

# Adobe Competitive Update

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Watson Marketing

# Watson Marketing

## Competitive Landscape

### Large Players

ORACLE®  
responsys® eloqua.  
Bronto

Adobe® SAP®  
neolane  
Marketing Start Solutions

salesforce  
ExactTarget® Pardot™  
an ExactTarget company

### Medium Players

emarsys  
emarketing systems

Experian™  
A world of insight  
cheetahmail

Marketo®

aprimo.  
TERADATA.

SMART FOCUS  
emailvision

### Other

emma Constant Contact MailChimp LISTRAK. SAILTHRU dotmailer selligent act-on lyris™  
salesfusion. Infusionsoft. yesmail eTrigue. adestra HubSpot SendGrid

Competitor	Closed	Lost	Grand Total	Win Rate
ExactTarget	43	35	78	55%
Mailchimp	19	13	32	59%
InHouse	19	10	29	66%
Marketo	12	13	25	48%
Bronto	11	10	21	52%
ClickDimensions	12	7	19	63%
Salesforce.com	8	11	19	42%
Adobe	9	7	16	56%
Eloqua	7	9	16	44%
Responsys	4	11	15	27%
Emarsys	7	7	14	50%
HubSpot	6	8	14	43%
Constant Contact	10	2	12	83%
DotMailer	2	10	12	17%
Pardot	7	3	10	70%

## Competitive History

- Salesforce Marketing Cloud (ExactTarget) has been the strongest competitor for IBM Marketing Cloud.
- Marketo appears in less deals, but is has proven difficult to beat.
- Watson Marketing, as an enterprise suite, competes most closely with Adobe, Oracle and Salesforce.

# Watson Marketing

## Offensive Competitive Strategy

### Data

- Marketing platforms have been built through acquisition, so approach is modular
- Most of our competitors (SF in particular) struggle with movement of data between their modules.
- Competitors don't have anything like UBX, so it's cumbersome to move data

### AI

- IBM has deep roots in AI, pre-dating the public introduction of Watson to Jeopardy in 2011
- >1,000 data scientists on staff, compared to 175 in Salesforce's newly introduced Research unit
- Broad set of AI capabilities beyond Marketing Cloud
- Solving real problems

### Open Platform

- UBX
- IBM works with best of breed technologies – there is essentially no limit to systems we are willing and able to integrate with
- Customers are not locked into our marketing technology stack

### Security

- Strength of stable company with solid future
- IBM makes it right

# Watson Marketing



Marketing Cloud  
**Competitive Intel**

# Watson Marketing



## Overview

### Company

- Founded: 1982
- Ownership: Public (NASDAQ: ADBE)
- >14k employees
- ~35 offices worldwide
- FY 2016 Revenue = ~\$5.85 billion
  - \$1.63b (28%) from digital marketing segment
    - 20% YoY revenue growth
    - 30% YoY signings growth
- Company best known for its Creative Cloud, but is making inroads with Marketing Cloud

### Key acquisitions

- Omniture
- Day Software
- Demdex
- Auditide
- Efficient Frontier  
(included Context Optional)
- Neolane
- TubeMogul




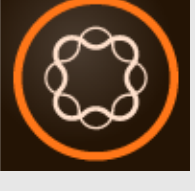
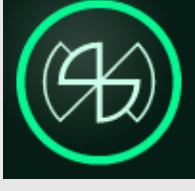
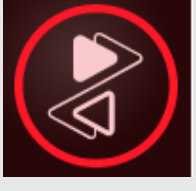


### Marketing Cloud

- Geography: Global
- Delivery Model: SaaS
  - On-premise for some modules
- Reputation:
  - Comprehensive but complex solution
  - Can get very expensive, due to modular nature of tools (many tools sold separately)
- Modules
  - Campaign Management
  - Leads Management
  - Social Marketing
  - Interaction Management (for real-time offers on websites/telephone)
  - Message Center (Admin module for notifications)

