*ISG Provider Lens™

2022

MarTech Service Providers 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, 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 1,300 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.

Table of Contents

Definition

Corporate executives expect more innovation apart from cost control, improved margins, profits, scale and growth. From a customer's perspective, there has been a change in habits, lifestyle, personalization needs and immediacy irrespective of the impact of COVID-19 on many markets, leading to the creation of a new consumer type over the past few months.

Digital technologies play a highly mitigating role. Companies that make up the Global 2000 list have teams that leverage marketing technology (MarTech) for all tasks ranging from hiring services to marketing for its competitive advantages. All digital marketing professionals are developing MarTech, thus contributing to the "shake" in this market. By combining the creativity of marketing professionals and their ability to develop digital campaigns to meet the expectations of digital customers with digital tools and methodologies such as design thinking and agile processes, MarTech companies are evolving with their wide scope of services.

ISG notes that trends in MarTech directly affect agencies, brands and corporate marketing departments. New technologies and consumer behavior, including those that are already experiencing digital transformation, demand a new marketing approach that requires a change in the mindset of consumers rather than tools.

ISG's analysis will focus on the way service providers are positioned in the market based on the strength of their portfolios and competitiveness. Despite the significant number of MarTech service providers in the global market, the MarTech Service Providers 2022 report will focus on the top competitors for each of the quadrants stated. These will include both global firms and local service providers.

The ISG Provider Lens™ quadrant study offers the following to the decision makers in marketing:

- Transparency over the strengths and weaknesses of providers/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.

Quadrants Research

The ISG Provider Lens™ study, MarTech Service Providers 2022, will include the following six quadrants:

Simplified illustration

MarTech Service Providers 2022	
Strategic MarTech Services	Digital Presence & Digital Ads
Digital Experience & Content	Social & Relationship
Digital Commerce Optimization	Analytics & Intelligence

Source: ISG 2022

At ISG's discretion, quadrants may be split into the midmarket and large accounts based on the size of the market in each region.

Strategic MarTech Services

This quadrant includes service providers that offer strategic marketing services and demonstrate knowledge of digital technologies to help clients take the best advantage of digital marketing. These providers can identify areas of improvement by evaluating current digital marketing performance with the right business roadmap. These plans involve presenting 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 ads

- Digital experience

- Digital content

- Social network

- Client relationship management

- Digital commerce

- Data analytics

- AI/machine learning

- Lead generation / Sales expansion

- Expanding outreach into new channels

- Customer service improvement

- Brand positioning

- Agile marketing approach

- Compliance and security

Eligibility criteria

- Ability to work on marketing disruption

- Understanding shifts in marketing processes

- Understanding and implementing performance marketing

- Employing state-of-the-art digital marketing techniques

- Leveraging social influencers

- Integrated marketing programs

- Creating an omnichannel strategy leveraging digital channels

- Designing an innovative brand strategy through digital technologies

- Redefining strategy for the digital world

- Understanding emerging business models

- Engaging with the new rules of competition

- Understanding ethical and legal issues in the digital world

Digital Presence & Digital Ads

This quadrant includes companies that help advertisers in the promotion, dissemination and display of brands, products, services and campaigns with the aim of facilitating and optimizing the results of advertising. The services cover platforms and tools for advertising on search networks and displays, portals, newsfeed and any digital media. They are also evaluated based on their resources for digital out-of-home advertisements, applications that use geolocation systems to optimize campaigns and reach consumers in the right place and at the right time. Additionally, it takes into account their ability to purchase online media through a tool or a program based on target audience as well as platforms and tools that are focused on results marketing, metrics and data collection.

