

The Forrester Wave™: Predictive Marketing Analytics For B2B Marketers, Q2 2017

6sense And Lattice Engines Lead A Diverse Field Of Emerging Solution Providers

by Allison Snow and Laura Ramos

June 14, 2017

Why Read This Report

In our 28-criteria evaluation of predictive marketing analytics providers for B2B marketers, we identified the 11 most significant — 6sense, BrightTarget, EverString, Infer, Lattice Engines (Lattice), Leadspace, Mintigo, MRP, Radius Intelligence (Radius), The Big Willow, and Versium Analytics (Versium) — and researched, analyzed, and scored them against those criteria. This report helps B2B marketing professionals make the right choice for their requirements.

Key Takeaways

6sense And Lattice Lead The Pack

Forrester's research uncovered a market in which 6sense and Lattice lead the pack. MRP, Radius, BrightTarget, Mintigo, and Leadspace offer competitive options. And EverString, The Big Willow, Infer, and Versium contend for a share of the market.

Demonstrated ROI Is Driving Predictive Marketing Analytics Adoption

Demand for predictive marketing analytics is growing because B2B marketers see early implementations delivering increased program efficiency and returns on marketing investments. Vendors that evolve beyond their predictive roots to offer exclusive insights into buyers' purchase propensity — and turn those insights into recommended actions — will outrun the pack.

Turning Predictions Into Action Is A Key Differentiator In This Market

As solution providers begin to reach technical parity in this market, differentiation will depend less on predicting accurately and more on connecting data and model outcomes to the next steps that marketing and sales should take. Vendors that marry unique insights with tools that more effectively reach and engage in-market buyers will position themselves to successfully deliver the unprecedented program efficiency and measurable returns that marketers want.

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[New Technologies Emerge To Help Unearth Buyer Insight From Mountains Of B2B Data](#)

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Predictive Analytics Definitively Boosts B2B Marketing Program Results

Predictive marketing analytics (PMA) is an emerging market that's crowded with many early entrants originating from academic or government backgrounds, enjoying piles of VC money, and lauding sophisticated new technologies.¹ Vendors' approaches to the collection and management of data, model building, and the balance of software versus services vary significantly.² It's a market that suits the nerdiest of techie nerds but not the typical B2B marketing professional.

Why then do B2B marketers show so much growing interest in PMA? Because early PMA adopters are seeing their efforts turn into real, measurable results. Improved ability to identify new ready-to-buy prospects, enhance segmentation precision, and better prioritize sales-ready leads are among the efficiency enhancements that marketing and sales teams experience after deploying predictive analytics (see Figure 1). And this investment continues to pay off because today's PMA solutions convincingly help B2B marketers:

- › **Evolve lead scoring from art to science.** Despite advances in lead-to-revenue (L2R) automation solutions that better align marketing and sales and deliver more targeted messages, conventional lead scoring still requires guesswork and trial to determine how to best qualify a lead.³ Using a broader range of demographics, business-buying activities, and social cues, new-generation predictive analytics helps marketers identify the specific combination of behaviors and fit characteristics that make a lead more promising to pursue. Many PMA solutions also now incorporate machine learning that analyzes activity on external web destinations that correlates with growing interest and intention to purchase.
- › **Improve conversion rates in a measurable and significant manner.** Consistently and almost universally, PMA vendors delivered quantifiable results to all of our reference customers. Specific outcomes for these marketers include improvements in lead quality, increased conversion rates at various stages of the purchase process, shorter sales cycles, and larger average deal sizes.

“When comparing deals identified by our PMA partner against baseline accounts, conversion-to-opportunity rates [were] 3.25 times higher. Purchase-stage opportunities scored with PMA converted at 50%, while nonscored converted at only 17%.” (Lauren Jones, global campaigns — infrastructure solutions group, Dell)

“Since using our PMA solution, we saw a 13% increase in our installed-base pipeline, a 27% increase in lead-to-opportunity conversion, 20% higher average deal sizes . . . [and] a 126% increase in pipeline [overall].” (Lea Ann Elbin, VP of global marketing operations, Citrix)

