

Customer Experience & Commerce

SPARK Matrix™: **Digital Marketing Analytics** **(DMA), Q4, 2023**

Market Insights, Competitive Evaluation, and Vendor Rankings

October, 2023



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Executive Overview

This research report includes a detailed analysis of the global digital marketing analytics (DMA) market dynamics, vendor landscape, and competitive positioning. The study provides competition analysis and ranking of the leading DMA vendors in the form of the SPARK Matrix. This research provides strategic information for technology vendors to better understand the market supporting their growth strategies and for users to evaluate different vendors' capabilities, competitive differentiation, and market positions.

Market Dynamics and Overview

Quadrant Knowledge Solutions defines digital marketing analytics (DMA) platforms as “a technology designed to support organizations in enhancing user experiences across various digital channels by evaluating the effectiveness of marketing initiatives. The platform gathers data from multiple channels that organizations use to connect and interact with customers, which enables them to conduct performance analysis and offers visual representations of the composed customer data, helping marketers convert behavioral data into actionable insights for campaign optimization.”

DMA platforms have transformed over the years as organizations recognize the importance of effective online presence and marketing strategies in driving growth and sustainability. DMA platforms are shifting their focus from fundamental web analytics tools that primarily monitor traffic metrics to a broad spectrum of digital marketing channels. It has undergone several changes to accommodate customer expectations, technological advancements, and alterations in business strategy.

With the rise of social media, the analytics focus shifted to platforms such as Facebook and Twitter, where engagement metrics, likes, shares, and comments became essential. Subsequently, digital marketing analytics evolved to address the challenges posed by the increase of marketing channels with data integration and advanced analytics techniques, including predictive analytics, attribution modeling, and customer segmentation. This evolution has empowered organizations to gain deeper insights into their digital marketing efforts and refine strategies accordingly.

The outlook of the DMA platform is shifting to incorporate more sophisticated technologies such as predictive analytics and AI-powered tools that will help organizations anticipate customer needs and prescribe the next-best actions to enhance digital experiences. These advancements in digital marketing analytics platforms have enabled organizations to gather and analyze customer data more effectively. Digital marketing teams are incorporating the usage of data-driven insights to personalize interactions.

The following are the key capabilities of DMA platforms:

- **Data Integration and Management:** DMA platforms combine data from multiple sources, such as social media, websites, email campaigns, and

advertising platforms, breaking down data silos and creating a unified view of customer behavior and interactions, enabling organizations to improve digital marketing campaigns, optimize customer experiences, and make better business decisions. Vendors in the market are offering integration compatibility with the tech stacks of users' legacy systems, resulting in improved data quality for integration. Vendors provide the tools and infrastructure to facilitate the aggregation, transformation, and storage of data from various channels. Moreover, vendors in the market are strengthening the utilization of AI to identify customer touchpoints and comprehend customer interactions effectively.

- **Visitor Traffic Monitoring and Evaluation:** The platform involves collecting and analyzing data about website visitors and their patterns to provide a deeper understanding of the online audience's behavior and preferences. Vendors in the market provide tools that track user interactions, page views, bounce rates, and click-through rates to measure the effectiveness of digital marketing efforts. Vendors in the market also offer continuous monitoring and evaluation of visitor traffic, which helps organizations identify audience preferences and tailor content to refine their strategies accordingly.
- **Predictive Analytics:** The DMA platform offers predictive analytics capabilities that help organizations forecast customer behavior, market shifts, and emerging opportunities. Vendors offer algorithms and models that analyze historical data to make informed forecasts. Vendors in the market empower organizations to proactively respond to changes in customer preferences, market dynamics, and other factors. By leveraging predictive analytics, organizations are delivering tailored experiences to meet customer needs. Vendors are also focusing on improving AI-driven real-time personalization and omnichannel orchestration to effectively tailor communications, advertisements, and campaigns across channels and accelerate conversion.
- **Journey Data Extraction and Optimization:** The DMA platform aims to optimize the customer journey by offering insights into the path the audience takes and identifying areas for improvement. Vendors in the market offer the ability to extract data related to the customer journey, allowing organizations to analyze the effectiveness of their marketing strategies and pinpoint bottlenecks. Vendors also help organizations refine their approach based on data-driven insights to optimize customer experiences, leading to increased engagement, higher conversions, and greater customer satisfaction.

- **Integration & Interoperability:** Integration and interoperability are crucial in DMA because they allow marketers to collect data from multiple sources and analyze it in a single platform. Vendors in the market provide the technology and application programming interfaces (APIs), middleware, and connectors to create a cohesive ecosystem for organizations. They also help organizations' existing systems/technologies communicate with each other, enable them to maximize the value of their technology stack, reduce manual data handling, and enhance operational efficiency.
- **Reporting & Dashboarding:** The reporting and dashboarding capability helps generate and share reports and visualizations to communicate the results of marketing analyses. Vendors in the market offer visually engaging reports and dashboards to track the performance of marketing campaigns, measure the impact of marketing initiatives, and identify areas for improvement. Vendors are also offering tools for creating customized reports and overviews of performance metrics, which enable organizations to identify trends, measure key performance indicators, and make timely, data-driven decisions.

