

MarTech Service Providers

A research report comparing strengths and advantages of MarTech partners



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The Brazilian market continues to grow in the number of new MarTech service companies and the maturity and level of service offerings. The dynamism of technology and market demand requires greater agility from partners, compelling them to focus on constant development. However, MarTech is still in its nascent stage; many companies and advertisers of their brands are still struggling to deliver the desired business outcome with their existing MarTech solutions.

ISG identifies that more than 80 percent of marketers across all industries focus on consolidating their technology systems due to the plethora of solutions acquired over time. However, that does not stop them from growing further in this market.

The Brazilian economy has always experienced fluctuations. The trend continues even in 2023, with consumer expectations returning to the pre-pandemic days; high interest rates affect budgets and consumer purchasing power. Personalized and consistent content is among the priorities for digital marketing investments

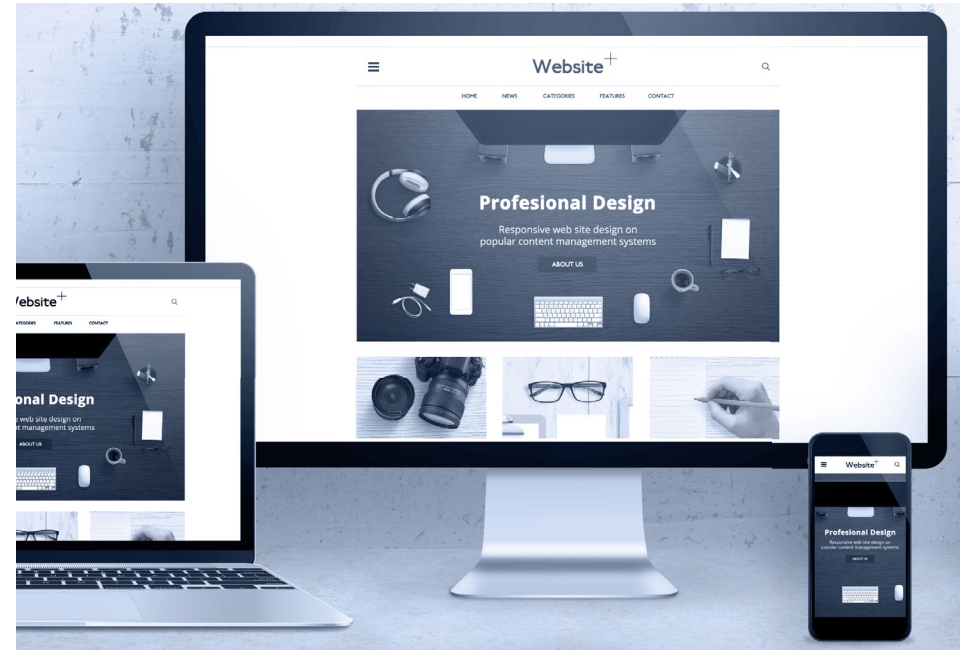
to drive sales, nurture loyalty and develop brand awareness.

ISG's analysis will focus on the way service providers are positioned in the market based on the attractiveness of their service offering and their competitive strength. Enterprises across various industries work with their marketing teams to find partners with strong MarTech capabilities.

The ISG Provider Lens™ quadrant study offers the following for digital marketing decision-makers:

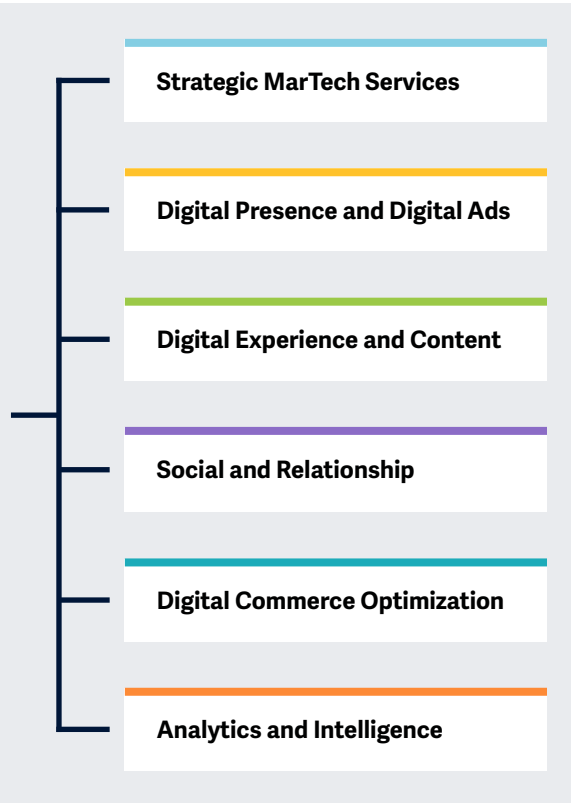
- Transparency over the strengths and weaknesses of service providers
- Differentiated positioning of service providers in relevant areas