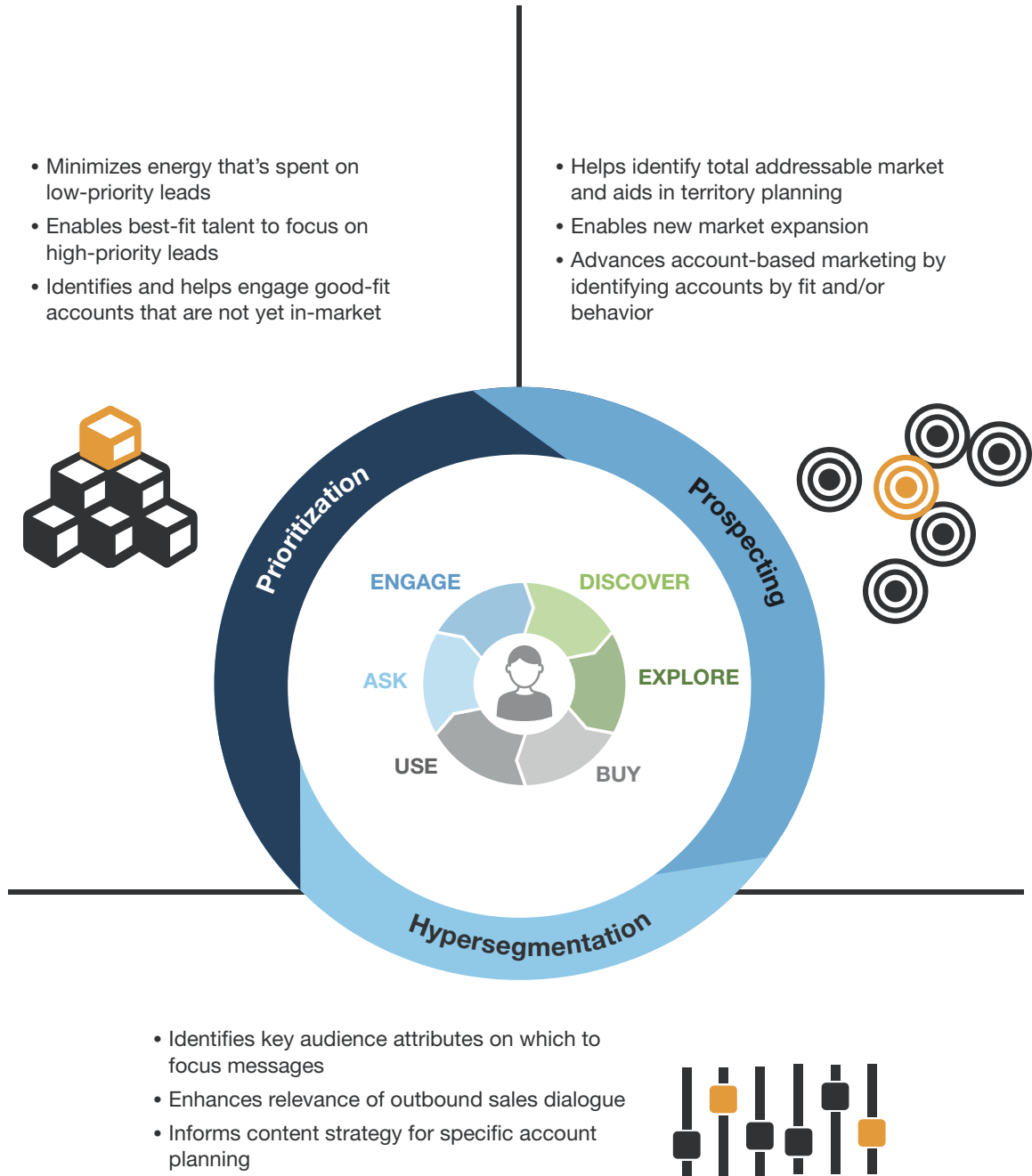
- › **Form an equal partnership with sales in driving revenue.** With 82% of CMOs owning goals that tie directly to revenue and profit, predictive intelligence becomes an essential tool for creating sales alignment and efficiency.⁴ Marketers like Adam von Reyn, VP of growth marketing at InsightSquared, point to higher-quality leads that sales progresses faster, marketing-sourced insights that help sales engage in more relevant dialogue with prospects, and better understanding

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of and commitment to sales priorities as benefits of using PMA. As von Reyn explains, “Only 15% of the leads marketing sent over to inside sales generated 80% of bookings. Using predictive, we now suppress 40% of that volume but still deliver more high-quality leads that sales can progress.”

FIGURE 1 Prioritization, Prospecting, And Hypersegmentation Are Core Use Cases For PMA



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Uncertainty And Change Will Dominate Near-Term Market Dynamics

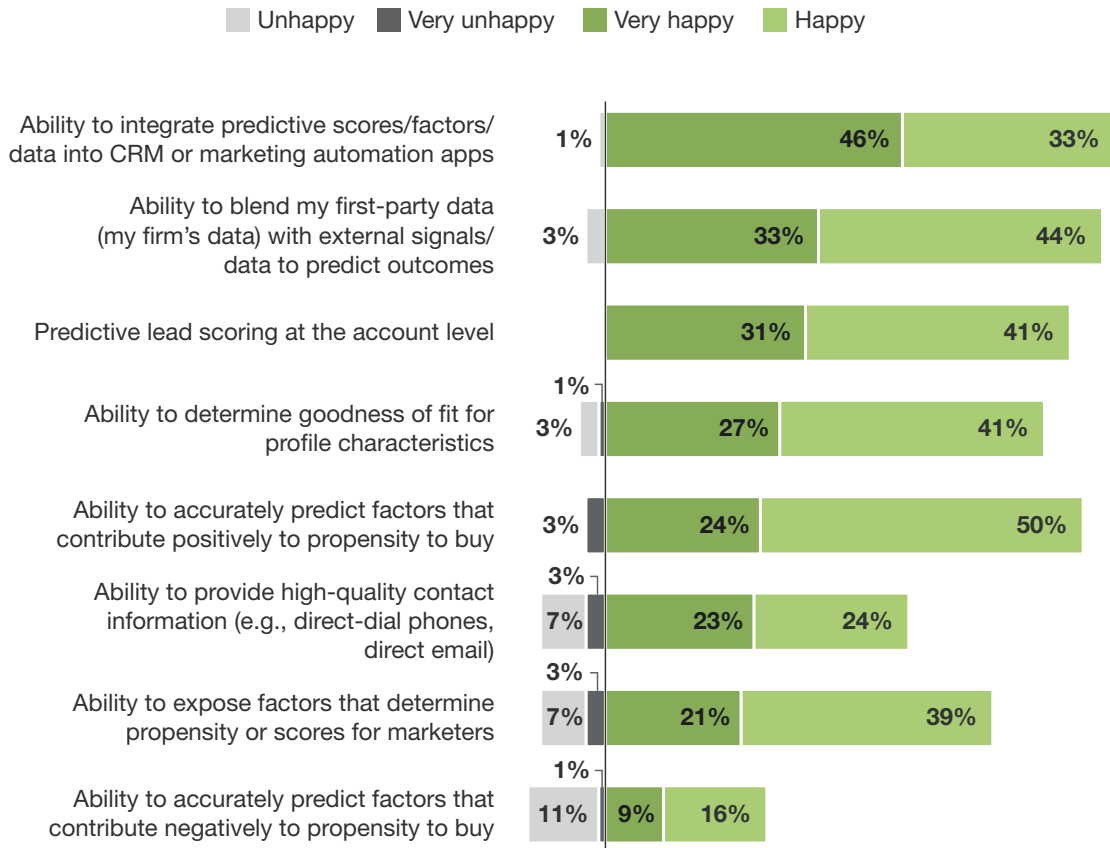
Despite solid results, determining which solution will work best for you is challenging because vendors' offerings include sophisticated technical elements that almost require a degree in data science to understand. Half of the 70 reference clients whom we surveyed as part of this Wave agree that determining what differentiates vendors in this space is difficult.⁵ And this situation will not sort itself out anytime soon because:

