

A collage of several skyscrapers with glass facades, viewed from a low angle looking up. The buildings are arranged in a staggered, overlapping pattern, creating a sense of depth and architectural complexity. The colors range from cool blues and greys to warmer yellows and oranges.

***ISG** Provider Lens™

2021

Martech Solutions and
Service Providers 2021

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; technology 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 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 www.isg-one.com.



Table of Contents

Definition	4
Quadrants Research	5
Schedule	12
Partial list of companies being invited for the survey	13

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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, convenience, and immediacy — this, apart from the impact of COVID-19 on many markets and the creation of a new kind of consumer in the past few months.

Digital technologies affect everyone, anytime and anywhere. Whether it is the companies that need to hire a service or the ones that sell marketing services, all companies that make up Global 2000 have teams that need to take advantage of marketing technology (Martech). It is already a reality that has offered many competitive advantages to all types of companies. All digital marketing professionals are developing Martech, thus contributing to “shaking” 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, Martechs are growing everywhere, and with a wide scope of services.

ISG notes that trends in Martech affect directly agencies, brands and the corporate marketing departments. Marketing 4.0 (Philip Kotler) represents the digital revolution of companies operating in this segment. New technologies and new consumer behavior (among the ones that are already experiencing digital transformation) demand a new approach to marketing that requires a transformation more in the mindset of consumers than in tools.

ISG's analysis will focus on the way providers in Brazil are positioned in the market, according to the strength of their portfolios and their competitiveness. While there are hundreds of providers in the market delivering Martech solutions and services, this report will only focus on the top competitors for each of the quadrants. The ones considered will include both global firms as well as local providers.

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

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

Our studies thus provide potential customers with an essential decision-making basis for positioning and go-to-market considerations. ISG advisors and enterprise customers also use information from these reports to evaluate their current and potential service provider relationships.

Quadrants Research

The ISG Provider Lens™ study, Martech Solutions and Service Providers 2021, will include the following six quadrants:

Simplified illustration

Martech Solutions and Service Providers 2021	
Digital Presence & Digital Ads	Digital Experience & Content
Social & Relationship	E-commerce
Virtual Events	Analytics & Intelligence

Source: ISG 2021

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

Digital Presence & Digital Ads

This quadrant includes companies that develop solutions for the promotion, dissemination and display of brands, products, services and campaigns, with the aim of facilitating and optimizing the results of advertising. These include the following: platforms and tools for advertising on search networks and displays; solutions for outdoor advertising that impact consumers outside the home; solutions that use geolocation systems as a way to optimize campaigns and reach consumers in the right place and at the right time; solutions for purchasing online media through a tool or a program, according to the target audience; platforms and tools focused on results marketing, metrics, and data collection.

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

- SEM/Search ads
- Display ads
- Video ads
- Native Ads
- Location-based marketing (for example: Waze)
- 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
 - E-mail marketing
 - SMS Marketing
 - WhatsApp marketing
- SEO & VSO
 - Positioning monitoring (Georanker)
 - Speed & load optimization (Google PageSpeed Insights)
 - Development of 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 e-mail in a growing business and how it can be used to quickly move prospects and customers through the customer value journey.

Digital Experience & Content

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

Shaping a DX strategy requires a careful assessment of available vendors and their solutions; organizational support, training and structural changes to show foresight, dedication, and determination to pursue a long-term DX strategy. Likewise, covering the 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.

It encompasses the capacity to analyze, optimize and offer innovation in user experience in digital channels, with a focus on conversion optimization and on all platforms, with abilities in the following:

- Interface design and prototyping
- Conversational marketing, AI and chatbot
- Custom content marketing
- Integrated digital service platforms
- Eye and mouse tracking
- A/B testing
 - Interface
 - E-mail marketing
- Augmented Reality (AR) experience
- Virtual Reality (VR) Experience
- Crossmedia campaign
- Content Management System (CMS) platform
- Content production based on keywords (SEO)

Eligibility criteria:

- Uses 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 DX technologies capable of meeting a variety of needs.
- Can build a digital experience stack from piecemeal offerings
- Is at the forefront of technology development in areas such as AI and machine learning.
- Provide strategic advantages in ensuring directly 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 providers that offer solutions in the areas of customer relations and marketing on social networks. These solutions include tools for social media management and monitoring and relationship management with influencers; platforms that manage and drive online and offline events for marketing actions; solutions for campaign management and fostering relationships with influencers and micro-influencers; all solutions that involve the relationship between a customer and a company through various communication channels; solutions focused on creating and distributing valuable and compelling content to attract, retain and engage the target audience — for this, they offer solutions related to the elaboration of content, SEO techniques and mass e-mail or SMS, in addition to using platforms to manage customer relationships.

