

The Relevancy Ring

ESP Buyer's Guide 2019, Enterprise Edition

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**The
Relevancy
Group**

The Relevancy Ring – ESP Buyer’s Guide 2019, Enterprise Edition



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Foreword: About the Research

Welcome to The Relevancy Ring, a quantifiable measurement of nine leading enterprise class Email/Everychannel Service Providers (ESPs). These vendors are all leaders.

This year the Relevancy Rings are specific to each vendor, which measures their functionality and satisfaction against participant and industry averages. The functionality highlighted relates to three key themes that are most important to enterprise marketers. They are — Automation, Analysis/Attribution, and Real-time data.

During the three-month research process, we spoke to marketers about their needs and aspirations. Then we evaluated how the vendor solutions are poised to eradicate marketer challenges and meet these aspirations. The report details the aspirations and hurdles that marketers face, the most desirable vendor features and attributes, as well as in-depth analysis of these nine vendors.

The report combines data from a February 2019 executive survey of 406 email marketers and documented ESP demos related to three key themes. We also utilized vendor questionnaires and our two-decades of knowledge of the providers in this sector. One-on-one phone interviews with several of the marketers who use these tools and our executive survey clients provided satisfaction data. The methodology details our entire recipe, but readers can feel confident in knowing that our vendor evaluation process is objective and does not stem from one analyst’s singular point of view. This guide also includes our analysis and perspective on vendors that did not for a variety of reasons participate in this research.

An excerpt of this research is presented in our digital magazine for marketers by marketers, [The Marketer Quarterly](#). Available for free with registration online, as well as via the [MQ App](#).

I hope you find this research useful and enlightening.

All the Best,



David Daniels,
CEO & Founder, The Relevancy Group, LLC
Publisher & Founder, The Marketer Quarterly, LLC

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Related Reading

- [The Relevancy Ring – CDP Buyer’s Guide, 2018](#)
- [The Relevancy Ring - Email Agency Buyer's Guide, 2018](#)
- [2019 Marketing and Martech Predictions](#)
- [Inbox Forever: Email Marketing and Consumer Communication Trends](#)

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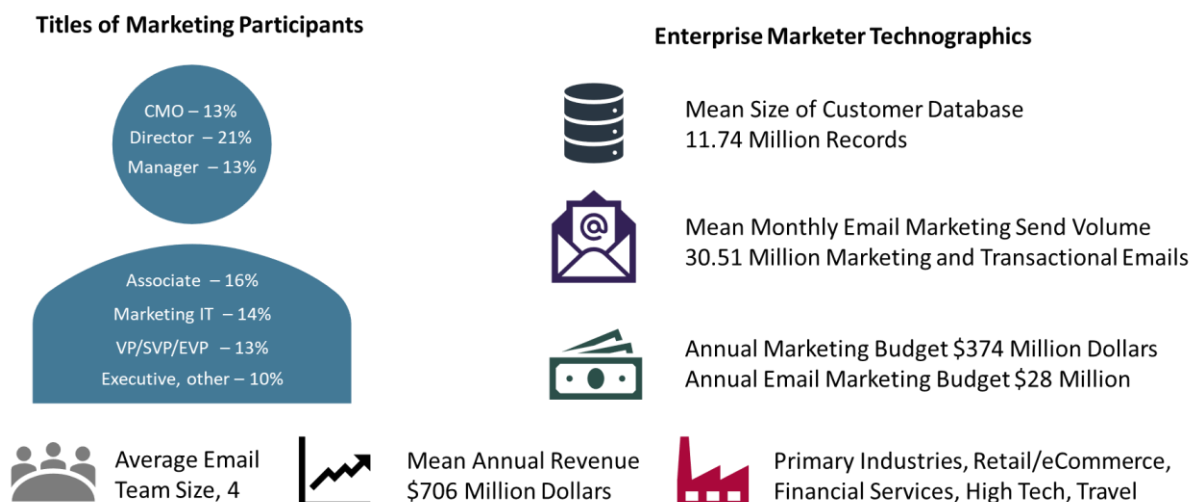
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SECTION I – The Enterprise Email Marketing Landscape and Outlook

Introduction: The Enterprise Email Marketer

The Relevancy Group conducted an executive survey in February 2019 that delivered 406 qualified responses. Among those surveyed, 246 self-identified as an enterprise organization, which is defined as having 1,000 employees or more and marketing internationally. These organizations are larger email senders and email marketing was the primary marketing channel for these survey respondents (Figure 1).

Figure 1: Enterprise Executive Marketer Survey Participants Profile



Source: The Relevancy Group Executive Marketer Survey n=406 2/19, Enterprise n=246 2/19, U.S. Only

The ESP Has Matured and Continues to Adapt to Meet Marketer Aspirations

Over the last few years, the traditional Email Service Provider (ESP) has adapted to become an “Everychannel Service Provider.” The market has more recently morphed again to introduce solutions that deliver extensible, explorable, experience-focused, everychannel tools (Figure 2). These technological advancements align well with marketers’ challenges and priorities, which are highlighted in this section.

The New ESP Delivers The “E” That is Most Important to Marketers, Typically “Experience”

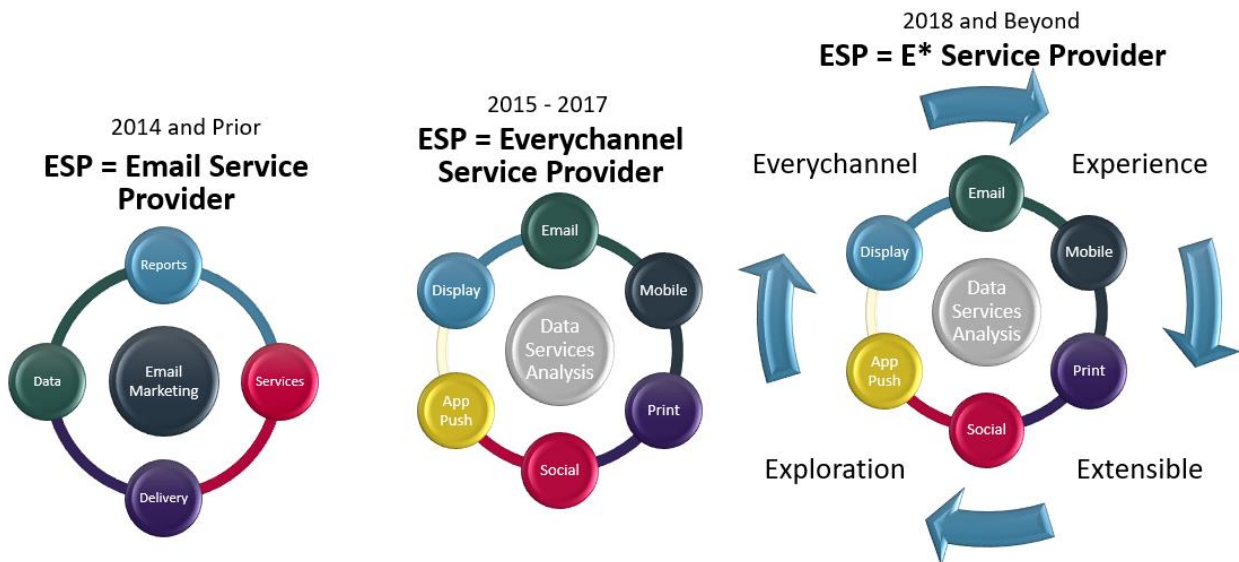
Since The Relevancy Group introduced the “Everychannel Service Provider” concept in 2015, we have witnessed marketers attempt to centralize their messaging and everychannel marketing needs and platforms into one solution. Email remains the most profitable marketing channel and when compared to other channels, email has the greatest marketer adoption. As such, email remains central to these “E” Solution Provider offerings. Understanding the evolution:

- *Email Service Provider* – For these companies, it is all about email execution, inbox placement (deliverability), wrapped with services and some level of reporting that often falls short of multi-dimensional analysis. Data is not centralized and often represents a pain point of integration or constant uploading, requiring the marketer to chase the ever-transient data exchange. From a data

exchange perspective, this process makes many email marketing solutions no more elegant than something like Dropbox with a mail transfer agent (MTA) stapled to it.

- *Everychannel Service Provider* – Data, services, and analysis are central to the offering of these providers. Data lives in or is fed into the solution via restful, real-time, smart integration tactics, taking the burden off of the marketer. These providers focus on real-time optimization, as well as services, and machine-based learnings in order to predict the best customer offers and paths across multiple channels. These companies can fulfill nearly every channel: email, mobile, app push, social, display, digital variable print, video, and in some cases, even addressable TV. These channels can be further enriched with data service and analysis. Attribution is central to this deployment option, not an afterthought. In this scenario, intelligence is centralized and execution channels act from the combined knowledge the marketer or automation tools prescribe. Lastly, the Everychannel Service Provider addresses identity management either natively or via partnerships. This is the ability to tie anonymous data with known CRM data to enable personalization at the individual level, which we refer to as individualization. One such example is a marketer's ability to turn off display ads delivered to customers that have purchased a specific SKU, or targeting the prospect in the channel where they are most likely to engage. Email remains key to the identity management riddle as our email address is our digital fingerprint and will continue to be for the foreseeable future.
- *Experience Service Provider* – These offerings take the Everychannel Service Provider solution set and embellish it with the following advancements:
 - *Experience*: This approach transcends relevance to deliver a unified and contextually accurate customer experience across channels and disciplines, such as sales, marketing and service. This requires a broader customer data set often involving identity management, social listening and digital creative consistency across marketing and advertising assets. These goal-oriented practices deliver experiences that are good for both the company and customer, such as a mobile app that simplifies checkout.
 - *Everychannel*: Channels rely more on automated journeys, but increasingly they rely on triggers based off real-time contextual-rich information that mechanized the delivery of an improved customer experience. This data-driven approach to automation across every channel can embody location, preference, behavioral, attitudinal and other data important to the customer experience.
 - *Extensible*: The solution can easily and rapidly accommodate changes. Driven by marketer will, partner and/or customer demand, these innovations and integrations are based on open standards and offer functional enhancements. The best providers have a partner marketplace or ready-to-go extensible suite solutions.
 - *Exploration*: This embodies the ability to use advanced attribution to analyze results, apply AI/machine learning, as well as leverage services to explore strategic and tactical optimizations. Exploration is the stepping off point for innovating marketing programs, as opposed to catching up to a peer group.

Figure 2: The ESP Evolution



Source: The Relevancy Group, LLC 2/15 - 2/19

Not All ESPs Operate the Same Way, Introducing Stream Based ESPs

In 2019, ESPs can be further classified not just by the features they offer, but in the way they integrate with data and deliver the solution. While many of the vendors in this research and in the ESP sector can ingest real-time data, there is a new collection of vendors that are built on cloud solutions including Amazon SE/AWS, Microsoft Azure and Google Cloud, that leverage new data management solutions including Snowflake, Hadoop, Netezza and others. But the most significant change is that this class of ESPs operate off live stream data. Stream data is continuously generated by real-time behavioral signals and processed incrementally to create individualized experiences. Like traditional ESPs, these modern stream-based ESPs can execute in everychannel. But unlike their tenured peers, most of these new providers ensure that the marketer doesn't have to synchronize and move their data from internal CRM systems. Instead data is captured in a real-time stream leveraging customer signals, then rules, goals, as well as marketer feedback define and deliver email marketing campaigns. Stream-based ESPs include but are not limited to vendors such as Bluecore, Braze, iPost, MessageGears, Sailthru, and Zeta Global. The vendor profiles in Section III of this report dig into this concept in greater detail by vendor.

In 2019 Enterprise Marketers Are Focused on Improving Targeting with Real-Time Data

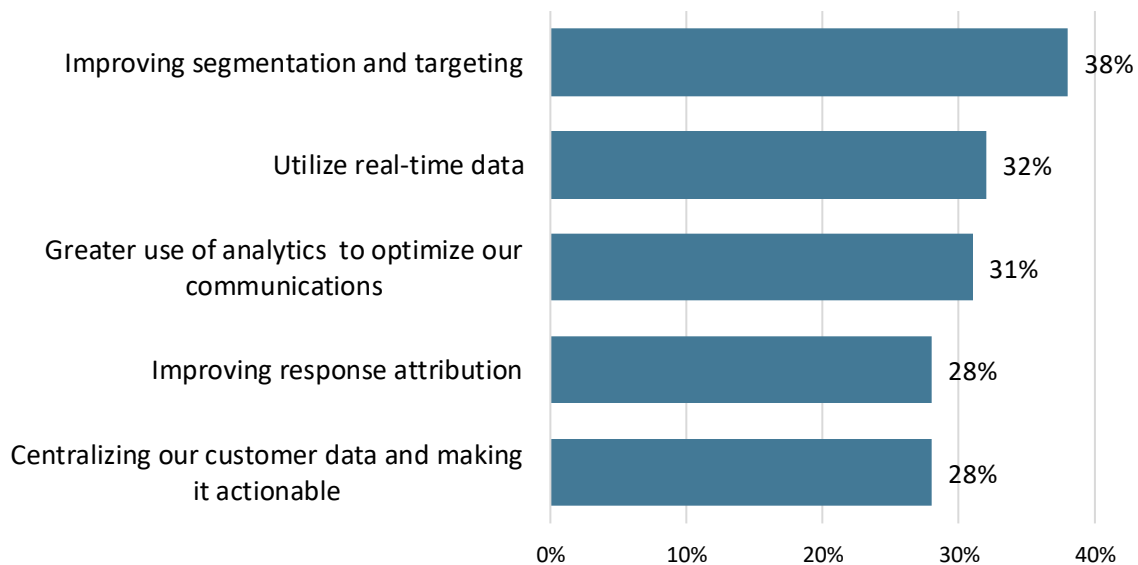
Enterprise marketers' 2018 aspirations indicate that they will challenge service providers to improve access to real-time data, analytics/attribution and easier access to customer data (Figure 3). The top five priorities for improving the ROI of enterprise email marketing programs in 2019 are:

- *Improving segmentation and targeting: Analytical Optimization:* ESPs and marketers are well aligned here, as both are making significant investments in their audience targeting capabilities.

Thirty-eight percent of marketers seek to personalize their experiences through improved targeting. We have consistently proven in our research that targeted marketing outperforms mass mailing. This is achieved by the second priority, utilizing real-time data.

- **Utilizing Real-Time Data:** In marketing, it has often been said that the best predictor of future behavior is past behavior. Utilizing real-time data dramatically improves upon that notion since past behavior is now comprised of minutes, hours or a day at most. Our research continues to prove that those that leverage real-time data in the customer experience have better results than those that do not. The rise of stream-based ESPs, as well as the significant updates that traditional ESPs have made to process real-time data, has made this aspiration a reality for 42 percent of marketers. Forty-two percent of marketers are utilizing real-time data in their personalization and individualization efforts.
- **Analytical Driven Optimization and Attribution Accuracy:** Marketers are focused on the need to better leverage analytics to optimize their programs and improve response attribution. While many attribution methods exist, we have witnessed ESPs that include multiple attribution models and an intense focus on cross-channel attribution. These companies include: Adobe, iPost, Cheetah Digital and Zeta Global.
- **Centralizing Customer Data and Making it Actionable:** Marketers seek to move data quickly between their data stores to their ESP and centralize this data. The advancements in real-time utilization and data integration are real, yet marketers still spend too much time moving data. Vendors such as Adobe, MessageGears, and Zeta Global offer hybrid and data mapping solutions that accelerate or completely remove the data exchange between the organization and the ESP.

Figure 3: Top Five Email Marketing Priorities, Enterprise – 2019



Question: What are your top five priorities for improving the ROI of your email marketing programs in 2019? (Select one)

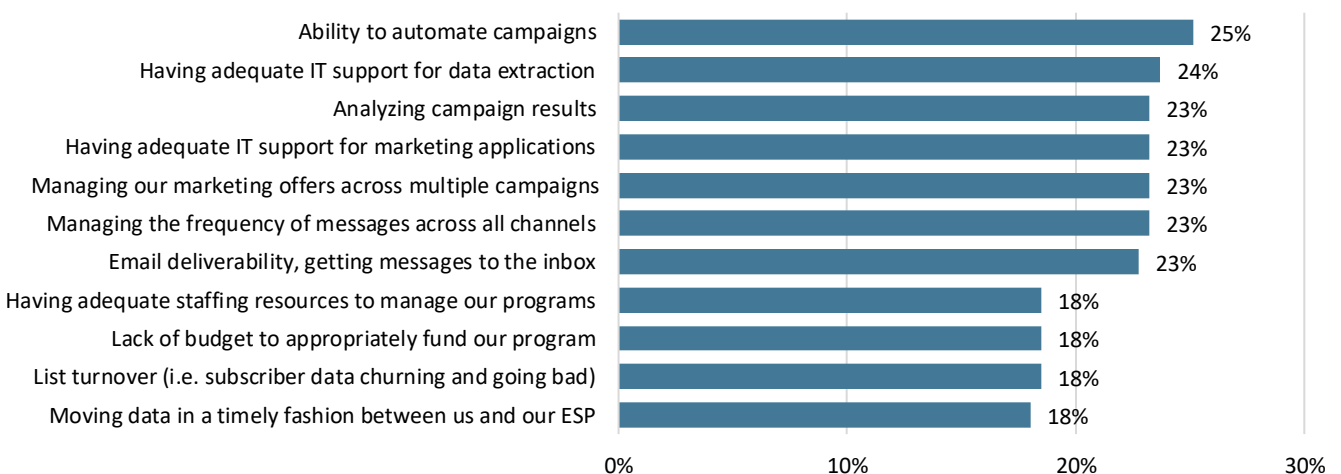
Source: The Relevancy Group Executive Marketer Survey n=406 2/19, Enterprise n=211 2/19 U.S. Only.