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

- Search engine marketing (SEM)/search ads

- Display ads

- Video ads

- Native Ads

- Location-based marketing

- Programmatic ads

- Audience strategies:

  - Remarketing ads

  - Lookalike

  - Matched audiences

- Shopping ads (Google Shopping/Merchant)

- Price-comparison ads (Buscapé, Bondfaro)

- Audio ads (AdTonos, Spotify Ads)

- Direct message marketing

  - Email marketing

  - SMS Marketing

  - WhatsApp marketing

- SEO and VSO

  - Positioning monitoring (GeoRanker)

  - Speed and load optimization (Google PageSpeed Insights)

  - Improvements in the platform for SEO and VSO

Eligibility criteria

- Provide digital ads — from banner ads on websites to video ads on YouTube

- Develop paid traffic plan

- Boost a website's traffic and visitors' trust while supporting other digital marketing disciplines

- Support marketers that use white hat tactics and understand intent-based search marketing

- Support the role of email in a growing business and how it can be used to quickly move prospects along the customer value journey

Digital Experience & Content

This quadrant includes leading digital experience providers, offering a holistic and complete stack of integrated digital experience technologies. To stay competitive, they are also at the forefront of technology development in areas such as AI and machine learning. Likewise, developing content that addresses the needs of potential customers, converting them into sales and business opportunities.

Shaping a digital experience strategy requires a careful assessment of vendors and their services. This 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 items in the content marketing program including methods and metrics will ensure that a provider delivers the right information at the right point during a customer's journey.

This quadrant analyzes a provider's ability to analyze, optimize and offer innovation in user experience in digital channels with a focus on conversion optimization and on all platforms including assessing the following abilities:

- Interface design and prototyping

- Conversational marketing, AI and chatbots

- Custom content marketing

- Integrated digital service platforms

- Eye and mouse tracking

- A/B testing

  - Interface

  - Email marketing

- Augmented reality (AR) experience

- Virtual reality (VR) experience

- Mix reality (XR) experience

- Crossmedia campaign

- Content management system (CMS) platform

- Content production based on keywords (SEO)

Eligibility criteria

- Use conversion rate optimization (CRO) methodology

- CRO calls to mind A/B testing to determine the best button color or hero shot

- Provide a holistic, all-in-one stack of integrated digital experinece technologies capable of meeting a variety of needs

- Build a digital experience stack from piecemeal offerings

- At the forefront of technology development in areas such as AI and machine learning

- Provide strategic advantages in ensuring direct control over all customer data

- Ability to finely tune and acutely control user experience

- Use big data platforms to achieve a single view of a customer

- Leverage modern web and native app technologies to deliver customized experiences for individual customers

Social & Relationship

This quadrant includes technological service providers that offer capabilities in the areas of customer relations and marketing on social networks. It covers tools for social media management and monitoring, relationship management with influencers, platforms that manage and drive online and offline events for marketing actions, resources for campaign management and fostering relationships with influencers and micro-influencers. It 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 attract, retain and engage the target audience. Providers in this space typically offer resources related to the elaboration of content, SEO techniques and mass email or SMS in addition to using platforms to manage customer relationships.

These services are dedicated to creating, managing, interacting and distributing content on digital channels in all the following modalities:

- Social media monitoring and sentiment analysis

- Events, meetings and webinars (organization, creation and promotion)

- Social media vídeo production

- Community management (participation or moderation of groups, forums, etc.)

    - Social media

    - Messenger groups (Whatsapp, Telegram)

    - App stores

- Influencers (intermediate, create and monitor)

- CRM solution

- Account based marketing (ABM)

- Customer experience (CX)

- Feedback and chat

- Marketing automation (automatic messaging, marketing campaigns and lead generation)

Eligibility criteria

- Engage with customers, build relationships and make offers to attract followers

- Attract prospects and move them through a marketing funnel to drive more sales and grow a business

- Deliver valuable content at every stage of a customer value journey

- Move a prospect through the customer value journey by creating content that satisfies needs at each of the three conversion funnel stages, namely awareness, evaluation and conversion

- Plan the content marketing strategy and create "perfect" content

Digital Commerce Optimization

This quadrant assesses service providers that offer tools for optimization and conversion of sales to digital commerce, customer loyalty solutions through benefits and long-term relationships, platforms for creating questionnaires and tools for conducting market research and enabling a business to set up and manage an online store. It also allows enterprises to review store performance, manage inventory, define product pricing and run promotions. Like any enterprise software, a digital commerce platform can be on premise or cloud based. Most small and mid-sized businesses (SMBs) prefer a cloud-based ecommerce platform due to the low upfront investment and flexibility to scale up or down in terms of usage without making any significant changes in the business.