# Watson Marketing



<b>Vertical Industries</b>	Financial Services	Government	High Tech	Media & Entertainment	Retail	Telecommunications	Travel & Hospitality
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 <b>Adobe Analytics</b>	 <b>Adobe Audience Manager</b>	 <b>Adobe Campaign</b>	 <b>Adobe Experience Manager</b>	 <b>Adobe Media Optimizer</b>	 <b>Adobe Primetime</b>	 <b>Adobe Social</b>	 <b>Adobe Target</b>
<p>Apply real-time analytics and detailed segmentation across marketing channels</p> <p>Discover high-value audiences and power customer intelligence</p>	<p>Data management platform (DMP) that helps build unique audience profiles to allow marketer to identify the most valuable segments and use them across any digital channel</p>	<p>Set of solutions that help marketers personalize and deliver campaigns across online and offline channels</p>	<p>Comprehensive content management solution for building and managing websites, mobile apps, and forms</p>	<p>Programmatic ad-buying solution that helps marketers forecast the best mix of search, display and social ads based on their budget</p> <p>Automates media plan execution of your media plan and helps marketers find the best way to deliver relevant content to high-value audiences.</p>	<p>Multiscreen TV platform that helps broadcasters, cable networks and service providers create and monetize engaging, personalized viewing experiences</p>	<p>Social management platform that ties every piece of data to the bottom line.</p> <p>Manages likes and follows, along with the deep relationship between customer sentiments and business goals.</p>	<p>Complete optimization solution that allows data-driven marketers to rapidly experiment and create high-converting personalized experiences</p>



## Strengths & Challenges

### Strengths

- Have the attention of marketers – Marketers are familiar with Adobe products
- Robust functionality
- Strong investment in growth of product functionality
- Ability to enable complex business rules and workflows
- B2C

### Challenges

- Complex solution, with high ramp-up time
- Each module sold separately – Solution can be very expensive
- Adobe Campaign does not easily connect with other tools in their marketing cloud; Requires custom implementation project
- Usability and personalization capabilities fall short
- Still building out its professional services offering