Marketers Are Challenged by Lack of Automation, IT Support, Analysis and Inbox Placement

Top 2019 marketer priorities largely reflect the challenges that continue to frustrate enterprise marketers' year after year. These hurdles fall into three buckets:

- Lack of Automation and Resources:** The ability to automate campaigns saw the biggest jump year-over-year from 20 percent in 2018 to top the list of challenges at 25 percent in 2019. There is a direct correlation between those marketers that state the lack of automation is challenge to those that cite lack of staff, creative, analysis and campaign coordination channel challenges. Automation, specifically through the utilization of AI/machine learning, is a vital tool and one that a handful of leading ESPs recognize. Without innovations in automation, marketers are doomed to continuously wrestle with labor-intensive processes.
- IT Support and Data Integration:** Twenty-four percent of marketers cite having adequate IT support for data extraction (Figure 4). Eighteen percent stated moving data in a timely fashion between their servers and their ESP was a challenge. There was also a similar year-over-year rise in the number of those citing adequate IT support for marketing applications. In 2019, it is imperative that ESP offerings must be better at addressing these data challenges. This is particularly true for legacy traditional ESPs as stream-based ESPs are making the need for data movement a thing of the past. Without the necessary fast access to data, improving the customer experience is simply a dream.
- Analyzing Campaign Results and Email Deliverability, Getting Messages into Inboxes:** Twenty-three percent of marketers continue to struggle with analyzing campaign results, which ties to the 2019 goals to improve analytics and attribution. Deliverability remains a perennial challenge for marketers, which has been cited as a top 10 challenge for the last 20 years. ISPs continue to adapt their algorithms. A quarter of consumers continue to change their email address each year. And marketers often fail to embrace hygiene or a rigorous investigation into dormant subscribers. All of the advancements in relevancy and the customer experience are meaningless if the message is not delivered. The leading ESPs are integrated with the best deliverability software and services providers, such as 250ok and Return Path.

Figure 4: Top 10 Challenges When Developing Email Campaigns, Enterprise – 2019



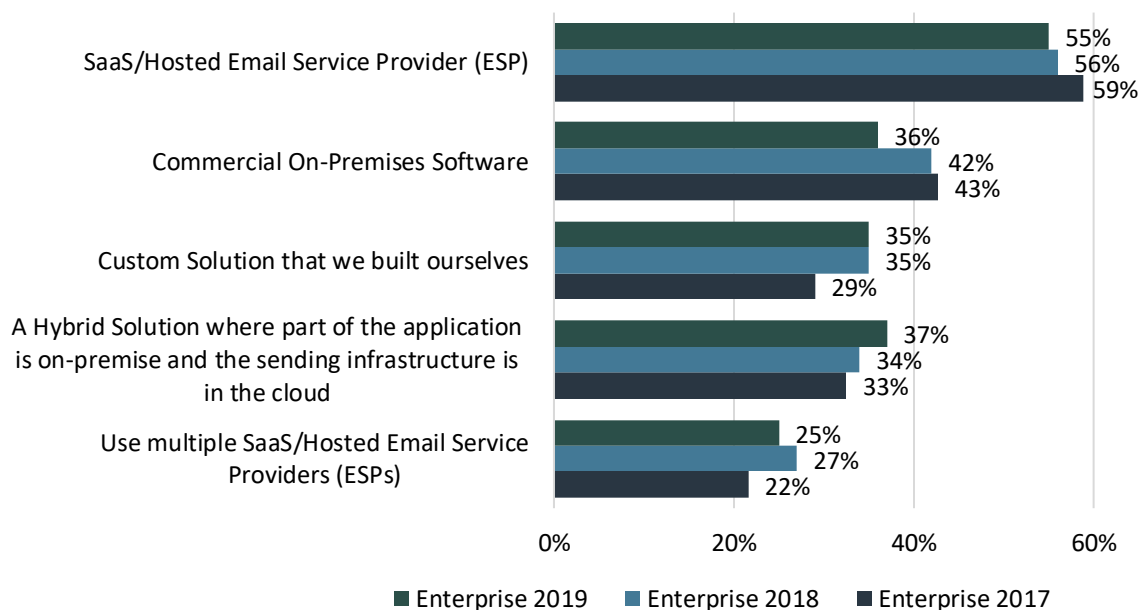
Question: What are your greatest challenges when developing email marketing campaigns? Note: 11 shown because of a tie.
(Select all) Source: The Relevancy Group Executive Marketer Survey n=406 2/19, Enterprise n=211 2/19 U.S. Only

Some Enterprise Marketers Are Turning to Hybrid ESPs and Programmatic Custom Solutions

Senders are utilizing multiple types of ESPs to manage their email marketing (Figure 5). Adoption of hybrid solutions, such as MessageGears and Adobe, have steadily increased over the last three years. Hybrid solutions feature one part of the application on-premise/customer's cloud, and the sending infrastructure in the cloud. Marketer adoption of multiple ESPs and custom solutions built on programmatic senders, such as SendGrid and SparkPost, remains strong among enterprise senders. Amazon recently released Pinpoint, an everychannel platform for promotional and transactional messages. These solutions are not wildly different from what some are building with custom code on top of programmatic solutions. The reasons for these changes in adoption are as follows:

- *Redundancy:* With some exceptions, ESPs still have not perfected the art of uptime. As evidenced in the data to follow, enterprise marketers place great emphasis on reliability in the vendor selection process. This redundancy can also be a fallback for deliverability, both in terms of keeping the primary mail stream going, and utilizing a secondary provider for acquisition or underperforming lists.
- *Closer to the Source:* As enumerated above, enterprise marketers are challenged to integrate and exchange data with ESPs. This 2019 solution adoption trend indicates that modern ESP solutions, such as hybrid or custom integration via open standards, are becoming more popular than legacy solutions, which require every bit of marketer data to be replicated in an ESP cloud.

Figure 5: Email Marketing Technology Utilized, Enterprise Senders – 2017 – 2019



Question Asked: What technology do you currently use to manage your email marketing? (Select all)

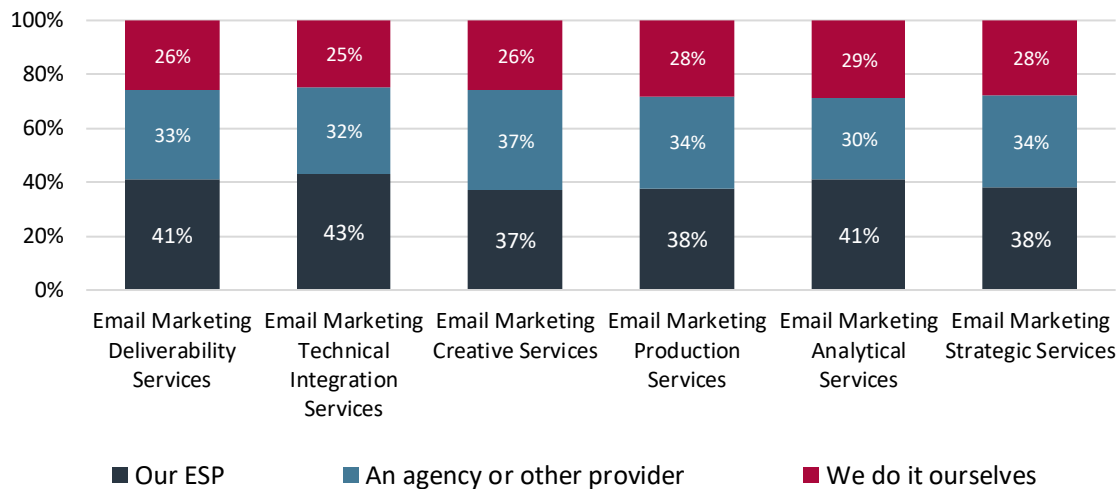
Source: The Relevancy Group, LLC/Executive Marketer Survey n=360 2/19,
Enterprise n=255 1/17, n=215 2/18, Enterprise n=211 2/19 U.S. Only

Marketers Are Embracing Services and Many Utilize Agencies Outside of Their ESP

Given the enterprise marketer's resource constraints and 2019 aspirations, it is no surprise that they continue to require and utilize specialized services. More marketers are turning to experts outside of their ESP (Figure 6). Over the past few years, many enterprise ESP marketing cloud providers only service their largest accounts with internal teams and rely on external expert agencies, such as DEG, Merkle, BrightWave or Trendline Interactive, as a go-to-market strategy. This is a massive shift from a decade [or longer] ago when full-service ESPs were the norm. Two participants in this guide — Cheetah Digital and Zeta Global — remain committed to the full-service model. Services are necessary and vital to innovating and optimizing the customer experience. Adoption is as follows:

- ***Deliverability Services:*** Seventy-four percent of enterprise marketers are adopting deliverability services. Most marketers, 41 percent, rely on their ESP, while another 33 percent utilize excellent third-party providers that include 250ok and Return Path. Twenty-six percent are the bravest, as these marketers state they go it alone, and act internally, presumably with the deliverability vendor tools built into their ESP.
- ***Technical Integration Services:*** Those marketers challenged by a lack of resources drive 76 percent of enterprise marketers to adopt these necessary services. Forty-three percent utilize their ESP for these services. There are many worthy agency solutions, of which 32 percent have been adopted.
- ***Creative Services:*** Improving the customer experience via a consistent digital experience across every channel is a must for enterprise marketers. It should also be noted, that ESP services are often contracted to named agency partners such as DEG, Merkle, BrightWave, Trendline Interactive, and others.
- ***Production Services:*** The need to stitch campaigns together and get them out the door remains labor intensive, particularly for those that have shunned automation and AI/machine learning. Overall, 72 percent utilize services, with slightly more utilizing their ESP (38 percent) compared to an agency (34 percent).
- ***Analytical Services:*** Aligning with marketer goals and challenges, 71 percent of enterprise marketers are adopting analytical services, such as reporting, measurement, and attribution. Forty-one percent of marketers utilize their ESP, we have seen a great improvement year-over-year with ESP analytic capabilities both via services and product enhancements.
- ***Strategic Services:*** Overall, 72 percent of enterprise marketers adopt these services. Strategy is one of the most critical services categories, as it is necessary to drive innovation and optimization. Thirty-eight percent utilize their ESP, 34 percent an agency partner and another 28 percent keep this to themselves.

Figure 6: Resources That Service Email Marketing, Enterprise – 2019



Question Asked: What types of vendors supply the services that your organization currently utilizes to execute your email marketing campaigns? (Select one)

Source: The Relevancy Group, LLC/Executive Marketer Survey n=360 2/19, Enterprise n=211, 2/19, U.S. Only

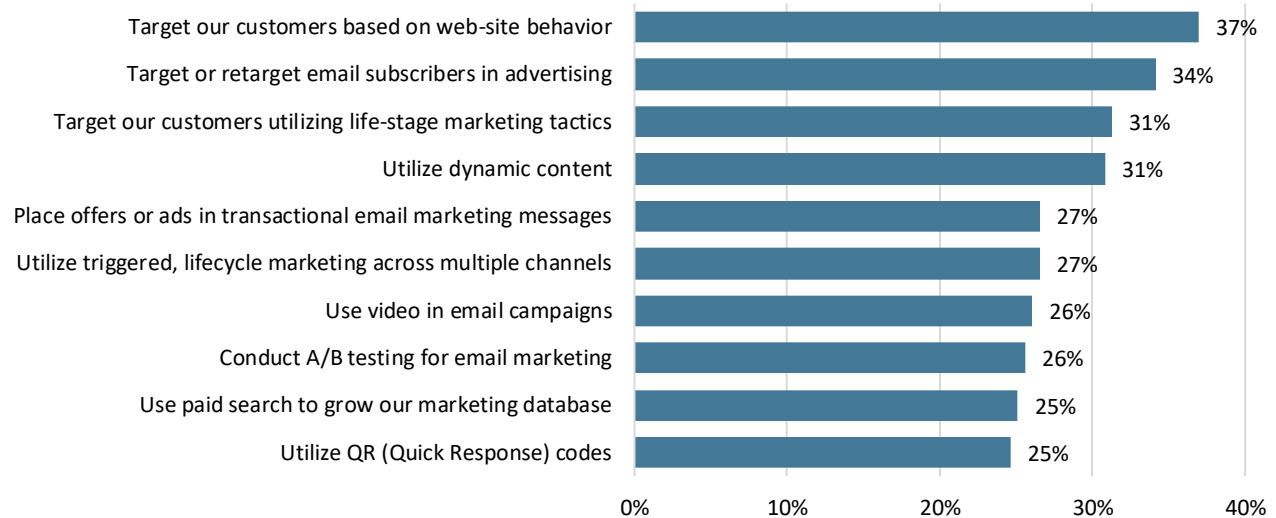
Marketer Sophistication is Increasing, More Are Leveraging Behavioral Signals for Online Targeting

Targeting and retargeting email subscribers in online advertising and utilizing behavioral signals has been the highest utilized tactic for enterprise marketers in 2019 (Figure 7). Year-over-year we have seen greater increase in adoption of this tactic than any other. In 2018, 27 percent of enterprise email marketers targeted customers based on website behavior (a.k.a. signals) and in 2019 that number increased to 37 percent. The number of those targeting or retargeting email subscribers in online advertising has also grown from 29 percent in 2018 to 34 percent this year. This increasingly popular tactic to target or retarget abandoned visitors has become easier over the last year given the rise of individualization, identity management, CDPs (Customer Data Platforms) and their partnerships with ESPs. Solutions such as LiveRamp and LiveIntent make it easy for marketers to upload PII data and target those individuals with online ads.

While this method is efficient and effective, email marketers are implementing retargeting more than proven email tactics including: testing, dynamic content, live/adaptive content and triggered lifecycle messages. Last year The Relevancy Group (TRG) stated, “As ESPs prioritize product investments they must be realistic in regards to the utilization of such features and have an eye towards site advertising targeting and retargeting solutions.” We continue to see ESPs build out data management capabilities or enter partnerships to deliver the functionality to their clients. Adoption of this type of signal-based targeting is also being driven by marketers adopting stream-based ESPs, which makes this a core feature.

These relevant email marketing tactics are being implemented not because of a lack of tools, but instead due to constraints on time, resources, and data. Testing and dynamic mailings imply access to data, additional content, time, and rework. The complexity of these staff and data issues underscores the need to seek out an ESP with experienced services and comprehensive product functionality.

Figure 7: Top 10 Email Marketing Tactics Utilized, Enterprise – 2019



Question Asked: From the following list, please select the statement or statements that best describe the email marketing tactics that you regularly utilize? (Select all) Source: The Relevancy Group Executive Survey n=360 2/19, Enterprise n=211, 2/19 U.S. Only.

SECTION II – ESP Selection Criteria

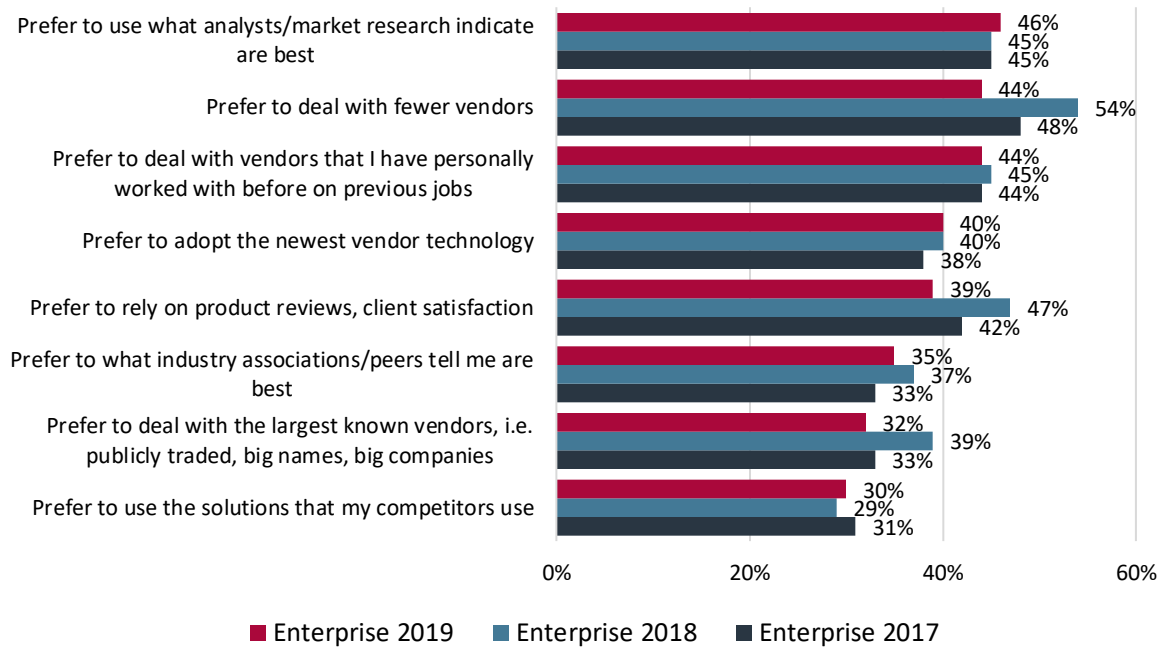
Section Introduction: The Email Marketer Evolution Manifests in New Vendor Selection Priorities

Even though email marketers are not embracing proven marketing tactics such as testing, their requirements and interest in selecting an ESP partner reveal new priorities and desired platform functionality. Enterprise marketers are keenly interested in vendors with experience in their industry, reliability and high customer satisfaction marks.

