

Magic Quadrant for CRM Multichannel Campaign Management

Published: 22 May 2012

Analyst(s): Adam Sarner

Digital marketing is transforming MCCM. While vendors in this market provide some digital offerings, such as social or mobile, most have a basic level of functionality and road map. Web content management vendors are building digital marketing functionality, and are competing in the MCCM space.

Strategic Planning Assumption

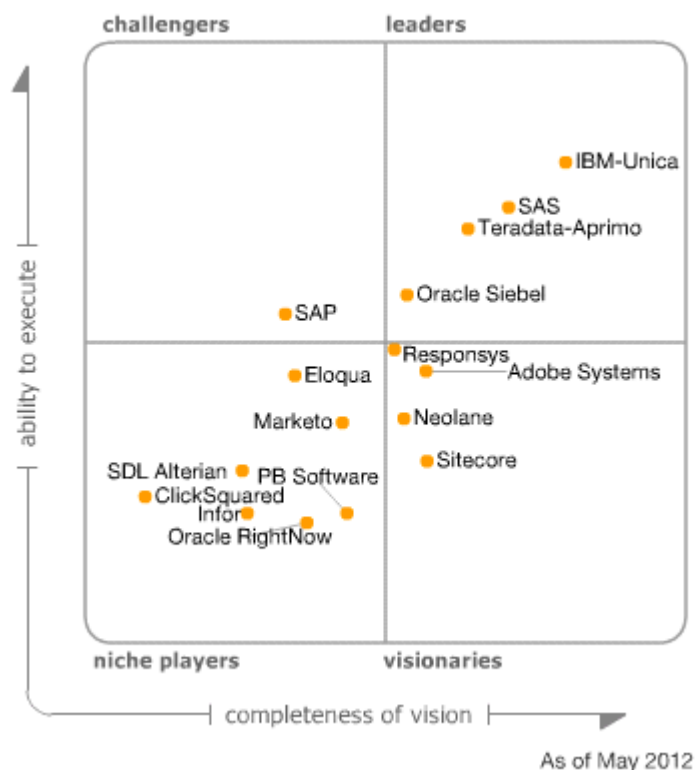
By 2014, customer service, Web analytics, content management and social CRM vendors will take more than 40% of the market share for campaign management.

Market Definition/Description

Multichannel campaign management (MCCM) processes enable companies to define, orchestrate and communicate offers to customer segments across multichannel environments, such as websites, mobile, social, direct mail, call centers and email. This approach can include integrating marketing offers/leads with sales for execution. Basic campaign management includes functionality for segmentation, campaign execution and campaign workflows. Advanced analytic functionality includes predictive analytics and campaign optimization. Advanced execution functionality includes loyalty management, content management, event triggering, and real-time decisioning/offer management in inbound and outbound environments. Digital marketing continues to integrate with campaign management, and includes addressable branding/advertising, contextual marketing and transactional marketing (see "Digital Marketing: The Critical Trek for Multichannel Campaign Management"). Digital marketing extends the marketing process through channels such as the Web, email, video, mobile and social applications, point-of-sale terminals, interactive TV, digital signage and kiosks.

Magic Quadrant

Figure 1. Magic Quadrant for CRM Multichannel Campaign Management



Source: Gartner (May 2012)

Vendor Strengths and Cautions

Adobe Systems

Adobe Systems enters this year's research for its vision and the continuing development of its digital marketing capabilities to assist companies and agencies in the best placing for their online marketing budgets across channels. Consider Adobe when Web analytics, Web content management and addressable advertising are top MCCM strategy priorities. The targeted industries are publishers, media, retail and financial services, among others.

Strengths

- Digital marketing: Although online focused, Adobe's digital marketing suite provides basic and advanced analytic and campaign management capabilities, and meets the criteria for this research. The digital marketing suite provides analytics for real-time segmentation, customer scoring and optimization capabilities to digital channels such as social, display, search video, email and mobile.

- Digital marketing acquisitions: Notable changes in 2011 included the acquisition of Demdex (an anonymous behavioral data service), Auditudo (a video advertising platform) and Efficient Frontier (real-time ad bidding/optimization), which includes a social media management platform through the acquisition of Context Optional. Enhancements to Adobe SiteCatalyst included real-time segmentation reporting filtered by segments such as Facebook users, mobile traffic and/or visitors who have watched a video or any other custom-defined segment. Adobe also released a SiteCatalyst iPad app that enables marketers to manipulate data for deeper analysis on the go. Also in 2011, Adobe announced and shipped SocialAnalytics, which will be integrated with Context Optional to create a new social campaign management product, Adobe Social, in 2012.
- Road map: The company's 2012 plans include the integration of its acquisitions of Demdex, Auditudo and Efficient Frontier for channel-specific solutions for advertisers with centralized campaign planning, buying and optimization across all channels.

Cautions

- Offline capability: Adobe's digital marketing suite is suited for the orchestration, measurement and execution of digital campaigns. However, like traditional campaign management vendors that have focused largely offline, other growing digital marketing platforms must continue to provide or integrate with offline campaign management functions, such as call centers and direct mail.
- Broader marketing adoption: Adobe needs to improve its sales strategy and execution. It needs the right type and number of personnel who can articulate the value of an optimized digital strategy for multiple industries.
- Advertising-centric: Adobe's digital marketing capabilities are largely geared for advertisers, agencies and publishers, not necessarily the marketing departments in the industries Adobe is targeting.

ClickSquared

ClickSquared enters this year's research, as it moves from offering more of a service to a product MCCM Niche Player. Business-to-consumer (B2C) midsize organizations wanting a software as a service (SaaS)-based subscription model with a focus on digital channels (such as email, SMS and social) can consider ClickSquared.

Strengths

- Momentum: Gartner estimated that ClickSquared's revenue reached \$26 million in 2011, with significant growth. ClickSquared claims to be earnings before interest, taxes, depreciation and amortization (EBITDA)-positive. The targeted industries are travel and hospitality, sports and entertainment, and banking for onboarding-type campaigning.
- Ease of use, and basic and advanced functionality: ClickSquared provides easy-to-use and accessible functionality, such as a drag-and-drop campaign design interface, visual audience

selection from within its business intelligence (BI) toolset, and the use of Netezza for quick, ad hoc query execution (fast counts). Many clients chose segmentation and data mining as top reasons for using ClickSquared. It provides basic and advanced campaign management, with advanced in-database analytic scoring capabilities, including prebuilt industry-specific predictive and descriptive models. Additions in 2011 included the launch of the Cross-Channel Marketing Hub in October. ClickSquared also partnered with Offerpop to provide Facebook and Twitter apps for social campaigns.