- › **Data accuracy, quality, and capability claims are challenging to validate.** Understanding the differences between Random Forest, Nearest Neighbor, Jaccard similarity, and K-Means algorithms is child's play, compared with understanding the differences between vendors' data relationships. Determining from whom suppliers buy data, who's got better access to relevant data as a result, and who's curating a database with the right volume and coverage for a marketer's needs is confusing at best and a mystery for most. And validating vendors' claims about data quality and value is a challenge for 64% of our reference customers.⁶
- › **Model development and management are still not DIY processes.** Next to data quality and availability, model creation affects prediction accuracy the most. Determining which prospects are in the market for a solution, prioritizing leads, and enabling sales with predictive insights requires marketers to interact with models directly and understand their basic principles. Unfortunately, model creation and management today is at best a collaborative effort between marketers and their suppliers' support personnel. Almost half of marketers (49%) whom we surveyed said that they had a positive experience with the modeling UI, but almost as many (39%) said that they did not use the interface at all.⁷
- › **Prediction outcomes focus on the what, not the how.** Predictions typically don't come with instructions for verifying the right mix of channels and content to positively influence outcomes. So B2B marketers struggle to operationalize resulting scores and signals for improving messaging, segmentation, and sales conversation starters. Reference customers were most satisfied with their vendor's ability to integrate predictive data with marketing systems. But they were least satisfied with the solution's ability to expose factors that determined scores and to deliver accurate contact information for taking action on opportunities (see Figure 2).
- › **Success highly depends on customer handholding.** PMA customers raved about the level of interaction that they have with customer success managers (CSMs). Although that's good news, we suspect that CSM support is compensating for poor track records of tailoring the technology to real-world circumstances. To make these solutions viable longer-term, marketers need to decrease their reliance on vendors' staff. PMA early adopter Sandeep Arora, global sales operations and analytics director at Adobe, explains, "A predictive model has to be evaluated on two levels: operational viability and mathematical solvency." Sandeep warns that service providers have expertise in PMA implementation and not business relevance, so, "Firms can't leave the call about business relevance to a vendor."⁸

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FIGURE 2 Customer-Reference Satisfaction Levels For Current Predictive Marketing Analytics Capabilities

“How happy are you with the following capabilities/features (those that you have used) of your predictive marketing analytics technology/solution vendor?”



Base: 70 global marketers who are reference clients of PMA vendors participating in this Forrester Wave™

Note: Neutral responses are not included. Forrester placed “very unhappy” and “very happy” responses side by side for emphasis.

Source: Forrester’s Q1 2017 B2B Predictive Marketing Analytics Forrester Wave™ Client Reference Survey

Successful Predictive Analytics Adoption Requires Four Prerequisites

PMA can help B2B marketers uncover new prospects, better qualify and prioritize leads, and segment buyers until the cows come home.⁹ Without requisite skills, tools, and processes to ensure that basic automation practices are not missing or broken, however, PMA will have little effect on pipeline or revenue. To make PMA pay off, B2B marketers require these preconditions:

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1. **Experience with marketing automation platforms and mature L2R processes.** Tenured marketers who find themselves working harder than before to generate the same number of qualified leads — or whose lead costs are inching upward — will benefit the most from the hypersegmentation and targeting power that PMA can deliver. Proven marketing automation experience is already helping 71% of those whom we surveyed make the most of their PMA solutions. Mature L2R processes also expose gaps in marketing and sales alignment that deeper buyer insights can help close.
2. **Dedicated processes for managing customer data.** Sure, you don't have to have perfectly clean, perfectly integrated data to get started with PMA. However, predictions are more accurate and more revealing when your data is more complete. Survey respondents agree: 54% said that poor data quality and accessibility substantially limits their ability to demonstrate results quickly and effectively. And first-rate data management and governance processes will improve or eliminate any data deficits that you have.
3. **Clear connections between business goals and prediction objectives.** With the right input and examples, vendors in this market can predict probability for various business outcomes. But marketers should sit down with sales and other stakeholders to pinpoint problems that they need to solve before making an investment. Identifying issues in the purchase process will allow you to evaluate the suitability of vendors' technology, data access, and relevance — and ensure that you get not only what the supplier offers but also what you need.
4. **The commitment to engage responsibly and masterfully.** Rather than looking at PMA with technical fascination, B2B marketers must assess their engagement readiness with rigor and objectivity. PMA solutions are only as effective and creative as the marketers who use them; weak engagement capabilities can render powerful systems of insight useless. Jeff Price, vice president of marketing at PrimePay, tells us: "We are still trying to figure out how to use leads generated from predictive more effectively. There is additional insight, sure, but it's still up to us to decide how we connect to prospects."¹⁰ For predictive marketing to uncover value, campaigns must become increasingly sophisticated in terms of workflows, personalization, and channels.