Competitive Landscape and Analysis

Quadrant Knowledge Solutions has conducted an in-depth analysis of the major DMA platform vendors by evaluating their products, market presence, and value proposition. The evaluation is based on primary research with expert interviews, analysis of use cases, and Quadrant's internal analysis of the overall DMA platform market. This study includes an analysis of key vendors, including Adobe, AT Internet by Piano, FICO, Google, Heap, IBM, IgniteTech, Medallia, Mixpanel, Optimove, Paragone, Salesforce, SAP, SAS, and Tinyclues by Splio.

Adobe, Google, Medallia, Optimove, Salesforce, and SAS are among the top performers positioned as technology leaders in the 2023 SPARK Matrix™ analysis of the global Digital Marketing Analytics Platform market. These companies provide a sophisticated and comprehensive technology platform to address various use cases, such as delivering real-time personalized messages to customers, providing omnichannel personalization, transforming digital journeys, increasing ROI with data-driven marketing insights, and offering unified customer experiences. Vendors also offer features building predictive and advanced audience segments, delivering enhanced customer experiences by providing relevant recommendations, monitoring & leveraging customer sentiment to plan product improvements, prioritizing customer issues, and optimizing ad spend.

Adobe has acquired the position of Leader in the 2023 SPARK Matrix for Digital Marketing Analytics Platforms for its ability to offer comprehensive tag management and innovative tools facilitating data collection and distribution across digital marketing platforms. The incorporation of machine learning (ML)-driven anomaly detection via Adobe Sensei to assist organizations in identifying statistically significant fluctuations in data across various metrics has given the company a strategic edge over its competitors.

Google specializes in providing internet-related products and services. The company's attribution analysis feature monitors user interactions throughout the marketing funnel on different platforms using its ML capabilities. It prioritizes user privacy by utilizing observed, first-party, and consented data in its ML models. Through its Funnel Exploration feature, the company enables organizations to visually represent user actions during website or application interactions, providing insights into the user experience and optimization opportunities. Its Segment Overlap feature uncovers relationships between different user segments, identifying new segments that meet specific criteria through advanced analytics.

Salesforce offers robust solutions designed to facilitate the effective management of customer data, streamline processes through automation, conduct in-depth data analysis to extract valuable insights, and provide personalized customer experiences. It distinguishes itself through the incorporation of automated regression modeling and advanced statistical analysis techniques, significantly reducing the time required for data analysis. The company supports the customization of dashboards and reports to accommodate the specific requirements of decision-makers and stakeholders across various organizational functions. It also enables cross-platform activation for organizations, allowing real-time actions, such as campaign adjustments and budget reallocations, across platforms such as Google and Facebook.

SAS offers a suite of services for business intelligence, data mining, business analytics, predictive analytics, customer intelligence, and enterprise risk management. It provides a range of testing and experiment methodologies, such as A/B/n, multiarmed bandit, and multivariate testing, for assessing web and mobile content activity paths. The platform's analytical automation enhances optimization agility, streamlining the process. Its product recommendation engine analyzes user behavior to estimate product preferences and delivers personalized recommendations using collaborative filtering techniques, boosting customer engagement. Through its algorithmic and rule-based attribution features, the company facilitates in-depth analysis of the business value of marketing interactions in complex customer journeys.

Medallia is a developer and provider of a Software as a Service (SaaS)-based customer experience platform. It evaluates the quality of online user experiences in areas such as frustration, engagement, navigation, technical performance, and form through its Digital Experience Score (DXS) feature. By utilizing AI and ML, the platform generates individual scores for each parameter, enabling a granular understanding of user experience. Medallia's distinctive capability lies in its capacity to enable organizations to gain comprehensive insights into the changing preferences and demands of individual customers, leading to personalized interactions. Its ability to uncover undisclosed online activities provides insights into customer interests and contexts, supporting meaningful conversations and real-time actions such as live chat or engagement surveys.

Optimove is a provider of a customer-led marketing platform designed to enhance customer retention through predictive micro-segmentation technology. Optimove's predictive behavior modeling leverages a combination of mathematical, statistical, and ML techniques to examine transactional, behavioral, and demographic data.

Its platform incorporates an automated feature for segregating control groups and analyzing individual campaign performance based on tangible financial metrics, empowering marketers to optimize each campaign's effectiveness. The company also supports A/B/n and multi-variant campaigns, allowing for comparative evaluations under uniform circumstances.