- Road map: The road map for 2012 includes expanded entitlement schemes, extended third-party channel integration capabilities, and improved content management and channel delivery options. ClickSquared also plans to work on expanded offer management capabilities, and cross-media response attribution metrics.

Cautions

- Overall mind share: ClickSquared's visibility for MCCM and digital marketing is low. The company made the minimum requirement for showing up on client shortlists for MCCM. However, the product side business is new.
- Support and service: Clients mentioned a still-maturing support and service organization with lead times even for simple tasks as an area for improvement.
- Number of new deals: Although ClickSquared now has over 100 customers, it just meets the client threshold of 15 new customers a year. The company has added significantly to its sales force, and recently added more management service provider (MSP) partners.

Eloqua

Eloqua remains a growing Niche Player, with a respected SaaS offering for lead management in B2B, or for B2B in consumer markets where large, considered purchases require a sales agent. Midmarket, B2B-oriented clients and those with sales agents working on large, considered purchases looking for on-demand campaign management focused on lead management should consider Eloqua.

Strengths

- Profitability: Eloqua revenue grew about 40% in 2011, to approximately \$71 million. The company has stated that it is profitable, and filed an S-1 toward its intention to go public (the filing date was August 2011).
- Expanding breadth: In July 2011, Eloqua introduced Revenue Suite, a set of applications (and services) designed to help businesses more accurately predict revenue growth. Eloqua Revenue Suite includes workflow tools for defining revenue cycle stages and dashboards that track the health of the integrated sales and marketing pipeline. Eloqua also announced Strict Mode, a feature to help marketers comply with the EU's high-profile privacy tracking regulations. In June 2011, Eloqua announced Eloqua AppCloud for B2B marketing applications. Categories include social, data and webinar/event applications. For example, social connectors such as Radian6 help marketers integrate social data with Eloqua data to build a buyer profile. Eloqua has over

50 apps, and released Eloqua Social Suite, a set of applications that makes it easy for B2B marketers to ramp up and use social media. Social Suite comprises several social applications, including social sharing and content apps to enable prospects and customers to share content across leading social networks like Facebook and LinkedIn.

- Road map: For 2012, plans include more advanced analytics, such as multilevel attribution metrics and a forecasting capability that looks at multiple past quarters. Eloqua also will release visual insight reports, such as heat maps of where prospects are located throughout a certain region. In 3Q12, Eloqua plans to launch Mobile Insight for the iPad, which will provide full access to the analytics platform so that executives can easily gain insight into marketing and sales effectiveness. In 4Q12, Eloqua will release its representational state transfer (REST) API so that customers and the company's ecosystem of 60-plus partners can build value-added marketing applications on the platform.
- System: References consistently referenced the completeness and robustness of the Eloqua system as top strengths.

Cautions

- Support and software: References mentioned some growing pains for support, or needing higher tiers of support for problem resolution. Clients mentioned software bugs in program reporting and metrics as needing improvement.
- Salesforce.com reliance: Most Eloqua customers use salesforce.com. However, Eloqua should not become overly reliant on this partnership, because salesforce.com could decide to purchase or develop its own lead management offerings.
- B2C: Consider alternatives when lead management in a B2B environment is not a priority.

IBM-Unica

Unica's mind share in the MCCM market keeps IBM in a Leaders position in this year's research. Unica is a key part of IBM's broader plans for its Smarter Commerce initiative (involving Unica, Coremetrics, Sterling Commerce and other assets/companies). Marketing departments can consider Unica when MCCM is a significant strategic requirement. Clients focused on B2B capabilities or MCCM in small or midsize businesses (SMBs) should consider alternatives.

Strengths

- Overall viability: IBM has a global reach, with \$106.9 billion in revenue in 2011, making it one of the more viable vendors in this market. IBM (Unica) reported 21.7% growth for its Enterprise Marketing Management group from 2010 to 2011. The acquisition of Unica by IBM is expanding Unica's reach into new markets, particularly in the Asia/Pacific region and Latin America.
- "Blue-washing": Notable changes in 2011 included the release of IBM-Unica 8.5, which included offer life cycle management; a new user interface (UI) for real-time personalization, including scriptless integration with websites; a suite-wide scheduler for model building and

scoring; and the IBM blue-washing of the marketing application suite, including localization into nine new languages (e.g., Italian, Japanese, Korean and Simplified Chinese).

- Road map: For 2012, a stronger focus on digital marketing will include much-needed data integration between Coremetrics Web behavior data and Unica Campaign. IBM will work on advanced response/conversion attribution capabilities that build on a multichannel interaction history and employ a new, statistically inferred response attribution capability. It will release a new interface for the Unica suite, and plans to release an MCCM SaaS offering for the midmarket in late 2012.
- Advanced campaign management: References consistently pointed to high scores for understanding marketers' needs in advanced campaign management.

Cautions

- Competition: The vendor must continue to provide and accelerate a leading vision as an MCCM vendor for digital marketing. There is accelerating competition, including from other markets, such as Web content management and Web analytics, gaining mind share and revenue in this area.
- Support: References continue to mention some professional support issues and lack of attention since the IBM acquisition. Clients want to see more partnered relationships, although they indicated that IBM has been improving in this area.
- Midmarket: IBM-Unica will see increased pressure from on-demand, midmarket players in campaign management. Although it targets midmarket solutions, the vendor needs to demonstrate success with its on-demand interactive marketing solution as a whole, not just distinct Web analytics offerings.

Infor

Infor CRM Epiphany re-enters this research as a Niche Player focusing on the MCCM market. Infor CRM Epiphany has reduced its emphasis on a CRM suite for sales to serve the Infor installed base, and is instead focusing on marketing departments and MCCM. Companies seeking campaign management with integrated advanced analytics in vertical industries such as financial services and insurance, telecommunications, hospitality and gaming, retail and high tech can consider Infor CRM Epiphany.