Market Analysts and Research Reports Influence Technology Selection

As a reader of this report you may be among the 46 percent of marketers that prefer to use the marketing and advertising technology that analyst/market research indicates are best (Figure 8). A near equal number of enterprise marketers state that a previous working relationship with a vendor is a strong influence on their purchasing decision. There is a large population of practitioners who have been in this industry for 15 years or more, increasing the potential that the marketer has worked on multiple ESP platforms and has formed distinct opinions. Year-over-year, fewer marketers state they are relying on product reviews and client satisfaction. We maintain that customer satisfaction is important and believe it is a critical part of vendor selection (See Section III). Despite marketers' utilization of multiple solutions, far less state they seek to work with fewer vendors. This down 10 percent year-over-year. Marketers are realizing that it is necessary to work with multiple vendors, many that are category vendors versus the alternative of going all in with one marketing suite.

Figure 8: Influences on Marketing Technology Selection, Enterprise – 2017-2019 – ‘Strongly Agree’



Question Asked: Thinking about when you purchase or influence the technology that you use for marketing and advertising, please indicate how much you agree with the following statements. ‘Strongly Agree’ Summary Table

Source: The Relevancy Group Executive Survey, Enterprise n=300 1/17, Enterprise n=241 2/18 Enterprise n=246 2/19 U.S. Only.

Security, Reliability Industry Expertise, Scalability and Reputation Drive ESP Vendor Selection

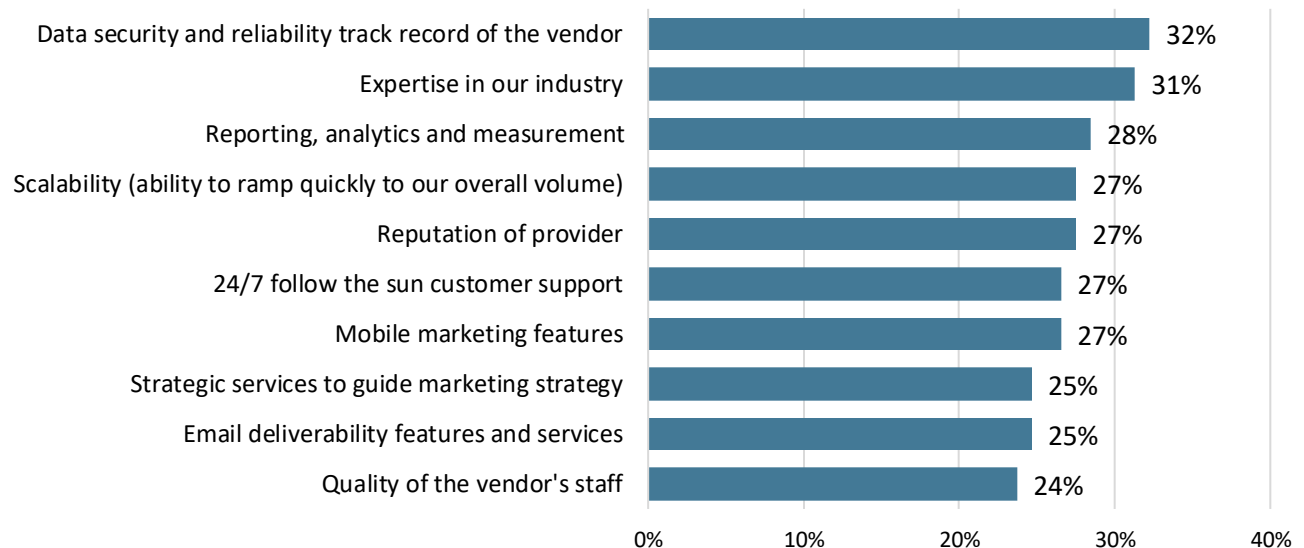
When beginning to assess ESPs, marketers’ top criteria are based on the vendor’s expertise in the prospective buyer’s industry (Figure 9). Vendors should not underestimate this consideration. When asked what their most important considerations are when selecting an ESP, marketers specifically cite the data security, reliability followed closely by industry expertise, analytic capabilities, scalability, and reputation.

- **Data security and reliability:** Buyers have a greater attentiveness to this aspect of a vendor’s offering, given the unfortunate news of data breaches across the internet and vendor outages. Buyers and vendors alike must ensure that they are well prepared to investigate such platform stability in the procurement process.
- **Industry expertise:** This is the fifth consecutive year that industry expertise has been one or two at the top of the vendor selection criteria. Anecdotal evidence suggests that ESPs benefit by going to market with an industry-focused approach. Industry experience is a driver in every technology segment that we have ever studied.
- **Feature set transcends email:** Included in the top 10 criteria for selecting an ESP are analytical, mobile marketing features, creative and strategic services that transcend basic email marketing functionality. The most competent vendors will not only be judged by their core email components, but their ability to deliver experience functionality across every channel.
- **Scalability:** Enterprise email marketers are on average sending 30 million messages a month and demand vendors that can scale to their volume but also not have large sends, list uploads or

massive record counts compete for resources. ESPs must be able to process data and events without hindering the marketer's productivity.

- *Reputation is driven by the quality of the vendor's staff, reliability and innovation:* A near equal number of buyers cited the reputation of the provider and quality of their staff as important attributes. Marketers must seek vendors with high customer satisfaction marks (See Section III).

Figure 9: Top 10 ESP Selection Criteria, Enterprise – 2019



Question Asked: What are your most important considerations when selecting an email marketing service provider (ESP) application? (Select all) Top 10 Selected Source: The Relevancy Group Executive Survey Enterprise n=211 2/19, US Only.

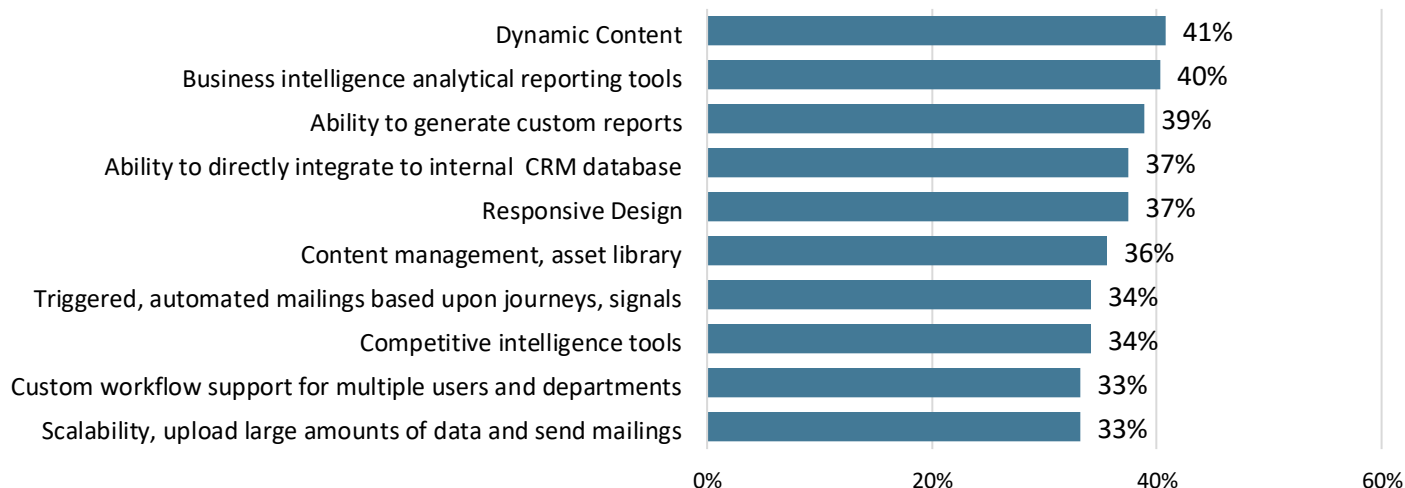
Showing A Shift to Sophistication Dynamic Content, Analytics, Direct CRM Integration Top Feature List

When selecting an ESP, dynamic content, analytical custom reporting tools, and the ability to directly integrate to internal CRM database top ESP features for enterprise marketers (Figure 10). These items document a shift in sophistication for the enterprise email marketer signaling that their needs are more complex than ever. While other key features surface in the top 10, such as responsive design, content management, journey automation tools and team workflow collaboration, marketers are mostly influenced by these top three features:

- *Dynamic Content* – Nothing has changed, and everything is different. What is old is new again, with dynamic content soaring back to the top of the desired features list. For years marketers aspired to do segmentation and personalized mailings of which dynamic content is an integral part. Now with the adoption of real-time data, individualization and those utilizing stream-based ESPs, dynamic content is once again a desired feature. The ESPs in this guide all have capable content editors and dynamic content capabilities (Section III).
- *Analytics and Custom Reporting Tools* – As we have seen throughout this research improved analytics and reporting are massive aspiration for enterprise marketers. ESPs have made massive year-over-year improvements with their analytical capabilities, many adding new visualization tools or the ability to port them to any popular business intelligence tool.
- *Ability to Integrate Directly to Internal CRM Database(s)* – This capability is a real differentiator as it does not require the marketer to move their data. Given the data challenges that marketers

cited it should be no surprise that the ability to tap into internal CRM data or leverage stream real-time data is a top consideration in ESP selection. Some ESPs cater to this capability (Section III).

Figure 10: Top 10 Most Important ESP Product Features, Enterprise – 2019



Question: What are the 10 most important product features when selecting an ESP application (select 10).

Source: The Relevancy Group Executive Survey n=360 2/19, Enterprise n=211 2/19 U.S. Only.

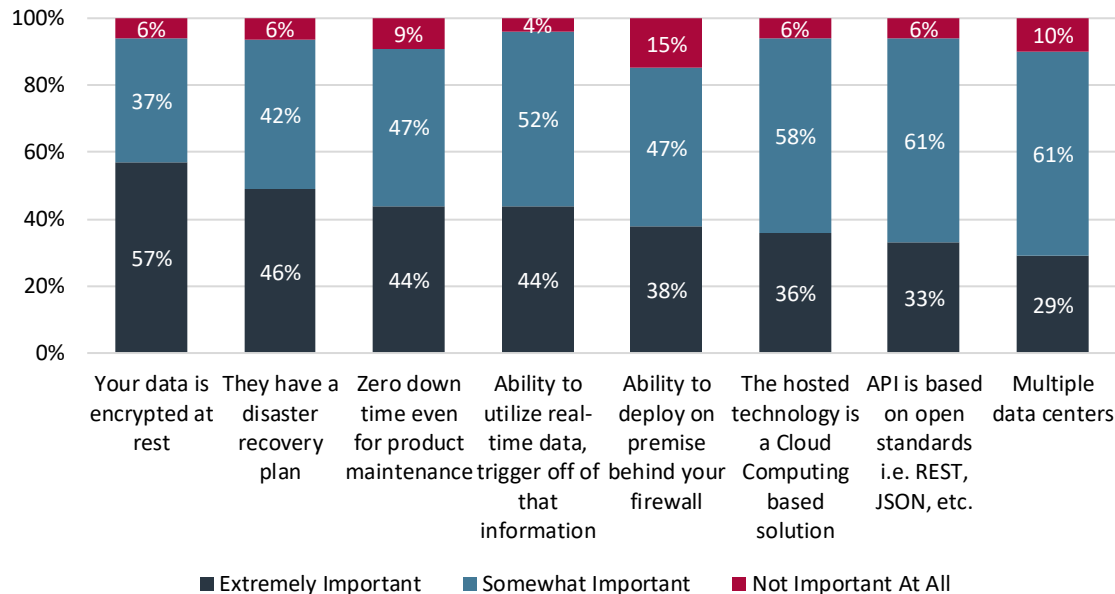
ESP Infrastructure Features Are Driving Marketing Purchase Decisions

Enterprise email marketers are increasingly sensitive to uptime, security and overall disaster recovery planning. Accordingly, marketers are sensitive to the following infrastructure capabilities:

- **“Cloud” and Data Encrypted at Rest:** While 57 percent of marketers cite this as extremely important in their ESP purchasing decision, only 37 percent of respondents stated that having the hosted technology as a cloud computing-based solution is just as important. Buyers are often confused as this rest encryption feature is typically exclusive to true a cloud computing infrastructure. This indicates that marketers love the idea of data encryption at rest but don’t fully grasp the necessary technical underpinnings. This situation is driven by the misplaced use of the word “cloud,” which is compounded by the many ESPs and vendors that tack the word “cloud” on the end of their branding when in fact none or very little of their solution is cloud based. Marketers should understand that if ESPs use that word, it is necessary to investigate those claims fully. The ability to encrypt data at rest is not a trivial task and often one that marketers need to pay extra for. Some vendors such as iPost and Zeta Global include this capability.
- **Disaster Recovery Plan:** The 46 percent of marketers that prioritize a disaster recovery plan further underscore the aforementioned reliability point. Marketers expect redundancy: 42 percent expect ESPs to have multiple data centers (Figure 11).
- **Zero Down Time for Maintenance:** Just as with any relationship, ESP-marketer relations that are high maintenance often get booted. Forty-four percent of marketers state zero down time including maintenance is extremely important.
- **Behind Firewalls and APIs:** Marketers emphasize these features too. We often hear from ESPs

that they can meet a particular client need if all of the data resides in their platform. Vendors that win can demonstrate extensible, elegant, scalable, efficient and effective capabilities based on current scalable open API standards (i.e. SOAP, REST, JSON). ESPs have massively different capabilities in these all-important areas and must remove integration illusions and demonstrate real-time open API integration and flexible deployment options.

Figure 11: Importance of ESP Infrastructure Features in Purchase Decision, Enterprise – 2019



Question: When selecting an Email Marketing Solution how important are the following features in your purchasing decision? (Select one for each option) Source: The Relevancy Group Executive Survey n=360 2/19, Enterprise n=211 2/19 U.S. Only.

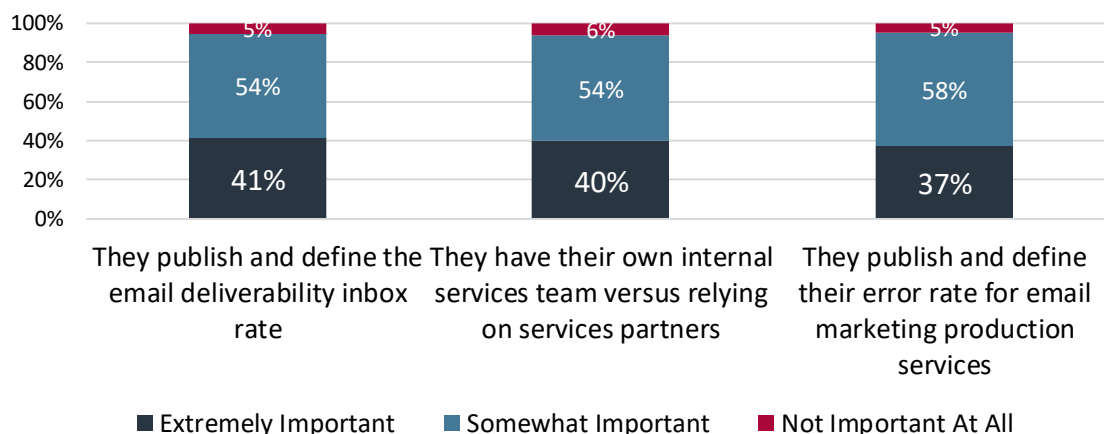
ESP Services Attributes Can be Equally as Important in Purchase Decisions as Infrastructure Features

We have documented that services, a vendor's reputation, and staff quality are top criteria in the ESP selection process, but for many marketers, service deployment is of equal importance to infrastructure features. When asked about the importance of these attributes the following attitudes arose:

- Marketers demand that the ESP define and be transparent about quality:** Marketers are so enamored with the need for services that 37 percent said it is extremely important that the ESP publish their error rate for email production services. Our research indicates that the mean reported error-free rate for email agencies (on a campaign, not message level) is 99.17 percent. It is critical for marketers to understand what constitutes an error and the mathematics behind the error rate.
- Some marketers would rather work with a vendor that had their own services team:** Forty percent of marketers stated that it is extremely important to work with a vendor that has their own internal services team versus relying on services partners. Another 54 percent stated they somewhat agree (Figure 12). This makes a huge difference when it comes to ESP selection as large software cloud-oriented vendors such as Salesforce and Oracle that push the servicing relationship to one of many qualified services firms (see [The Relevancy Ring – Email Agency Buyers Guide, 2018](#)).

