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The Forrester Wave™: Partner Relationship Management, Q4 2018

The 12 Providers That Matter Most And How They Stack Up

by Jay McBain
October 31, 2018

Why Read This Report

In our 26-criteria evaluation of partner relationship management (PRM) providers, we identified the 12 most significant ones — Allbound, Channeltivity, ChannelXperts, Impartner, Magentrix, Mindmatrix, Oracle, Salesforce, TIE Kinetix, Webinfinity, Zift Solutions, and ZINFI — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2B marketing and channel professionals make the right choice.

Key Takeaways

Salesforce, ZINFI, Zift Solutions, And Impartner Lead The Pack
Forrester's research uncovered a market in which Salesforce, ZINFI, Zift, and Impartner are Leaders; Mindmatrix, Oracle, Channeltivity, and TIE Kinetix are Strong Performers; and Magentrix, Webinfinity, ChannelXperts, and Allbound are Contenders.

Driven By New Buyers, Channel Growth Is Increasing The Need To Automate
The PRM market is growing because B2B channel professionals are seeing a sharp increase in the variety of partner types. New shadow channels come with different business models, and channel pros need to manage them more like influencers, advocates, and alliances than traditional resellers.

Quick-Start Templates, Personalization, And Advanced Analytics Are Key Differentiators
As legacy technology becomes outdated and less effective, the ability to scale a partner program includes the use of more specialized templates, improved business logic and workflows, personalization at the company and individual level, and analytics that drive the next best action.

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End-To-End Partner Management Is Critical To Reach New Buyers

As brands increasingly use channels, partnerships, and alliances as a primary vehicle to reach customers, managing these relationships in a consistent, predictable, and productive way will be critical. Strong partner programs that serve indirect routes-to-market will differentiate companies in the next decade, and B2B channel pros need the right technologies to support and scale them, providing personalization and self-service at every interaction point (e.g., recruitment, onboarding, training, enablement, incentives, co-selling, and co-marketing).

As we discovered in the Forrester report "Death Of The Traditional IT Channel," channel ecosystems are entering a period of unprecedented change.[1] New line-of-business buyers are making most technology decisions and using shadow channels to do so. New channel partners are also entering the market with new business models — many without resell components — which changes the economics of partner management. Due to this expansion of new influencers, advocates, and alliances, many B2B channel pros are taking a fresh look at commercial PRM platforms to address:

› **Inefficient workflows.** B2B channel pros who rely on spreadsheets or aging custom-built applications for PRM often can't keep up with certifications, leads, incentives, and deals without proper workflows and business logic in place. Manual tasks such as service communications, tracking opportunities, and marketing development fund (MDF) audits take considerable field time, which makes channel partners frustrated and question the brand's commitment.[2]

› **Increased need for personalization and scale.** Very few programs have a homogeneous set of partners that can be managed via a linear gold/silver/bronze type of program. Our research has identified more than a dozen types of partners per program, with an additional eight job roles inside each.[3] The permutations grow with multiple product lines, tiers, geographies, and economic models. This level of scale requires new automation technologies that will soon include AI, machine learning, and predictive analytics.

› **Sophisticated segmentation and targeting.** B2B channel pros are moving away from the shotgun approach of the past — amassing a long tail of dormant partners with the hope of activating them with the right mix of incentives and charm. Channel partners have also become smarter, understanding the constraints on their time and resources.[4] The top-performing partners are placing their bets on — and giving their loyalty to — brands that offer the best PRM systems to smooth their business processes and knowledge transformation and drive joint opportunities.

PRM Solutions Are Maturing To Foundational Platforms

B2B channel professionals and their technology organization counterparts have invested in PRM since the early 2000s as a single source of truth for indirect sales. It was usually a silo-driven system that rarely integrated with back-end enterprise resource planning or sales and marketing systems. As CRM started to grow significantly in the mid-2000s, it challenged PRM as the core source of truth for

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indirect sales. PRM then went through a retrenchment period before it rebounded in the past five years as a critical horizontal platform.[5] Fully integrated with modern cloud-based CRM systems, the PRM solutions here all provide critical tools and workflows for the entire partner life cycle including:

› **Partner management.** This is the database schema, taxonomy, security, and multitier profile management for modeling your channel partner ecosystem at the company and individual level. It includes organizational and location structures, governance, partner tier levels, partner business model types, skills and certifications, market savvy, staff role constitution, partner-to-partner relationships, etc. The schema can extend to include custom attributes.