Strengths

- Core campaign management functionality: Infor includes basic and advanced campaign management execution, and basic and advanced analytics. The company has doubled its development team for Epiphany, and plans an aggressive six-month deployment cycle of releases. Infor CRM Epiphany's campaign management strength is in B2C service industries, and it still has significant mind share in real-time, next-best-offer capabilities through CRM Enterprise Interaction Advisor.

- **Advanced analytics:** Notable 2011 additions to Epiphany included Shopping Advisor to help retailers offer personalized website content and recommendations, a partnership with Orbis Global for Marketing Resource Management and Marketing 10.0, and Interaction Advisor 10.0 releases for unified inbound/outbound marketing.
- **Road map:** The road map for 2012 includes a needed UI update, and most notably a packaging of Interaction Advisor for recommendation/next-best-offer help in email, social networking, mobile advisories, etc.
- **Channels:** References mentioned the ability to target the appropriate audience across channels, and to keep campaign promotions and offers consistent regardless of channel as strengths for Epiphany.

Cautions

- **Competition:** Infor Epiphany offers B2C campaign management in a company that mostly sells software to B2B manufacturing environments, and Infor CRM Epiphany had been somewhat of a neglected product in MCCM capability. Although there have been renewed investments in and aggressive development of the offering, the MCCM market has gotten much more competitive.
- **Digital marketing capability:** Social marketing and mobile capability, hot areas for MCCM and digital marketing, are still in future planning.
- **UI, and software installation and integration:** References mentioned a needed UI update, complexity of software installation and integration, and that, although powerful, the UI takes time to configure properly. References mentioned a dedicated and knowledgeable professional service team, but acknowledged its expense.

Marketo

Marketo is a Niche Player with top mind share in lead management capabilities primarily for the midmarket, but the company continues to make gains with larger organizations. B2B marketers should consider Marketo as a midmarket provider of SaaS lead management tools that enables them to automate the lead process. Consider alternatives if B2B lead management isn't a priority.

Strengths

- **Growth:** Marketo continues to grow quickly. The vendor reported revenue growth of more than 150% in 2011, compared with reported 300% revenue growth in 2010. Gartner estimates Marketo's 2011 revenue to be in the \$30 million range. The company is not yet profitable, but has significant funding, and is showing more multidivisional deployments in larger companies.
- **Lead management's expanding breadth:** Additions in 2011 saw improvements in the product, including, most notably, a multistep program capability, event marketing and integration with webinars, and continued development of analytics such as Revenue Cycle Explorer (Ad Hoc Report Builder) to analyze program performance, multiple lead scores and a multitouch

attribution capability. Marketo also launched a lower-priced lead management option called Spark by Marketo for midsize companies. Marketo also partnered with ExactTarget, which will resell Marketo's Revenue Performance Management solution as it expands globally. Marketo released a prebuilt integration capability for Microsoft Dynamics.

- Road map: The road map for 2012 includes plans for integration of the first acquisition, Crowd Factory, for social marketing techniques (see "2012 Crowd Factory Extends Marketo Offering, but Is Not Transformational"). Road map areas include work on marketing resource management (MRM) for planning calendars, forecasting capabilities beyond waterfall forecasting and developing, and partnerships via a Marketo application exchange.
- Setup and ease of use: References consistently point to setup and ease of use as strengths for Marketo, and continue to score it as above average for the lead management product as a whole.

Cautions

- Salesforce.com reliance: The vast majority of Marketo's offerings integrate with salesforce.com. However, Marketo should not become overly reliant on this partnership, because salesforce.com could decide to purchase or develop its own lead management offerings.
- Reporting and analytics: References consistently mentioned out-of-the-box reporting and analytics as being weak. Clients found revenue cycle analytics to be better, but this feature costs extra, and can be difficult to get data from.
- Profitability: Marketo is well-funded and growing quickly, but it is not yet profitable. The vendor has set its sights on 2012 as a break-even point.

Neolane

Neolane moves to the Visionaries quadrant in this year's research, with \$44 million in revenue in 2011. It continues to raise visibility and mind share in B2C and B2B MCCM. Neolane is often seen in perpetual license deals against IBM-Unica for MCCM. Marketers also can consider Neolane when SaaS is a preferred option, and when more digital marketing areas such as Web/email and social marketing are a focus.

Strengths

- Growth: Neolane reported growth of approximately 47% in 2011. It focused on the U.S., the U.K., France and the Nordic market. Among the industries targeted are retail, travel/hospitality, media/entertainment and financial/insurance.
- Digital marketing focus: Notable additions in 2011 included more leading MCCM capabilities, such as Neolane Social Marketing, with features including social sign-on, social user profile capture into the marketing database, and the ability to deliver real-time personalized offers to Facebook and Twitter. Many competitors are still working on these capabilities, and the company reports Neolane Social Marketing being sold in 35% of net new deals.

- Road map: The road map for 2012 includes the company's own advanced analytics for interaction/offer management, as well as additional social and mobile capabilities.
- UI and customizable campaigns: References consistently mention Neolane's easy UI and the ability to fully customize campaigns as top strengths.

Cautions

- Workflow complexity: Several references mentioned complexity in setting up and running workflows.
- Road map acceleration in digital marketing: Neolane should leverage its MCCM capability and vision in digital marketing areas such as Web campaign management, social marketing and search marketing, and should further market itself in the social space to differentiate itself in the growing and competitive campaign management space.
- Specific B2B functionality: Neolane offers B2C and B2B capabilities, but should further develop its lead management thought leadership by leveraging not only B2C capabilities for B2B, but also specific B2B capabilities, such as event management, contract management and pricing optimization.

Oracle RightNow

Preacquisition and postacquisition, Oracle RightNow will sell its campaign management offerings as part of RightNow's CX suite, and remains a Niche Player in this Magic Quadrant. Marketers should consider RightNow Outreach when they need to complement customer service, and where more visionary social and knowledge activities with basic campaign management capabilities are needed in an on-demand delivery model.