- *Marketers want their ESPs overall mean deliverability rate published and defined:* Sixty-two percent of marketers stated they had knowledge of how their ESP calculates their deliverability and inbox placement rates, indicating that 38 percent were unaware of what went into this all-important measure. Forty-one percent stated that it is extremely important to them that the ESP publish and define the email deliverability inbox rate, 54 percent stated it was somewhat important. Given the importance that buyers are putting on deliverability tools, ESPs that transparently publish this information will likely benefit over those that do not.

Figure 12: Importance of ESP Services Attributes in ESP Purchase Decision, Enterprise – 2019



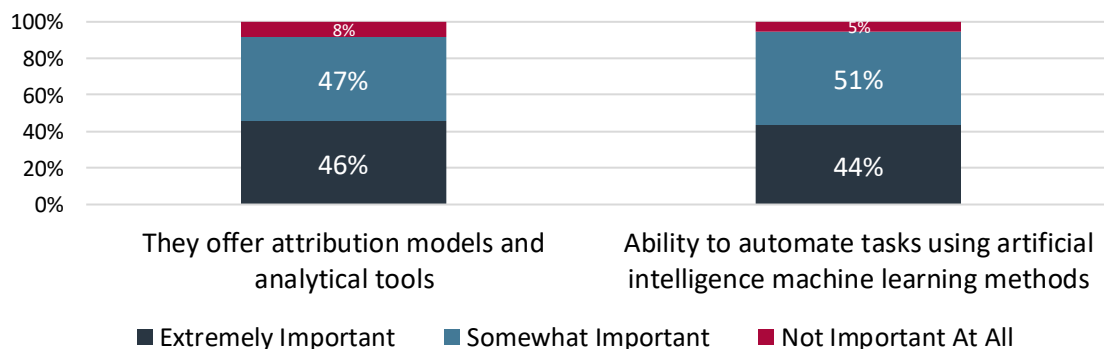
Question Asked: When selecting an Email Marketing Solution how important are the following features in your purchase decision? (Select one for each option)

Source: The Relevancy Group Executive Survey n=360 2/19, Enterprise n=211 2/19 U.S. Only.

Automation Via AI/Machine Learning and Attribution Tools Are Extremely Important in ESP Selection

Enterprise marketers single out the ability to automate processes, recommendations, and tasks via AI/machine learning and attribution capabilities as extremely important in the ESP selection (Figure 13). When asked if their ESP offered AI/ML for personalization, 62 percent of marketers said yes and 38 percent said no. These attitudes signal enterprise marketer maturation and validates the product development, as well as acquisitions of vendors that have accelerated development of these product features.

Figure 13: Importance of AI Automation and Attribution in ESP Purchase Decision, Enterprise – 2019



Question Asked: When selecting an Email Marketing Solution how important are the following features in your purchasing decision? (Select one for each option)

Source: The Relevancy Group Executive Survey n=360 2/19, Enterprise n=211 2/19 U.S. Only.

SECTION III – Evaluation of ESP Vendors, Enterprise

Section III Introduction: The Relevancy Ring Evaluation and The Relevancy Group Approach

The nine vendors reviewed include: Adobe, Bluecore, Cheetah Digital, iPost, MessageGears, Sailthru, Salesforce Marketing Cloud, Selligent Marketing Cloud and Zeta Global. These vendors are all leaders. These companies serve enterprise and mid-market senders. In this evaluation we are focused on the needs of enterprise marketers.













































































































This year, the Relevancy Rings, which measures their functionality and satisfaction against participant and industry averages, are specific to each vendor. The functionality highlighted relate to three key themes that are most important to enterprise marketers. They are Automation, Analysis/Attribution, and Real-time marketing.

During the three-month research process, we spoke to marketers about their needs and aspirations, then we evaluated how the vendor solutions are poised to eradicate marketer challenges and meet these aspirations. The report details the aspirations and hurdles that marketers face, the most desirable vendor features and attributes, as well as in-depth analysis of these nine vendors. For more details, consult the methodology at the end of this report.

ESPs Satisfy Everychannel Needs

Central to the ESP functionality are everychannel capabilities (Figure 14). With few exceptions these enterprise vendors can address nearly every channel and most have attribution and AI/machine learning capabilities. Note that the features marked below as native may incur additional costs.

Figure 14: ESP Everychannel Capabilities Evaluated

Channel/ Vendor	Adobe	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global
SMS/MMS									
Push App Messages									
Mobile Deep Linking									
Social Publishing									
Social Listening									
Display Advertising									
Recommendation Engine									
Email Hygiene									
Data Enrichment									
DMP/Identity Management									
Multichannel Attribution									
Predictive Modeling									














































 = Native  = Partner, Separate Login &/or Fees  = Partial Offering &/or Extra Fees  = Custom  = Not Offered

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 4/19

Despite Differences in Success Metrics, Great Parity Exists with Testing Functionality Across ESPs

Traditional testing methods imply rework: after learning what is successful, marketers must go back and recast the winning version. All ESPs evaluated have the capability to deploy automated tests, which feature the ability to automatically send the winning version (Figure 15).

Figure 15: ESP Testing Capabilities Evaluated

Testing/ Vendor	Adobe	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global
Hold Out a Specified Percentage, Uses Random Selection									
Automated A/B Testing									
Automated Deployment of the Winner									
Metrics that can Determine the Automated Winner	Open, Clicks Unsubscribe Rate.	*Manual; Open, Clicks, Conversion, Revenue	Opens, Clicks, Any Metric the Marketer Desires	Based on Marketer Goals	Opens, Clicks	Opens, Clicks, Conversion, Revenue, Page Views	Opens, Clicks, Conversion	Views, Clicks, Revenue, Number of Orders	Opens, Clicks, Conversion, Revenue
Multivariate Testing									
Testing Consistent with Mailings and Lifecycle Campaigns									

 = Native  = Partner, Separate Login &/or Fees  = Partial Offering &/or Extra Fees  = Custom  = Not Offered

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 4/19

Place Emphasis on Vendor Reputation, Infrastructure Security and Uptime Performance

As evident in Section II, ESP infrastructure features are driving marketing purchasing decisions. Given the mission-critical nature of email marketing, particularly in many industries such as financial services, retail and travel, none of the technical prowess or user experience of an application matters unless it is running 24/7 365 days a year. Marketers must ensure that they are working with a vendor that has redundancy and can guarantee redundant secure data centers.

Such peace of mind not only makes for good sleep, but also ensures that email messages (which may dictate industry compliance for some, and revenue for others) will continue to manifest. All the enterprise vendors evaluated meet the necessary infrastructure requirements. Real differences exist based on data center numbers, types and the ability to be fully redundant (Figure 16). Related to prospective vendor's data infrastructure is their ability to comply with the EU General Data Protection Regulations (GDPR). While not detailed here, buyers must investigate the ESP's GDPR capabilities and their preparedness for the California Consumer Privacy Act (CCPA).

Figure 16: ESP Data Center and Maintenance Details

Function/ Vendor	Adobe	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global
Active or Passive	Active/Passive	Active/Active, Google Cloud Platform, no additional fee	Active/Active no additional fee	Active/Active no additional fee	Active/Active no additional fee	Active/Active no additional fee	Active/Passive, can do Active/Active for a fee	Active/Passive	Active/Active
Number of Data Centers	Multiple including Americas, Europe and Asia. In each region, there are multiple data centers	Multiple, Google Cloud Platform	6 collocated Tier 4 data centers.	2, AWS and Raging Wire	4 Sites, U.S., 1 – AWS, EU 1 AWS, 2 – TX, CA All are SOC 2 Compliant and Certified	Multiple sites in US, EU, AU, Cloud Infrastructure	4	Selligent runs the European client base on a European data-center and the US client base from the US datacenter.	Tier 4 AWS Data Centers
Maintenance Windows	Guarantee 99% availability. Maintenance has no impact on sent emails. Maintenance performed at an agreed upon time. Platform performance will not be compromised.	Ships code every business day, and that can include maintenance items. This does not impact email delivery or functionality, and Bluecore abides by strict SLAs and up-times.	Pre-Planned, application updates are performed monthly (four-hour window). Most does not impact a client's access to the application.	Release 2-3x per week. This has no effect on clients. To date, we have not had a maintenance period that affect clients.	Never had to schedule downtime for maintenance or software upgrades	Not Reported	Due to our high availability throughout the technology within the platform, we do not typically take 'downtime' for maintenance windows.	Selligent runs 2 regular maintenances per month. This is 4 hour period starting at midnight per maintenance but downtime is limited to max 15 minutes per client per maintenance.	Planned maintenance is coordinated solely on client demand 24/7/365. Schedule is followed by approval from each client for a given window of time needed to perform maintenance.
Reported Uptime	In the past five years, Adobe has never had an unplanned outage that affected their customers globally.	Since 2017, 2 brief outages resolved within 4 hours. One overnight delay of 9.5 hours.	Not Disclosed	System was never fully offline. Database may have had latency for small deration or UI unresponsive or messages delayed but no data loss.	4 hours of unplanned downtime in the past 4 years.	99.99% for the past 36 months.	99.99%	A long outage of the company's Google hosted module in the recent past due to massive issues on the GCP Kubernetes platform at Google.	4 unscheduled outages over the last 4 years, which were all restored in under 4 hours, none of which impacted any client's customers

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 4/19

Not All Email Service Providers Offer Services

The majority of marketers utilize services in some fashion. Most of the enterprise vendors evaluated offer some services, will many partner with outside agencies (Figure 17).

- *ESPs that offer full services and technology approach include:* Cheetah Digital and Zeta Global. Bluecore also has a high concentration of full-service clients.
- *ESPs that offer services internally or via partnership include:* Adobe and Salesforce Marketing Cloud. Both have internal services, but also work with external partners.
- *ESPs that lead with technology first:* Beyond deliverability and technical/integration services, vendors such as iPost, MessageGears, Selligent Marketing Cloud are focused on their technology solution first. While they offer excellent customer support, they go to market as a self-service solution.

For an in depth look at email marketing agencies, get TRG's [Email Agency Buyer's Guide](#).

Figure 17: ESP Services Details

Service/ Vendor	Adobe	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global
Percentage of clients that are Full Services	Approximately 10% including service partners	41% Full Service, 84% Utilize Some Services	50% Full Service, 90-95% Utilize Some Services	10% Full Service, 20% Hybrid 70% Self Service	5% Full Service, 75% Utilize Some Services	0% Full Service, 85% Utilize Some Services	Support clients how they want to be serviced	100% of clients utilize some services, but only few are Full Service	52% Full Service, 48% Utilize Some Services
Hours of support for Full Services	24/7 for most services, some are 24/5	Business hours, plan 24/7 in 2019	24/7	24/7	Business hours (8-5), 24/7/365 for critical issues	N/A	24/7, Platinum Support	24/7	24/7
Creative Services Headcount	Not Disclosed	Not offered	Included in Strategic Services	6	6	Not offered	Not Disclosed	Not offered	15, majority are U.S. based
Strategic Services Headcount	Not Disclosed	3	About 100, 50% are outside U.S.	3	6	Not Disclosed	Not Disclosed	Not offered	12, majority are U.S. based
Production Services Headcount	Not Disclosed	11	About 500, 50% are outside U.S.	6	6	Not Disclosed	Not Disclosed	Via Partners	183, majority are outside of U.S.
ESP/Client Collaboration and Approval Tools	Native and external applications	Wrike and Google Documents	Native and partner applications	Slack, Hipchat, Google, Skype	Native	"use external applications for this purpose"	Native and partner applications	They have approvals capabilities	On 1H 2019 Roadmap
Frequency of Client Meetings	Customer Success Managers are assigned to every customer	full - at least 1x/wk on calls and 1x/quarter in-person hybrid/collaborative - at least 2x/mo on calls and 2x/yr in person	Clients get a dedicated client success manager, acct manager, monthly	Monthly/ quarterly live, weekly online video	Meet with full service clients weekly during the on-boarding process. This time is included in their total cost.	Daily communication and weekly meetings; however should a client wish to meet more regularly the arrangement is fully flexible to their needs.	Depends on client engagement but all clients engage with a Client Success Manager	Weekly and Quarterly review meetings with our full-service clients. The costs are not included in our pricing.	On-Demand, Weekly, Monthly and Quarterly
Error Free Rate	0.1% error rate	99%	99%	99%	Not Disclosed	Not Disclosed	Not Disclosed	99.9%	100%
How is Error Free/Accuracy Rate Calculated?	based on the number of campaigns with errors per total number of sends in a year	This is calculated using Mixpanel's measurement of actions taken by internal Bluecore users against # of issues logged.	Total number of errors subtracted from total number campaigns / total number campaigns	Not Disclosed	Not Disclosed	Not Disclosed	Not Disclosed	Not Disclosed	Not Disclosed

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 4/19

Some Variance in Delivery Tools & Services – All Are Robust

All vendors in the report offer the basic services required to register, authenticate, and 'warm' or 'ramp' IPs, as well as provide some level of ongoing delivery support and mitigation services. However, the following items stand out (Figure 18):

- **Pre-send rendering and inbox placement reporting:** Every platform reviewed offers some level of pre-send rendering. Some such as Bluecore, iPost and MessageGears include those rendering capabilities at no additional fee. Most vendors partner with either Return Path, 250ok, or both, to provide additional delivery insights such as inbox rate, and domain-level delivery metrics. One or two of these solutions are fine, as methodologies of inbox placement measurement differ widely from providers that rely on panels versus seed lists. Marketers must ensure that they are familiar and comfortable with the methodology of such inbox placements and confirm that the measure has significant implications in guiding optimization strategies.

- **Delivery metric methodologies are mixed:** There seems to be a lack of a consistent measure for deliverability across these ESP participants. Marketers must investigate the metric methodology before making choices on the merit of an ESP's stated deliverability rate. At 20 plus years into the commercial ESP sector, we would expect that deliverability methodologies are the same, but apparently some are gaming to drive higher rates. It is a simple metric, the number of emails sent minus the number of bounced messages, including any send errors.

Figure 18: ESP Deliverability Details

Service/ Vendor	Adobe	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global
In-house Deliverability Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Deliver Messages Based on Relative Campaign Priority That is Set by The Marketer	Yes, Native Feature	Yes, Marketer and AI Driven Auto-Prioritize	Yes, Achieved via Business Rules	Yes, Native Feature	Yes, via account selection and account priorities	Yes, Native Feature	Yes via custom queries	On 2019 Product Roadmap	Yes, Native Feature
Performance Alerts if Metrics Falls Below Pre-set Criteria	Yes, email and in product alerts	Yes, email alerts	Yes, Triggers Report Summary	Yes	Yes	Yes	Yes via custom report that can be triggered at a threshold	No, But reporting on any campaign is available where this can be consulted.	Yes, Open/Click regardless of medium. SMS alerts can be sent.
Deliverability Partner	Return Path, 250ok	Return Path, 250ok, eDataSource	Return Path	250ok	Return Path, 250ok	250ok	Return Path	Return Path, 250ok	eDataSource, Return Path
Rendering Partner	Litmus	Email on Acid built into UI	Return Path, Litmus	Email on Acid built into UI, no additional fee	Litmus built into UI	Email on Acid built into UI	Return Path	Litmus built into UI, Moving to Email on Acid	Email on Acid and Litmus
Authentication Standards	DKIM, SPF, DMARC	SPF, DKIM; rDNS – no additional fees	SPF, DKIM; DMARC via a partner w/ fees	SPF, SenderID, DKIM, DMARC – No additional fees	SPF, DKIM, DMARC, SenderID – No additional fees	SPF, DKIM, DMARC	SPF, Sender ID and Domain Keys, DKIM, DMARC	SPF, DKIM, DMARC – No additional fees	rDNS, SPF, DK, DKIM, DMARC – No additional fees
Competitive Intelligence Partner	eDataSource	eDataSource	eDataSource, Custom Benchmark reports	eDataSource, Return Path, Benchmark reports	Custom, can utilize eDataSource	Provides their own internal vertical benchmarking	Return Path	Return Path and Internal benchmarking figures only	eDataSource, Benchmark reports
Delivery/Privacy Associations	ESPC, CSA, M3AAWG	IAPP, CIPP	ESPC, CSA, IAPP, Signal Spam	Not active, but work with partners that are	M3AAWG, ESPC	OTA, MAAWG, ESPC and EEC	ESPC, MAAWG, OTA, Spam Haus, DDV, Signal Spam	M3AAWG, CSA	ESPC, M3AAWG, OTA
Delivery Rate Calculation	all email sent minus errors, exclusions and hard bounces. All formulas are public	This formula is also available in the UI as a tooltip	Number of messages sent, minus the number of bounced messages	Total universe of sent and that which reached the inbox "unfiltered". (this includes all the standard bounce/complaints and opt outs, but also takes into account google filtering	Seed list results weighted by list composition	Total emails sent minus email that bounced	Total attempted, less all failures, divided by the total attempted	Number of successfully delivered emails – (indirect/asynchronous bounces & list unsubscribe & spam complaint)	Total attempted, less all failures, divided by the total attempted

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 4/19

Reporting and Analysis Features Are Critical to Optimizing Marketing

Reporting and analytics is a top priority in 2019, and it remains a key feature that often drives ESP purchasing selection. In most industries these features are the top consideration. With some exceptions in the breadth of the offering we see little variance in the vendors we reviewed in this area (Figure 19).