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

- Ecommerce solutions (web, app)

- Marketplace solutions (web, app)

- Channel integration (omnichannel; web, app)

- Creation and management of affiliate marketing

- Dynamic prices (price scraping)

- Marketing automation (lead reactivation, remarketing, cart recovery, etc.)

Eligibility criteria

- Explore products, services and sellers through digital channels and experiences

- Engage in social networks (public and private) as part of the buying experience

- Serve as a buyer's digital adviser

- Evaluate sellers, find alternative sellers and substitute products, track deals, monitor seller delivery and service performance

- Online store experiences and commerce services via multiple channels (mobile, web, chat, voice assistant, in-app, TV, kiosks, etc.), personalized to buyers

- Design differentiated and highly usable/accessible digital buying experiences to make them easier, reliable and assertive

- Monitor buyer activity for signs of disruptions and be ready to step in to help

Analytics & Intelligence

This quadrant includes service providers that collect data and information from either online or offline buyers. It also examines offerings that use market intelligence and drive sales engines such as business intelligence techniques, big data systems, loyalty programs and market research. In addition, providers in this space typically offer solutions that use a large volume of data for analysis, segmentation, decision making and marketing actions and 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 include the following:

- Analytics tool

- Predictive analytics

- Data unification

- Consumer data platform

- Consumer behavior prediction

- Data management platform

- Call tracking analytics

- Web analytics solution

- Compliant to data privacy regulations (LGPD/GDPR) in marketing activities

Eligibility criteria

- Offer processes and technologies that enable marketing professionals to evaluate the success of their marketing initiatives

- Find patterns in marketing data to increase actionable knowledge

- Employ statistics, predictive modeling and machine learning for insights and to answer questions

- Ability to map customer journey

- Assign marketing spend to measured outcomes

- Simulate and measure the business impact of marketing and advertising campaigns

- Implement predictive models

Schedule

The research phase falls in the period between **January and April 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **June 2022**.

Milestones	Beginning	End
Launch	February 03, 2022	
Survey phase	February 03, 2022	March 04, 2022
Sneak previews	May 2022	
Press release	June 2022	

Please refer to this link below to view/download the ISG Provider Lens™ 2022 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.

ISG Star of Excellence ™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The program is 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. 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. Here is the email address: Star@isg-one.com

List of companies being invited for the survey

Are you in the list, or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

Accenture U.S.	aMind Solutions	D1
Concentrix	Amobee	Deal
Contently (Content Marketing Solution)	Anderson	DEFY Media
FGPG	Atento	Deloitte
Hangar12	Atos Internacional	Deloitte Digital
KL Communications, Inc.	Augmentum	dentsu
Movéo	Biz4Commerce	Digital Net Agency
Silvercrest	Blue Corona	Digital Promotion Agency
Siteimprove	Bower House Digital	Digital Pulp
SueYoungMedia.com	Brandastic	Distrito
US Sweepstakes & Fulfillment Company"	Branex	DP6
	BRQ	DPZ&T
Accenture Interactive	BTown Web	DRB
Actuate Media	Capgemini	Duncan Channon
Africa	Carmatec	DXC Technology
Agencia 242	CI&T	EDGE Marketing
Agência Mango	Clearsale	EloGroup
Agencia Mestre	Codal	Elsner Technologies
Agencia Mirum	Cognizant	Emizentech
Akamai Technologies, Inc.	Concentrix	Enviou
Aldeia Comunicação	Creativosbr	Envision eCommerce
AlfaPeople	Cybage	Escale Digital