Strengths

- Customer service: Oracle RightNow has core strengths in customer service and complimentary marketing and sales solutions, with emphasis on high technology, retail, consumer goods, higher education, government and telecom. RightNow focuses on B2C-oriented businesses, which are better suited to the vendor's campaign management offerings and its installed base of service-based call centers.
- Fusion Service replacement: Oracle plans to use RightNow as a replacement for Oracle Fusion Service. RightNow Marketing was renamed RightNow Outreach, and will serve to trigger campaigns based on agent or customer activity. Notable social additions in 2011 included Social Monitor for brand pages on Facebook for use with segmentation with outbound email campaigns.
- Road map: Plans for 2012 include bringing in advanced analytics such as Oracle's real-time decisioning tools and integration with newly acquired Oracle ATG for e-commerce. Plans include adding marketing content to service emails.

- Ease of use: References consistently mention ease of use as a strength for RightNow's campaign management capabilities.

Cautions

- Social marketing and Web analytics: References rated the social marketing and Web analytics capabilities below RightNow's other capabilities.
- Digital marketing execution: The vendor should continue to develop its more visionary digital marketing strategy (such as social and mobile marketing), and its intersection with customer service.
- Broader capabilities: Consider alternatives when integrated marketing and service solutions are not a priority.

Oracle Siebel

Oracle Siebel remains a Leader in this year's research for its focus on MCCM with loyalty marketing. B2C marketers should add Siebel Marketing to their campaign management shortlists, particularly when marketers can leverage the integration of marketing and loyalty management. Consider alternatives when an overall CRM suite is not the main value proposition.

Strengths

- Growth: Oracle reports that Siebel Marketing's licensed revenue and deal size continued to grow in 2011, up about 20% from 2010, by Gartner's estimate.
- Loyalty management focus: Notable changes in 2011 included Siebel Loyalty Management release 8.2.2, with new features such as theme-based clubs and event-based promotions. Siebel released a graphical promotion designer and rules library to improve the user experience around recurring redemption awards, promotion simulation, etc. Oracle also certified Siebel Marketing against the latest Oracle Business Intelligence Suite Enterprise Edition (OBI EE) 11g to significantly improve performance and scalability, and targeting capabilities. Oracle Siebel improved its visualization, and spatial and mapping data-driven segmentation and analysis (to allow location-based targeting). Oracle Siebel and Oracle ATG Integration first steps in MCCM included customer profile mapping and synchronization.
- Road map: For 2012, Oracle is targeting a Next Best Action (NBA) Framework for Siebel CRM, including advanced integration between Siebel CRM and Oracle Real-Time Decisions (RTD), and support for broader, user-defined recommendation categories, such as next-best-product and message recommendations (not just marketing offers). Siebel is adding social media marketing components to its Siebel Loyalty Management solution to enable communities of social influencers to increase their engagement and revenue. There are plans for campaign performance optimization improvements for Siebel Marketing. Continued work is planned for Oracle Siebel integration with Oracle WebCenter Sites (formerly FatWire) for Web channel and content management.

- Automation of campaigns, and integration: References cited end-to-end automation of campaigns and integration with Siebel Loyalty as top strengths for Siebel Marketing.

Cautions

- Documentation and releases: References indicated the need for clearer documentation for business users and a less time-intensive and complicated release strategy to configure new features. Oracle reports that it has taken steps to address this, including moving to an agile development process, and introducing an annual innovation pack strategy.
- Integration with the broader CRM suite: Siebel Marketing continues to achieve momentum among marketing departments for B2C campaign and loyalty management capabilities, but integration with the broader CRM suite remains the primary value proposition.
- Loyalty versus best of breed: References reported choosing Oracle Siebel because of an existing relationship with the company, rather than because it is best of breed, except when loyalty management was the main driver.

PB Software

PB Software is a Niche Player offering advanced analytics, basic and advanced outbound campaign management, and inbound campaign management (inbound/outbound fusion) to B2C financial services, telecommunications and some retail clients. Marketers should consider PB Software when their real-time inbound/outbound dialogue strategy includes advanced predictive analytic capabilities and a contact center among its channels.

Strengths

- Growth: PB Software reported an increase of 60% in MCCM-specific revenue. Gartner estimates that the company earned about \$17 million in revenue in campaign management in 2011. PB Software is more visionary than other vendors in MCCM due to its uplift optimizer capability, which focuses offers based on customers likely to respond to the message, and identifies those who will buy anyway and those who will never buy.
- Advanced analytics: The company now has new anonymous/known Web visitor targeting to present relevant offers from acquisition throughout the customer life cycle. Notable additions for 2011 included a new version of Portrait Interaction Optimizer, with a Silverlight-based interface for simplified selection and targeting, and real-time performance views of responses with heat map visualization of success and or concerns. PB Software has one interface for all inbound and outbound MCCM, including one view of tracking campaign performance, and a unified calendar view. Enhancements in 2011 included direct connectors into Microsoft Dynamics CRM and salesforce.com.
- Road map: Plans for 2012 include a visual selection and segmentation interface for campaigns across inbound and outbound environments. This interface may be used in stand-alone mode for ad hoc customer data exploration when sold separately as Portrait Explorer. Portrait Explorer allows marketers to see customer profiles and attributes graphically organized in

customer cards that can be laid out to compare and contrast personae and experiment with queries to check how different segments are sorted.

- Professional services: References referred to PB Software's professional services as having worked hard with business users to help drive tool use, and that the personnel understood their business.

Cautions

- Mind share: The vendor's visibility into and mind share for overall MCCM remains low, though its work on MSP partnerships should help.
- Social marketing: PB Software should accelerate some road map ideas on location-based mobile marketing, and should invest in social marketing as part of a digital marketing strategy.
- Call center: Seek alternatives when a call center isn't a significant part of your overall MCCM strategy.

Responsys

Responsys moves in execution and vision to become one of the Visionaries as it takes a digital approach toward MCCM. B2C marketers can consider Responsys when seeking a SaaS-only campaign management tool that uses email, mobile, social, display and Web as main channels. Clients seeking B2B functionality such as lead management or event planning, and midsize, SMB or B2C clients seeking inbound marketing in the call center, should consider alternative providers.