› **Planning and contract management.** Solutions incorporate elements of channel strategy; planning at the company, region, or product level; go-to-market; coverage mapping and execution; and capacity planning. They also support contracting with different partner types, while complying with local regulations and legislation in every region in the world.

› **Performance management.** Most PRM solutions can model the gives (performance) and gets (rewards) of the master manufacturer-partner relationship program (tiers). Designing multitiered incentive programs at the company and individual level drives motivation, behaviors, and loyalty, with backup from extensive dashboards and notifications that serve channel account managers, finance, operations, and marketing.

› **Onboarding, training, and service management.** Platforms include partner segmenting, targeting, nurturing, and recruitment, along with learning management functionality such as education, training, and certifications. They support robust technical support mechanisms such as tickets and help desk with modern tools such as chat, knowledge base, community, and self-service.

› **Partner portal/content management.** A partner portal is a website through which content, applications, and communications flow between a manufacturer and its channel partners. Most PRM implementations begin with a personalized, content-centric partner portal. The key portal management requirement is adaptability because savvy channel pros want to advance their partner portals to support the more valuable business processes and interactions.

› **Partner opportunity management.** Supporting co-selling initiatives is a core part of PRM. The ability to register deals, distribute leads, and apply custom business rules for qualifying, ranking, and scoring leads is critical in driving indirect sales growth. The multitiered, multifaceted approach is what differentiates the functionality from CRM systems. Collaboration mechanisms from the brand to the partner through the entire sales cycle and partner support for the customer buying journey are key differentiators of leading partner programs.

› **Partner marketing management.** Solutions support local partners' co-marketing initiatives with the setup of MDF, co-op funding, and through-channel marketing functionality such as cobranded assets, email, social, search, or syndicated content — hallmarks of a best-in-class

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partner program. Although not as extensive as the technology assessed in "The Forrester Wave™: Through-Channel Marketing Automation, Q2 2018," a basic set of marketing campaign enablement with the associated funds is an important component of PRM.

› **Business intelligence and channel data management.** Offering prepackaged reports and dashboards with support from an analytics engine that helps a brand determine the most efficient and productive adjustments to the program is another key attribute of today's solutions. The next major evolution of PRM will be around AI, machine learning, and predictive/prescriptive analytics, with several vendors already working with early adopters. Leveraging the mountains of data inside the PRM system as well as external feeds such as point-of-sale, inventory, pricing, distributor, and end user reporting will crown the next generation of leading vendors in this space.

Partner Relationship Management Evaluation Overview

To assess the state of the PRM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top PRM vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 26 criteria, which we grouped into three high-level buckets:

› **Current offering.** Forrester reviewed a wide range of partner management technologies including profile management, security, systems of record, planning, coverage, assignment, contract management, strategy, dashboards, and notifications. We also looked at the partner life cycle including onboarding, training, service automation, co-selling, co-marketing, as well as corresponding portal and content technology, integrations with other systems, and UI/user experience (UX).

› **Strategy.** Forrester reviewed the product vision, market approach, innovation road map, supporting products and services, and partner ecosystem.

› **Market presence.** Forrester reviewed the revenue, number of customers, number of new customers added in 2017, average deal size, number of users, and number of employees.

Evaluated Vendors And Inclusion Criteria

Forrester included 12 vendors in the assessment: Allbound, Channeltivity, ChannelXperts, Impartner, Magentrix, Mindmatrix, Oracle, Salesforce, TIE Kinetix, Webinfinity, Zift Solutions, and ZINFI. Each of these vendors has (see Figure 1):

› **Forrester client interest.** Forrester clients express interest in learning more about the evaluated vendors, frequently asking about the evaluated vendors within the context of inquiry, advisory, and/or consulting.