These services are dedicated to the ability of 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.)
 - o Social media
 - o Messenger groups (Whatsapp, Telegram)
 - o 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
- Can 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

E-commerce

This quadrant includes providers that offer tools for optimization and conversion of sales to e-commerce; customer loyalty solutions through benefits and long-term relationships; platforms for creating questionnaires and tools for conducting market research; platform that enables a business to set up and manage an online store. The application comes with all the necessary tools to market and sell the products. It also allows business owners to review store performance, manage inventory, define product pricing and run promotions. Like any enterprise software, an e-commerce platform can be on premise or cloud based. Most small medium business (SMB) prefer a cloud-based e-commerce platform as the upfront investment is almost negligible and they have the freedom 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:

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

Virtual Events

This quadrant includes providers that replicate a physical event, but online, where the solutions allow the hosting of a conference, trade show or product launch from the comfort of a home or office, using only a laptop/mobile and an Internet connection. Participants can expect one-to-one live chat and videoconferencing, live seminars and presentations, integrated social media channels as well as real time delegate networking features. There are no limitations on the interactivity of a virtual event. Provide visualization of branded booths, resource centers, sponsor areas, live presentation auditoriums and networking lounges.

These services are dedicated to create, promote, prepare, operate and manage digital events with the ability to deliver the following:

- Event website
- Event registration and landing pages
- Live presentation content
- Webcast, one-way audio/video
- Live simulated and On-demand+
- Chat
- Q&A session
- Live polling
- Note-taking/favorite slides
- Recorded content
- Interactive video conferencing
- Virtual meeting
- Virtual booths
- Feedback surveys
- Online event guide
- Mobile event app

Eligibility criteria:

- Provide online virtual experience
- Connect attendees anywhere in the world, virtually
- Offer cross-device desktop web and mobile experience platform
- Provide engaging and interactive experience
- Foster networking among attendees
- Provide demos and onboarding for troubleshooting and for providing support
- Ability to use and navigate on the back end and front end
- Offers interconnected features, purpose-built to save on time and energy
- Offer possibilities to customize look, feel and user experience

Analytics & Intelligence

This quadrant includes providers that offer solutions that collect data and information from buyers; offerings that use market intelligence and drive sales engines such as business intelligence techniques; big data systems, loyalty programs and market research; solutions that use a large volume of data for analysis, decision making and marketing actions; customer data platforms designed for customer data that include profiles, personal identifiers, website visits, mobile app sessions, e-mail 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
- Seek to find patterns in the 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 and main survey phase take place between **February 2021 and June 2021**, followed by the evaluation, analysis and validation phase between May and May/June.

Selected results will be presented to the media in **June 2021**.

*You can download the questionnaire on an online platform. We will provide you with your individual link in our invitation via email.

Milestones	Beginning
Launch	March 23, 2021
Survey (questionnaire and briefing)	March 18, 2021 – March 31, 2021
Begin sneak previews	May 3, 2021
Content provisioning	May 7, 2021
Press release	June 2021

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.

Partial 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.

[kolekto]

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A4D Marketing Digital

Aaron Marketing Consulting

AB Agencia Digital

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Accenture Interactive

AceleraVix

Acumen Solutions

Africa

Agencia Close

Agencia Colors

Agência Fato Relevante

Agencia Incandescente

Agencia M2BR

Agencia Mango

Agencia Mestre

Agencia Papo Digital

Agencia Resultage

Agencia Tenda

Agencia Yellow Kite

AKQA

Aldeia

Approach Comunicação

Benetton Comunicação

Bower House Digital

Buzzmonitor

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Take
TB Web
Tech Mahindra
Textual Comunicação
The Aubergine Panda
Today
TOTVS
Track.co
Trama Comunicação
Trammit
Valid
Vanguarda Midia Digital
VML
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Do you need any further information?

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