Vendors such as Mixpanel, IBM, SAP, Heap, IgniteTech, FICO, and AT Internet by Piano have been positioned among the Strong Contenders in the 2023 SPARK Matrix. These vendors offer extensive technological capabilities and are garnering market traction across various industry sectors and geographic regions. They are also aware of upcoming and prospective market trends and have strategically outlined a comprehensive plan to leverage future growth prospects.

Mixpanel's DMA platform offers a distinctive suite of features, including data table view, multi-touch attribution analysis, identity resolution, custom categorization for demographic and user behavior breakdowns, and the ability to incorporate ad-network data for campaign effectiveness analysis, aimed to enhance the efficiency of marketing teams. Mixpanel helps identify successful practices for underperforming campaigns, helping optimize advertising budgets for organizations by evaluating key performance indicators, such as clicks, impressions, cost-per-click, and return on ad spend, to assess campaign effectiveness.

IBM offers a DMA platform that streamlines the data analysis process by integrating two of its offerings—Watson AI and Cognos Analytics, providing a range of solutions for data analysis and visualization. IBM's strategic advantage lies in its self-service data exploration functionality that empowers users to independently interact with data and uncover valuable insights.

SAP's DMA platform offers various AI-powered functionalities that enable organizations to improve campaign performance, measure customer results, and proactively refine marketing strategies without requiring a specialized data team. Its self-service data modeling and preparation signify a substantial advancement in shaping vital performance metrics, dimensions, and hierarchies. Its augmented analytics feature offers machine-generated analytics, helping organizations make data-driven decisions. The platform's incorporation of what-if simulations aids in assessing various scenarios, leading to more informed decisions and improved business outcomes.

Heap offers a digital insights platform that helps agile digital teams comprehend and enhance digital experiences. Its platform stands out due to its advanced data science capabilities for the proactive identification of significant events and trends in the digital user experience. Its session replay function provides an overall understanding of individual user actions and guides users to specific moments within a session, saving time and effort and facilitating efficient user behavior analysis. It simplifies data analysis through heatmap visualization, making it accessible to non-technical users and helping organizations make informed decisions and improve workflow efficiency.

IgniteTech specializes in delivering secure and scalable enterprise content delivery solutions. Its Beckon platform offers a scorecard feature that provides an overview of the customer experience by aligning key metrics and performance indicators with organizations' strategic goals, enabling them to gain a comprehensive understanding of marketing performance. The Beckon Calendar serves as a scheduling tool for managing marketing campaigns and events, with split-screen functionality for correlating metrics with campaign timelines to understand performance fluctuations.

FICO offers solutions for implementing advanced analytics and ML to provide customized experiences that consistently deliver optimal business results and customer satisfaction. FICO provides simulation and optimization tools for organizations to experiment with various strategies, mathematically improving resource allocation and prioritization. The platform's risk-aware prospecting and real-time pre-screening solutions ensure consistent decision-making across marketing and customer management processes in organizations, facilitating customer base growth while effectively mitigating risks.

AT Internet by Piano offers software solutions designed to assist organizations at all levels of expertise in the fields of digital analytics and data mining. The company's platform offers an extensive range of performance optimization features, such as pre-configured analyses, detecting unusual patterns, exploring customer interactions, and examining conversion funnel efficiency. Furthermore, the company facilitates data extraction via an API for data mining purposes, enables personalized notifications, and supports connections with various data sources, such as Customer Relationship Management (CRM), Search Engine Optimization (SEO), and testing. AT Internet stands out by prioritizing data reliability through automated site scans that identify tags and detect inconsistencies in tagging strategies, ensuring data accuracy without resorting to sampling.

A scope for strong technology enhancement and limited market exposure have resulted in Paragone and Tinyclues by Splio being positioned as Aspirants in the SPARK Matrix, Digital Marketing Analytics Platform, 2023.

Paragone is a provider of social media marketing applications primarily focusing on paid social media. Its DMA platform distinguishes itself through its Actionable Performance Monitor (APM), which helps organizations monitor real-time data concerning paid social advertising across multiple networks. APM empowers performance marketers to efficiently identify areas for improvement, employ AI for campaign success forecasts, and take proactive steps for performance optimization. Additionally, the Performance Simulator feature allows organizations to retrospectively test performance strategies and predict the likelihood of achieving future performance goals using APM's advanced AI.

Tinyclues by Splio offers a DMA platform that features Campaign Studio (Beta), which is designed to enhance the effectiveness of multi-offer campaigns. The platform also offers the Efficiency Map feature, which helps organizations identify more effective approaches for promoting their offerings. This enables organizations to make informed decisions about using broad-based or targeted strategies, resulting in more profitable, targeted campaigns and increased revenue.

DMA vendors are enhancing their technological value proposition by improving key functionalities, which include data integration and management, journey data extraction & optimization, visitor traffic monitoring and evaluation, predictive analytics, audience segmentation and profiling, communication and collaboration, and dashboard and reporting capabilities. Vendors are also scaling their capabilities to provide customized deliveries and identify touchpoints catering to customers' recent interactions.

