

The Forrester Wave™: Customer Feedback Management Platforms, Q4 2018

The Nine Providers That Matter Most And How They Stack Up

by Faith Adams
October 30, 2018

Why Read This Report

In our 40-criteria evaluation of customer feedback management (CFM) providers, we identified the nine most significant ones — Clarabridge, Confirmit, InMoment, MaritzCX, Medallia, NICE Satmetrix, Qualtrics, SMG, and Verint — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer experience (CX) professionals choose the right CFM vendor for their organization.

Key Takeaways

Medallia, Qualtrics, InMoment, And Clarabridge Lead The Pack

Forrester's research uncovered a market in which Medallia, Qualtrics, InMoment, and Clarabridge are Leaders; Confirmit, MaritzCX, and SMG are Strong Performers; and NICE Satmetrix and Verint are Contenders.

CX Pros Aim To Be Proactive — Not Reactive

The CFM market is growing because more CX pros see the technology as essential to addressing their top challenges and transforming CX. CX pros increasingly trust CFM vendors to act as strategic partners, enabling them to move from reacting to customer problems to avoiding them through advanced features.

Scalability And Advanced Analytics Capabilities Are Key Differentiators

As more features of CFM technology become commoditized, buyers will find differentiation in scalability and advanced features like predictive and prescriptive analytics. Vendors that can successfully provide these features will position themselves to successfully deliver enterprise-grade CFM solutions.

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[Applying The Forrester Wave™: Customer Feedback Management Platforms, Q4 2018](#)

[How To Build Your Voice Of The Customer Program](#)

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CFM Is Critical To CX Transformation

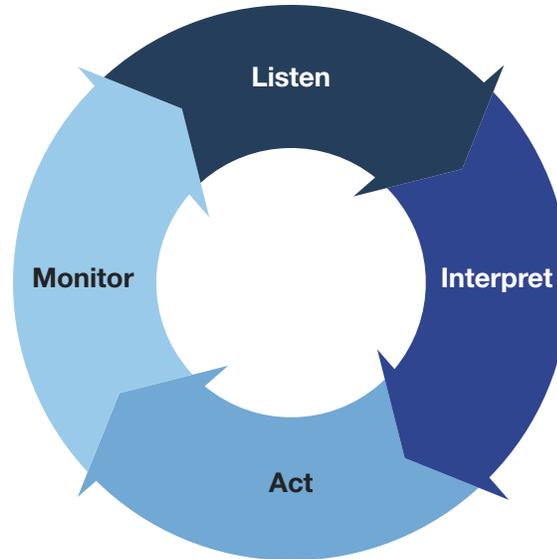
To transform customer experience, CX professionals rely on customer feedback management technologies and services. This is because CFM helps CX pros manage complexity by centralizing and automating key voice-of-the-customer (VoC) activities (see Figure 1). Forrester defines CFM as:

A system of software and processes that supports a company's VoC program by helping a company to solicit feedback from key customers across channels; centrally collect solicited and unsolicited feedback; analyze structured and unstructured feedback; distribute insights across the organization; close the loop with customers; act on the insights; and monitor progress continuously.

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FIGURE 1 CFM Platforms Support Four Tasks Of The VoC Program



VoC activity	How customer feedback management (CFM) can help
Listen	<ul style="list-style-type: none"> • Capture feedback across multiple channels, touchpoints, and levels of the customer relationship. • Gather unsolicited feedback from other sources (e.g., social and nonsocial).
Interpret	<ul style="list-style-type: none"> • Provide tools to analyze feedback and create dashboards and reports that are relevant to different audiences. • Automatically tailor and distribute predefined analyses for different stakeholders based on their assigned roles and permissions. • Predict what customers may do in the future.
Act	<ul style="list-style-type: none"> • Alert users when they need to respond to individual customers based on business rules, and provide tools to manage cases through to closure. • Provide analyses and decision tools to prioritize and prescribe systemic actions based on available customer data.
Monitor	<ul style="list-style-type: none"> • Track changes in metrics over time (e.g., customer satisfaction, Net Promoter Score [NPS], customer effort). • Measure results of VoC-initiated activities, such as immediate responses to customers, and their impact on customer loyalty.