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Key focus areas for MarTech Service Providers 2023.

Simplified Illustration Source: ISG 2023



The ISG Provider Lens™ MarTech Service Providers 2023 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the Brazil.

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Strategic MarTech Services

Definition

This quadrant includes service providers that offer strategic marketing services and demonstrate expertise in digital technologies to help clients get the most out of digital marketing. These providers can identify areas of improvement by assessing current digital marketing performance with the right business plans, which involve taking a data-driven approach, customizing analytics, creating KPI dashboards, and providing an analysis of methods, digital media, technology and data to generate leads and sales.

These services involve the ability to collect, analyze and optimize results based on data that include the following:

- Digital transformation enablement
- Digital presence
- Digital advertising
- Digital experience
- Digital content
- Social network

- Customer relationship management
- Digital commerce
- Data analytics
- AI/ML
- Lead generation/sales expansion
- Expanding reach into new channels
- Customer service improvement
- Brand positioning
- Agile marketing approach
- Compliance and security

Eligibility Criteria

1. Ability to work with marketing transformation
2. Understand changes in marketing processes
3. Understand and implement performance marketing
4. Employ state-of-the-art digital marketing techniques
5. Leverage social influencers
6. Offer integrated marketing programs
7. Create an omnichannel strategy using digital channels
8. Create innovative brand strategy through digital technologies
9. Redefine strategy for the digital world
10. Understand emerging business models
11. Engage with the new rules of competition
12. Understand ethical and legal issues in the digital world



Digital Presence and Digital Ads

Definition

This quadrant includes companies that help advertisers promote, advertise and display brands, products, services and campaigns to facilitate and optimize advertising results. Services include platforms and tools for advertising on search networks and displays, portals, news feeds and any digital media. The companies are also evaluated based on their capabilities for digital out-of-home advertising and applications that use geolocation systems to optimize campaigns and reach consumers at the right place and time. In addition, it considers the ability to buy online media through a tool or a program based on the target audience, as well as platforms and tools focused on results marketing, metrics and data collection.

The services are used to create, operate and manage campaigns on digital channels and across all modes and platforms of the following:

- Search engine marketing (SEM)/search ads
- Display ads
- Video ads
- Native ads
- Location-based marketing
- Programmatic announcements
- Audience strategies:
 - * Remarketing ads
 - * Lookalike
 - * Matched audiences
- Shopping ads (Google Shopping/Merchant)
- Price-comparison ads (Buscapé and Bondfaro)
- Audio ads (AdTonos and Spotify Ads)
- Direct message marketing:
 - * Email marketing
 - * SMS marketing
 - * WhatsApp marketing
- SEO and VSO:
 - * Position monitoring (GeoRanker)
 - * Speed and load optimization (Google PageSpeed Insights)
 - * Platform enhancements for SEO and VSO

Eligibility Criteria

1. Provide digital ads, from banner ads on websites to video ads on YouTube
2. Develop paid traffic plan
3. Increase website traffic and visitor confidence by supporting other digital marketing disciplines
4. Support marketers that use white hat tactics and understand intent-based search marketing
5. Support the role of email in a growing company and how it can be used to quickly move prospects along the customer value journey



Digital Experience and Content

Definition

This quadrant includes the leading digital experience providers, offering a holistic and complete set of integrated digital technologies. They are also at the forefront of technological development in areas such as AI and ML to stay competitive. Likewise, they develop content that addresses the needs of potential customers, converting them into sales and business opportunities.