Solutions That Thrive Will Operationalize Predictive Intelligence

Vendors that evolve beyond predictive roots to offer unique, relevant insights into buyers' purchase propensity — and that turn those insights into actions that influence outcomes — are the ones to bet on as strategic solutions providers. Instead of just scoring leads and adding criteria to transactional marketing systems, we see PMA offerings becoming an essential part of a larger, more dynamic customer engagement platform — one that meets the needs of business buyers in a more personalized and timely manner. Winners in this market will:

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- › **Deliver actionable insights and information, not just make predictions.** More than any other function, marketing must use third-party data that it doesn't control and often changes. Predictive analytics represents the cutting edge in managing business data and changing the behavior of customer-facing employees. As a result, data curation and management capabilities will become more differentiated.
- › **Blend predictive analytics with early-stage engagement.** Predictive analytics helps marketers better understand the real size and scope of their total addressable market (TAM) and the needs of any account inside that market. Vendors that integrate deeply with advertising technology — or create their own ad platforms — can marry this deep account intelligence with more dynamic ways to engage anonymous contacts and build relationships well before buyers raise their hands. Seamlessly using this insight to then inform content creation, campaign strategies, and account pursuit strategies for sales will become a key component of leading predictive solutions.
- › **Support sales in a whole new way.** Prioritizing leads is now table stakes. Forward-leaning solutions will tell sales how to engage an account, which individuals to approach about what topics, and when to do so — all based on machine-learning analysis of how ideal customers buy. As account-based marketing (ABM) becomes less of a buzzword and more of a common practice, we see PMA evolving into an essential ingredient of ABM execution — a viewpoint with which 90% of marketers whom we surveyed agree.
- › **Solve some thorny marketing attribution problems.** Marketers tell us that attributing program spend to revenue results is the biggest challenge that they face when determining marketing budgets.¹¹ PMA solutions that shed light on what is now a largely anonymous first touch will help marketers definitively close the loop between early brand awareness activity and closed/won deals. This will inform marketing's new brand-building investment by pinpointing which marketing content, channel, or message helped increase the right buyers' information-gathering and exploration-based behavior. This will also help marketers decide how, with whom, and when to run the program again.
- › **Enable marketers to better engage with buyers across the customer life cycle.** More than 80% of surveyed customers said that they use predictive analytics to identify which accounts to approach or how to prioritize hand-raisers. In the digital age, keeping customers loyal and turning them into advocates is equally as important as acquiring them. Solutions that give marketers new insight — and recommend actions to take — are the ones to bet on to most effectively engage accounts and contacts across the customer's lifetime.

Predictive Marketing Analytics For B2B Marketers Evaluation Overview

To assess the state of the B2B PMA market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of exceptional PMA vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria to facilitate deep examination of the players. We evaluated the vendors against 28 criteria, which we grouped into three high-level categories:

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- › **Current offering.** Our evaluation of current capabilities focused on three core principles. We analyzed the extent to which vendors can provide output that reliably predicts an outcome in a specific time frame. We also looked at the ease with which marketing and sales can execute informed campaigns using model output and the degree to which the model output supports customer engagement across the customer life cycle. This led to criteria development in five key areas: model setup and building, data sourcing and production, model management, outputs of the prediction process, and the ease with which nontechnical users can go from onboarding to producing results.
- › **Strategy.** We evaluated the vendors' strategy using qualitative discussions about their corporate strategy, market approach, overall vision and road map, as well as market momentum. We used quantitative data points such as market focus (i.e., the percentage of firms' revenue and road map plans for PMA versus that for other related products and services). We also used results from a Forrester-curated survey in which clients of participating vendors rated their service providers by clarity of vision and ability to innovate.
- › **Market presence.** The market presence criteria determine the size of circles for vendors in the Forrester Wave graphic but have no weight in terms of overall scoring. We used information that we gathered or extrapolated about the size of each vendor's installed base of B2B accounts for the evaluated offering, revenues from the evaluated offering, and our estimate of the relative awareness of the vendor in the market at large.

Evaluated Vendors And Inclusion Criteria

Forrester included 11 vendors in the assessment: 6sense, BrightTarget, EverString, Infer, Lattice, Leadspace, Mintigo, MRP, Radius, The Big Willow, and Versium. The vendor inclusion criteria stipulated that each vendor has (see Figure 3):

- › **Comprehensive core PMA functionality.** Whether the vendor delivers the offering as software, managed services, or a combination of the two, each one that we included in this evaluation has sufficient functionality to serve B2B marketing and sales in a variety of predictive marketing use cases. Minimum use cases included predictive lead scoring (e.g., prioritizing best-fit leads and informing lead routing) and prospecting (e.g., sizing total available markets or identifying new markets for ABM and sales pursuit). These use cases also included hypersegmentation (e.g., understanding key predictive signals and data attributes and using those to personalize messaging or sales dialogue).¹²
- › **A proven presence in the B2B PMA market.** Products in this evaluation are not general-purpose predictive analytics solutions. For inclusion, vendors must have actively targeted and supported B2B marketers and generated 50% or more of their prior year's revenue from B2B clients.

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- › **Mindshare within Forrester's client base.** We looked at inquiries with Forrester clients to determine mindshare for vendors. We also included vendors with low market awareness if we believed that the solution provided exceptional functionality in the space and warranted consideration by potential buyers.

FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated
6sense	6sense
BrightTarget	BrightTarget
EverString	EverString Audience Platform
Infer	Infer
Lattice Engines	Lattice Engines
Leadspace	Leadspace
Mintigo	Mintigo
MRP	MRP Prelytix
Radius Intelligence	Radius Revenue Platform
The Big Willow	The Big Willow
Versium Analytics	Versium

Vendor inclusion criteria

- The predictive marketing analytics functionality of the solution provides a range of capabilities that Forrester listed in an eligibility survey.
- The vendor actively targets, markets to, sells to, and supports B2B marketers. At least 50% of the vendor's revenue comes from sales to B2B customers and/or partners.
- The vendor has mindshare within Forrester's client base (e.g., mentions in client inquiries and other forms of client interaction).