Strengths

- Profitability: Responsys is a profitable public company, with \$134.9 million in revenue for 2011. It provides basic B2C campaign management, and some advanced analytic and digital marketing capabilities in a multitenant SaaS application. Responsys targets many industries, including (in order of priority) retail, financial services, travel and hospitality, and high technology. Channels include email, mobile, social, display and Web.
- Expanding digital marketing breadth: The 2011 additions to the Responsys offerings included, most notably, a display retargeting capability through Interact for Display, more advanced analytic capability such as Winner Selection/Program Optimization decisioning type capability that tests message timing, channel and frequency, as well as testing for different types of content. Other additions include Responsys Interact for distributed marketing, and integration with Bazaarvoice.
- Road map: Plans for 2012 include predictive modeling, advanced customer segmentation and clustering, display behavioral data integration, and mobile and video display retargeting.
- Expectations: References consistently point to Responsys as having met or exceeded expectations for the offering as a whole.

Cautions

- Email-centric: Gartner estimates that more than 70% of Responsys' revenue comes from email marketing. Many references reported that they use email and Web landing pages as their main channels.
- Support and rollouts: References mention somewhat slow support turnaround times, and the need to be more proactive in alerting customers of new product rollouts and how to use them.
- Data analysis and mining: References consistently mention Responsys as being at the top for email marketing, but also a need for more advanced data analysis and data mining investment for multichannel marketing.

SAP

SAP's company strength and delivery of marketing as an integrated solution within a CRM suite keep it a Challenger in this market. Marketing departments in an SAP environment should evaluate SAP campaign management to see whether it meets their requirements before seeking best-of-breed solutions.

Strengths

- Core campaign management: SAP provides basic and advanced campaign management execution, high-performance customer segmentation, trade promotion management, lead management and loyalty management. Advanced analytics include real-time offer management in campaigns. The vendor reports that about 50% of its active CRM 7.0 customers use SAP Marketing.
- Big data progress: Notable changes in 2011 included the release of CRM 7.0, with an increased focus in B2C offerings such as the HANA accelerator, which has the ability to deal with large sets of data such as social media sources. Also new and available in 2Q11 was Social Customer Engagement, an on-demand solution for social monitoring in the B2B-to-consumer space. SAP introduced Collaborative Campaign Management to include partners in campaign planning and execution. SAP also extended its loyalty management capability to include partner products and services to run joint loyalty programs.
- Road map: The road map for 2012 includes plans to release a HANA-based predictive segmentation solution, SAP Audience Discovery and Targeting, along with advanced segmentation and real-time predictive analytics and data mining. SAP plans to release a hosted model for SAP Loyalty Management. Social additions will include tighter integration with NetBase for social monitoring and profiling, and StreamWork for social collaboration. SAP also plans to offer tighter integration with ExactTarget and OpenText.
- Single system and view: References mentioned that using one system that provides a single customer view with SAP as one of the vendor's strengths.

Cautions

- Social marketing: Social marketing is more in the future-road-map stage than the execution stage. SAP is pointing to partnership plans in social analytics, but plans to build social interactions and engagement capabilities, leveraging the analytic outputs. Most CRM suite providers are still trailing in social CRM offerings.
- Overall MCCM: References point to integration with SAP as the biggest driver for SAP marketing, not necessarily its overall MCCM capability.
- Current or planned environment: Consider alternatives if SAP is not part of your current or planned environment.

SAS

SAS continues its leadership positioning in this Magic Quadrant for its strong revenue in campaign management and best-in-class marketing analytics. It should be on the shortlists of marketing departments that want advanced analytics within MCCM.

Strengths

- Overall revenue and viability: SAS is a large, privately owned company with approximately \$2.7 billion in revenue in 2011. Gartner estimates that it has about \$325 million in campaign management revenue (analytics included), up about 9% over 2010. The vendor has solid basic and advanced functionality for campaign management, as well as strong advanced analytics capabilities, such as analytics segmentation and optimization, that are integrated into the campaign process.
- Analytics: Changes in 2011 included the integration of Assetlink into SAS, with new modules such as resource planning and claims management. SAS also released SAS Conversation Center, which captures tweets, with some routed response workflow. This will complement SAS's social media analytics capability, which received its own updates, with support for 15 additional languages. Real-time decision manager was rearchitected, with performance improvements and added JBoss and WebLogic support, and removed requirements for WebSphere MQ. Campaign management added Greenplum relational database management (RDBM) support.
- Road map: The road map for 2012 includes a new Web-based, persona-driven interface for SAS CI 6.1, and a high-performance version of its Marketing Optimization that promises a more than 50-times improvement in computing time. The digital marketing capability now includes SAS's newly acquired aiMatch offering, renamed SAS Intelligent Advertising for Publishers. The road map calls for extended capabilities for advertisers (on the buy side) and agencies to optimize, measure and simulate/forecast advertising inventory in a fully multitenant deliverable.
- Integrated data structure: References reported that having an integrated data structure underneath MCCM is one of the most beneficial features of SAS products. References consistently mentioned that SAS delivers on what is promised "without storytelling."

Cautions

- Campaign management: References consider SAS for power-user-type work, using its advanced analytics capability, rather than for its strengths in campaign management alone. References also mentioned that these advanced capabilities require more configuration than they assumed.
- Digital marketing thought leadership: The vendor needs to accelerate its digital marketing strategy, particularly around its Web analytics and social offerings. In addition, SAS has been slow to get adoption for its Real-Time Decision Manager (released in 2007). These should be highly visible core competencies for SAS, and should be leveraged as key differentiators in digital marketing and the MCCM space.
- Alternatives: Consider alternatives when advanced marketing analytics is not a marketing project priority.

SDL Alterian

After being acquired by SDL, Alterian remains a Niche Player in this year's research, providing campaign management execution built on top of a high-performing analytics engine. Clients looking for hosted campaign management with a focus on analytical tools can consider SDL Alterian for midmarket campaign management as part of an MSP solution.