Shaping a digital experience strategy requires a careful evaluation of providers and their services. It also involves looking into organizational support, training, and structural changes to show foresight, dedication and determination to pursue a long-term roadmap. In addition, covering basic elements in the content marketing program, including methods and metrics, ensures that a provider delivers the right information at the right point during a customer's journey.

This quadrant assesses a provider's ability to analyze, optimize and deliver user experience innovation across digital channels with a focus

on conversion optimization and on all platforms, including the evaluation of the following capabilities:

- Interface creation and prototyping
- Conversational marketing, AI and chatbots
- Customized content marketing
- Integrated digital service platforms
- Eye and mouse tracking
- A/B Test:
 - * Interface
 - * e-mail Marketing
- Augmented reality (AR) experience
- Virtual reality (VR) experience
- Mixed reality (XR) experience
- Crossmedia campaign
- Content management system (CMS) platforms
- Keyword-based content production (SEO)

Eligibility Criteria

1. Use conversion rate optimization (CRO) methodology
2. CRO calls to mind A/B testing to determine the best button color or hero shot
3. Provide a holistic set of integrated digital experience technologies capable of meeting various needs
4. Create a set of digital experiences from fragmented offerings
5. Being at the forefront of technology development in areas such as AI and ML
6. Provide strategic advantages by ensuring direct control over all customer data
7. Ability to precisely adjust and control the user experience
8. Use big data platforms to create a single customer view
9. Use modern web technologies and native applications to deliver personalized experiences for individual customers



Social and Relationship

Definition

This quadrant includes technology service providers that offer capabilities in customer relations and social media marketing. It covers tools for social media management and monitoring, influencer relationship management, platforms that manage and drive online and offline events for marketing actions, resources for campaign management, and fostering relationships with influencers and micro-influencers. The quadrant also looks into the relationship between a customer and a company through various communication channels and the creation and distribution of valuable and compelling content to retain and engage the target audience. Providers in this space typically deliver capabilities related to content authoring, SEO techniques, and mass email or SMS, in addition to using platforms to manage customer relationships.

These services are dedicated to the creation, management, interaction and distribution of content on digital channels in the following modalities:

- Social media monitoring and sentiment analysis
- Events, meetings and webinars (organization, creation and promotion)
- Social media video production
- Community management (participation or moderation of groups, forums, etc.)
 - * Social media
 - * Messenger groups (WhatsApp, Telegram, etc.)
 - * App stores
- Influencers (intermediate, create and monitor)
- CRM solution
- Account-based marketing (ABM)
- CX
- Feedback and chat
- Marketing automation (automated messages, marketing campaigns and lead generation)

Eligibility Criteria

1. Engage with customers, build relationships and make offers to attract followers
2. Attract potential customers and move them through a marketing funnel to generate more sales and grow the business
3. Provide valuable content at every stage of the customer value journey
4. Move a potential customer through the value journey by creating content that meets the needs at each of the three stages of the conversion funnel, namely recognition, evaluation and conversion
5. Plan the marketing strategy and create the perfect content



Digital Commerce Optimization

Definition

This quadrant evaluates service providers that offer sales conversion and optimization tools for digital commerce; solutions for building customer loyalty through benefits and long-term relationships; platforms for survey creation; and tools for conducting market research and enabling a company to set up and manage an online store. These tools also allow companies to analyze store performance, manage inventory, set product prices and run promotions. A digital commerce platform can be on-premise or cloud-based, like any enterprise software. Most small and midsize businesses (SMBs) prefer a cloud-based e-commerce platform because of the low, upfront investment and flexibility to scale up or down the usage without making significant changes to the business.

These services are dedicated to the ability to deploy, optimize and integrate solutions with the following capabilities:

- E-commerce solutions (web and app)
- Marketplace solutions (web and app)
- Channel integration (omnichannel, web and app)
- Affiliate marketing creation and management
- Dynamic pricing (price scraping)
- Marketing automation (lead reactivation, remarketing, cart recovery, etc.)