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› **Enterprise market traction.** Included vendors often compete for enterprise-class deals (based on Forrester client interviews, customer reference interviews, and services and software vendor responses to anonymized surveys) and illustrate vision and thought leadership within the PRM space. Vendors have also subsequently proven that they have the ability to support enterprise needs of Forrester customers.

› **Revenues totaling at least $3 million.** All included vendors must have a total annual revenue of approximately $3 million or more. We kept the revenue cutoff low to recognize the large number of small players and fragmented nature of the PRM market.

› **A best-of-breed product available for purchase.** Included vendors have a standalone PRM product that has been in general release for a substantial amount of time and is in use by at least 20 global customers. The products we included have a specific release that was generally available at the time of data collection for this evaluation, with references available for contact.

FIGURE 1 Evaluated Vendors And Product Information

Vendor	Product evaluated	Version
Allbound	Allbound	4.8.1
Channeltivity	Channeltivity	5.2.8
ChannelXperts	ChannelPRM	
Impartner	Impartner PRM	5.6
Magentrix	Magentrix PRM	
Mindmatrix	Mindmatrix Partner Enablement Platform	4.48
Oracle	Oracle Engagement Cloud — Partner Relationship Management	18B
Salesforce	Sales Cloud PRM	Summer 2018
TIE Kinetix	FLOW Partner Automation	
Webinfinity	Webinfinity Partner Engagement Hub on the Webinfinity Platform	
Zift Solutions	Channel as a Service (CHaaS)	
ZINFI	Partner Relationship Management	9.6

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Vendor Profiles

We intend this evaluation of the PRM market to be a starting point only and 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 2 and see Figure 3). Click the link at the beginning of this report on Forrester.com to download the tool.
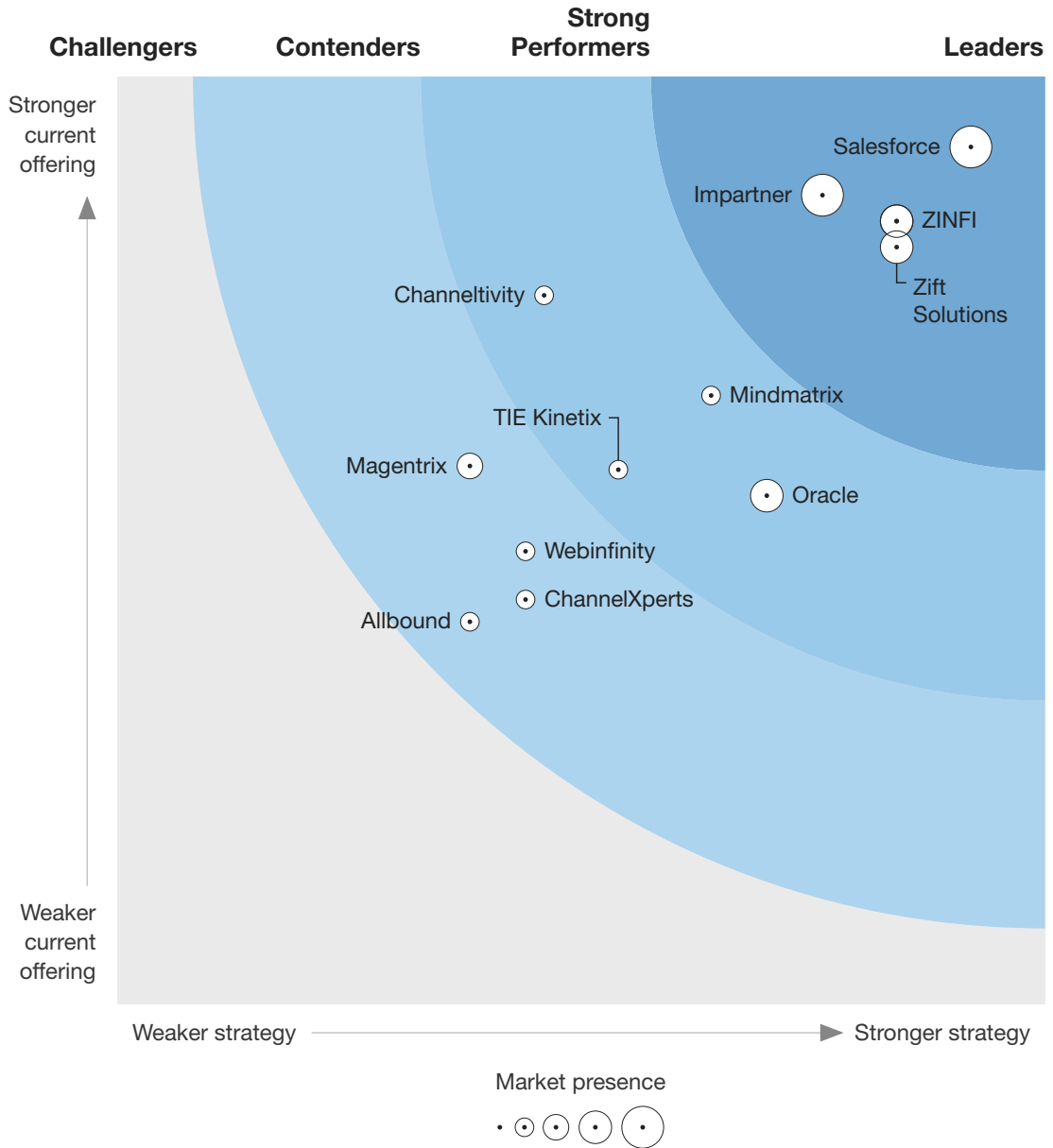
FIGURE 2 Forrester Wave™: Partner Relationship Management, Q4 2018