Strengths

- Overall viability: SDL, a large and profitable provider of global information management systems, acquired Alterian for \$110 million. Alterian has its own line of business in SDL called the SDL Campaign Management and Analytics Division. This gives Alterian some needed stability after a series of missed earnings and a top management turnover before having been acquired. Alterian gets a larger global footprint, after the acquisition, which was completed in January 2012.
- Alchemy: Alterian Alchemy, now being rebranded as SDL Campaign Manager and SDL Customer Analytics, was finally released after many extended delays. SDL Alterian will further expand its focus to include direct sales in the enterprise space. The Alchemy offering should provide much-improved ease of use and workflow for campaigns, while focusing on its strengths in analytical reporting and including more accessible, role-based functionality for different users. SDL Alterian will still offer and support Alterian Marketing Suite v.3.0 for existing users. SDL reports 30 new campaign management customers, which includes six new ones for Alterian Alchemy. Most Alchemy clients (MSPs) are still being implemented. SDL restructured Alterian into three lines of business for campaign management and analytics, social and Web content management to focus on growth opportunities and buying centers within diverse markets. Before the acquisition, Alterian planned to merge all three areas into a suite.
- Road map: In 2012, SDL will focus on enterprise scalability, which includes enhancements to built-in predictive analytic capabilities, enhancements to email reporting and dashboarding, including prebuilt templates, scalability enhancements to support audiences of 100 million, and

additional integration points with SDL SM2 and SDL Social Media Intelligence. SDL Campaign Manager will be integrating with SDL Tridion and SDL Fredhopper for Web personalization, content optimization and offer management. SDL will work on integration with SDL Quatron for marketing dashboards and user experience internationalization leveraging SDL Language Services and SDL Language Technologies. The planned updates are for the MSP channel and direct sales.

- Value: References pointed to the vendor as being a good value for the cost.

Cautions

- Disruptive management turnover: Alterian management issues (and missed numbers) before the eventual acquisition by SDL hurt momentum and direction for Alterian. The SDL acquisition should bring stability and reinvestment into its development and growth plans.
- Delays: References mentioned significant delays for Alchemy and longer-than-expected implementation times. References also gave mixed scores to support and mentioned slow response times, but noted competency when these issues were addressed.
- MSP-centric: The channel partner, not the marketing department, usually selects Alterian. In addition, MSPs tend to view Alterian as a lower-cost, operationally focused alternative to larger campaign management offerings.

Sitecore

Sitecore enters this year's research among the Visionaries, focused on digital marketing as it moves from more traditional Web content management to digital marketing capabilities aimed directly at marketing organizations. Consider Sitecore when Web campaign management and the orchestration of campaigns for digital channels are priorities. Top industries targeted thus far include financial services, energy, oil and gas, government and insurance.

Strengths

- Profitability: Sitecore is profitable, with \$55 million in revenue reported for 2011. Gartner estimates that about half of its revenue comes from MCCM. Sitecore is based in Denmark, with most of its revenue coming from the U.S., the U.K. and Denmark (in that order).
- Digital marketing: Sitecore serves content, and can execute campaigns for websites, email campaigns, mobile sites and social media, and seeks to be a hub for exchanging digital information with external systems such as customer databases (Microsoft SQL or Oracle). The company offers on-premises and single-tenant options, and offers its own consulting for digital marketers and partners with agencies such as Sapient Nitro and Rosetta.
- Functional breadth: Included in 2011 was significant growth of additional MCCM capabilities, including email marketing that enabled email campaigns to be tied to other channel behaviors, including mobile and Web channels. Other additions included engagement scoring and tracking across campaign channels. Sitecore released Social Connect 1.1, which enables integration with Facebook, Twitter and LinkedIn. Sitecore partners with Baynote for content

recommendations and targeting, Brightcove and Ooyala for video asset management and delivery, Lionbridge for translation services, and Jungle Torch for search engine optimization (SEO) integration.

- Aggressive road map: Sitecore's 2012 plans include an aggressive release schedule, with dynamic delivery of print assets and automated campaign tracking via quick response and other 3D bar code systems. Also being released in 2012 is the capability for advanced drill-down and online analytical processing (OLAP) analysis of campaign data. Sitecore is partnering with Telligent social marketing/engagement on websites. Sitecore has plans to release social media monitoring and language translation services as part of its App Center portfolio. In 2012, Sitecore will release Visual Path Analyzer, which aids channel attribution metrics, and will improve connections with salesforce.com, Siebel and SAP.
- Integration flexibility and scalability: References consistently point to integration flexibility and scalability as strengths for Sitecore.

Cautions

- Digital marketing functionality: References indicated that although Sitecore is adding to its breadth of digital marketing functionality, best-of-breed offerings, such as third-party email marketing engines are still favored over its offerings.
- Microsoft-centric infrastructure: Sitecore suits Microsoft .NET environments, and mainly requires a Microsoft-centric infrastructure and complementary technology. Although Sitecore's Web content management product interoperates with third-party systems via its own APIs and XML repository, Java-oriented developers seeking to create unique Web applications and to employ Java interoperability standards generally look elsewhere.
- Offline capability: Sitecore is suited for orchestration of digital campaigns and the utilization of Web content management. However, like the traditional campaign management vendors that have focused largely offline, Sitecore and other growing digital marketing platforms must continue to provide or integrate with offline campaign management, such as call centers and direct mail.

Teradata-Aprimo

Teradata-Aprimo remains a Leader in this year's research. Consider Aprimo Campaign Management when MRM is a strong component for B2C MCCM.

Strengths

- Overall momentum: Teradata's overall revenue was up 22% in 2011 from 2010, and up 19% in product revenue. Teradata and Aprimo have unified the branding of their campaign management offerings under the Aprimo brand. Aprimo is developing, selling and supporting the existing campaign management offerings separately, depending on business issues, data strategy, deployment preference and campaign complexity.

- **Functionality ownership versus partnering:** Notable changes in 2011 included Aprimo Relationship Manager and Aprimo Marketing Studio integration of Marketing Operations functionality. Aprimo also introduced a real-time decisioning offering called Aprimo Real Time-Interaction Manager, released as its Inbound Marketing module. Previously, the company partnered for this core functionality. Teradata's acquisition of Aster Data Systems will provide Aprimo with a service offering for advanced digital marketing attribution. Aprimo and Aster will start integrating to provide real-time offerings via digital channels based on preferences expressed through social media.
- **Road map:** The road map for 2012 includes continued integration with Real Time-Interaction Manager, along with existing outbound marketing capabilities. Teradata-Aprimo will develop digital marketing areas such as digital marketing attribution metrics, and will invest in email and social marketing (see "eCircle Deal Will Extend Teradata/Aprimo's Digital Marketing Strategy") for segmentation based on social data, social campaigns, and an understanding of customer and campaign sentiment.
- **References:** Teradata's professional service references consistently rate it the highest among all campaign management vendors in this research. Statements regarding excellent skills and customer-oriented consultants that understand the business needs are common.