Many of the providers who are focused on campaign management and everychannel integration support multi-touch, cross-channel attribution models. Adobe, Cheetah Digital, MessageGears and Zeta Global have the most sophisticated attribution analysis tools. Many of the other vendors can meet this functionality through custom work and partnerships.

There have been exciting developments in data visualization over the last year. Several vendors are allocating resources to make our troves of email data easier to analyze, understand, and act on, through more powerful data visualization tools. Adobe, Cheetah Digital, iPost, MessageGears and Zeta Global have offerings that allow for some data manipulation and visualization. With their EMVision offering, iPost has included Tableau as a front end on their analytical data warehouse. Selligent Marketing Cloud and Bluecore are utilizing their AI foundation to drive analytical insights. MessageGears revealed their new reporting interface, a significant improvement over their previous offering. The firm provides lovely visualizations for engagement data. Salesforce Marketing Cloud has Google analytics 360 integration, which will make data from Google Analytics 360 visible in Salesforce Marketing Cloud reporting UI for a more complete understanding of campaign performance.

All of the vendors offer a rich set of APIs that allow marketers to pull reporting data into other in-house analytics tools.

Figure 19: ESP Reporting and Analytics Details

Function/ Vendor	Adobe	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global
In-house Analytic Services	●	●	●	●	●	●	●	●	●
Crosschannel Attribution Reporting	●	●	●	○	●	●	●	●	●
Export in These Formats	Excel, PDF	CSV, custom configurations for others	Excel, PDF, CSV, DOCX, RTF, XLSX, PPTX and SFTP.	Excel, CSV, PDF	CSV, XML	API, CSV, JSON, Report Exporter	CSV, ZIP, PDF, Excel, TIFF, XML, MHT	PDF, CSV	PDF, Excel, CSV, DOCX, RTF, ODT, ODS, XLSX, PPTX
Ability to Generate Custom Reports in the Application	●	●	●	●	●	●	●	●	●
User Generated Custom Dashboards	●	●	●	●	●	●	●	●	●
Reporting is available within 24 hours of send time	●	●	●	●	●	●	●	●	●
Subscriber Level Reporting	●	●	●	●	●	●	●	●	●
Report that lists campaigns delivered over a specific time with KPIs	●	●	●	●	●	●	●	●	●
Device Level Reporting	●	●	●	●	●	●	●	●	●
Link Level Reporting	●	●	●	●	●	○	●	●	●
Creative Level Performance Reporting	●	●	●	●	●	○	●	○	●
Distribute Reports to list at specific times	●	●	●	○	●	○	●	●	●
Other Information	Offers drag and drop interface for dynamic content reporting	Provides for automated notifications and scheduled reports of specific metrics	Clients can customize reports and dashboards, and select many visualizations	They offer a BI tool EMVision, which is an analytical data warehouse with Tableau front end for visualization.	All data is delivered back to customers and can be used to perform ad hoc reporting on their own	Additional reporting based on user acquisition source, performance over time	All native and non-native data sources are available for reporting in real time	Consumer Intelligence module leverages AI to offer venn diagrams to find lookalike audiences	At no additional cost users can utilize their out of the box analytics to generate custom visualizations.

● = Native ● = Partner, Separate Login &/or Fees ● = Partial Offering &/or Extra Fees ● = Custom ○ = Not Offered

Source: The Relevancy Group-Relevancy Ring ESP Questionnaire 4/19

AI/Machine Learning Are Making ESPs Easier to Use and More Valuable

The ability to leverage machine learning to improve offers, predict the best journey, automate data integration, and simply take over tasks that a marketer used to have to do are present in many of the enterprise ESPs that we reviewed. The stand-outs we saw are as follows:

- **Adobe** – Central to Adobe’s Experience Cloud is their AI tool Sensei, which is a framework and set of intelligent services that dramatically improves the design and delivery of digital experiences. Adobe is using AI to handle attribution by algorithmically determining the impact of specific marketing touch points, enhancing personalization by recommending relevant content, and ultimately, driving more valuable customer experiences.
- **Bluecore** – The solution is based on an AI foundation that matches customers to offers and message templates creating a paradigm shift in what is possible in email automation. The through note of their AI capabilities are driving tremendous email marketer efficiencies and optimization.
- **Cheetah Digital** – Cheetah Digital is hyper-focused on marketers, specifically asking “how do they create revenue generating outcomes for their clients?” They utilize AI for descriptive, predictive, and prescriptive outcomes, as well as build their predictive models via academic algorithms. The company also uses AI to build data associations based on predictive inferred affinity. This has created new efficiencies for their clients, as it has accelerated the data onboarding and data table relationships. The company doesn’t use third-party tools.
- **Salesforce Marketing Cloud** – Salesforce offers an email engagement prediction engine, which determines who is likely and least likely to engage. For example, this data is then used for targeting in the appropriate channel, such as guiding less engaged customers into a display ad campaign. Their AI engine, Einstein, is used throughout the application and across all Salesforce Clouds.
- **Selligent Marketing Cloud** – Their AI solution, Cortex is used to drive efficiencies in personalization, best offer, channel and time of day. Cortex utilizes data and universal customer profiles to optimize and automate audience scoring, journey mapping and offer management. This capability rivals that of their fellow ESP and Cloud peers.
- **Zeta Global** – In 2017, Zeta acquired AI/machine learning firm Boomtrain, and has done an excellent job of integrating it throughout the ZetaHub 2.0. Their website beacon collects and informs machine learning allowing for real-time offers and messaging across every channel. They use AI for asset meta-tagging classification and send-time optimization via their tool Prime Time, as well as in the analytics to look at next best channel. It was one of the more tightly integrated and robust AI offerings that we encountered.

Progressive Profiling and Real-Time Stream Segmentation Is an Important New Reality for Marketers

Progressive profiling had related to capturing customer preferences over time. Now in the age of site tags to capture customer signals in real-time stream and apply AI/machine learning, it is possible to target and segment customers at the individual level in real-time. This is different than historical CRM and RFM (recency, frequency, monetary) segmentation. While this is still necessary and the approach that most marketers take, many marketers and ESPs are moving to an approach that utilizes real-time data and automations to deliver highly relevant individualized experience. This is now possible and many of the ESPs evaluated in this report have orchestrated their products to ensure that marketers utilize this new approach to personalization. ESPs including Adobe, Bluecore, MessageGears, Sailthru, Selligent and Zeta Global led their demos with this approach. The future is a segment of one and that notion of individualization is powered by real-time stream capable ESPs.

Complete Parity with Journey Management Features and Drag/Drop Template Editors

While just a few years ago massive differences could be found in journey management and graphic template editors. The usability variances have been removed and we found all of the ESP solutions reviewed to be intuitive. In fact, most all of the vendors reviewed use the BEE email editor that is incredibly easy to use drag and drop builder for designing mobile responsive editors. While not all ESPs reviewed utilize BEE, all had updated their editors resulting for many which looked like a derivative of BEE.

Scoring ESPs To Marketer Aspirations, Challenges and 2019 Themes – The Relevancy Rings

We asked the participants in this guide to demo their capabilities on the following themes that encapsulate 2019 marketer aspirations, challenges and themes. They are as follows:

- *Automation:* Automations including triggered campaigns, and the ability to automate routine marketer tasks which may leverage AI/machine learning, are necessary to address the aspiration of improving automation and resource-related challenges (Figure 4).
- *Real-Time:* Marketers aspire to implement more real-time marketing and improve data and system integrations (Figure 3). Progressive profiling, stream real-time segmentation, and individualization is now possible. These tactics are often more efficient and effective than traditional RFM and historical segmentation. These improvements rely on the AI/machine learning technologies and innovations in hybrid ESP infrastructure.
- *Analysis/Attribution:* This theme relates directly to measurement challenges and the analysis aspirations including improved attribution for the everychannel marketer. We also reviewed the traditional reporting tools including custom report and business intelligence visualizations.

Attributes Measured. We scored each vendor on three areas for each one of these themes.

- *Completeness:* A measure of how complete this functionality is within the vendor's platform. For example, did they apply to every channel and system events and were they native to the application.
- *Uniqueness:* A measure of how unique the functionality is from their industry peers. For example, is the vendor utilizing AI/machine learning, repeatable playbooks or a framework.
- *Quality:* A measure of the quality of the user interface of this functionality. Functionality that was particularly usable and intuitive scored higher.

Understanding the scoring.

- Every analyst scored each of the themes and each of the attributes. Those scores were then averaged and in the following Relevancy Rings.
- Scoring: 0-5 points for each attribute scored.
 - 0=No capability
 - 1=Significantly below expectations and/or requires customization
 - 2=Below expectations and/or requires customization or partner
 - 3=Meets expectations, similar to peer group. This is a baseline and not a bad score
 - 4=Above expectations, better than most
 - 5=Significantly exceeds expectations, best in class

View the Relevancy Rings in the Vendor Profiles. The scorecard data is below (Figure 20).

Figure 20: The Relevancy Ring Scorecard Data – ESPs 2019, Enterprise

	Adobe Campaign	Bluecore	Cheetah Digital	iPost	MessageGears	Sailthru	Salesforce Marketing Cloud	Selligent Marketing Cloud	Zeta Global	All Participant Average
Automation Completeness	4.5	4	4.5	4	4.5	4.5	5	4	4.5	4.4
Automation Uniqueness	4.5	5	3.5	4	4	3.5	3.5	4	4	4.0
Automation Quality	4	5	4	4.5	4	4	3	4	4.5	4.1
Real-Time Completeness	4.5	4.5	3.5	4	4	3.5	3.5	4	4	4.0
Real-Time Uniqueness	4.5	4	4	4	5	3.5	3.5	4.5	5	4.2
Real-Time Quality	4	5	4	4	4	5	3	4	5	4.2
Analysis Completeness	4	3.5	4.5	3.5	3.5	3	3.5	3.5	4	3.7
Analysis Uniqueness	3.5	3	5	5	3.5	3	3.5	3.5	4	3.8
Analysis Quality	4	3	4	4	4	3.5	3	3.5	4	3.7

Source: The Relevancy Group, 4/19

The Relevancy Ring Client Satisfaction Awards

Client satisfaction can't be simulated. The Relevancy Group spoke with a sample of reference clients from several vendors and leveraged our email marketer survey panel to collect anonymous satisfaction data from buyers of these solutions. While we weigh this panel data in our final analysis, this data highlights the customer's pure voice. The Relevancy Group is proud to present the Gold and Silver Relevancy Ring Client Satisfaction Awards, which is a measure of client satisfaction across 15 categories (Figure 21). These client affirmations signal client trust and respect for ESP vendor partners in these categories.

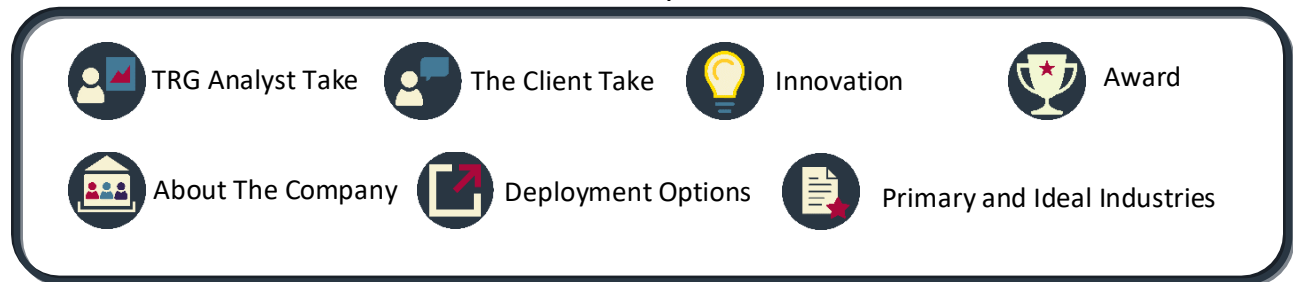
Note that there are ties, as in some cases the mathematical differences were so slight in the Number 1 Gold position or in the Number 2 Silver position that we couldn't distinguish a clear winner. We find that client satisfaction and overall vendor reputation often drives vendor selection.

Figure 21: The Relevancy Ring Client Satisfaction Awards – ESPs 2019, Enterprise

The Relevancy Ring Client Satisfaction Award Categories	Gold Award	Silver Award
Product Innovation	MessageGears	Bluecore
Infrastructure/Stability	Cheetah Digital, Sailthru	Adobe
Campaign Execution	Adobe, Bluecore	Cheetah Digital, MessageGears
Deliverability Tools and Services	iPost	MessageGears, Sailthru
AI & ML	Bluecore	Adobe, Cheetah Digital
Educational Resources	Bluecore	Cheetah Digital, Zeta Global
Account Management	iPost, Zeta Global	MessageGears
Strategic Services	Bluecore, Selligent	Adobe, Zeta Global
Production Services	Cheetah Digital	Zeta Global
Technical Services	MessageGears	Bluecore, iPost
Creative Services	Cheetah Digital	Salesforce Marketing Cloud
Omnichannel Marketing	Adobe	Sailthru
Integration Capabilities	MessageGears	Zeta Global, iPost
Technical and Customer Support	MessageGears	iPost, Zeta Global
Usability	Selligent	Sailthru
Overall Value	Adobe, MessageGears	Selligent, Zeta Global
Industry Expertise	Zeta Global	Bluecore

Source: The Relevancy Group-Relevancy Ring ESP Reference Client Interviews Q1 2019
The Relevancy Group Executive Survey n=360, 2/19 U.S. Only

Vendor Profiles - Vendor Profile Icon Map



Adobe – <https://www.adobe.com/marketing/campaign.html>



Adobe's vision is 'changing the world through digital experiences.' Adobe Campaign is a comprehensive solution for the orchestration, launch and measurement of personalized cross-channel marketing campaigns, that fuel meaningful customer experiences. Their clients are everychannel marketers, 67 percent utilize three or more channels and almost 39 percent utilize two or more solutions from the Adobe Experience Cloud. Adobe Campaign has demonstrated that they can effectively scale and deliver valuable customer experiences across every channel. While Campaign is part of the larger Adobe Marketing and Experience Clouds, it can also be deployed in a hybrid manner where the data elements reside in the customer's data center or cloud, and the sending and message assembly portions reside in Adobe's cloud. One area that impressed us was their passion and ability to push the marketer to improve the sophistication of their marketing efforts. Adobe has hooks into the application allowing them to understand how clients are utilizing the tool. If the client is not using parts of the application, then they provide a playbook for the customer success manager to have a conversation with the client. This ensures that the marketer iterates, identifies new objectives and moves along the marketing maturity curve. The solution makes excellent use of real-time data providing progressive profiling to address the customer experience across every channel. Their Sensei AI tool is a framework that optimizes subject lines, content tagging, dynamic content, offer management and analytics. Some of the strong Sensei features that impressed us included predictive send-time optimization, based on subscriber engagement data, as well as Identifying at-risk, engaged, and fatigued segments for predictive churn. Sensei is always continuously learning and is used to prioritize offers one over another. The orchestration and journey management tools are simple and intuitive. Marketers must simply drag and drop into the email designer. Marketers that utilize Dreamweaver will love the ability to launch email from within Dreamweaver and its bi-directional tie to the creative cloud allows for in-email image editing via their robust and intuitive creative tools. The content is synched between the creative and marketing clouds. We like their user interface, which is tremendously intuitive. Leveraging the Adobe unified profile, Campaign can easily tap into other parts of their marketing cloud including their targeting application and analytics. They are doing stream-based segmentation and are utilizing Marketo purchasing data. They have a vast partner network including Microsoft Dynamics. If you are utilizing other aspects of the Adobe Experience Cloud, you must give Adobe Campaign strong consideration.



Adobe earned universally high customer satisfaction marks in virtually all areas that The Relevancy Group measures. They earned especially high scores in the areas of Campaign Execution, Omnichannel Marketing, Overall Value, Infrastructure/Stability, use of AI/ML, and received exemplary scores across the board. Customers we spoke with had high praise for Adobe Campaign and remarked that "[they're] getting a ton of value from the product" and that "return on investment has been tremendous." One potential driver of those positive customer experiences is a training/onboarding program that customer report as being "extremely helpful," and the Adobe Experience League, which has blossomed into "a true community that enables learning." Customers also expressed love for the Adobe account teams and appreciate "extremely quick turnaround times," and reported that the team "anticipates needs ahead of time" and ensures programs run "smoothly and efficiently."