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FIGURE 3 Forrester Wave™: Partner Relationship Management Scorecard, Q4 2018

	Forrester's weighting	Allbound	Channeltivity	ChannelXperts	Impartner	Magentrix	Mindmatrix
Current offering	50%	2.06	3.82	2.18	4.36	2.90	3.28
Partner management	20%	2.40	3.60	2.20	4.40	2.40	3.00
Partner onboarding, training, and service	20%	1.60	3.70	1.70	4.30	3.70	3.00
Partner co-selling/co-marketing	20%	1.70	4.40	2.30	5.00	2.40	4.40
Partner portal/integrations	20%	2.90	3.00	2.30	4.40	3.00	3.00
Partner performance/incentives	20%	1.70	4.40	2.40	3.70	3.00	3.00
Strategy	50%	1.90	2.30	2.20	3.80	1.90	3.20
Product vision	25%	3.00	3.00	3.00	5.00	3.00	5.00
Market approach	25%	1.00	3.00	1.00	3.00	1.00	3.00
Innovation road map	20%	3.00	1.00	3.00	3.00	3.00	3.00
Supporting products/services	15%	1.00	1.00	3.00	3.00	1.00	3.00
Partner ecosystem	15%	1.00	3.00	1.00	5.00	1.00	1.00
Market presence	0%	2.00	1.70	1.20	4.30	2.40	1.60
Revenue	25%	1.00	1.00	1.00	3.00	1.00	1.00
Number of customers	20%	3.00	3.00	1.00	5.00	3.00	3.00
New customers added in 2017	15%	5.00	3.00	1.00	5.00	5.00	1.00
Average deal size	10%	1.00	1.00	3.00	3.00	1.00	1.00
Number of users	20%	1.00	1.00	1.00	5.00	3.00	1.00
Number of employees	10%	1.00	1.00	1.00	5.00	1.00	3.00

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

FIGURE 3 Forrester Wave™: Partner Relationship Management Scorecard, Q4 2018 (Cont.)