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Evince Development	HCL	IPG
EY	HCL Unica	Isobar
Fbiz	Helloo	Iteris
FEXLE INC	HGS - Hinduja Global Solutions	JeffreyGroup Brasil
Five9	Hi Platform	Kelly Scott Madison
Flowsense	Hibu Inc.	Key Ideas Infotech
Fortics	Hit Digital	Keyrus
Foxtail Marketing	Hoffman Marketing Communications, Inc.	Kinetic Social
Frogslayer		kolekto
Gain Response Marketing	Horizon Media Inc	KPMG
Genesys	Hotmart	Leadlovers
Geofusion	IBM	Lew'Lara/TBWA
GFT Technologies	i-Cherry	Major Tom
Globant	Idigital Strategies	Mangosoft
Go Fish Digital	Ignite Visibility	Mapa360
GoBots	Imagine 360 Marketing	Marketo Lead Management
GroupM	Indra Minsait	Markitors
GrowTeam	Infocore, Inc.	Match Drive
Grupo Ideal Trends	Infosys	McAfee
Grupo TV1	Ingram Micro	McPherson Marketing Group
Harlo Interactive	Inside Digital	MediaMath
Havas	IntelliSurvey	Mediaocean

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Medidata	Oliver Agency	PwC
Merkle	Olos	Quick eSelling
Meticulosity	OMD	Quinstreet, Inc.
Metizsoft Solutions	OmniChat	Raccoon
Metric Theory	Omnicom Group	Radial
Micro Focus	Omnicom Media Group	Ranosys
Mindminers	Opinion Box	Resultados Digitais
Mirrorball	OSF Digital	Revana Digital
Moburst	Outmarketing Brasil	Riverbed Marketing
Mundo do Marketing	P2H Inc	Rocket Content
Mutant	Peppery	Rocket.chat
Nação Digital	Perficient	Roland Berger
NectarBits Pvt ltd	PG Mediabrands	RRD
NeigerDesign	Pipedrive	S4 Capital
Neodigital Brasil	PIP's Inc	Salesforce
Netpeak	Pivofy	Schlesinger Group
Nettechnocrats	Plum Voice	ScienceSoft
Nexer	Power Digital Marketing	Search Berg
Nielsen	PowerChord, Inc.	Seed
NTT DATA (everis)	Proximity	SEOValley
NTT everis	Proxys Group	Sherlock Communications
Ogilvy	Publicis Groupe	Sitel

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Sitewire	Take	Visionet
Smart Sites	Tata Consultancy Services (TCS)	VML
SoapBoxSample	Tech Mahindra	VTEX
Social Miner	TechTic	Web Choice
SoftServe	Telefonica	WebClues Global
Softtek	The ABM Agency-Account Based Marketing	Weber Shandwick
Software AG		WebFX
SoftwareOne	The Incentive Group	Widen Enterprises, Inc.
Solucx	The Trade Desk	Winnin
Spark	Thee Digital	Winsby Inc.
Spencer Thomas Group	ThoughtWorks	Wipro
Splinkr	Traina	WMcCann
Squid	Tray	WPP
Stefanini	Trianz	Wunderman
Stellar	T-Systems	XCOM
Stilingue	TunAD	YRGRP
Supercash	Unisys	Zeeng
Sykes Enterprises	Valtech	Zendesk
Sympla	Ventura Associates International LLC	Zenvia
Tail	Verizon Media	Zeta Global Holdings Corp

Contacts for this study

Do you need any further information?

If you have any questions, please do not hesitate to contact us at

Mauricio Ohtani
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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 work identified by the 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 to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of 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 Provider Lens QCRT Program Description

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 advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures 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 QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- help define and validate quadrants and questionnaires,

- advise on service providers inclusion, participate in briefing calls,

- give their perspectives on service provider ratings and review report drafts.

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study

Paul Gottsegen
Partner and President, ISG
Research & Client Experience

Richard Chang
Director

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.