FOR B2C MARKETING PROFESSIONALS

The Forrester Wave™: Social Media Management Solutions, Q2 2017

The 10 Leading Vendors Supporting Enterprise Social Marketing

by Erna Alfred Liousas and Jessica Liu
June 12, 2017

Why Read This Report

In our 32-criteria evaluation of social media management solution providers, we identified the 10 most significant ones — Facelift, Hootsuite, Lithium Technologies, Oracle, Percolate, Salesforce, Spredfast, Sprinklr, Sprout Social, and Sysomos — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketers make the right choice.

Key Takeaways

Hootsuite, Lithium Technologies, Spredfast, And Sprinklr Lead The Pack
Forrester's research uncovered a market in which Hootsuite, Lithium, Spredfast, and Sprinklr lead the pack. Facelift, Sysomos, Percolate, and Salesforce offer competitive options. Oracle and Sprout Social lag.

Recent Solution Updates Fuel Enterprisewide Collaboration
As social media usage permeates the enterprise, social media management solutions (SMMS) follow suit. Most providers deliver enhanced review and approval and response management capabilities, responding to organizationwide needs. However, social advertising capabilities remain an opportunity area.

Measurement, Integration, And Security Certifications Are Key Differentiators
As SMMS technology becomes more commoditized, SMMS providers prioritizing digital enterprisewide capabilities will prevail. Such capabilities include: measurement that validates business impact, integration within the client's existing technology stack, and international security certification.

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with Brigitte Majewski, Stephanie Liu, and Christine Turley
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Brands' Demands For SMMS Mature, Expanding Use Cases

Since our 2015 Forrester Wave™ on social relationship platforms (SRPs), enterprises have matured in their use of social media. Marketers actively embrace it, as do other business units such as customer service, product, sales, and HR.[1] Because of this expansion, Forrester now refers to SRPs as social media management solutions (SMMS), a naming convention more in line with marketplace vernacular and reflective of the broader potential for these tools to add value across the customer life cycle. We define social media management solutions as:

> *Solutions that help marketers publish, monitor, and respond to customer posts on social networks.*

SMMS are available as point or suite solutions. Back in 2015, we cautioned marketers against social suites and encouraged the purchase of best-of-breed point solutions. We still recommend point solutions.[2] Since then, however, we've seen enough improvements in suite capabilities to make them a practical consideration for brands balancing multiple social marketing objectives and for whom efficiency and collaboration outweigh specific technology requirements.[3] Customer references from this year's Forrester Wave perceive more buying efficiencies with suite solutions than point solutions and don't agree that simply cobbling together different social point solutions guarantees best-of-breed quality (see Figure 1).

FIGURE 1 Customer References Agree Social Suites Provide More Buying Efficiencies Than Point Solutions

"Please indicate how strongly you agree or disagree with each of the following statements."

It's more effective to buy all our social tools from the same vendor.
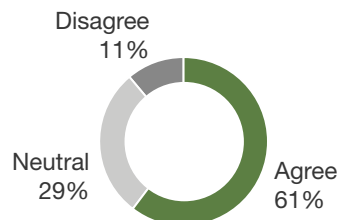
Buying different social tools from different vendors is the best way to ensure you get best-of-breed solutions.

Disagree 11%
Neutral 29%
Agree 61%

Agree 21%
Neutral 29%
Disagree 50%
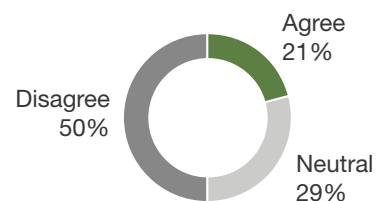
Base: 38 social media management solution users
Note: Percentages may not total 100 because of rounding.
Source: Forrester's Q2 2017 Global Social Media Management Solutions Forrester Wave™ Customer Reference Phone/Online Survey