Cautions

- **Classic channels:** References mentioned the need for evolution beyond the classic channels of direct mail and email, and the need for significant investment in mobile and social channels.
- **Support:** References noted that support is slow and sometimes limited, and that they rely on more expensive extended services for resolution. Aprimo plans to address these issues by putting in place a customer experience team to provide better service on all service levels.
- **Road map time frame:** Teradata-Aprimo needs to deliver on a complete, combined offering in the next 18 months. This is a concern in a rapidly moving digital marketing environment. References consistently mentioned usability and complex upgrades as the biggest cautions for ARM.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Added

These vendors were added:

- Adobe Systems

- ClickSquared
- Infor
- Sitecore

Dropped

The following vendors did not meet our minimum criteria for 2012:

- Microsoft Dynamics
- SmartFocus

Inclusion and Exclusion Criteria

For inclusion in this year's research, Gartner focused on vendors that offer the most relevant and compelling marketing solutions, and evaluated them against the criteria listed below. As the market continues to evolve, we will adjust the criteria to reflect changing user requirements and vendor capabilities.

Functionality

Vendors must support all the following:

- The ability to create, execute and manage multichannel campaigns
- Proven campaign planning, tracking and reporting, with role and approval capability
- A UI suitable for marketing users who create, execute on and report on campaigns
- Basic campaign management functionality, such as segmentation, campaign execution and campaign workflow

Market Presence and Momentum

Vendors must support all the following:

- At least 30 customers using campaign management
- At least 15 new customer wins in the past 12 months
- Substantial appearances on Gartner client shortlists for campaign management evaluations
- At least eight accessible client references

Vendor Viability

Vendors need to have at least \$10 million in revenue, and enough cash to fund a year of operations at the current rate of cash depletion.

Advanced Analytics and Execution

Vendors must support at least one of these advanced functionality and execution components:

- Predictive analytics: This is the capability to analyze customer behavior to predict attrition/ churn, next most likely purchase and propensity to buy, enabling a company to more effectively target customers or stage offers during interactions.
- Campaign optimization: This is the ability to balance and coordinate multiple constraints to maximize the expected value from one or multiple campaigns. Functionality enables trade-offs among different campaign execution options, such as which campaign to use, which channel to use, the number of interactions per individual and the expected value of each campaign.
- Event triggering: This functionality involves the detection, prioritization and execution of a response for a significant event affecting a customer relationship. The functionality enables users to be aware of the time when a customer is most likely to be receptive to a particular offer.
- Real-time recommendations: This is suited for offer management, and deals with offer arbitration. It enables the combination of the most-up-to-date information from data collected prior to the interaction, as well as new data collected during a real-time interaction with a customer. This approach is useful when new data needs to be collected to refine an offer, or when new data indicates that a significantly different course of action is required.

Digital Marketing

We considered specific digital marketing functionality, such as Web analytics, social analytics, social marketing and search marketing.

We place a strong emphasis on innovative, visionary offerings. Visionary examples are in advanced or emerging areas, such as inbound marketing, social, mobile and overall digital marketing. Visionaries can set a strategic direction, or demonstrate specific innovative capabilities in one or more functionality areas (such as advanced campaign functionality or digital marketing integration) in campaign management that the market will eventually adopt. Visionaries may have campaign management implementations from different buying centers, such as the customer service or e-commerce department.

Evaluation Criteria

Ability to Execute

The criteria and weightings for the Ability to Execute remained the same as 2011. We have adjusted the minimum and maximum percentages to accommodate more, but this does not represent a change in the market as a whole.

Product/Service: This is a key differentiator in vendor selection for companies trying to gain a competitive advantage. Therefore, product capabilities are given a high overall weighting. Subcriteria include basic campaign and advanced campaign management functionality (45%), and basic and advanced analytics (45%), while functionality for digital marketing is given the remaining weighting (10%).

Overall Viability (Business Unit, Financial, Strategy, Organization): This addresses the overall health of the vendor, including line-of-business offering campaign management solutions. Viability includes the vendor's history of and commitment to the continued success and development of world-class MCCM. This is given a high weighting.

Sales Execution/Pricing: This provides an assessment of the overall effectiveness of the sales channel, and how it deals with presales responsiveness, contract negotiations and pricing for campaign management. This is given a standard weighting.

Market Responsiveness and Track Record: This gives an assessment of the campaign management vendor's success in creating and meeting a consistent demand for its product, measured in continuing client wins and use in its installed base. This is given a low rating.

Marketing Execution: This provides an assessment of the vendor's overall momentum and perceived campaign management focus and presence in the market. Vendors must show established and continued broad or specific (such as industry focus) credibility for campaign management in a multichannel environment. This is given a high weighting.

Customer Experience: This is an evaluation of client relationships with campaign management vendors. Product support and responsiveness and access to best practices, such as user groups, are considered. An important component of the customer experience is ease of tool use. Gartner's campaign management clients see this as an important aspect of the overall customer experience. This is given a standard weighting.

Operations: This is the ability of a vendor to meet its goals and commitments. Factors include organizational structure (skills, experience, systems and other vehicles) that enable the vendor to operate efficiently and effectively on an ongoing basis. This is given a low rating (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	High
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	Low
Marketing Execution	High
Customer Experience	Standard
Operations	Low

Source: Gartner (May 2012)

Completeness of Vision

The criteria for Completeness of Vision remained the same as 2011. The innovation weighting moved from low to standard.

Market Understanding: This is the vendor's ability to understand the campaign management space, as well as its value proposition in the market, and how effective it is at reaching the marketing buying center for companies purchasing campaign management solutions. Vendors must demonstrate campaign management solutions that fit the needs of the overall market. This is given a high weighting.