What's innovative for the marketer? If underutilized, the application and services team will inform the marketer of areas for optimization pushing them to become more sophisticated.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Campaign Execution, Omnichannel Marketing, Overall Value; Silver: Infrastructure/Stability, Artificial Intelligence and Machine Learning, Strategic Services



About The Company – Eight North American locations: San Jose, CA, Boston, Washington D.C., New York, Seattle, Salt Lake City, San Francisco, and Ottawa. EMEA: Belgium, Denmark, France, Germany, Austria, Ireland, Switzerland, Italy, Netherlands, Scotland, Republic of Moldova, Poland, Romania, South Africa, Spain, UK, Sweden. APAC: China, Japan, Hong Kong, Korea, Singapore, India, Australia, New Zealand. South America: Brazil

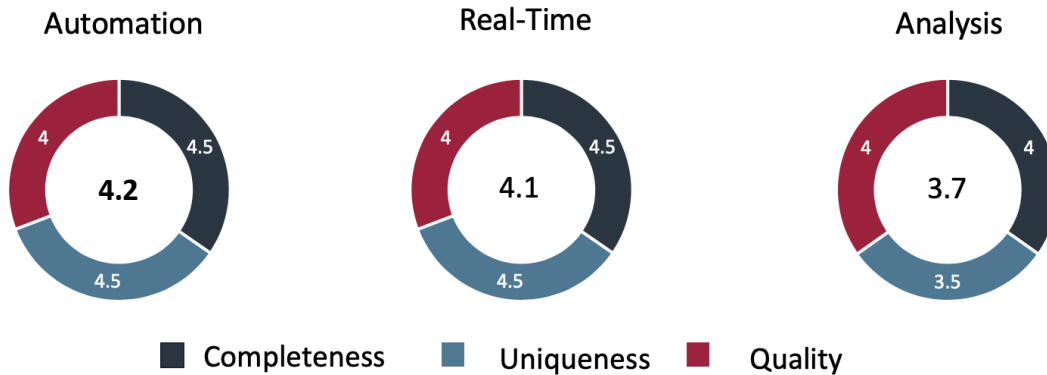


Deployment Options – Software-as-a-Service (SaaS), Managed Service, Hybrid, On Premise



Primary and Ideal Industries – Retail, Financial Services, Media/Entertainment, Manufacturing, Telecommunication, Insurance, eCommerce, Services, Printing and Publishing

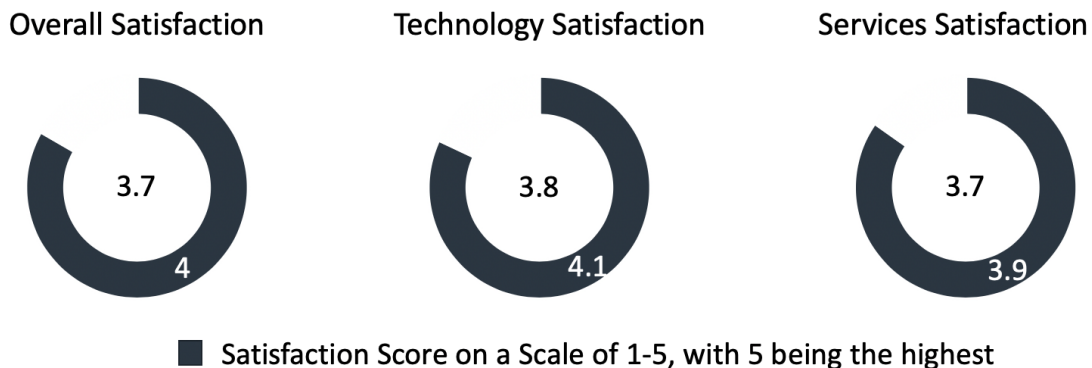
Adobe Campaign Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Adobe Campaign Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews Q1/19

The Relevancy Group Executive Survey n=306, 2/19 U.S. Only

Bluecore – <https://www.bluecore.com/>



Bluecore launched in 2013 as solution to assist email marketers to easily optimize email triggers, such as abandoned browsers. Today, Bluecore is a full featured stream-based ESP that uses a site tag to handle identity matching, import catalog data, and to communicate to customers in highly relevant ways. They have a patent around managing ecommerce product catalog via site tags, and how that data is organized. A key tenet of Bluecore's customer philosophy is, "performance as a strategy." This tenet expands to Bluecore's pricing model, which is performance-based. They charge based on clicks and their clients have reported impressive 40x lifts in revenue per click. We were completely impressed with the ease of deployment. All clients get a dedicated onboarding manager and client deployments take just 45 days. Marketers begin with the end in mind, optimizing towards decided upon business goals. These benchmarks could be branding goals, conversion goals that are specific to engaged or non-engaged buyers. The Bluecore site tag ingests the product catalog and at its core has an AI competent to match the behavioral signals to the marketer goals. This automatically matches products, as well as the best offer and creative to the individual. They refer to this one-to-one individualization as "autopilot," and based on marketer feedback to the results, the process is further optimized via AI. Their performance-based approach and the product offering is truly revolutionary. AI-driven messages can be prioritized by marketers and they can automatically synch offers in other channels including Facebook, display, print, SMS and on-site. Merchandisers can tweak offer rules and the entire product catalog is leveraged off the client's website and replicated in real-time within Bluecore. They capture price changes and automatically create metadata for every product and a schema, making it an external CMS alternative for marketers and merchandisers to search for product trends. Marketers can input historical client data, such as LTV models/values. Their analytics offering is thorough and has an excellent user interface. Bluecore is currently focused on retail/ecommerce categories and any marketer in that industry must consider Bluecore as their approach is truly disruptive to the legacy ESP vendors.



We spoke to several customers who universally raved about the people, technology, and service they received from Bluecore, and were excited by the growth they are witnessing. The company earned top marks in the areas of Campaign Execution, Educational Resources, Strategic Services, and use of Artificial Intelligence (AI) and Machine Learning (ML), and were close to the top in Product Innovation, Technical Services, and Industry Expertise. Customers report that "it's staggering how much useful information/data is generated through the AI and ML," and the Bluecore paradigm "has been so much more efficient for [our] business." They highlighted significant lifts in business results since switching to Bluecore, mentioning that "results from triggered and automated campaigns have blown [us] away," and that "batch sending has gone smoothly too." Every single customer we spoke with highlighted ease of implementation as another area of strength.



What's innovative for the marketer? Goal-based, AI-driven completely automated email campaigns that are priced based upon performance.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Campaign Execution, Educational Resources, Strategic Services, Artificial Intelligence and Machine Learning; Silver: Product Innovation, Technical Services, Industry Expertise



About The Company – Bluecore has 3 offices, New York, London and New Delhi. 200 Clients (400 brands), 40 percent of clients are enterprise.

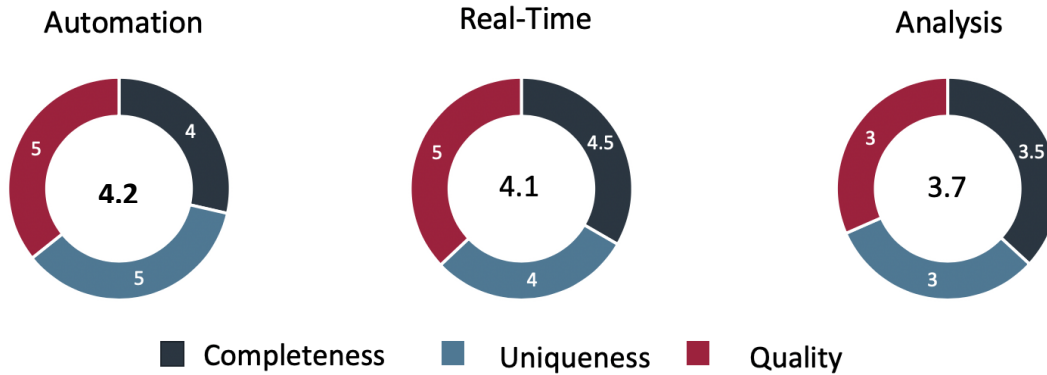


Deployment Options – SaaS based on Google Cloud Platform.



Primary and Ideal Industries – Retail: Apparel, Footwear, Luxury, Electronics, Home Goods, Health & Beauty, Jewelry

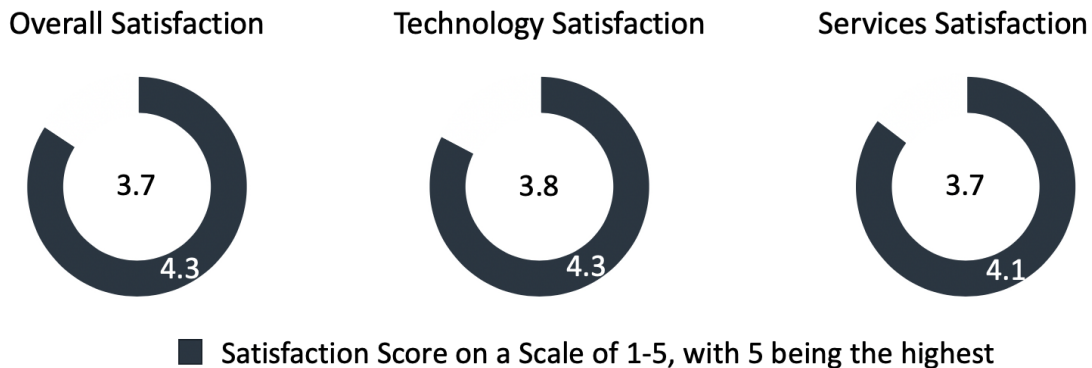
Bluecore Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Bluecore Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19
The Relevancy Group Executive Survey n=401, 2/19 U.S. Only

Cheetah Digital – <https://cheetahdigital.com/>



As the largest ESP, Cheetah Digital is “dedicated to marketers.” Half of their employees are in services. With program complexity increasingly Cheetah Digital intelligently leads with their 20 years of services expertise. They are purely focused on marketing technology and offer tremendous scale. They manage 7+ petabytes of managed data, send over 1 billion messages a day, and have over 650 services professionals. They are obsessed with customer success, with an impressive client success manager to client ratio of 3:1. Cheetah Digital also offers robust global support offerings that allow for follow-the-sun, 24/7/365 support for everything from technical issues to how-to product questions. Since our last update they have improved their journey workflow including A/B testing and data triggers. Cheetah Digital has also added push campaign, mobile app development, e-commerce, POS and social ad capabilities. They have also improved the performance of the system and added tremendous scale to deal with real-time data. Cheetah Digital has impressive flexible data ingestion, which drives their ability to progressively profile customers and target them in real time based off of live stream signals. They are utilizing AI to predict content for companion and upsell items. They have excellent and thorough campaign management orchestration that supports every channel including, SMS, display, social, site, mobile, print, call center, and offline POS. The firm has a complete AI methodology that marketers can adjust via rules. The ESP’s analytical tools, which include an integrated business intelligence tool complete with snazzy visualizations, are excellent. We love their full suite of attribution models, which were the most comprehensive that we found in this study. In the last year, Cheetah Digital has made acquisitions that have added CDP components and every channel loyalty management capabilities. The technology is based on Hadoop and acts as the real-time stream-based processor. Marketers that seek a services-oriented partner with a highly scalable product must consider Cheetah Digital.



Cheetah earned top, or nearly top, marks in most of the areas we measure, including infrastructure/stability, production services, creative services, campaign execution, educational resources, and use of Artificial Intelligence and Machine Learning. Customer references validated these data by reporting extremely high levels of satisfaction, adding that “Cheetah Digital has an impressive reputation and pedigree which they continue to live up to every day.” Customers with complex onboarding and integration requirements gave “compliments to the onboarding team” who “kept us and our partners on track” and were the “driving force towards getting [us] launched on time.”



What’s innovative for the marketer? Their updated distributed marketing tool has an improved UI and their parent-child architecture makes it ideal for multi-brand organizations with in-store marketing operations.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Infrastructure/Stability, Production Services, Creative Services; Silver: Campaign Execution, Educational Resources, Artificial Intelligence and Machine Learning



About The Company – Cheetah Digital has 26 offices across 13 countries. Sixty-five percent of clients are enterprise.

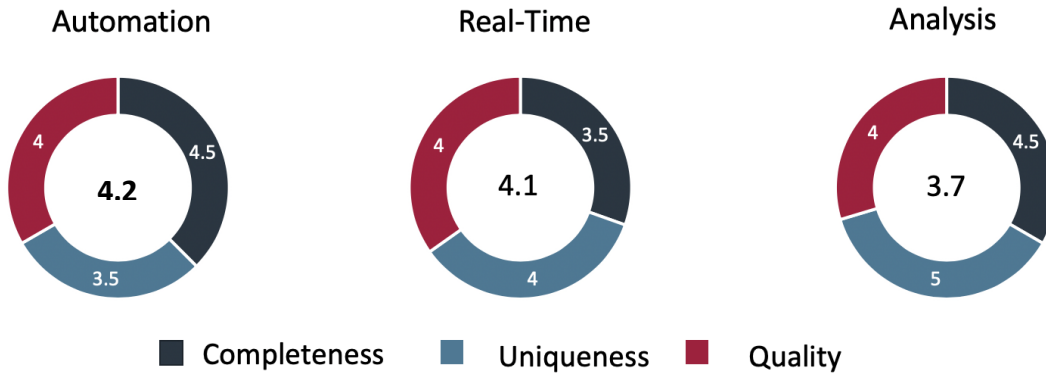


Deployment Options – Cheetah Digital can be deployed via SaaS or via Managed Service.



Primary and Ideal Industries – Retail, Travel/Hospitality, Financial Services, and Media/Publishing

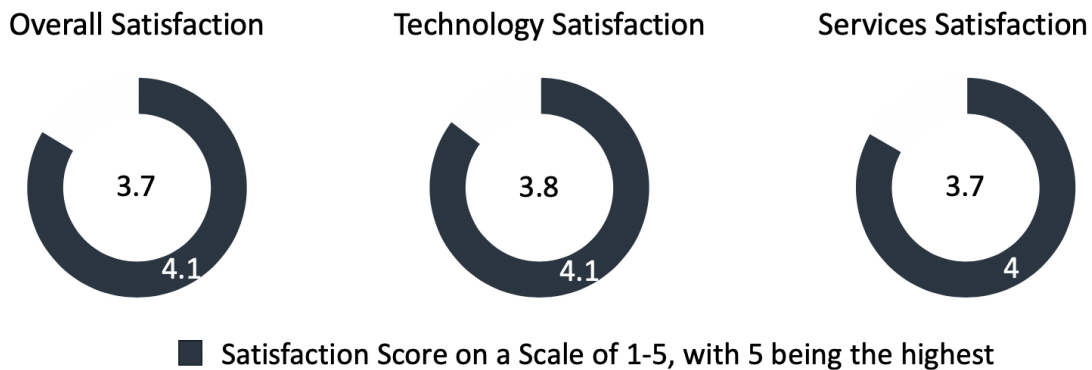
Cheetah Digital Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Cheetah Digital Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19

The Relevancy Group Executive Survey n=406, 2/19 U.S. Only

iPost – <http://www.ipost.com>



iPost was launched in 2001 and acquired in 2015 by ClickMail, the largest iPost reseller and integrator. The tenured management team totally rebuilt iPost and launched iPost Enterprise in 2017. iPost has built an impressive highly scalable ESP based upon an SOC2-certified and GDPR-compliant data marketing platform. The solution is constructed on the auto scaling AWS infrastructure and a flexible MySQL data model. Clients can define and build their own schemas. We were thoroughly impressed with the user interface and the ease-of-use throughout the platform. iPost clients benefit from the tenured leadership and ESP experience. In rebuilding this platform, such knowledge comes through in several product features. For example, their journey management orchestrations support every channel including print and call center push messaging and is tremendously intuitive. They outshine many peers with their advanced testing that can be inserted in journey automations. iPost offers automations that can leverage real-time data and trigger messages in every channel, as well. Their analytics offering EMVision sits in AWS Redshift and utilizes Tableau for visualizations, which is more robust than many of their peers. They are managing the email MTA layer, and managing their own IPs as opposed to utilizing a programmatic mail sender such as SendGrid. Like others, iPost uses the BEE editor, which we like. iPost offers great value as they include Email on Acid for rendering and 250k for deliverability tools at no additional charge. iPost also provides services including technical, strategic and creative. Any marketers seeking an easy-to-use self-service scalable ESP must consider iPost.



The iPost customers we spoke with presided over sophisticated, enterprise-level programs and all praised iPost as “an amazing partner.” iPost scored incredibly high across the board in our customer satisfaction ratings, but especially in the critical areas of Deliverability Tools, Services and Support, Account Management, Technical Services, Integration, and Technical and Customer Support. Reference customers had a lot to say about services and support specifically, citing that the team is “amazing,” “highly responsive” and “always there for [us].” Customers appreciate the “incredible flexibility, power and scalability” of the platform, and reported “a very smooth ramp up.”



