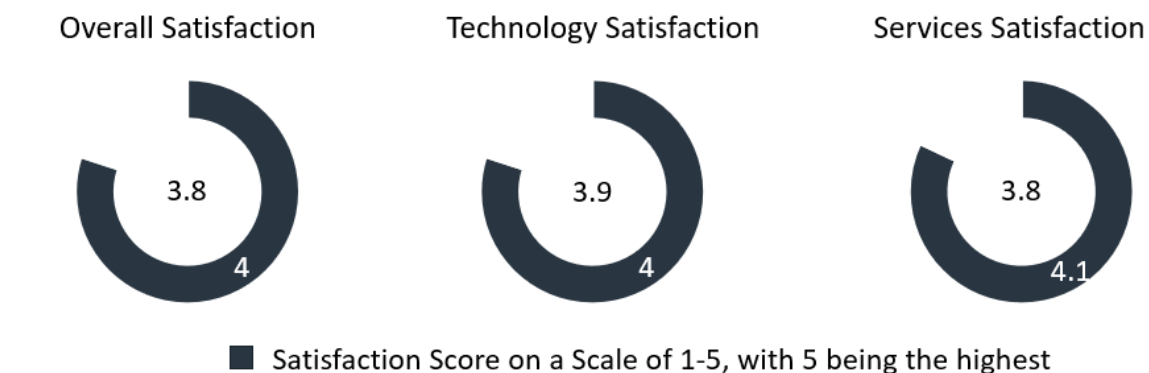
Zeta Global Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 3/18

Zeta Global Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 1/18

The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

Additional ESPs – The Following Were Invited and Elected Not to Participate In Our Research

- **Oracle Responsys** – A standalone email solution, Responsys offers worldwide support and promises to integrate it into the vast Oracle holdings. They have always declined to participate in this report. In 2017, their mean overall customer satisfaction score was 3.6 as compared to the overall all participant mean of 3.8, with their lowest satisfaction scores in product innovation and education. Their last product update was in August 2017, their release notes can be found [here](#).
- **Sailthru** – Focused on email, Sailthru relies on site tagging and a predictive analytics in a non-SQL environment. They were named a contender in our 2015 ESP Buyer's Guide.
- **Selligent** – Selligent has a capable everychannel offering that incorporates real-time data and AI/machine learning. Unfortunately timing did not work out for them to participate, but from what we have seen, marketers should consider them when seeking a competent technical offering. Inbox Marketer is one of their primary agency partners.
- **Yesmail** – Backed by agency services and their third-party data offering, Yesmail is an email solution with an array of everychannel features. They were named a leader in our 2015 Guide but have since declined to brief us on their business. We can only speculate about their capabilities.

METHODOLOGY STATEMENT

In Q1 of 2018, The Relevancy Group completed research in order to capture the state of the email marketing industry and evaluate seven ESPs that elected to participate in this research.

The Email Marketer Survey: In February 2018, The Relevancy Group conducted a survey that resulted in 401 completed and qualified email marketing executives. We qualified respondents based on their sending volume, familiarity of their email marketing program and other attributes such as the individuals' role/title. Respondents self-identified their company size and market sector category. We collected descriptive information about these organizations including revenue, budgets as well as items such as the size of the marketer's customer database. The survey utilized skip ordering and randomization and screener questions. Survey data was used for anonymous satisfaction reference data and to inform the weighting placed on features evaluated in the vendor questionnaire.

The Vendor Questionnaire: The Relevancy Group designed a questionnaire that mimics the requirements documents that are utilized when conducting ESP Request for Proposal (RFP) vendor selection. This questionnaire contained just under 300 questions to provide detail on the vendor's company, strategy, products, staff and infrastructure. Questionnaire responses were scored against The Relevancy Group's five-point capabilities scale. Product, infrastructure and services information was then weighted by marketer survey responses. This weighting ensured the importance of specific attributes and product features, reflecting the priorities of the surveyed email marketers.

Client Satisfaction Data: The Relevancy Group gave vendors the option of providing three reference clients for each vendor. The customer interviews occurred over the phone, each followed the same reference questionnaire. We asked reference accounts to score vendors on 1-to-5 scale across several attributes including: their satisfaction with the vendor's product, infrastructure, services and support. These interviews also included a general discussion related to the client's relationship with their vendor. Client Satisfaction data was combined with, or based on, anonymous satisfaction data from the vendor's clients that participated in the aforementioned email marketer survey. This survey data included the

same questions and satisfaction scale that were used in the reference questionnaire. The Relevancy Group utilized this combined reference data to inform.

Use cases: We asked the vendors to demonstrate their offering and focus on three themes that aligned with marketer aspirations and challenges. Those themes included Automation, Real-Time and Analytics. Two TRG Analysts participated in the demos and scored the vendors on their ability to satisfy the use cases on a 1-to-5 scale. We also scored the quality of the demo, innovation, product roadmap and overall quality of the presentation. That data is presented in the individual Relevancy Rings for each vendor.

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About The Relevancy Group, LLC | www.relevancygroup.com | (877) 972-6886 | info@therelevancygroup.com

Founded in 2010 and led by tenured industry analyst and marketer David Daniels, The Relevancy Group (TRG) provides market research and advisory services. We measure consumer and executive behaviors to develop strategies that optimize a return on marketing investments. Each Analyst has a minimum 15 years of experience in digital marketing. We are a trusted advisor to leading technology organizations and familiar brands. TRG is dedicated to educating the market on emerging trends and the imperative tactics needed to foster trust with customers in order to improve an organization's relevance within the broader on and offline connected economy. We deliver unique market research and services.

In addition to working with some of the top brands and vendors in the digital marketing economy, TRG produces dozens of surveys, research reports and webinars each year. Team members remain highly sought after public speakers that continue to entertain and enlighten audiences at conferences around the world. We also publish the digital magazine for marketers by marketers, [The Marketer Quarterly](#). Available for free with registration online, and through the MQ app on [iTunes](#), [Google Play](#) and [Amazon](#).