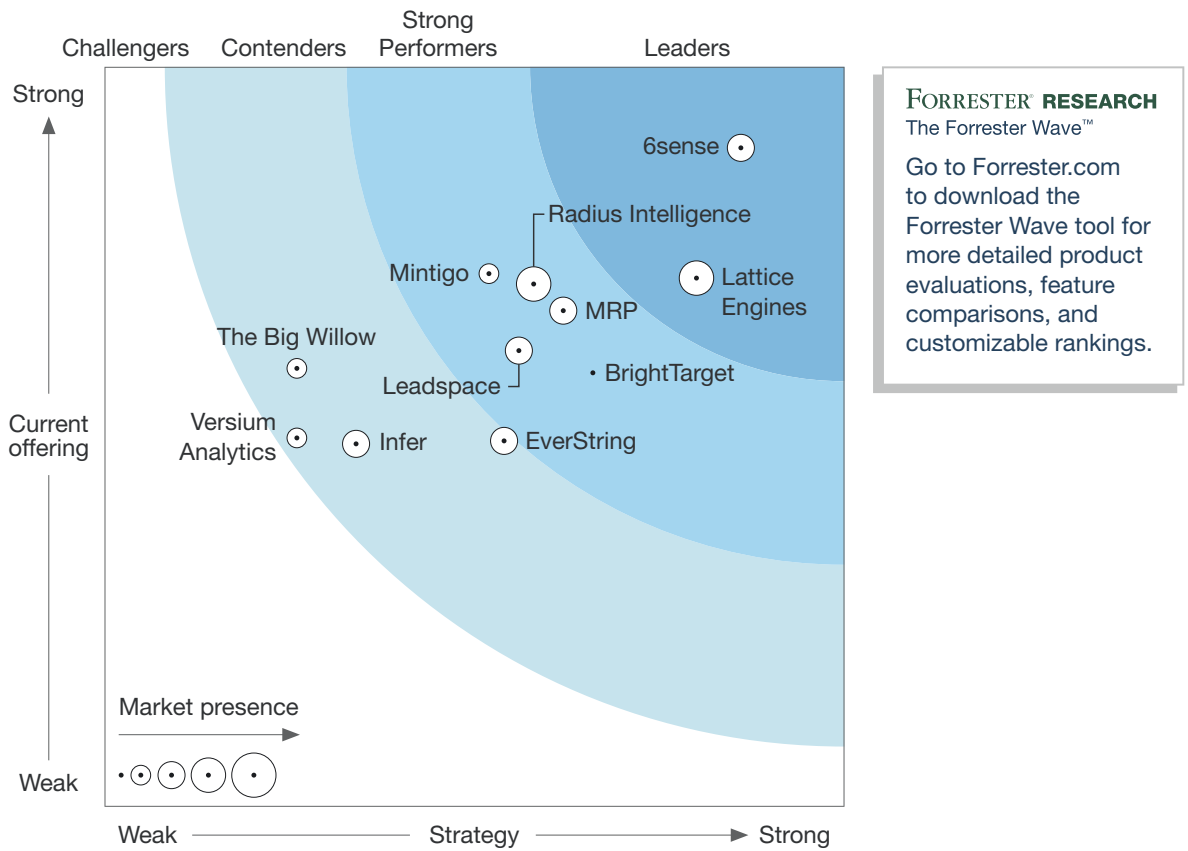
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Vendor Profiles

This evaluation of the predictive B2B marketing analytics market is intended only to be a starting point. We encourage clients to review our detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4). Due to the early stage of this market, we also encourage clients to undertake financial and reference-customer due diligence according to their needs and risk profile. As part of our evaluation, Forrester does not conduct financial investment or stability analysis of the vendors.

FIGURE 4 Forrester Wave™: Predictive Marketing Analytics For B2B Marketers, Q2 '17



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FIGURE 4 Forrester Wave™: Predictive Marketing Analytics For B2B Marketers, Q2 '17 (Cont.)

	Forrester's weighting	6sense	BrightTarget	EverString	Infer	Lattice Engines	LeadSPACE	Mintigo	MRP	Radius Intelligence	The Big Willow	Versium Analytics
Current Offering	50%	4.44	2.92	2.46	2.44	3.56	3.07	3.59	3.34	3.52	2.95	2.48
Model setup and building	25%	5.00	2.75	2.50	2.00	3.25	3.00	3.50	3.50	3.50	3.50	2.50
Data source and usage	20%	4.75	3.00	3.00	2.00	3.50	3.00	3.50	3.50	3.25	3.00	2.75
Model management	15%	3.70	3.00	1.70	2.60	3.60	3.30	3.70	2.60	4.60	2.60	2.90
Output of prediction process	20%	4.10	3.20	2.70	2.70	4.20	2.80	3.30	3.30	3.10	2.30	2.30
Ability to take action	20%	4.30	2.70	2.20	3.05	3.35	3.30	4.00	3.55	3.40	3.10	2.05
Strategy	50%	4.30	3.30	2.70	1.70	4.00	2.80	2.60	3.10	2.90	1.30	1.30
Corporate strategy	40%	5.00	4.00	3.00	1.00	4.00	2.00	2.00	3.00	4.00	1.00	1.00
Message that fits the market	30%	4.00	3.00	3.00	3.00	4.00	4.00	3.00	3.00	2.00	1.00	2.00
Product road map	20%	4.00	2.00	2.00	1.00	4.00	3.00	3.00	3.00	3.00	2.00	1.00
Support for global marketing and sales	10%	3.00	4.00	2.00	2.00	4.00	2.00	3.00	4.00	1.00	2.00	1.00
Market Presence	0%	2.75	1.00	2.75	2.75	4.00	2.75	2.00	2.75	3.25	1.25	1.75
Installed base	50%	2.00	1.00	3.00	3.00	4.00	3.00	2.00	3.00	3.00	1.00	2.00
Evaluated product vendor revenue	25%	4.00	1.00	2.00	2.00	4.00	2.00	2.00	3.00	3.00	1.00	2.00
Market awareness	25%	3.00	1.00	3.00	3.00	4.00	3.00	2.00	2.00	4.00	2.00	1.00