Eligibility Criteria

1. Explore products, services and sellers through digital channels and experiences
2. Engage in social networks (public and private) as part of the buying experience
3. Serve as a digital advisor to buyers
4. Evaluate sellers, find alternative sellers and substitute products, track deals, and monitor seller delivery and service performance
5. Online store experiences across multiple channels (mobile, web, chat, voice assistant, in-app, TV, kiosks, etc.), personalized for buyers
6. Design differentiated and highly usable/accessible digital buying experiences to make them easier, more reliable and more accurate
7. Monitor buyer activity for signs of disruptions and be ready to intervene to help



Analytics and Intelligence

Definition

This quadrant includes service providers that collect data and information from online or offline buyers. It also examines offerings that use market intelligence and drive sales mechanisms, such as business intelligence techniques, big data systems, loyalty programs and market research. In addition, providers in this space typically offer solutions that use big data for analysis, segmentation, decision-making and marketing actions, along with customer data platforms for profiles, personal identifiers, website visits, mobile app sessions, email responses, chat transcripts, audio recordings of customer service interactions, social media comments and purchase orders.

These services are dedicated to the ability to collect, analyze and optimize results based on data that includes the following:

- Analytics tool
- Predictive analytics
- Data unification
- Consumer data platform
- Consumer behavior prediction
- Data management platform
- Call tracking analytics
- Web analytics solution
- Compliance with data privacy regulations (LGPD/GDPR) in marketing activities

Eligibility Criteria

1. Provide processes and technologies that enable marketers to evaluate the success of their initiatives
2. Find patterns in marketing data to increase actionable insights
3. Employ statistics, predictive modeling and ML to gain insights and respond effectively to queries
4. Ability to map the customer journey
5. Attribute marketing expenditures to measured results
6. Simulate and measure the business impact of marketing and advertising campaigns
7. Implement predictive models



Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following six quadrants in the MarTech Service Providers 2023 report:

Quadrant	Brazil
Strategic MarTech Services	✓
Digital Presence and Digital Ads	✓
Digital Experience and Content	✓
Social and Relationship	✓
Digital Commerce Optimization	✓
Analytics and Intelligence	✓



The research phase falls in the period between May and September 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2023.

Milestones	Beginning	End
Survey Launch	April 26, 2023	
Survey Phase	May 2, 2023	June 2, 2023
Sneak Previews	July 2023	August 2023
Press Release & Publication	September 2023	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The ISG Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

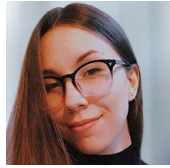
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Contacts For This Study



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Lead Analyst**



**Kelly
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Research Analyst



ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Accenture Song	BRQ	DP6	GroupM
Master Agency	Register	Driven.CX	Havas
Akamai Technologies	Capgemini	DXC Technology	HCL
AlfaPeople	Carmatec	Enext	Hit Digital
aMind Solutions	CI&T	Elsner Technologies	Horizon Media
Amobee	Codal	Envision eCommerce	Hotmart
Approach	Cognatis	Escale Digital	IBM
Attentive	Cognizant	EY	Idigital Strategies
Augmentum	Compass UOL	Fexle	Ignite Visibility
Avanade	Concentrix	Five9	Match.mt
Birlasoft	Cybage	Foxtail Marketing	Minsait (Indra)
Blue Corona	Datametric	Gentrop	Infosys
Brandastic	Deal	GFT Technologies	Ingram Micro
Branex	Deloitte Digital	Globant	Isobar
Brivia	dentsu	Go Fish Digital	Keyrus



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KPMG	Outmarketing Brazil	Squid	Wipro
LewLara/TBWA	Perficient	Stefanini	WMcCann
Major Tom	Power Digital Marketing	Stilingue	Wunderman
Mangosoft	Processor	Take	XCOM
Marketing World	Publicis Sapiant	Tata Consultancy Services (TCS)	YRGRP
Mutant	PwC	Tech Mahindra	Zeeng
Digital Nation	Quick eSelling	Telefonica	
Nexer	Raccoon	ThoughtWorks	
NTT DATA	Rocket.Chat	T-Systems	
Ogilvy	Semantix	Unisys	
Oliver Agency	Siemens Digital	Valtech	
OMD	Sitel	Visionet	
Omnicom Media Group	Softtek	VML	
OSF Digital	SoftwareOne	Weber Shandwick	



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





MAY, 2023

BROCHURE: MARTECH SERVICE PROVIDERS