	Forrester's weighting	Oracle	Salesforce	TIE Kinetix	Webinfinity	Zift Solutions	ZINFI
Current offering	50%	2.74	4.62	2.88	2.44	4.08	4.22
Partner management	20%	3.00	5.00	3.00	2.20	3.60	4.40
Partner onboarding, training, and service	20%	2.30	5.00	3.00	2.40	3.70	4.30
Partner co-selling/co-marketing	20%	2.40	4.40	3.00	1.70	4.30	4.30
Partner portal/integrations	20%	3.00	4.40	2.40	3.60	4.40	3.70
Partner performance/incentives	20%	3.00	4.30	3.00	2.30	4.40	4.40
Strategy	50%	3.50	4.60	2.70	2.20	4.20	4.20
Product vision	25%	3.00	5.00	3.00	3.00	5.00	5.00
Market approach	25%	5.00	5.00	3.00	1.00	3.00	3.00
Innovation road map	20%	3.00	3.00	3.00	3.00	5.00	5.00
Supporting products/services	15%	5.00	5.00	3.00	3.00	5.00	5.00
Partner ecosystem	15%	1.00	5.00	1.00	1.00	3.00	3.00
Market presence	0%	3.90	5.00	1.90	1.50	3.80	3.20
Revenue	25%	3.00	5.00	3.00	1.00	3.00	3.00
Number of customers	20%	3.00	5.00	1.00	1.00	3.00	3.00
New customers added in 2017	15%	5.00	5.00	1.00	3.00	3.00	3.00
Average deal size	10%	5.00	5.00	3.00	3.00	5.00	3.00
Number of users	20%	5.00	5.00	1.00	1.00	5.00	3.00
Number of employees	10%	3.00	5.00	3.00	1.00	5.00	5.00

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

Leaders

› **Salesforce distances itself from the pack.** Salesforce is the largest and fastest-growing PRM vendor in the industry. It benefits from CRM leadership and has an extensive global ecosystem of partners and support resources. Salesforce's PRM solution, an extension of its Community Cloud

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offering, shows strength across the board and has an ambitious road map. It integrates advanced Einstein AI and a digital experience platform that allows mass customization by type of user, subindustry, geography, or offering, which can be packaged into Lightning Bolt Solutions.

We received consistent feedback that the PRM platform takes quite a bit of configuration and integration work to go live. Some customers had a difficult time with third-party integrators that didn't have PRM skills, and the average time-to-deployment was significantly longer than competitors'. Customers also want Salesforce to beef up the co-marketing capabilities to, through, and with partners. The Salesforce PRM platform best suits enterprise-class organizations with large and complex channel organizations and extensive custom requirements.

› **ZINFI leverages a strong engineering pedigree and horizontal approach.** ZINFI's PRM solution provides robust global capabilities with excellent functionality, flexibility through a modular approach, and infinite customizations for complex channel environments. Paired with strong PRM functionality, concierge services, and sales enablement, the company was one of the first to envision unified channel management. It's also put significant work into improving UI/UX, deal registration, MDF management, and business intelligence features in the past few years. The company is actively looking to make additional sales and marketing investments to enter other industries and market segments that it hasn't focused on before.

Customer feedback centered around the balance between extra functionality and ease of use. Customers also reported a few UI glitches, but the company was quick to respond and provide service. ZINFI is a good fit for technology and manufacturing customers looking for a unified channel platform to handle complex workflows and requiring flexibility to fit emerging channel programs.

› **Zift uses an acquisition strategy to build its horizontal Channel as a Service platform.** Zift has come together with Relayware and Elastic Grid to create a full-function partner platform that goes beyond PRM to include through-channel marketing and creative/concierge-type services. Its vision is even more extensive and may include other channel software categories in the future. The PRM solution delivers comprehensive functionality on top of a very robust and configurable business rules engine platform. The partner education, training, and certification support capabilities are also among the best in this category. Zift gets high marks for its global coverage and has significant bases of operations in North America, Europe, and Asia Pacific.

Multiple references mentioned that support is sometimes challenging because of limited resources. As the companies merge their platforms, areas still exist that they haven't fully integrated. The legacy Relayware PRM platform was modular, so getting it all under one hood has taken a significant investment of time and money. The integration time tends to be longer than average, and more-than-average customization is necessary out of the box. Zift is a good fit for companies looking for robust end-to-end channel management capabilities from a company with a forward-looking strategy and vision.