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

Leaders Pull Ahead With Striking Conversion Results And Full Life-Cycle Support

- › **6sense leads by turning sophisticated buyer analysis into proven program lift.** With more than 15 years in the market, 6sense delivers sophisticated predictions using a broad array of external data sources and buying clues, coupled with deep analysis of internal data and an extensive track record of solving leading-edge problems. Its patented prediction system deduces when a business purchase is imminent, and its exclusive proprietary buying signals let marketers and sales professionals know when to focus on specific accounts and contacts. Through such, 6sense produces conversion lift, which is measurably much higher than baseline results.

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Considerations: This capability comes with tradeoffs when considering how 6sense built its product. Locating the right data from a myriad of transactional systems and integrating years of first-party data using near-continuous synchronizations takes work. So 6sense emphasizes servicing customers' success with accurate models over building an intuitive set of UIs and reporting tools that better suit everyday marketers. As a result, 6sense's customer base is comparatively smaller for a supplier with its tenure and experience.

Fit: A strong background in solving sophisticated customer problems and impeccable references make 6sense the right fit for midmarket and large-enterprise companies that focus on early-stage customer acquisition and sell through a combination of direct, online, and channel partners.

- › **Lattice predicts outcomes for global marketers across the customer life cycle.** Lattice became a product company in 2011, quickly amassed a Fortune-500-heavy customer base that spans multiple industries, and consistently performs across all criteria that we evaluated. Its predictive capabilities prescribe outcomes for sales and marketing use cases that cut across the entire customer life cycle — from early-stage account and contact acquisition to current-customer enrichment and competitive win-backs — and strongly complement modern ABM strategies. Lattice has a very strong strategic showing with its road map and vision, proven global deployments, and ability to connect with nontechnical marketers.

Considerations: Lattice first earned a reputation as a black box by limiting exposure to the signals behind its scores and predictions. Open APIs and a new UI address this issue, but interpreting the significance of some indicators can still challenge the uninitiated. Native integrations are limited to Marketo, Salesforce, and Eloqua, but more are planned. Although the solution still requires a manual process to extend data to social and digital media platforms, Lattice plans enhancements to streamline these integrations. Lattice can match customer data and enrich it with a variety of demographic, firmographic, transactional, and website information — and use this data to predict and score. But use of behavioral signals is limited to nurture scores from the customer's marketing systems or intent scores from a third party.

Fit: B2B marketers who want to predict a broad range of outcomes — from territory planning to spotting likely prospect conversion, identifying cross-sell and upsell candidates, and building deeper account-based relationships — will find that Lattice is a good fit.

Strong Performers Offer Marketers A Rich Variety Of Predictive And Deployment Options

- › **MRP unites predictive analytics with demand generation services.** MRP's value stems from its ability to combine demand generation and ABM services with predictive analytics. The Prelytix platform monitors account-level activity against keywords on multiple ad exchanges together with MRP practitioners who design, deliver, manage, and measure phone, email, and digital ad campaigns. This gives MRP the proprietary ability to analyze data from demand generation activity, merge it with a customer's first-party data, and produce a multidimensional account score, which helps marketers determine the next best step to take with accounts. The result is a self-professed closed-loop between predictions and marketing activity for feeding results back into models.

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Considerations: Using MRP as a full-service demand generation partner means outsourcing important sales and marketing functions, which marketing leadership may want to keep centralized. Also, the services-based model makes marketers depend on MRP for model building, inspection, and management, which can affect prediction quality. MRP's predictions focus narrowly on account and contact identification as well as lead qualification, with only a few clients venturing into post-sale activities like churn prediction.

Fit: If you want an outsourced model for end-to-end demand creation that predictive insights drive — and your internal resources make accessing external help on a fractional basis attractive — then MRP can be a great fit for your needs.

- › **Radius bridges the data enrichment and predictive markets.** Radius has created and continues to build a massive repository that combines hundreds of attributes from more than 18 million US businesses and 37 million contacts, with aggregated and anonymized data from more than 680 million records from customers' systems. This combination of sourced and customer-contributed data means that Radius could create the largest cloud-based B2B data source, housing the most up-to-date business information without the need for manual verification or the inaccuracy of purely crowdsourced methods. Radius' match rates and accuracy are thus very high and do not degrade as quickly as those of other approaches.

Considerations: Radius' coverage today is richest for small US-based businesses; the company has work to do to bring its midmarket and enterprise coverage in line with its small business roots. As it continues to invest in its Network of Record, Radius must also decide whether to position and compete in the data management market while keeping a foothold in predictive analytics — a tough choice for any small company with fixed resources.

Fit: B2B marketers wanting to size total market availability accurately (especially among US-based small businesses), predict segments that represent the best opportunities, rank look-alike prospects in those segments, and identify the right people to target should choose Radius.

- › **BrightTarget's star rises by focusing on customers' lifetime value.** Headquartered in the UK and recently acquired by Sidetrade, BrightTarget is a relative newcomer to the US-centric PMA landscape.¹³ As the latest building block in Sidetrade's quest to become the leading provider of predictive sales-to-cash solutions, BrightTarget predicts not only who will convert and when but also who will deliver the most lifetime value. Incorporating unique information, such as invoice history, service records, and calculated cost to serve, BrightTarget helps business executives and marketers calculate their customer base's current value. It then determines which steps to take with customers or prospects to maximize business equity.