While most vendors offer the complete set of core functionalities, the degree of proficiency in delivering these functionalities varies across vendors. Therefore, vendors should prioritize strengthening their key capabilities, ensuring seamless integration with organizational tools and platforms, leveraging diverse native capabilities, and emphasizing scalability and extensibility. Further, their ability to accommodate emerging technologies such as AI, ML, and predictive analysis stands as the distinguishing factor in the global DMA landscape. Vendors are further concentrating on incorporating generative AI to elevate their DMA offerings, providing resilient technology and distinctive value propositions aligned with customer requirements.

Key Competitive Factors and Technology Differentiators

The following are the key competitive factors and differentiators for the evaluation of digital marketing analytics (DMA) platform vendors. While most DMA platforms may provide all the core functionalities, the breadth and depth of functionalities may differ by different vendors' offerings. Driven by increasing competition, vendors are increasingly looking at improving their DMA platforms' technology capabilities and overall value proposition to remain competitive.

- **The Sophistication of Technologies:** The current trend in the industry is to promote the responsible advancement and adoption of AI, enhancing digital marketing analytics while simultaneously safeguarding the reputation of brands and enterprise data. It should empower organizations to make more informed decisions regarding digital marketing strategies and quantify the effects of these efforts on net revenue retention (NRR). Users should evaluate the vendors on their ability to offer automated computation of behavior and engagement for customer accounts, providing a comprehensive evaluation of social and website traffic. Users should also examine the platform's commitment to enhancing its capacity to integrate AI into marketing analytics operations and swiftly generate personalized content that aids digital marketing teams in content creation, synthesizing customer touchpoints, refining personalization, and automation.
- **Funnel Exploration:** The Funnel Exploration feature visualizes gradual actions visitors undertake while interacting with a website or application. Some of the leading vendors are offering both open and closed funnel options. Users should also assess vendors' capability to identify visitor experiences throughout the entire process, detect potential optimization opportunities, and recognize any modulation in audience performance.
- **Behavioral Modeling:** Some vendors offer behavior modeling that employs mathematical, statistical, and ML techniques to analyze transactional, behavioral, and demographic data. Users must evaluate vendors on their ability to forecast future customer behavior and value, including metrics such as conversion likelihood, top spender potential, churn probability, reactivation possibilities, and future customer value.

- **Comprehensive AI & ML Capabilities:** Vendors offer sophisticated marketing analytics and AI solutions that cater to diverse users and intents throughout the data and ML lifecycle. Users must evaluate the vendors on their capability to provide detailed customer journeys, regulatory modifications regarding data collection and utilization, and industry shifts affecting third-party cookie measurement. Users should also evaluate vendors based on the breadth and depth of their AI research algorithms and overall AI & ML capabilities that can assist organizations in adapting to these dynamic changes.
- **Trend Analysis:** DMA platforms provide the capability to analyze current trends in the digital marketing landscape and adapt strategies accordingly, which is a significant advantage for marketers. Users should evaluate vendors on their ability to provide safe and secure interactions for marketers to access trend data sets. They should also assess vendors on their capability to understand what customers are searching for, enabling informed analysis and better data-driven decisions.
- **Ad Hoc Analysis:** Vendors in the DMA space offer a feature that provides a robust and flexible canvas to create customized analysis projects. Users must evaluate vendors on their capability to intuitively drag and drop multiple variables, including segments, dimensions, and metrics, to provide instant data visualization.
- **Intelligent Data Processing:** DMA platforms can efficiently process and transform data, ensuring its quality and relevance and helping organizations derive meaningful insights. Users should evaluate vendors on their ability to provide data analytics for marketers to understand data and improve campaign performance and overall marketing ROI.
- **Robust Branding Capabilities:** Users should consider vendors that offer the capability to assess a brand's worth through real-time web analytics support. The platform facilitates the measurement of direct traffic to a brand's website and the subsequent evaluation of bounce rates for these online channels. Additionally, users should look at whether the vendor offers organizations tools for tracking social media engagement, enabling them to estimate the timing, frequency, and locations of customer visits across various channels. Users should also look for a DMA platform that can track the rate of backlinks, helping organizations understand content performance across all channels.

- **Generative AI:** Vendors are currently focusing on the integration of advanced generative AI capabilities into their existing solutions to improve efficiency and effectiveness. Users should evaluate the functionalities of generative AI, providing valuable insights and automatically generated content. Users should also consider evaluating vendors on parameters combining AI-driven customer analytics with generative AI to create personalized responses and other content in the appropriate context.

SPARK Matrix™: Strategic Performance Assessment and Ranking

Quadrant Knowledge Solutions' SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix provides a visual representation of market participants and provides strategic insights on how each supplier ranks related to their competitors concerning various performance parameters based on the category of technology excellence and customer impact. Quadrant's Competitive Landscape Analysis is a useful planning guide for strategic decision-making, such as finding M&A prospects, partnerships, geographical expansion, portfolio expansion, and similar others.