# Watson Marketing

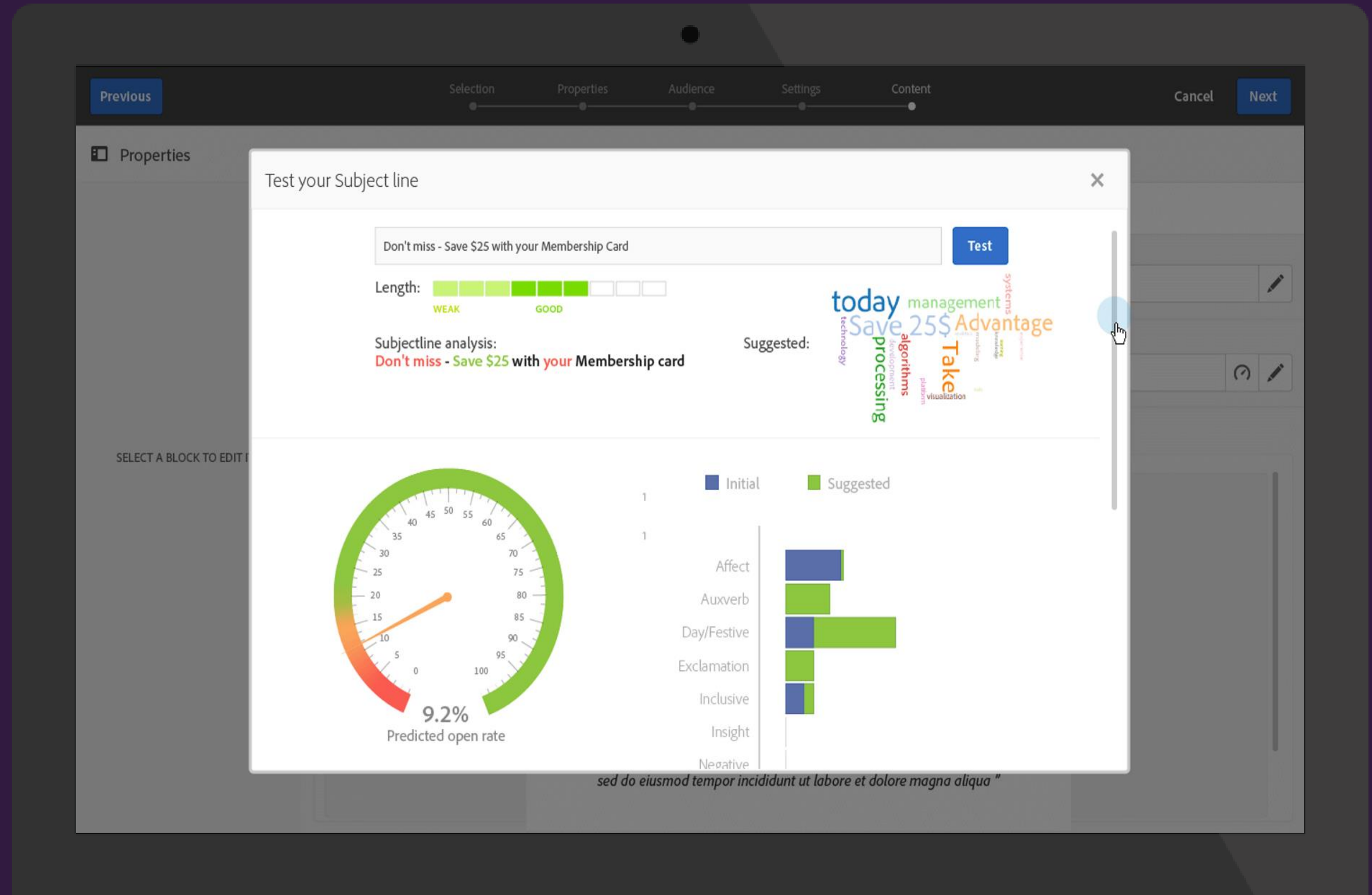


## Adobe Sensei (AI)

Sensei = Adobe's new AI capability

### Features

- Intelligent Alerts
- Automated Insights for digital ads
- Lookalike modeling (Adobe Audience Manager)
- One-click Auto-Target personalization (Adobe Target)
- Enhanced recommendation engine - suggested offers (Adobe Target)
- Smart Tags (Adobe Experience Manager)
- Predictive Subject Lines (Adobe Campaign)



# Watson Marketing



## Selling against Adobe

### Key Differentiators

- Ease of use
  - Adobe Marketing Cloud is complex solution with high ramp-up time
  - Although single sign-on is now available for Adobe Marketing Cloud, product can be very difficult to use due to the fact that the various capabilities come from different acquired modules
- B2B experience/capabilities
  - Adobe has strong history in B2C, but thin experience in B2B
- Pricing
  - IMC pricing is upfront, and usually ends up lower overall
  - Adobe is priced by module, and each module comes at an additional cost
  - According to a Gartner vendor rating published in November, transparency in their pricing structure is a serious issue for Adobe, with Marketing Cloud lacking published guide prices or formulas that enable the potential cost to be simulated

## Competitive Resources

### Software Sellers Workspace (SSW):

<http://w3-03.ibm.com/software/spcn/content/Q683433V94059I55.html#indexb>

### W3: IBM Marketing Cloud Sales Community

[https://w3-connections.ibm.com/communities/service/html/communityview?communityUuid=d8a31708-19ab-4371-96c6-](https://w3-connections.ibm.com/communities/service/html/communityview?communityUuid=d8a31708-19ab-4371-96c6-906666783670#fullpageWidgetId=W7ac34484be3a_4564_8448_9afa7c149c3a&folder=dd11545d-7ba9-42e5-aa2a-4a5a2743bc8b)

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