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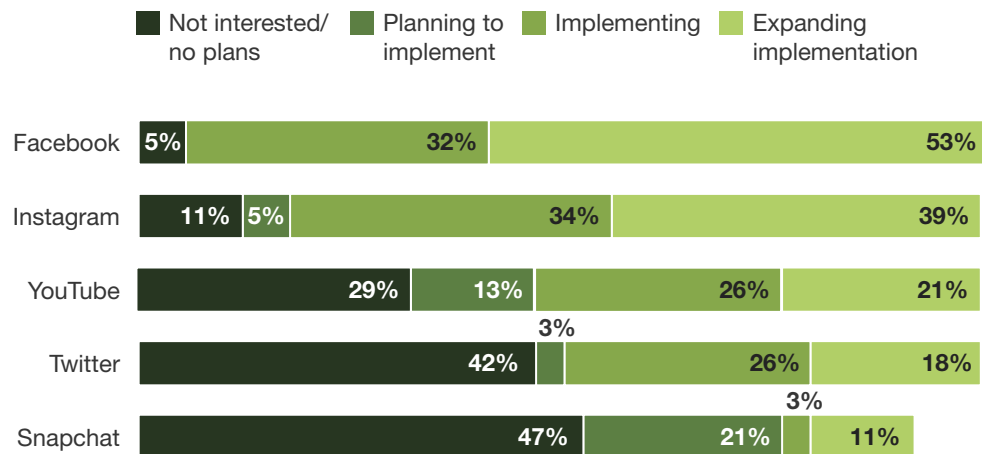The 10 Leading Vendors Supporting Enterprise Social Marketing

SMMS Technology Responds To Brands' Expanded Social Needs, Albeit Gradually

Today's leading SMMS get the publishing, monitoring, and posting job done — 87% of survey respondents say their SMMS provider delivers the functionality it promised.[4] But social marketing is a fast-changing landscape. Instead of anticipating buyer needs, SMMS gradually react, as demonstrated by their paced addition of capabilities that support cross-functional tasks such as campaign management and brand reputation management. SMMS' latest functional additions address enterprisewide needs such as:

› **Cross-team consensus through enhanced review and approval capabilities.** The growing complexity of branded social media initiatives requires the contribution of business units outside of the marketing department. In our survey, customer references reported customer service, PR, and customer insights teams, among others, serving as active contributors to marketing efforts.[5] Some vendors address this complexity with augmented review and approval processes capable of including external, nonseat holders. One client reference shared that such sophistication addresses his business objective of faster approver response times while limiting risk.

› **Crisis control through advanced response management.** Poorly timed posts or ads during times of crisis make brands appear tone-deaf to current events, potentially damaging brand reputation and even stock price.[6] When PR, corporate communications, marketing, and others push out content independently, the option to freeze all disparate social communications through one safety mechanism gives brands overarching control while they regroup. Lithium's automated post lock and pause functionality even lets brands temporarily suspend posts without losing the posts' valuable content.

› **Inconsistent integration with social advertising capabilities.** SMMS and social advertising have a natural affinity, sharing engagement with consumers within the same channel. And B2C marketers aren't slowing down their investment in social advertising. Almost one-third of customer references are implementing paid-ad buys on Facebook and more than half are expanding their boosted-post tactics (see Figure 2). But SMMS are slow to integrate full social ad functionality despite this increased marketer activity. Of the vendors we assessed, only Sprinklr received a perfect score for its social advertising integration capabilities.

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FIGURE 2 Customer References Are Implementing And Expanding Their Use Of Social Advertising

"What are your company's plans for using the following paid social tactics for buying ads?"

Legend:
- Not interested/ no plans
- Planning to implement
- Implementing
- Expanding implementation

	Not interested/no plans	Planning to implement	Implementing	Expanding implementation
Facebook	5%		32%	53%
Instagram	11%	5%	34%	39%
YouTube	29%	13%	26%	21%
Twitter	42%	3%	26%	18%
Snapchat	47%	21%	3%	11%

Base: 38 social media management solution users
Note: Not all responses are shown.
Source: Forrester's Q2 2017 Global Social Media Management Solutions Forrester Wave™ Customer Reference Phone/Online Survey