Each market participant is analyzed against several parameters of Technology Excellence and Customer Impact. In each of the parameters (see charts), an index is assigned to each supplier from 1 (lowest) to 10 (highest). These ratings are designated to each market participant based on the research findings. Based on the individual participant ratings, X and Y coordinate values are calculated. These coordinates are finally used to make the SPARK Matrix.

| Technology Excellence | Weightage | Customer Impact | Weightage |
|--------------------------------------|-----------|--------------------------------|-----------|
| Sophistication of Technology | 20% | Product Strategy & Performance | 20% |
| Competitive Differentiation Strategy | 20% | Market Presence | 20% |
| Application Diversity | 15% | Proven Record | 15% |
| Scalability | 15% | Ease of Deployment & Use | 15% |
| Integration and Interoperability | 15% | Customer Service Excellence | 15% |
| Vision and Roadmap | 15% | Unique Value Proposition | 15% |

Evaluation Criteria: Technology Excellence

- **The sophistication of Technology:** The ability to provide comprehensive functional capabilities and product features, technology innovations, product/platform architecture, and such others.
- **Competitive Differentiation Strategy:** The ability to differentiate from competitors through functional capabilities and/or innovations and/or GTM strategy, customer value proposition, and such others.
- **Application Diversity:** The ability to demonstrate product deployment for a range of industry verticals and/or multiple use cases.
- **Scalability:** The ability to demonstrate that the solution supports enterprise-grade scalability along with customer case examples.
- **Integration & Interoperability:** The ability to offer product and technology platform that supports integration with multiple best-of-breed technologies, provides prebuilt out-of-the-box integrations, and open API support and services.
- **Vision & Roadmap:** Evaluation of the vendor's product strategy and roadmap with the analysis of key planned enhancements to offer superior products/technology and improve the customer ownership experience.

Evaluation Criteria: Customer Impact

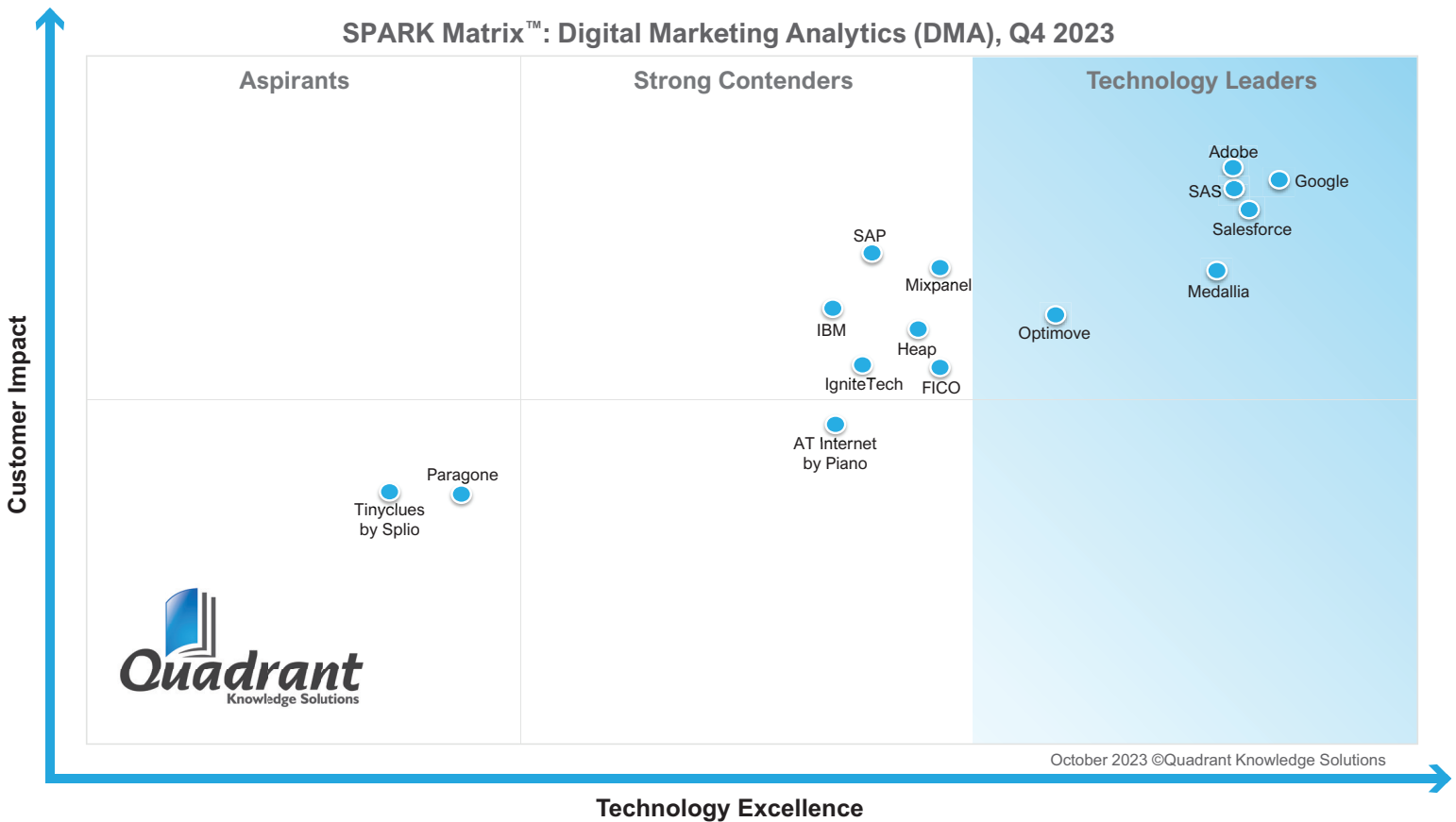
- **Product Strategy & Performance:** Evaluation of multiple aspects of product strategy and performance in terms of product availability, price-to-performance ratio, excellence in GTM strategy, and other product-specific parameters.
- **Market Presence:** The ability to demonstrate revenue, client base, and market growth along with a presence in various geographical regions and industry verticals.