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> **Impartner pours significant private equity funding into sales and marketing expansion.** Since rebranding from Treehouse Interactive four years ago, the company has grown significantly year on year with a beefed-up senior management team, the Salesforce ecosystem, and growth into new industries and global markets. The very tight integration with Salesforce CRM has allowed it to leverage the huge number of channel organizations that run their back ends on that platform. Work has been done across the platform in recent years to improve the UI/UX, build extensive templates and workflows, and compete on faster self-service deployments by customers. This focus has earned it a sizable number of new logos and referrals.

> With the company growing so quickly, several references mentioned that they wanted a better road map with more rigor around new releases and attention to detail. Impartner has broadened its focus on multiple industries outside of technology and telecom and will need to scale specific workflows, templates, and onboarding processes for new types of customers and use cases. Impartner is a good fit for customers that have invested in CRM solutions like Salesforce and Microsoft Dynamics and are looking for a fully integrated, easy-to-implement, and full-featured PRM solution.

Strong Performers

> **Mindmatrix provides unique functionality covering direct and indirect sales.** Mindmatrix has carved out an interesting niche among customers that want to manage their entire go-to-market and routes-to-market from one platform. Supporting the direct and indirect sales workflows in one platform gives customers a level of control and visibility that isn't available from other vendors in this report. With a special emphasis on partner enablement, the solution excels with customers based on its intuitiveness, ease of use, and end-to-end management of the entire partner journey.

> We heard from customer references that the company could offer more training and best practices for new users. The platform is robust, and several people felt they weren't getting the most out of the solution. We also heard that the notifications and trigger system would benefit from more levels of configurability. Mindmatrix is a good fit for midsize technology and manufacturing customers looking to run their entire direct and indirect sales process from one view.

> **Oracle looks to expand beyond its traditional installed base.** Oracle has quietly built a robust and capable PRM platform since our last PRM Wave in 2016. Most of its PRM customers are customers of other Oracle products. Given this installed base, we haven't seen much in terms of sales and marketing investment in the broader community. But a major benefit is that it covers many industries, which has allowed Oracle to build functionality and use cases to serve almost any type of channel, partner, or alliance. Early-adopter feedback has been very positive about the support and commitment of the product team, especially regarding responsiveness.

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Those same early adopters reported bugs and performance issues that slowed their partner deployments. The broader ecosystem of system integrators is also learning to use the product at the same time as early adopters, causing some relationship issues and missteps. The Oracle PRM platform best suits enterprise-class organizations within the larger Oracle ecosystem that are looking for strong integrations with back-end systems and unified support.

› **Channeltivity is growing fast with a mature, highly configurable solution.** Channeltivity entered the PRM market 11 years ago and targeted small and medium-sized business (SMB) and midmarket customers looking to build a robust channel program on a budget. The company has evolved since then and serves customers of all sizes across technology and manufacturing verticals. It is a full-featured PRM platform, which excels in self-service, has seamless Salesforce integration, and gets backing from a high-touch customer support team that won rave reviews from the references we spoke with. References reported being able to deploy Channeltivity within a matter of days with the breadth and depth of self-enablement functionality and straightforward workflows out of the box.

We heard feedback that the platform needs more multitier functionality, especially in regions such as Europe where distributors play a much more central role in the channel relationship. We also heard that the co-marketing functionality is still a bit rudimentary, and to do more advanced partner cobranding or co-marketing, a through-channel marketing point solution is necessary. Channeltivity is a good fit for technology and manufacturing customers looking for a robust PRM platform with strong self-service functionality, powerful integrations, and extra hand-holding support.

› **TIE Kinetix offers global PRM with extensive supply chain integration.** TIE Kinetix has delivered supply chain, commerce, and marketing solutions to OEMs, manufacturers, and vendors for more than 30 years. Most business comes from technology companies, but it also has success in retail, CPG, and luxury goods. The FLOW solution incorporates more than PRM and offers a flexible pricing structure that includes unlimited partners and supports 44 languages. Over the past year, the company has refocused on its core solutions, which has meant more investment in PRM.

References noted that the UI/UX needs improvement and the complexity of the platform can be overwhelming at times. TIE Kinetix is a good fit for global technology or retail customers looking for flexible, highly configurable, and integrated solutions for end-to-end partner management.