Overlap With Digital Marketing Tools Raises The Bar For SMMS Vendors

Convergence is rampant across the marketing technology (martech) stack.[7] SMMS capabilities are no exception, especially as social marketing becomes less siloed and an integral part of marketing overall. SMMS are adding capabilities already well represented in digital marketing stacks such as measurement and content marketing, while established marketing technologies are adding SMMS capabilities. Buyers risk paying for duplication that fragments data, complicates integration, and hampers collaboration. Caveat emptor: Choose an SMMS that complements your existing technology stack and proactively supports an expanding ecosystem, especially in areas such as:

› **Measurement and reporting.** Brands need to measure beyond content metrics and impressions.[8] Today's marketer must validate social's contribution to the business by demonstrating impact on revenue and brand health.[9] Customer references cited analytics and reporting as challenges in phone interviews; in our survey, customer references gave their vendors' measurement and reporting capabilities an average rating of 5.08 on our 7-point scale, showing room for improvement for this critical capability.

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› **Integrations.** SMMS technologies should integrate with a marketer's existing technology stack to drive greater value. For example, integration with a client's CRM enables a more complete customer profile, improving future customer experiences in all channels. Yet even when integrations are available, they require heavy lifting from the client. One customer reference shared that his IT group must be involved from a "maintenance and management perspective." SMMS vendors have an opportunity to not only provide out-of-the-box integrations for existing technologies, but also to develop processes that ease the effort and friction for clients.[10]

› **Security/risk certifications.** Expect international security and privacy certifications to become mandatory requirements of brands' technology partners in the near future as privacy and risk laws become more stringent.[11] These certifications keep providers compliant with evolving global regulations. SMMS vendors can't rely on their hosting partners to meet these requirements on their behalf, as they are ultimately responsible for any data breaches. Salesforce was the only vendor to meet all our security criteria.

Social Media Management Solution Evaluation Overview

To assess the state of the social media management market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top social media management solution vendors. After examining past research, user needs assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 32 criteria, which we grouped into three high-level buckets:

› **Current offering.** We evaluated each solution's current feature set with a focus on its ability to pull nonmarketers into the social media management process. Specifically, we looked at whether the solution's response, content, and workflow capabilities allow for nonseat holders to review content and whether they pull in external data sources, such as CRM or business intelligence (BI) tools. We also analyzed each solution's social advertising, measurement, and data partnerships, and factored in usability, platform security, global functionality, and overall customer satisfaction.

› **Strategy.** Similar to the current offering criteria, we evaluated each vendor's strategy for expanding social use cases beyond marketing. For planned enhancements, we looked specifically for road maps that focused on expanding social media beyond marketing teams and sought partnership ecosystems that include nonsocial measurement and data partnerships. We also evaluated vendors' customer retention efforts, pricing transparency, revenue growth, and clarity of their target markets.

› **Market presence.** This group of criteria focuses on the size of each vendor. We looked at each vendor's install base, revenue, and customer support.

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Evaluated Vendors And Inclusion Criteria

Our evolved 2017 inclusion criteria resulted in the exclusion of some vendors that qualified for our 2015 Forrester Wave of this category. In addition, we excluded Adobe because it is no longer investing in its standalone social product; it is developing its Experience Cloud to deliver social functionality as part of a broader offering. Forrester included 10 vendors in this assessment: Facelift, Hootsuite, Lithium Technologies, Oracle, Percolate, Salesforce, Spredfast, Sprinklr, Sprout Social, and Sysomos. Each of these vendors has (see Figure 3):

› A projected revenue for 2017 of at least USD $26 million.

› A client base that consists of at least 25% B2C companies.

› A client base that consists of at least 25% enterprise-sized companies (defined as 1,000 employees or more).

FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated
Facelift	Facelift Cloud
Hootsuite	Hootsuite Enterprise
Lithium Technologies	Social Media Management
Oracle	Social Cloud
Percolate	Percolate
Salesforce	Social Studio
Spredfast	Spredfast Conversations
Sprinklr	Sprinklr Experience Cloud 10.4.0
Sprout Social	Sprout Social
Sysomos	Sysomos 6.5

Vendor inclusion criteria

The vendor has a 2017 projected revenue of at least USD $26 million.

The vendor's client base consists of at least 25% B2C companies.