- **Proven Record:** Evaluation of the existing client base from SMB, mid-market, and large enterprise segments, growth rate, and analysis of the customer case studies.
- **Ease of Deployment & Use:** The ability to provide superior deployment experience to clients supporting flexible deployment or demonstrate superior purchase, implementation, and usage experience. Additionally, vendors' products are analyzed to offer a user-friendly UI and ownership experience.
- **Customer Service Excellence:** The ability to demonstrate vendors' capability to provide a range of professional services from consulting, training, and support. Additionally, the company's service partner strategy or system integration capability across geographical regions is also considered.
- **Unique Value Proposition:** The ability to demonstrate unique differentiators driven by ongoing industry trends, industry convergence, technology innovation, and such others.

SPARK Matrix™: Digital Marketing Analytics (DMA)

Strategic Performance Assessment and Ranking

Figure: 2023 SPARK Matrix™
(Strategic Performance Assessment and Ranking)
Digital Marketing Analytics (DMA)



Vendors Profile

Following is the profile of the leading DMA vendors with a global impact. The following vendors profile is written based on the information provided by the vendor's executives as part of the research process. The Quadrant research team has also referred to the company's website, whitepapers, blogs, and other sources for writing the profile. A detailed vendor profile and analysis of all the vendors, along with various competitive scenarios, are available as a custom research deliverable to our clients. Users are advised to directly speak to respective vendors for a more comprehensive understanding of their technology capabilities. Users are advised to consult Quadrant Knowledge Solutions before making any purchase decisions regarding digital marketing analytics and vendor selection based on research findings included in this research service.

Medallia

Establishment Year: 2001

Headquarters: Pleasanton, California.

Medallia is a developer and provider of a SaaS-based customer experience platform. Medallia offers experience orchestration solutions which serve as a unifying technological layer that acquires knowledge, comprehends data, and manages customer journeys and dialogues. Medallia aids in comprehending the genuine intentions of each customer across various journeys, touchpoints, and timeframes, with the aim of meeting individual needs throughout their entire interaction on online and offline media channels. Additionally, Medallia offers services in various domains, including Customer Experience Management, Business Intelligence, Enterprise Feedback Management, Employee Experience, Social Listening and Contact Center. Medallia is vertically agnostic yet has deep experience in various industry verticals including Automotive and Transportation, Communications and Media, Financial Services, Healthcare and Life Sciences, Insurance, Manufacturing, Restaurants, Retail and Consumer Goods, Technology and Services, Travel and Hospitality and more. Medallia has a strong presence in North America, Europe followed by APAC, Middle-east, and Latin America.

Product Overview

Product Name: Medallia Experience Orchestration, Digital Experience Analytics

Medallia captures data from diverse communication channels, such as voice, video, digital, social media, and corporate messaging tools to create by actionable journey insights to drive meaningful engagement by leveraging AI decisioning. Digital Experience Analytics (DXA) leverages data science and machine learning to uncover genuine customer interactions on websites and apps. With an additional DXA data layer, it becomes feasible to identify the root causes of poor customer experiences and provide actionable solutions promptly. Medallia integrates digital insights into marketing technology stacks, to enhance favored analytics, A/B testing, and customer management tools, allowing for the creation of advanced customer segments and tailored future communications based on prior digital behavior.