Considerations: BrightTarget has small market share, compared with its US counterparts. Its success will depend on how quickly it can establish a market leadership position in Europe and then draw a crowd in the US with thought leadership about the value of predicting actions to improve customers' lifetime value. Many B2B marketers — struggling to get basic segmentation

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and positioning correct — are not yet mature enough to take advantage of the more advanced business-level outcomes that BrightTarget can predict. But we think that BrightTarget's straightforward, elegant UI and services that help customers focus on optimum segments and use cases will boost its chances of success.

Fit: B2B marketers wanting to drive sustainable business growth through marketing and sales efficiency — especially those in Europe — should take a look at BrightTarget to help drive revenue across the entire customer life cycle.

- › **Mintigo enables sales with machine-learning-driven marketing content and insights.** Mintigo stands apart from the crowd with its Predictive Sales Coach product — a capability that boosts existing sales workflows with intelligence from its strong buying-signal transparency and data science and management capacity. Using propensity indicators and purchase intent, Predictive Sales Coach lets marketers recommend content, start a dialogue, or ask probing questions about topics that buyers care about. It delivers these topic-level insights and next-step recommendations directly into the lead, contact, account, and opportunity records that salespeople consult daily. Mintigo stands apart with a very sharp focus on sales-support use cases.

Considerations: With a heritage of developing software for Israeli defense agencies, Mintigo's machine-learning algorithms and processes are sophisticated and technically intricate. But this tech background shows in Mintigo's messaging and value positioning to marketers. Customer references leaned toward firms with strong analytics and data science practices in place. And Mintigo's vision of delivering fully automated operations will likely fall outside of less-tech-savvy marketers' comfort zones, especially when picking the right training examples for model building.

Fit: Mintigo's rich sales enablement capabilities make it a solid choice for teams with technically sophisticated marketing operations looking to execute ABM programs in pursuit of net-new market opportunities or accounts.

- › **Leadspace lets marketers zero in on people and buying centers.** Leadspace capitalizes on ABM's growing importance by delivering buying team intelligence to individual decision makers at the contact level and account level. Leadspace aggregates and scores the expertise of individuals at a company and gives ABM-focused marketers the ability to identify the right roles and decision makers who they (and sales) want to target. Leadspace can support a wide range of engagement models from providing bespoke models and data that work alongside established data science teams to outsourcing the predictive operation.

Considerations: Leadspace differentiates itself by understanding multiple sources of data at the individual level, which is relatively easy to replicate; high-quality demographic and behavioral attributes at the contact level power this capability, not model and algorithm sophistication. But leapfrogging competitors will require obsessive focus on capturing and revealing segmentation-supporting details and exposing more interesting and granular individual-level activity.

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Fit: Midmarket and enterprise firms that want an easy way to sell the value of a predictive program to sales and executives should consider Leadspace. Described as adaptive and dynamic by its customer references, Leadspace specifically supports A/B testing to reveal the lift that its analysis and recommendations deliver using metrics that the business understands, such as conversions and pipeline value.

Contenders Fill Niches With Self-Service, Partnerships, Devices, And Consumer-Level Data

- › **EverString's solution delivers solid results to volume-driven marketers.** The EverString solution checks all of the boxes for marketing and sales leaders who seek prospecting support, solid data enrichment, and uncomplicated self-service. Rather than selecting training sets of positive and negative records — a process that can make model building complex and overly iterative — EverString only requires examples of historical success, which company names, domains, or keywords define, to discover commonalities that predict best-fit opportunities at the account and contact level. This approach and other process simplifications let EverString deliver results such as higher conversion rates and reduced sales cycles with relatively minimal investment in both time and capital.

Considerations: Finding look-alike accounts with similar attributes doesn't help marketers determine if buyers in those accounts are interested or if/when they may buy. To address this, EverString recently added additional data sources that supply intent signals. But how the user experience will manifest this value has yet to prove out with customers whom we interviewed.

Fit: Marketing and sales professionals with a high volume of prospects or need to identify new ones should look to EverString for an easy-to-use solution that helps determine where to focus dollars and effort.

- › **The Big Willow links device activity to location for predicting purchase propensity.** As the newest kid on the block, The Big Willow (TBW) brings some new capabilities to the scene by using device-level buyer behavior data to score known accounts and identify net-new ones. It analyzes keywords that are associated with viewed content on multiple publisher domains to link devices to topics and accounts. By identifying changes in activity during a 52-week time period, TBW can help marketers determine if an upswing in device-level activity at a specific business location is indicative of purchase interest. TBW uses proprietary matching techniques to serve ads to devices at that location to generate leads or build awareness among potential influencers.

Considerations: Unfortunately, TBW delivers this capability as a service only, making it look more like an agency than a technology provider. Although this may work for now, without a UI to help marketers sell sales and other executives on the value, TBW's near-term prospects will be limited to sophisticated enterprises marketing to other large enterprises. Most B2B marketers know how to buy software. But they don't have experience managing digital advertising inventory through demand-side platforms, which limits TBW's opportunity until B2B marketers' adtech acumen catches up with their martech investments.

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Fit: B2B marketers with large product portfolios selling to big enterprises — or through a wide variety of channel partners — should consider TBW to help make digital advertising dollars stretch further and produce more ready-to-buy leads.

- › **Infer builds on its broad installed base through rich integrations.** Infer's wide range of ecosystem integrations demonstrates a deep commitment to weaving data science into everyday workflows. From prebuilt connectors for commonly used marketing automation systems to adtech platforms and demand generation solutions such as telesales, ABM, and content syndication, Infer integrations let marketers leverage model output to engage customers with ease. Infer's sales intelligence product summarizes predictive scores, presents the top signals behind each score for model transparency, and identifies direct competitors of existing customers. It can present this information natively through integration with its CRM partner interfaces as well.