What’s innovative for the marketer? Their robust analytics offering and inclusion of features such as pre-send rendering that other vendors usually typically include only at an additional cost.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Deliverability Tools, Account Management; Silver: Technical Services, Integration Capabilities, Technical and Customer Support



About The Company – iPost has four office locations globally. They have 150+ clients.

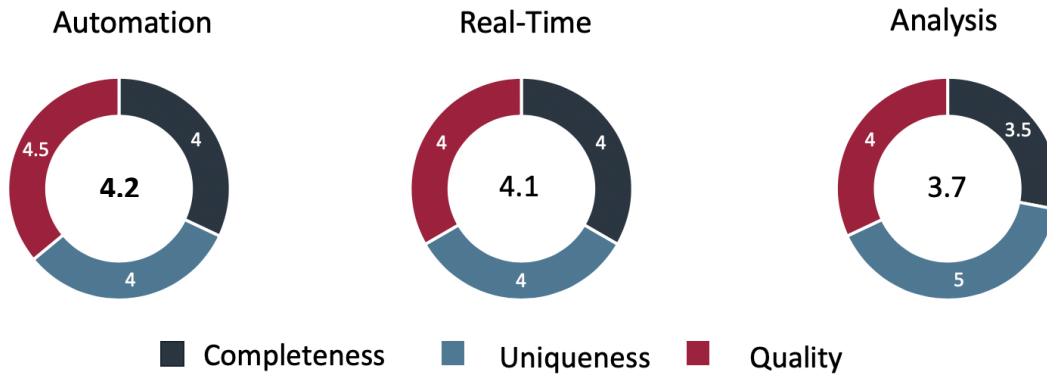


Deployment Options – iPost is a SaaS platform built on AWS.



Primary and Ideal Industries – Retail, Hospitality, Gaming, Publishing, eCommerce

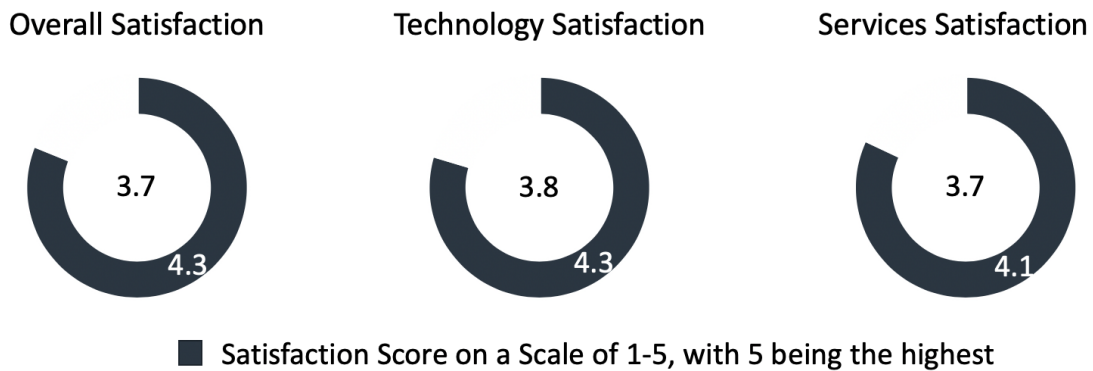
iPost Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

iPost Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19

The Relevancy Group Executive Survey n=406, 4/19 U.S. Only

MessageGears – <http://messagegears.com/>



MessageGears is an incredibly scalable ESP that focuses on “Super Senders” that they define as those that send more than 10 million messages a month and execute hyper-personalization at scale. Their disruptive technology is a hybrid solution that works off real-time live data. This hybrid solution allows clients to keep their data behind a firewall and under their control simply by connecting the on-premises application to a cloud solution. There is no synching or moving data, which makes MessageGears different than traditional ESPs, and empowers simple at-scale sophistication. They are experts at leveraging real-time stream-based data and have many clients that are changing, and localizing content based off such data. Since our last evaluation they have expanded to everychannel messaging, including SMS, push and they have vastly improved their UI. MessageGears’ new drag-and-drop audience builder is beautiful and their upgraded journey orchestration, as well as their content template editor is effortless to use. MessageGears makes complex tasks such as building and counting audiences easy to use and instantaneous. They also expanded the types of data instances clients can directly connect to, such as Snowflake, Hadoop, Hive, Redshift, and Impala, as well as to any of the cloud providers including Google, AWS and Azure. MessageGears has a successful track record of onboarding and deploying complex enterprise senders. MessageGears is ideal for enterprise marketers that do not want to move or outsource data to an ESP. With a cloud infrastructure and robust APIs that are easy to set up, the solution is built for scale. In the last year, MessageGears has ramped up their services team and continues to partner with credible email marketing agencies. Marketers with significant database marketing investments that do not wish to replicate data must give MessageGears serious consideration. MessageGears’ hybrid email marketing solution is the answer for clients with massive amounts of ever-changing data, a need to leverage real-time data and/or concerned with data security.



Customers who choose the MessageGears solution tend to run sophisticated, highly personalized, data-driven programs at scale. Virtually everyone we have ever spoken with has raved about the people and technology at MessageGears and this year is no different. Customers again awarded them more top satisfaction honors than any other ESP. MessageGears customers reported especially high satisfaction scores in Product Innovation, Technical Services, Integration, Technical and Customer Support, and Overall Value, but they weren’t far behind in any category. This year, customers echoed previous sentiments about the solution’s uniqueness, but added that “the company ethos is spectacular,” and that for a company that wants to leverage data where it rests “there is absolutely no better solution out there.”



What’s innovative for the marketer? Their ability to *_not_* replicate data offers tremendous cost savings and as such MessageGears offers unique, fair pricing packages.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Product Innovation, Technical Services, Integration Capabilities, Technical and Customer Support, Overall Value; Silver: Campaign Execution, Deliverability Tools, Account Management



About The Company – Based in Atlanta, GA, MessageGears began in 2010. They are focused on data-centric enterprises sending a high volume of email.

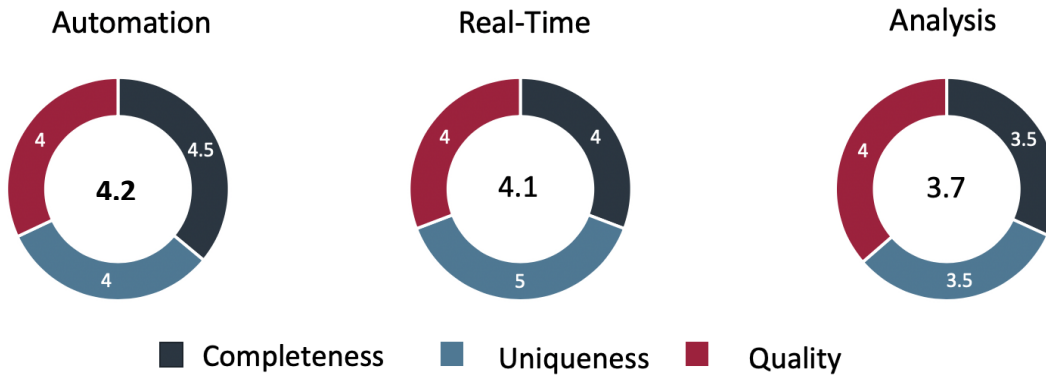


Deployment Options – Hybrid, APIs. The Hybrid integration platform combines on-premises software with cloud-based delivery. The SaaS part of their offering is built in AWS.



Primary and Ideal Industries – Travel, Financial, Retail, Marketing Automation

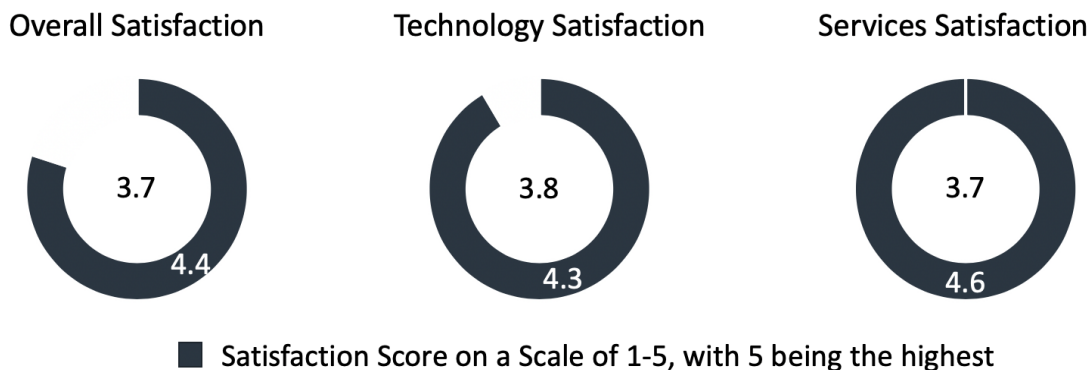
MessageGears Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

MessageGears Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19
The Relevancy Group Executive Survey n=406, 4/19 U.S. Only

Sailthru – <https://www.sailthru.com/>



In January 2019, Sailthru was acquired by CM Group, which is doing a vertical roll up of marketing technology companies including: Liveclicker, Delivra, Campaign Monitor, and Emma.

In the CM Group portfolio, Sailthru represents their enterprise-focused ESP. Like many of their peers, Sailthru has updated their email composer and it is easy to use. AI is central to their offering and they have added predictive capabilities in their lifecycle optimizer for improved cross channel journey orchestrations. These predictions find subscribers that are likely to opt-out, purchase, disengage, or engage with email or on a site. Sailthru is also doing an excellent job of utilizing AI to improve open rates through subject line scoring. This feature utilizes AI to score subject lines that are most likely to be opened based on millions of data points that are updated in real time. AI is also being utilized to determine which channels are best for win-backs and welcome series. Using this approach, they are building in anomaly detection to alert marketers to poor performance and to new opportunities. We were impressed with Sailthru's automated intelligent "Bandit" testing. Sailthru utilizes progressive profiling, which leverages real-time stream data to deliver product recommendations. Their AI approach is not black box, as marketers can tweak these recommendations by changing the weighting of the algorithms that are utilized. Sailthru offers individualized send-time optimization that pinpoints behavior to the best hour for an individual to receive email within a possible 24-hour timeframe. Their audience builder is intuitive and they have easy-to-use orchestration playbooks that includes testing within a lifecycle journey. Sailthru has demonstrated that they can scale. In 2017, client Epic Games was serving 30 million subscribers. By the end of 2018, the audience had grown to 180 million. Sailthru should be in the consideration set of senders that plan to scale rapidly and desire a steam-based ESP.



Our research indicates that Sailthru clients are delighted with the technology and services they receive from the company. Customers offered high marks across the board, but Sailthru earned top or near-top honors in the key areas of Infrastructure/Stability, Deliverability Tools, Services and Support, Omnichannel Marketing, and Usability. Customers appreciate being able to "leverage the platform effectively across email, web, and mobile" and are able to realize "significant business advantage" and "positive customer experiences" as a result.



What's innovative for the marketer? AI based recommendations in an easy to use interface.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Infrastructure/Stability; Silver: Deliverability Tools, Omnichannel Marketing, Usability



About The Company – CM Group has 10 global offices and 300,000+ customers across all market segments.

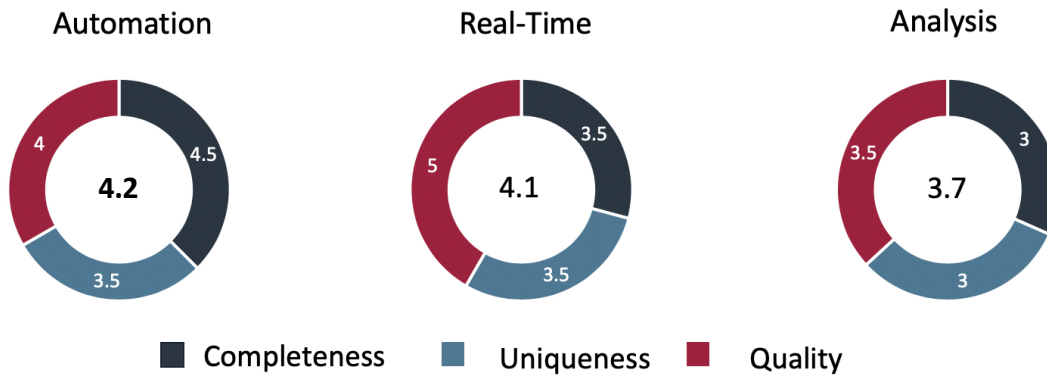


Deployment Options – Sailthru is deployed as a Software-as-a-Service (SaaS) solution.



Primary and Ideal Industries – Media/Publishing, Retail/eCommerce, Gaming, Travel and Hospitality

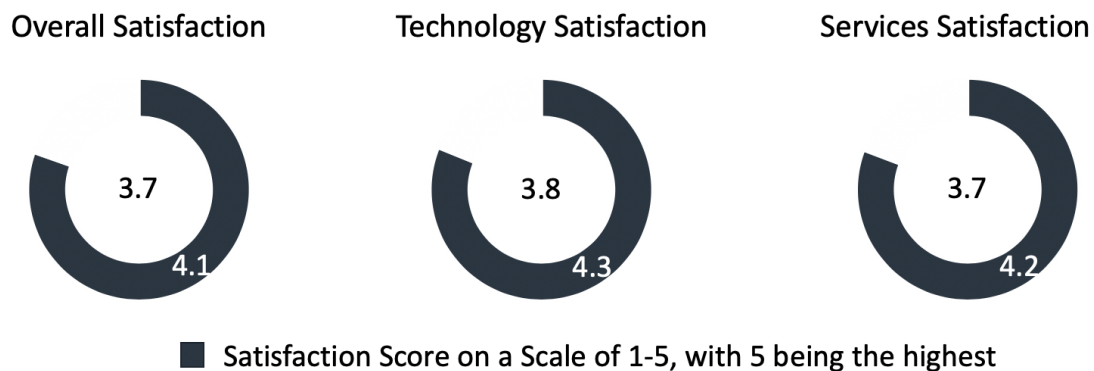
Sailthru Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Sailthru Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19
The Relevancy Group Executive Survey n=406, 2/19 U.S. Only

Salesforce Marketing Cloud – <https://www.salesforce.com/products/marketing-cloud/overview/>



Salesforce believes that the business world is undergoing the fourth industrial revolution: the era of AI/machine learning. The company is focused on personalizing every touchpoint, and AI is central to their offering. Salesforce has massive scale, synching 12 billion records a day and storing 43 petabytes of consumer data. For services, Salesforce partners with many capable email marketing agencies. They have recently introduced their own digital marketing maturity model, which aims to drive marketer sophistication across channels. New features include: Journey templates, folders, testing and validation. They have also added basic message send analytics, weather content blocks, improvement to the UI. Salesforce expressed to us that many of these enhancements were designed to make the product easier to use and we believe they achieved that goal. They are managing real-time data in Interaction Studio which can integrate with Journey Builder, allowing content recommendations to be triggered in real-time. They have also added many training enhancements in their Trailhead tool. Their Einstein AI personalization capabilities are excellent. In addition to predicting email engagement and journeys, the tool has a drag-and-drop Einstein content block that easily inserts product recommendations into the email. For Salesforce users of Sales, Service or Commerce Clouds, the Marketing Cloud is an obvious solution, as the cross-platform integrations exist. Enterprise marketers with complex journeys that seek a solution capable of massive scale should consider Salesforce Marketing Cloud.



In the window after Salesforce acquired ExactTarget, The Relevancy Group witnessed a dip in customer satisfaction metrics across the board. As customers adjusted to a new culture, new people, and in many respects, a new way of doing business. We are pleased to report that Salesforce customer satisfaction scores are now on the rise and that they outperform or meet the industry mean in virtually every single category we measure. Customers not only appear to be highly satisfied with the marketing cloud itself by awarding it near high marks in the area of integration, they also quantified their pleasure in Salesforce Creative Services with top marks, as well.



What's innovative for the marketer? Einstein AI capabilities automate many marketing tasks and improve the quality of offers, journeys and recommendations.



The Relevancy Ring Award – A measure of client satisfaction: Silver: Creative Services



About The Company – Salesforce has many offices across the Americas, EMEA and APAC. A full list of our office locations can be found here: <https://www.salesforce.com/company/locations/>. All of these offices service Marketing Cloud.

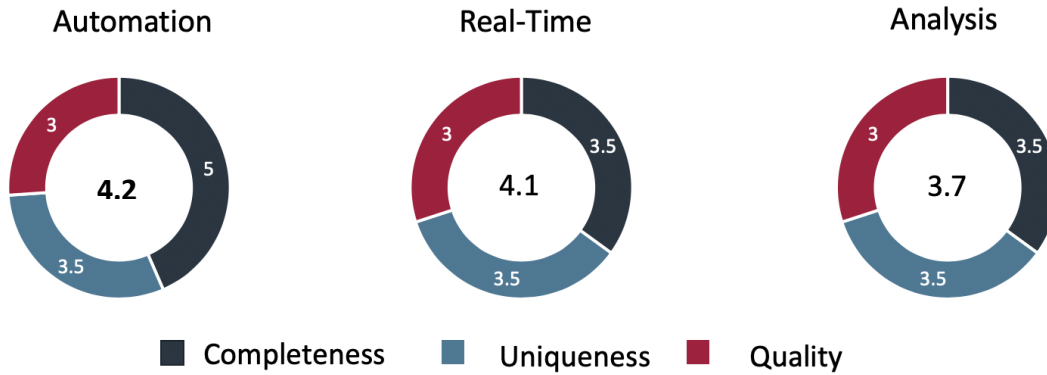


Deployment Options – Salesforce Marketing Cloud is deployed as a Software-as-a-Service (SaaS) solution.