The platform offers effective 1:1 orchestration of customer journeys and provides communication with other systems for event processing, customer data lookup, and audience engagement. Medallia Experience Orchestration offers application connectors, an API framework, and mobile software development kits (SDKs) to facilitate interaction with both internal and external data sources and systems. Medallia's partner ecosystems consist of a wide range of software which includes Google, SAP, Microsoft, Adobe, Oracle, Mandrill, Meta, Twilio, Airship, and more to provide advanced customer experience, trend analysis and targeting end users. The key capabilities of Medallia's Digital Marketing Analytics include scaling digital experience, understanding visitor experiences, journey management, issue identification, and real-time customer support.

Analyst Perspective

Medallia offers enhanced digital experiences to attract and retain online customers. However, creating such experiences becomes challenging when a significant portion of customers do not provide feedback on their satisfaction. To address this, Medallia DXA offers a solution that provides a comprehensive view of every digital customer experience and offers actionable insights. Medallia assesses each customer's digital experience, identifying opportunities for enhancing the organization's digital presence, strengthening customer relationships, and increasing revenue. The platform offers a distinctive perspective on customer journeys via impactful visualizations and behavioural insights. It helps improve the overall customer experience by highlighting critical moments across digital properties.

Medallia Experience Orchestration provides aggregated views, delivers valuable business intelligence to operational stakeholders, and offers relevant journey context to customer-facing staff. Additionally, it offers dynamic views of live end-to-end journeys, revealing high-value moments, identifying hotspots, highlighting friction points, and flagging moments of delight and frustration. Furthermore, the platform maintains dynamic customer profiles that are continuously updated during every interaction or event, even when the customer profile is anonymous.

For a deeper understanding of online experiences, Medallia through its visualization tools facilitates session replays, and heatmaps, to provide quick insights and actionable improvements. Session replays allow users to investigate anomalies by watching screen recordings of online visitor interactions. Heatmaps feature visually represents on-page user behaviour, aiming to boost engagement and conversion rates.

Some use cases for Medallia's Digital Marketing Analytics include accessing session replays directly from survey responses, aligning survey responses with digital experience scores (DXS) to quantify and benchmark CX metrics over time, receiving actionable alerts to uncover frustration and experience issues connected to negative survey results, segmenting customers based on survey responses to dive deeper into experience issues of specific response groups.

Technology Differentiators

Medallia's distinguished technology offering facilitates real-time, highly personalized interactions based on insights that are delivered through centralized orchestration, ensuring uniformity in tailored engagement across all communication channels. The incorporation of built-in arbitration prioritizes decisions based on individual customer tendencies and promotes the most relevant conversation.

Another differentiator for Medallia is its Digital Experience Score (DXS) feature that evaluates the quality of online user experiences across various parameters: frustration, engagement, navigation, technical aspects, and form. This analysis, empowered by AI and machine learning, generates individual scores for each parameter, thereby highlighting areas for site enhancement.