Contenders

› **Magentrix touts its all-in-one cloud collaboration platform with solid integrations.** After releasing its first product six years ago, Magentrix has built a modern PRM platform that supports online self-guided training, onboarding, lead registration, deal management, sales playbooks, collaboration, and self-service customer success. The platform has solid knowledge management capabilities and strong integrations with Salesforce and Microsoft Dynamics CRM solutions. The company gets most of its business from the technology sector but also has a growing business

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in the finance and manufacturing industries. Open to serving highly regulated industries of any capacity, Magentrix includes enterprise-grade features and security that focus on the entire customer and partner journey.

We heard from customer references that more templates and preprogrammed use cases would be valuable. Magentrix is relatively small in employee size, so a more robust support organization will be necessary to scale, especially into different industries. Magentrix is a good fit for midsize companies running on a Salesforce or Dynamics back end looking for a highly customizable and secure PRM solution.

› **Webinfinity rethinks the PRM market with personalized workspace automation.** Webinfinity launched in 2014 with a mission to change the traditional PRM user experience. The concept of personalized workspace automation allows the system to dynamically configure user experiences with just-in-time enablement. With the complexity and growing permutations of new partner types, the ability of a system to intelligently do this ensures the right partner user gets presented the right resources at the right time. This is a nonlinear approach to partner management and focuses on personalization more than standard segmentation. Webinfinity is a low-code/no-code environment that allows nontechnical channel managers to configure all aspects of the system.

Being a newer platform, references noted some limitations in the ability to build multilevel and multitier workflows and some issues with visibility into deal registration. Webinfinity is a good fit for companies looking to replace a traditionally linear PRM approach with a highly flexible, adaptable, and personalized approach to each individual in a partner ecosystem.

› **ChannelXperts extends PRM by adding cloud services automation.** ChannelXperts is the smallest firm that we evaluated in this report. The company punches well above its weight with a mature and fully featured PRM solution. Many customers are in Germany, but the company is rapidly expanding into the US and other countries. ChannelXperts assists customers with consulting and integration services beyond the ChannelPRM software solution. The solution offers different levels of flexibility, configuration, and workflows at an affordable price. There is also through-channel marketing automation and partner community features in the platform.

While references rated support highly, they mentioned that upfront training could use improvement and expectations around deployment timing could have better management. One noted that the deal registration functionality needed enhancement and channel account managers could have better training on the solution. ChannelXperts is a good fit for SMB companies looking to modernize their channel processes and easily integrate with a wide variety of back-end systems.

› **Allbound disrupts traditional PRM tools with a focus on the partner experience.** Allbound has grown steadily in the PRM market and found its niche in software companies and startups architecting their channel programs for the first time. The company believes the success of a PRM solution depends on the partner's experience and therefore has invested in a very modern UI/

UX. Additionally it provides innovative sales enablement functionality, such as support for sales playbooks, social media content posting, and gamification. Allbound also has an excellent mobile-friendly solution.

Customer feedback highlighted the solution's lack of maturity and deep functionality. Areas such as partner onboarding, business planning, capacity and coverage, and co-marketing also need development. Allbound is a good fit for smaller companies launching their first channel program or midsize channel organizations looking to engage partners in a new way.

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Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

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 September 15, 2018.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls when necessary 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.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

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. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

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

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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, please visit The Forrester Wave Methodology Guide on our website.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] See the Forrester report "Death Of The Traditional IT Channel."

[2] We have experienced a measured increase in the number of PRM inquiries and evaluation advisories in the past year related to inefficient channel tools and processes.

[3] See the Forrester report "The Three C's Of Shadow Channel Recruitment."

[4] Source: "7th State of the Channel," CompTIA, September 2018 (https://www.comptia.org/resources/technology-ecosystem-trends-research).

[5] We have experienced a significant increase in the number of PRM inquiries and evaluation advisories in the past year. We have also seen increased venture capital and private equity investment in the PRM space as well as new vendor entrants. Together these indicate renewed interest in and adoption of PRM solutions.

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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