Considerations: Infer does not leverage third-party intent signals in its models, potentially affecting its ability to monitor account or contact activity that occurs outside of customer-owned platforms. It is also not optimized for self-service, which will deter those hands-on marketers who desire more flexibility. Gaps like these will only make the competition more intense, with a crowded market pushing Infer out of the limelight that it enjoyed just 18 months ago.

Fit: Infer is a solid choice for marketers who need to prioritize ease of predictive-supported campaign execution and a high-touch partnership over self-directed model development with an internal team of data scientists.

- › **Versium pairs business and consumer data to enable complex segmentation.** Only Versium incorporates consumer-level signals, such as individual demographics, financials, hobbies, education, assets, and career histories, to help predict propensity to buy and tailor messages and offers to the personality, risk profile, and values of business buyers. The implications of this unique data set are considerable — especially because more relevant segmentation can help weave personal interests and motivations into the essential relationship building in B2B marketing and selling.

Considerations: Versium is still in its early days, so the degree to which marketers will be adept at weaving this consumer-centric data into daily operations is still unclear. To thrive, Versium must cultivate this proficiency among sales users and move beyond its current integration with Microsoft Dynamics to support a broader array of sales platforms, starting with Salesforce. Versium must also deliver training, best practices, and examples that help ensure that its customers use consumer insights in ways that are business-relevant and not personally intrusive.

Fit: The ability to help tailor dialogue and outreach with consumer and business attributes makes Versium ideally suited for global, premier account management teams that need to use a high-touch approach to land and maintain marquee customers.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by May 17, 2017.

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

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- › **Online product demos and strategy briefings.** We asked vendors to conduct demonstrations of their products' functionality using multiple scenarios that Forrester outlined in advance and brief us on their current strategy, product directions, and perspectives on the market. We used findings from these product demos and briefings to validate details of each vendor's product and/or service capabilities.
- › **Customer reference calls.** To validate the qualifications of products, services, and vendors, Forrester also conducted reference calls with three of each vendor's current customers.
- › **Online customer surveys.** See the Survey Methodology section that follows.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors by: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Survey Methodology

Forrester's Q1 2017 B2B Predictive Marketing Analytics Forrester Wave™ Client Reference Survey was fielded to marketers who are client references of PMA vendors participating in this Forrester Wave. Forrester fielded the survey during Q1 2017 and received 70 responses. Exact sample sizes are provided in this report on a question-by-question basis. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

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Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Endnotes

¹ Recent examples include the following. Source: Paul Sawers, “Mintigo raises \$10 million to help B2B firms target their most likely customers,” VentureBeat, May 15, 2017 (<https://venturebeat.com/2017/05/15/mintigo-raises-10-million-to-help-b2b-firms-target-their-most-likely-customers/>).

Source: Barry Levine, “Predictive marketer Radius lands \$50M so companies can optimize for the world they want,” VentureBeat, July 29, 2015 (<https://venturebeat.com/2015/07/29/predictive-marketer-radius-lands-50m-so-companies-can-optimize-for-the-world-they-want/>).

Source: “6sense Raises \$20 Million – Predictive Intelligence Platform Uncovers In-Market B2B Buyers,” 6sense press release, February 19, 2015 (<https://6sense.com/2015/02/6sense-raises-20-million-predictive-intelligence-platform-uncovers-in-market-b2b-buyers/>).

² See the Forrester report “[New Technologies Emerge To Help Unearth Buyer Insight From Mountains Of B2B Data.](#)”

³ See the Forrester report “[The Forrester Wave™: Lead-To-Revenue Management Platform Vendors, Q4 2016.](#)”

⁴ See the Forrester report “[The Evolved CMO In 2016.](#)”

⁵ Of the 70 current PMA vendor customers whom we surveyed, most are very satisfied and positive about their experiences: 85% are Net Promoters, and 95% would renew again with their current vendor. Source: Forrester’s Q1 2017 B2B Predictive Marketing Analytics Forrester Wave™ Client Reference Survey.

⁶ Sorting through data quality claims proved to be one of the most challenging aspects of this evaluation because definitively testing data accuracy requires the ability to follow predictions from identification through closed deals, which is a process that can take months to complete and will differ by each tested use case. Source: Forrester’s Q1 2017 B2B Predictive Marketing Analytics Forrester Wave™ Client Reference Survey.

⁷ Source: Forrester’s Q1 2017 B2B Predictive Marketing Analytics Forrester Wave™ Client Reference Survey.

⁸ See the Forrester report “[Balance Predictive Marketing Analytics With Engagement Mastery.](#)”

⁹ This idiomatic phrase of likely Scottish origin (meaning “for a very long time”) may derive from the fact that cattle in the Highlands are put out to graze on the common where grass is plentiful, and they stay out for months before scarcity of food causes them to find their way home in the autumn for feeding. Source: “Till the cows come home,” The Phrase Finder (<http://www.phrases.org.uk/meanings/382900.html>).

¹⁰ See the Forrester report “[Balance Predictive Marketing Analytics With Engagement Mastery.](#)”

¹¹ Source: Forrester’s Q4 2015 International B2B Marketing Budget And Spending Online Survey.

¹² See the Forrester report “[What’s Possible With Predictive Marketing Right Now?](#)”

¹³ Source: “Sidetrade acquires Artificial Intelligence start-up BrightTarget,” Sidetrade press release, November 21, 2016 (<http://uk.sidetrade.com/financial-news/2016/2016/sidetrade-acquires-brighttarget/>).

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