Primary and Ideal Industries – Retail, Travel & Hospitality, Financial Services, Healthcare & Life Sciences, Media & Entertainment, and CPG & Technology

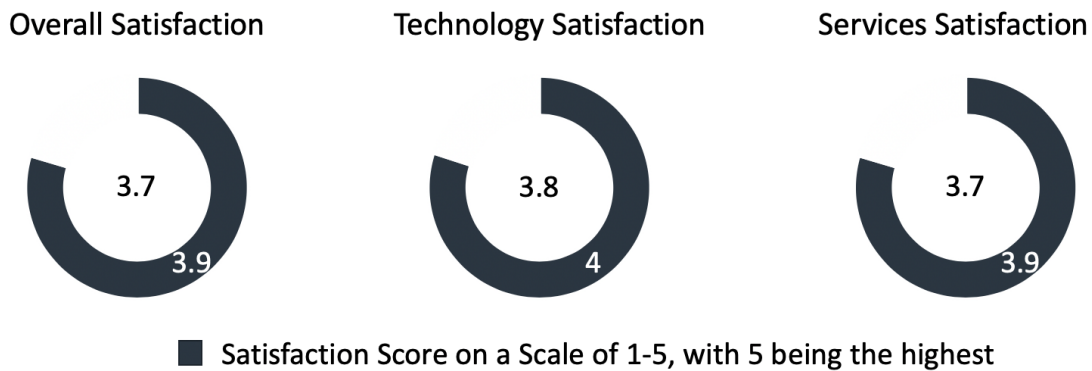
Salesforce Marketing Cloud Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Salesforce Marketing Cloud Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19

The Relevancy Group Executive Survey n=406, 2/19 U.S. Only

Selligent Marketing Cloud – <https://www.selligent.com/>



Selligent Marketing Cloud leverages a universal customer profile, their AI engine Cortex, ingestion of data, and content to deliver individualized experiences across everychannel.

Selligent has been successfully growing their business over the last several years. We were impressed with their CDP like capabilities to ingest all types of data, synch and match customer identity. They detailed client case studies that revealed complex data integration needs that touched upon everychannel including call centers. Selligent has an excellent approach to building a universal customer profile, which includes data hygiene, identity resolution, deduplicaiton, cross-device linking and behavioral targeting. They are experts at ingesting data across channels, particularly real-time stream-based signals. Their solution has a dedicated real-time event process that allows them to process unstructured data at scale. Unlike their peers, they have built their own highly configurable MTA. This year they improved the UI making it easier to use, particularly as it relates to their journey management and email editor capabilites. They also improved send-time optimization, data handling, intuitive AI and smart audiences, improving their overall relevancy. We found their AI tool Cortex to be excellent and transparent. It is designed to match the best content, offer, channel and time. Marketers can configure algorithms in Cortex. Their analytics and offering in general is easy to use and intuitive. Marketers that seek a solution that can scale with real-time data and provide universal customer identity profile management in an everychannel solution must consider Selligent.



Selligent customers reported high levels of satisfaction with the technology and services they received across the board, but especially in Strategic Services, Usability, Creative Services and Overall Value. In most areas where they didn't earn top marks, they weren't far off. In fact, one customer felt constrained by our five-point scale insisting that the Selligent user interface and ease of use of the platform deserved even more points, stating "I have to give them a six." Other customers appreciated the data expertise that comes with a Selligent partnership, stating that "they're not a traditional ESP," and that the deep integration with Selligent enables "highly relevant communications [we] couldn't achieve previously."



What's innovative for the marketer? Selligent Cortex AI capabilities that improves personalization, matching the best content, offer, channel and time



The Relevancy Ring Award – A measure of client satisfaction: Gold: Strategic Services, Usability; Silver: Overall Value



About The Company – Selligent has eight worldwide offices, 700+ clients, 25 percent of which are enterprise

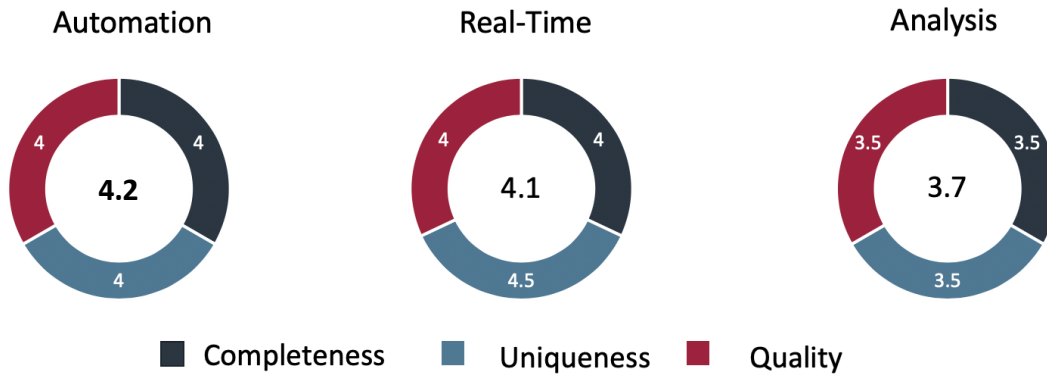


Deployment Options – Selligent Marketing Cloud is deployed as a Software-as-a-Service (SaaS) solution.



Primary and Ideal Industries – Retail, Media & Publishing, Travel/Hospitality, Manufacturing, Financial Services, Insurance, Services, Automotive

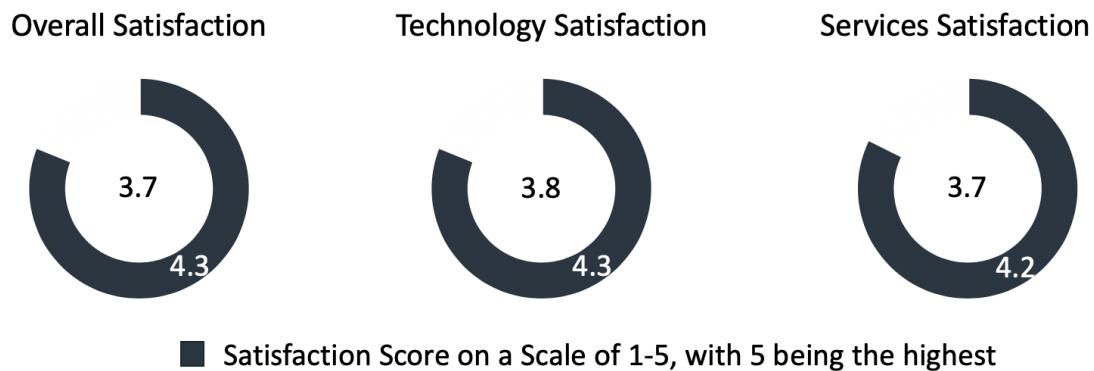
Selligent Marketing Cloud Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Selligent Marketing Cloud Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19
The Relevancy Group Executive Survey n=406, 2/19 U.S. Only

Zeta Global – <http://zetaglobal.com>



Zeta Global believes in one-to-one marketing driven by AI progressive personalization at scale. Since our last evaluation, Zeta Global has integrated all their recent acquisitions into one platform. Zeta Global has made tremendous progress to realize their vision of one single experience platform. They have one integrated platform that includes their data cloud/hub with native AI and support for real-time stream-based processing, everychannel support with connected identity and intent graphs. Zeta Global uniquely straddles the line in this category having built their solution for native ingesting, processing, and responding to real-time stream-based events at scale [while also maintaining backwards compatibility to satisfy the needs of customers operating in a batch-style environment]. They have also rapidly advanced the features of combined platform functionality. This has led to significant wins and year-over-year sales growth. Valued at over \$1 billion, Zeta Global has all the functionality to address the needs of the everychannel enterprise marketer. Their solution provides persistent identity management and their extensive platform can listen to signals and target/re-target individuals across every channel. They demonstrated how their offering can make anonymous individuals into known consumers and then apply AI/machine learning to improve offers, automations and the entire marketing process. Zeta Global's AI/machine learning, identity resolution abilities and real-time capabilities underscore their role as a market leader. Zeta Global is an expert at managing data in motion, stream-based signals and customer intent. Four and a half million websites run their commentary system, which is a permissible NLP AI system, to leverage customer comments and utilize them in identity matching and intent. We were impressed by Zeta's continued ability to innovate, specifically their live profiling and progressive personalization to deliver the best offer at the right time via their send time optimization tool Prime Time. The solution is user friendly and more than capable. Zeta Global is one of the service-oriented ESPs and recently have made changes to where those teams are located and staffed. Zeta Global's attribution analytics and built business intelligence tools continue to be best in class. We love their AI/machine learning capabilities. Marketers seeking scale, rapid innovation, progressive profiling stream-based individualization, everychannel capabilities and follow-the-sun services must give Zeta Global serious consideration.



The Zeta customers we spoke with this year are all large enterprise marketers for whom email is a vitally important component of their business. These companies, without exception, expressed high levels of satisfaction. Zeta earned top, or nearly top, honors this year in the areas of Educational Resources, Account Management, Strategic Services, Production Services, Integration, Technical and Customer Support, and Overall Value. Customers offered especially high praise for the Zeta account teams, reporting that "they're a true extension of our team," and that one specific resource "likely knows our business better than we do."



What's innovative for the marketer? Industry-specific internal modeling that offers predictive recommendations based on a massive array of customer behavior and data.



The Relevancy Ring Award – A measure of client satisfaction: Gold: Account Management, Industry Expertise; Silver: Educational Resources, Strategic Services, Production Services, Integration Capabilities, Technical and Customer Support, Overall Value



About The Company – Founded in 2007, Zeta Global operates in three continents with 12 offices around the globe including the UK (London, Bristol, Middlesbrough); India (Hyderabad,

Bangalore, Chennai); Czech Republic (Prague); and Singapore. Fifty-two percent of clients are enterprise.

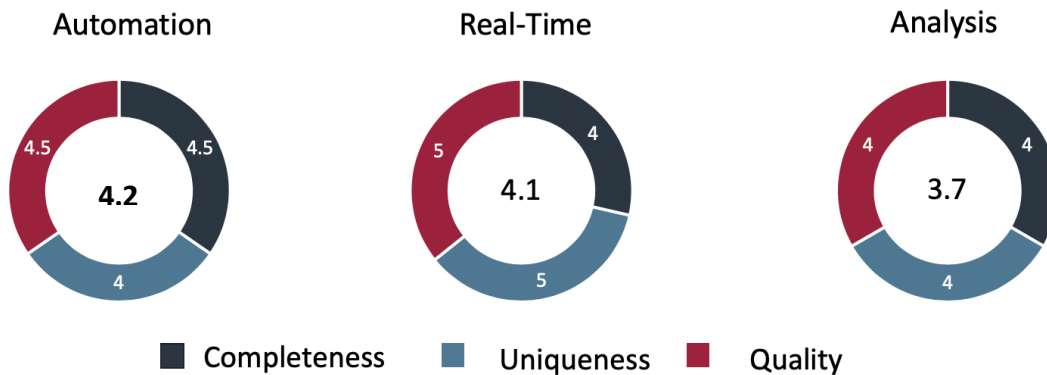


Deployment Options – Zeta offers SaaS and Managed Services solutions. They selectively consider on-premises engagements based on scale and customer requirements.



Primary and Ideal Industries – Travel & Hospitality, Financial Services, Retail, Luxury Retail, Healthcare, Media & Entertainment, Education

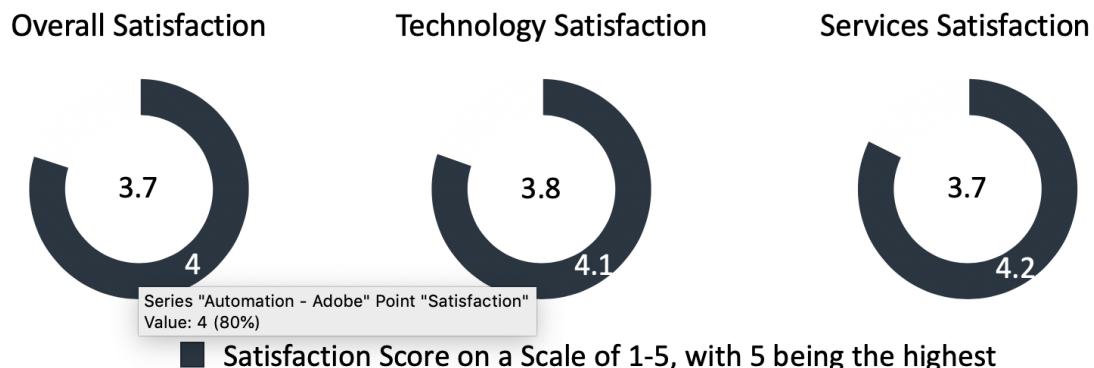
Zeta Global Product Functionality Relevancy Rings



The number in the center of the ring is the all participant average for that area of functionality

Source: The Relevancy Group, 4/19

Zeta Global Client Satisfaction Relevancy Rings



The number in the center of the ring is the mean satisfaction score for the ESP industry

The Relevancy Group-Relevancy Ring ESP Reference Client Interviews 4/19
The Relevancy Group Executive Survey n=406, 4/19 U.S. Only

Additional ESPs – The Following Were Invited and Elected Not to Participate in Our Research

- **Epsilon Agility Harmony** – See our 2018 ESP Buyer’s Guide for commentary on Epsilon. Just prior to the publication of this report Publicis announced that they were acquiring Epsilon for \$4.4 billion.
- **Oracle Responsys** – A standalone email solution, Responsys offers worldwide support and promises to integrate it into the vast Oracle holdings. They have always declined to participate in this report. In 2017, their mean overall customer satisfaction score was 3.6, as compared to the overall all participant mean of 3.8, with their lowest satisfaction scores in product innovation and education. Their last product update was in August 2017, their release notes can be found [here](#).
- **Yes Marketing** – Backed by agency services and their third-party data offering, Yesmail is an email solution with an array of everychannel features. See our 2018 Email Marketing Agency Guide for their services capabilities.

METHODOLOGY STATEMENT

In Q1 of 2018, The Relevancy Group completed research in order to capture the state of the email marketing industry and evaluate nine ESPs that elected to participate in this research.

The Email Marketer Survey: In February 2019, The Relevancy Group conducted a survey that resulted in 406 completed and qualified email marketing executives. We qualified respondents based on their sending volume, familiarity of their email marketing program and other attributes such as the individuals’ role/title. Respondents self-identified their company size and market sector category. We collected descriptive information about these organizations including revenue, budgets, as well as items such as the size of the marketer’s customer database. The survey utilized skip ordering and randomization and screener questions. Survey data was used for anonymous satisfaction reference data and to inform the weighting placed on features evaluated in the vendor questionnaire.

The Vendor Questionnaire: The Relevancy Group designed a questionnaire that mimics the requirements documents that are utilized when conducting ESP Request for Proposal (RFP) vendor selection. This questionnaire contained just under 300 questions to provide detail on the vendor’s company, strategy, products, staff and infrastructure.

Client Satisfaction Data: The Relevancy Group gave vendors the option of providing three reference clients for each vendor. The customer interviews occurred over the phone, each followed the same reference questionnaire. We asked reference accounts to score vendors on 1-to-5 scale across several attributes including: their satisfaction with the vendor’s product, infrastructure, services and support. These interviews also included a general discussion related to the client’s relationship with their vendor. Client Satisfaction data was combined with, or based on, anonymous satisfaction data from the vendor’s clients that participated in the aforementioned email marketer survey. This survey data included the same questions and satisfaction scale that were used in the reference questionnaire. The Relevancy Group utilized this combined reference data to inform.

Use cases: We asked the vendors to demonstrate their offering and focus on three themes that aligned with marketer aspirations and challenges. Those themes included Automation, Real-time and Analytics. Two TRG Analysts participated in the demos and scored the vendors on their ability to satisfy the use cases on a 1-to-5 scale. That data is presented in the individual Relevancy Rings for each vendor.



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Founded in 2010 and led by tenured industry analyst and marketer David Daniels, The Relevancy Group (TRG) provides market research and advisory services. Our tenured team are trusted advisors to leading technology vendors and familiar brands. The Relevancy Group delivers a series of original research, custom research, lead generation and advisory services. Our Relevancy Ring Buyer's guides are highly sought after and have been proven to help marketers and vendors alike. We also publish the digital magazine for marketers by marketers, [The Marketer Quarterly](#). Available for free with registration online, and through the MQ app on [iTunes](#), [Google Play](#) and [Amazon](#).