The vendor's client base consists of at least 25% enterprise-sized companies, defined as companies with 1,000 employees or more.
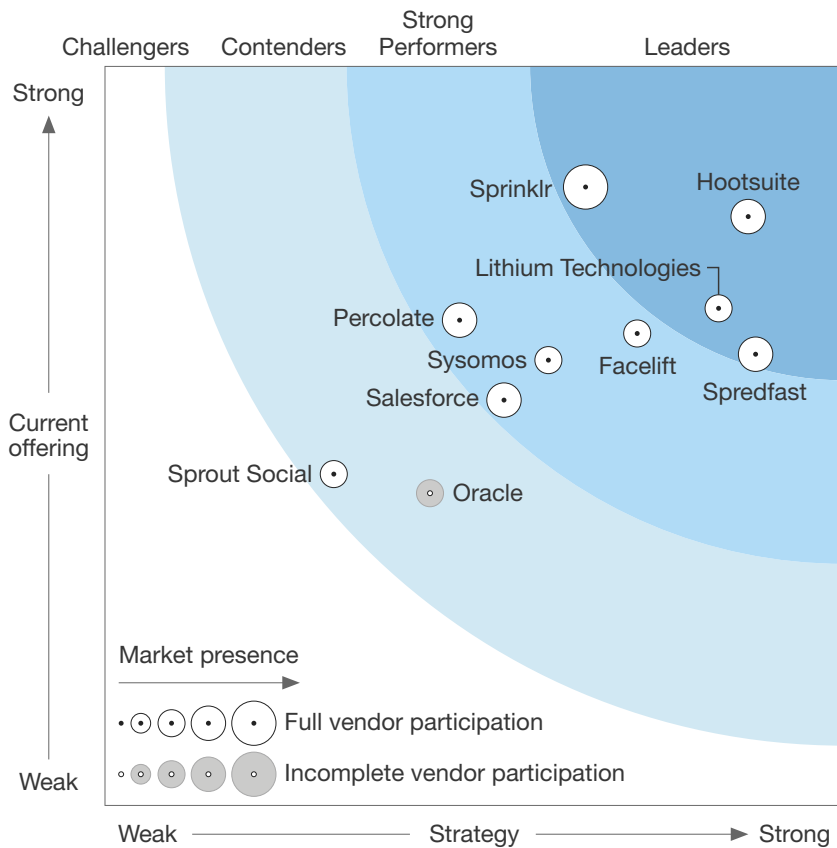
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Vendor Profiles

This evaluation of the social media management market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4).

FIGURE 4 Forrester Wave™: Social Media Management Solutions, Q2 '17

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FIGURE 4 Forrester Wave™: Social Media Management Solutions, Q2 '17 (Cont.)

	Forrester's weighting	Facelift	Hootsuite	Lithium Technologies	Percolate	Salesforce	Spredfast	Sprinklr	Sprout Social	Sysomos
Current Offering	50%	3.18	3.97	3.35	3.27	2.73	3.04	4.17	2.23	3.00
Response	5%	3.00	2.00	5.00	2.00	2.00	3.00	3.00	3.00	3.00
Content	10%	2.30	3.70	3.70	3.10	3.10	2.40	3.70	0.90	1.95
Workflow	20%	4.50	4.00	4.00	3.50	3.00	3.50	4.00	1.75	3.00
Social advertising	5%	3.00	3.00	1.00	1.00	3.00	3.00	5.00	0.00	0.00
Measurement and data	20%	3.00	5.00	3.00	3.00	1.00	5.00	5.00	3.00	5.00
Usability	10%	2.00	4.00	3.00	5.00	2.50	4.00	3.50	4.50	3.00
Security and risk	10%	2.50	3.50	4.00	3.00	5.00	2.00	3.50	0.50	0.50
Global functionality	10%	3.00	4.00	2.80	2.10	3.20	1.00	5.00	0.40	5.00
Customer satisfaction	10%	4.00	4.00	3.00	5.00	3.00	1.00	4.00	5.00	2.00
Strategy	50%	3.60	4.35	4.15	2.40	2.70	4.40	3.25	1.55	3.00
Planned enhancements	40%	3.00	5.00	3.00	1.00	3.00	5.00	3.00	1.00	3.00
Partnerships	40%	4.00	4.00	5.00	3.00	2.00	4.00	4.00	1.00	3.00
Customer retention	5%	3.00	2.00	4.00	5.00	5.00	5.00	4.00	5.00	5.00
Pricing transparency	5%	5.00	5.00	5.00	3.00	3.00	5.00	0.00	5.00	1.00
Revenue growth	5%	3.00	3.00	5.00	3.00	1.00	1.00	5.00	5.00	1.00
Target market	5%	5.00	5.00	5.00	5.00	5.00	5.00	0.00	0.00	5.00
Market Presence	0%	2.95	3.45	2.65	3.40	3.95	4.00	4.45	2.85	2.75
Installed base	50%	3.90	2.90	2.80	2.80	3.90	3.50	3.90	2.20	3.00
Revenue	25%	1.00	5.00	3.00	3.00	5.00	5.00	5.00	2.00	1.00
Customer support	25%	3.00	3.00	2.00	5.00	3.00	4.00	5.00	5.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Leaders