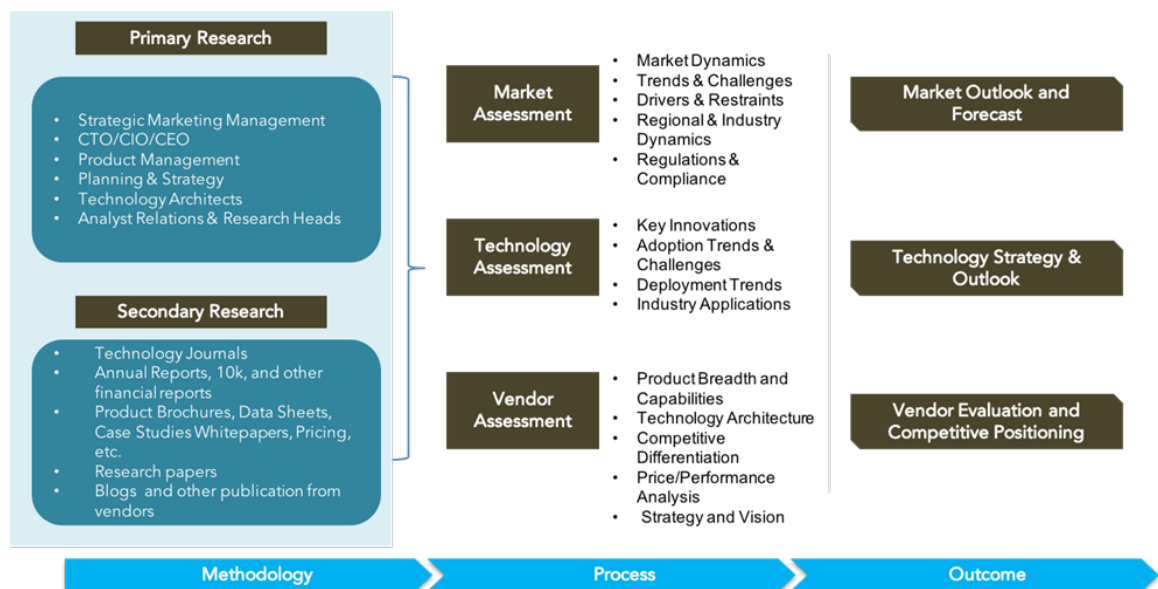
Market Differentiators

Medallia's distinctive capability lies in its capacity to enable brands to gain comprehensive insights into the changing preferences and demands of individual customers. This deep understanding empowers organizations to customize their responses, ensuring personalized customer interactions. By uncovering the undisclosed online activities of customers, Medallia discovers customers' interests and contexts, facilitating relevant and meaningful conversations. The platform triggers real-time actions, such as live chat or engagement surveys, in response to digital behaviors, such as expressions of frustration or high engagement levels.

Additionally, Medallia's ability to analyze aggregated customer data enables the creation of refined customer segments. These segments, in turn, facilitate the re-engagement of customers through targeted content, promotions, and messaging, ultimately contributing to an enhanced customer lifetime value.

Research Methodologies

[Quadrant Knowledge Solutions](#) uses a comprehensive approach to conduct global market outlook research for various technologies. Quadrant’s research approach provides our analysts with the most effective framework to identify market and technology trends and helps in formulating meaningful growth strategies for our clients. All the sections of our research report are prepared with a considerable amount of time and thought process before moving on to the next step. The following is a brief description of the major sections of our research methodologies.



Secondary Research

Following are the major sources of information for conducting secondary research:

Quadrant’s Internal Database

Quadrant Knowledge Solutions maintains a proprietary database in several technology marketplaces. This database provides our analyst with an adequate foundation to kick-start the research project. This database includes information from the following sources:

- Annual reports and other financial reports
- Industry participant lists
- Published secondary data on companies and their products

- Database of market sizes and forecast data for different market segments
- Major market and technology trends

Literature Research

Quadrant Knowledge Solutions leverages on several magazine subscriptions and other publications that cover a wide range of subjects related to technology research. We also use the extensive library of directories and Journals on various technology domains. Our analysts use blog posts, whitepapers, case studies, and other literature published by major technology vendors, online experts, and industry news publications.

Inputs from Industry Participants

Quadrant analysts collect relevant documents such as whitepaper, brochures, case studies, price lists, datasheet, and other reports from all major industry participants.

Primary Research

Quadrant analysts use a two-step process for conducting primary research that helps us in capturing meaningful and most accurate market information. Below is the two-step process of our primary research:

Market Estimation: Based on the top-down and bottom-up approach, our analyst analyses all industry participants to estimate their business in the technology market for various market segments. We also seek information and verification of client business performance as part of our primary research interviews or through a detailed market questionnaire. The Quadrant research team conducts a detailed analysis of the comments and inputs provided by the industry participants.

Client Interview: Quadrant analyst team conducts a detailed telephonic interview of all major industry participants to get their perspectives of the current and future market dynamics. Our analyst also gets their first-hand experience with the vendor's product demo to understand their technology capabilities, user experience, product features, and other aspects. Based on the requirements, Quadrant analysts interview with more than one person from each of the market participants to verify the accuracy of the information provided.

We typically engage with client personnel in one of the following functions:

- Strategic Marketing Management
- Product Management
- Product Planning
- Planning & Strategy

Feedback from Channel Partners and End Users

Quadrant research team researches with various sales channel partners, including distributors, system integrators, and consultants to understand the detailed perspective of the market. Our analysts also get feedback from end-users from multiple industries and geographical regions to understand key issues, technology trends, and supplier capabilities in the technology market.

Data Analysis: Market Forecast & Competition Analysis

Quadrant's analysts team gathers all the necessary information from secondary research and primary research to a computer database. These databases are then analyzed, verified, and cross-tabulated in numerous ways to get the right picture of the overall market and its segments. After analyzing all the market data, industry trends, market trends, technology trends, and key issues, we prepare preliminary market forecasts. This preliminary market forecast is tested against several market scenarios, economic most accurate forecast scenario for the overall market and its segments.

In addition to market forecasts, our team conducts a detailed review of industry participants to prepare competitive landscape and market positioning analysis for the overall market as well as for various market segments.

SPARK Matrix: Strategic Performance Assessment and Ranking

Quadrant Knowledge Solutions' SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix representation provides a visual representation of market participants and provides strategic insights on how each supplier ranks in comparison to their competitors, concerning various performance parameters based on the category of technology excellence and customer impact.

Final Report Preparation

After finalization of market analysis and forecasts, our analyst prepares necessary graphs, charts, and table to get further insights and preparation of the final research report. Our final research report includes information including market forecast; competitive analysis; major market & technology trends; market drivers; vendor profiles, and such others.

Client Support

For information on hard-copy or electronic reprints, please contact Client Support at ajinkya@quadrant-solutions.com | www.quadrant-solutions.com