Marketing Strategy: This offers an assessment of how well a vendor can differentiate itself from its competition and of functionality, and how it articulates continued leadership in its overall campaign management vision. This is given a standard weighting.

Sales Strategy: This assesses a vendor's strategy in using direct and indirect sales channels to sell campaign management solutions. This is given a standard weighting.

Offering (Product) Strategy: This assesses the campaign management feature set as it maps to functionality requirements in campaign management, particularly functionality that enables advanced capability in inbound and outbound environments. This is given a high weighting.

Business Model: This assesses the vendor's alignment of its go-to-market and sales strategies for particular industries, geographies or delivery models. This is given a standard weighting.

Vertical/Industry Strategy: A vendor is assessed on how well its solutions target its current market, as well as its ability to leverage best practices or capabilities for targeting new industries. This is given a standard weighting.

Innovation: This assesses the vendor's expertise or capital for investment for pre-emptive purposes in developing new areas of campaign management. This is given a standard weighting.

Geographic Strategy: This (see the Business Model criterion) is given a standard rating (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	Standard
Innovation	Standard
Geographic Strategy	Standard

Source: Gartner (May 2012)

Quadrant Descriptions

Leaders

Leaders consistently do considerably better in overall campaign management performance for basic and advanced campaigns, and for integration with e-marketing. They have high market visibility, high market penetration, strong market momentum and a strategic vision for growing the campaign management business.

Challengers

Challengers see continued investments in campaign management solutions as complementary offerings to the business applications that are their core competencies. Challengers have a developing understanding of the campaign management market and basic campaign management functionality. They see campaign management as an opportunity to increase revenue and retention in their installed bases, and they concentrate on established clients' needs for campaign management functionality and strategic direction, rather than on setting a visionary pace with potential requirements.

Visionaries

Visionaries provide a strong vision for the campaign management market, or excel in advanced or emerging areas, such as inbound marketing and digital marketing. They can set a strategic direction or demonstrate specific innovative capabilities in one or more functionality areas (such as advanced campaign functionality or e-marketing integration) in campaign management that the market will eventually adopt. Visionaries may have campaign management implementations from different buying centers, such as the call center or e-commerce department. Although Visionaries show promise in campaign management, they may lack execution capabilities, such as growth potential, resources or scalability, in the near term.

Niche Players

Niche Players provide specific needs in the campaign management space. They may be focused on a specific functionality, process (for example, lead management), geography and/or industry. Campaign management vendors in this section tend to lack a broader set of campaign management capabilities (such as advanced analytics) or execution potential (such as sufficient resources or a fully developed market strategy).

Context

This year's leading MCCM vendors provide the breadth and depth of capabilities needed to support multichannel campaigns, while Niche Players continue their focus on ease of use, accessibility and a SaaS delivery model. Many vendors are rethinking, acquiring or building advanced analytic capabilities such as predictive analytics, offer management and response attribution metrics, as B2C and B2B companies increase the demand for optimizing their budget and campaign efforts across growing and complex channels. Three vendors entered the Visionaries quadrant this year, as digital marketing is top of mind for most Gartner clients evaluating MCCM. Expect continued, accelerated digital marketing (mobile and social) development and acquisitions in 2012.

Market Overview

The CRM market as a whole continued to enjoy a strong rebound in 2011, with total revenue reaching \$11.9 billion, a 12.7% growth from 2010. Marketing automation software, a \$2.8 billion market in 2011, for which campaign management revenue represents the largest portion, is expected to have year-over-year, double-digit growth for the next three years. It represents the largest growth area in CRM, compared with sales and customer service software revenue forecasts (see "Forecast: Enterprise Software Markets, Worldwide, 2008-2015, 4Q11 Update").

However, traditional campaign management markets have started to address, but still have not fully addressed, the digital marketing ecosystem, addressable branding/advertising, contextual marketing, social marketing and transactional marketing. Consequently, vendors in adjacent markets, such as Web analytics and Web content management, have had to formulate their own strategies and build their own marketing-specific applications, such as recommendation engines,

mobile marketing, display and search engine optimization capabilities, social marketing and Web campaigns. In 2012:

- Marketing automation software will continue to rebound from its position in 2010, and will have year-over-year, double-digit growth through 2015.
- Innovation by traditional campaign management vendors will be needed in areas such as social and mobile marketing. There continues to be a growing demand from clients.
- Newcomers from adjacent markets, such as Web analytics and Web content, management will continue to compete for campaign management market share.

Gartner clients should use the criteria in this research to assess the MCCM market, and to help develop a road map of their capabilities. Clients should not expect a full suite of digital marketing and more traditional offline campaign management for at least another three years. Gartner clients will need to plan on sourcing multiple applications for continued innovation, and to meet evolving digital marketing needs.

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Digital Marketing: The Critical Trek for Multichannel Campaign Management"

"Top Use Cases and Benefits for Successful Social CRM"

"Cool Vendors in CRM Marketing, 2012"

"Marketing Framework: Essential Building Blocks for Multichannel Campaign Management Functionality"

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to

continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements, etc.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Regional Headquarters

Corporate Headquarters

56 Top Gallant Road
Stamford, CT 06902-7700
USA
+1 203 964 0096

European Headquarters

Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters

Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters

Gartner Japan Ltd.
Atago Green Hills MORI Tower 5F
2-5-1 Atago, Minato-ku
Tokyo 105-6205
JAPAN
+ 81 3 6430 1800

Latin America Headquarters

Gartner do Brazil
Av. das Nações Unidas, 12551
9° andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509

© 2012 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. or its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. The information contained in this publication has been obtained from sources believed to be reliable. Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information. This publication consists of the opinions of Gartner's research organization and should not be construed as statements of fact. The opinions expressed herein are subject to change without notice. Although Gartner research may include a discussion of related legal issues, Gartner does not provide legal advice or services and its research should not be construed or used as such. Gartner is a public company, and its shareholders may include firms and funds that have financial interests in entities covered in Gartner research. Gartner's Board of Directors may include senior managers of these firms or funds. Gartner research is produced independently by its research organization without input or influence from these firms, funds or their managers. For further information on the independence and integrity of Gartner research, see "Guiding Principles on Independence and Objectivity" on its website, http://www.gartner.com/technology/about/ombudsman/omb_guide2.jsp.