› **Hootsuite's revamped capabilities officially cement its enterprise status.** Legacy player Hootsuite maintains valued partner status with customers due to its liberal integration philosophy and client responsiveness. It has enhanced its offering with progressive measurement and advertising capabilities previously unavailable. While these new additions are individually valuable, Hootsuite must migrate its measurement and advertising user interfaces into refined end-to-end experiences to anticipate marketers' evolving needs. Hootsuite Enterprise's collaboration, compliance, archiving, and integration capabilities make it an appropriate product for brands expanding their use of social beyond marketing teams.

› **Lithium Technologies offers a response-driven SMMS reminiscent of its heritage.** Lithium's year-old SMMS is reflective of the vendor's community- and customer-support roots, as demonstrated by its strong response management and suggested response capabilities. To fully develop social media into a core communication vehicle, Lithium must support the next level of core SMMS capabilities, such as collaboration, and include regional social networks without complicating the user experience. Lithium's SMMS is best for brands prioritizing response to customer interactions across social.

› **Spredfast aims to bring marketing and servicing together for "brand love."** Spredfast's Conversations product delivers traditional SMMS functionality plus access to add-on features to unify service and marketing for greater brand affinity. Though clients remain loyal to Spredfast, they see opportunities for improvement. Some clients want direct integrations into specific digital asset managers (DAMs). Spredfast does proactively suggest using services such as Zapier to connect APIs, but this solution is at an additional cost to the client. Conversations is well suited for brands wanting better collaboration across marketing and service teams.

› **Sprinklr's advertising capabilities extend its social marketing reach.** Sprinklr's advertising integration lets clients stay within Sprinklr even as they boost posts, create dark posts, or set targeting and budget parameters. Plus, Sprinklr offers solid measurement capabilities. However, Sprinklr's lack of pricing transparency is an area of concern — clients express apprehension about Sprinklr's obscure pricing and unexpected additional fees. Sprinklr's SMMS is best for large enterprise social deployments or organizations that already leverage its listening capability.

Strong Performers

› **Facelift's flexible, workflow-driven approach fuels cross-team initiatives.** Facelift, a German newcomer, doesn't view social media as an isolated channel. Rather, it enables the distribution of social's impact across the enterprise with a rigorous yet safe approach to workflow and approvals. However, Facelift has an opportunity to deliver more value for global enterprises. It must prioritize regional network coverage, language accessibility, mobile app support, and partnership expansion to remain competitive globally. Facelift is best suited for European-based brands or divisions seeking operational efficiency.

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› **Sysomos reimagines its SMMS with a focus on listening and search.** In 2015, social listening provider Sysomos acquired Expion, a standalone SMMS, and GazeMetrix, an image recognition product. Sysomos has transformed itself into a social suite with extensive language, tagging, analysis, and measurement capabilities. Yet clients that we spoke with struggle to unlock the full value of this broader platform, saying it's not streamlined and some functionality feels disjointed. Sysomos must better unify its diverse components with a user-friendly interface featuring value-added technology integrations and collaborations. Sysomos suits clients with global language, analysis, and listening needs.

› **Percolate excels with content governance, but misses some SMMS needs.** Percolate focuses attention on three content-centric principles: visibility, coordination, and governance. Percolate has an intuitive interface garnering good scores across usability, content integration, tagging, and compliance categories. Percolate must continue investing in areas that are of increasing importance to digital marketers. For example, response management is core to a brand's social presence, but this remains an area of opportunity as Percolate doesn't support automated post lock and pause functionality. Percolate is best suited for brands that prioritize content creation and collaboration.

› **Salesforce updates its user experience, yet usability remains an opportunity.** Salesforce has taken its Social Studio SMMS several steps forward since 2015 with a solution that tackles user experience. Clients noticed significant user interface updates within this past year. Social Studio does well with tagging and regional social network coverage, but challenges remain with Social Studio's cost for integrating across the Salesforce ecosystem. For example, the Salesforce Wave Analytics Cloud provides robust data and measurement at an additional cost. Social Studio is best for brands planning to invest or already invested in the Salesforce ecosystem.

Contenders

› **Oracle shines with language support, but must invest in fresh automated capabilities.** Oracle addresses client needs with its global interface available in 36 languages. Though it is a nonparticipating vendor in this evaluation, it is currently improving its overall user experience with a user interface upgrade across all its products. Oracle must create efficiencies and provide additional value for marketers by investing in automated capabilities such as suggested responses and content recommendations that leverage customer data from other parts of its ecosystem. Oracle is best suited for clients already invested in the Oracle ecosystem.

› **Sprout Social delivers on customer satisfaction, but not complex client needs.** Sprout Social offers table stakes SMMS functionality at a reasonable price with high usability and customer satisfaction. Core capabilities include suggested response and scheduling functions. But Sprout Social will hinder its ability to serve clients across markets if it doesn't evolve — for example, global enterprises seeking to reach customers on networks such as China's Sina Weibo or Russia's VK will quickly hit limitations with Sprout Social's small global footprint. Sprout Social best supports US-based clients with publishing and customer care needs.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Survey Methodology

Forrester's Q2 2017 Global Social Media Management Solutions Forrester Wave™ Customer Reference Phone/Online Survey was fielded to 63 customer references provided from the vendors evaluated in the Forrester Wave.

Forrester fielded the survey from March 14 to April 11, 2017. Respondent incentives included a courtesy copy of the Forrester Wave report. Exact sample sizes are provided in this report on a question-by-question basis.

This survey used a self-selected group of respondents and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by March 6, 2017.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted in-person briefings to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls and survey.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers, and fielded a survey on customer satisfaction to an additional two to six references per vendor.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

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After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] Forrester believes social media can provide brands with value that goes beyond the marketing team. See the Forrester report "You Don't Need A 'Social Marketing' Strategy."

[2] Best-of-breed point solutions complement core marketing technology capabilities. See the Forrester report "Complement Your EMSS With Best-Of-Breed Point Solutions."

[3] See the Forrester report "Vendor Landscape: Social Marketing Technology."

[4] Source: Forrester's Q2 2017 Global Social Media Management Solutions Forrester Wave™ Customer Reference Phone/Online Survey.

[5] Source: Forrester's Q2 2017 Global Social Media Management Solutions Forrester Wave™ Customer Reference Phone/Online Survey.

[6] In 1975, intangible assets such as brand health and customer experience accounted for approximately 17% of the S&P 500's market value; today, that percentage has risen to more than 87%. Companies must manage their actions across mediums, including social media, to protect brand health and their bottom line. See the Forrester report "Brand Resilience: Understanding Risk Managers' Key Role In Protecting Company Reputation."

[7] See the Forrester report "A More Perfect Union: Adtech And Martech Convergence Will Revolutionize Marketing."

[8] See the Forrester report "Measure Marketing Engagement Right Or Not At All."

[9] See the Forrester report "How To Measure Social Programs."

[10] Source: Forrester's Q2 2017 Global Social Media Management Solutions Forrester Wave™ Customer Reference Phone/Online Survey.

[11] See the Forrester report "Assess Your Data Privacy Practices With The Forrester Privacy And GDPR Maturity Model."

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