Note: Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

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The Market Continues To Grow And Evolve In The Face Of Challenges

Since the last Forrester evaluation published in Q2 of 2017, the CFM space has seen significant growth.¹ What's more, it continues to progress from the technology standpoint. But the story isn't *all* rosy. Today's CFM vendors operate in a problematic environment characterized by:

- › **A lack of coordination and cooperation within client organizations.** Nearly 40% of CX pros cite a lack of cooperation across their organization as a key challenge when it comes to improving CX. Nearly 25% cite a lack of CX measurement data.² In addition, less than half of CX pros are responsible for their enterprise VoC program, and 65% say that there are other teams in their organization that are also focused on CX.³ This often results in multiple technologies being used to collect the VoC across the enterprise, bringing redundant costs. Worse, this approach creates data silos that inhibit an end-to-end view of the experience and minimize the impact that CFM can have on CX transformation.
- › **Continued convergence of offerings and target verticals among vendors.** The CFM vendors included in this evaluation approached the market from many different directions, but today their offerings have largely converged. Now each of the vendors promises most of the same features and capabilities, making it increasingly difficult for CFM buyers to differentiate their strengths and weaknesses and decipher who is best at what and who is best for their specific needs. What's more, these vendors continue to expand into many of the same verticals. For example, SMG — originally known for its expertise in the service industry — acquired Catalyst Healthcare Research in 2017.⁴
- › **A race for the most sophisticated tech like AI and machine learning.** The current CFM landscape is packed with vendors touting AI capabilities. That's exciting because true AI-enabled solutions aim to mimic humans' abilities to think and sense the world around them, reason through the information, and then act.⁵ That potential AI future is easy for buyers to fall in love with, but today's AI reality has a long way to go before it can deliver. The limitations of today's CFM platforms won't go away soon, in part due to a shortage of skilled human resources who can train the systems to interpret the data.

CFM Evaluation Overview

To assess the state of the customer feedback management market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top CFM vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. Client references also played a large role in our evaluation: We conducted three client reference calls per provider and fielded a survey among these client references. We then evaluated vendors against 40 criteria, which we grouped into three high-level buckets:

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- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave™ graphic indicates the strength of its current offering. Key criteria for these solutions include feedback and data collection, text analytics, driving action and monitoring change, enterprise scalability, professional services, and employee experience (EX) and recognition.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. This includes the vendor's customer strategy, product strategy and road map, enterprise strategy, partner ecosystem and approach, and employee ecosystem.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's active client base, enterprise customer base, and revenue from CFM and related services.

Evaluated Vendors And Inclusion Criteria

Forrester included nine vendors in the assessment: Clarabridge, Confrimit, InMoment, MaritzCX, Medallia, NICE Satmetrix, Qualtrics, SMG, and Verint. Each of these vendors has (see Figure 2):

- › **A comprehensive CFM technology offering.** To align with Forrester's definition of CFM, providers included in the Forrester Wave were screened to ensure that they support each key CFM activity with their own technology solution rather than by offering services on top of another firm's software.
- › **Strong market presence and interest from Forrester clients.** To focus on the largest players in the space, we limited this Forrester Wave to providers that reported 2017 revenues of at least \$50 million from CFM technology and services. We only included providers who reported that more than 45% of that revenue came from North America.⁶ Additionally, Forrester clients often discuss these vendors and their products through inquiries. Each vendor is consistently mentioned as a competitor by other vendors in the space, and these vendors compete for similar clients as per Forrester's assessment of the competitive landscape. Finally, to ensure an enterprise focus, we limited the Forrester Wave to providers that have demonstrated their capabilities to support these large clients.

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FIGURE 2 Evaluated Vendors And Product Information

Vendor	Product evaluated	Version evaluated	Release date
Clarabridge	Clarabridge CX Suite	Summer 2018	August 2018
Confermit	Confermit Horizons	Version 24	August 27, 2018
InMoment	CX Intelligence Cloud	Version 7.34.1	August 29, 2018
MaritzCX	MaritzCX Technology Platform	N/A	August 2, 2018
Medallia	Medallia Experience Cloud	Version e653	August 30, 2018
NICE Satmetrix	NICE Satmetrix NPX	N/A	February 2018
Qualtrics	Qualtrics Experience Management Platform	2018.08	August 2018
SMG	smg360	Version 6	August 15, 2018
Verint	VoC Solutions	15.2	October 2017

Vendor Profiles

We intend this evaluation of the customer feedback management market 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 3 and see Figure 4). Click the link at the beginning of this report on Forrester.com to download the tool. Please see the Forrester report “[Applying The Forrester Wave™: Customer Feedback Management Platforms, Q4 2018](#)” for additional insight.

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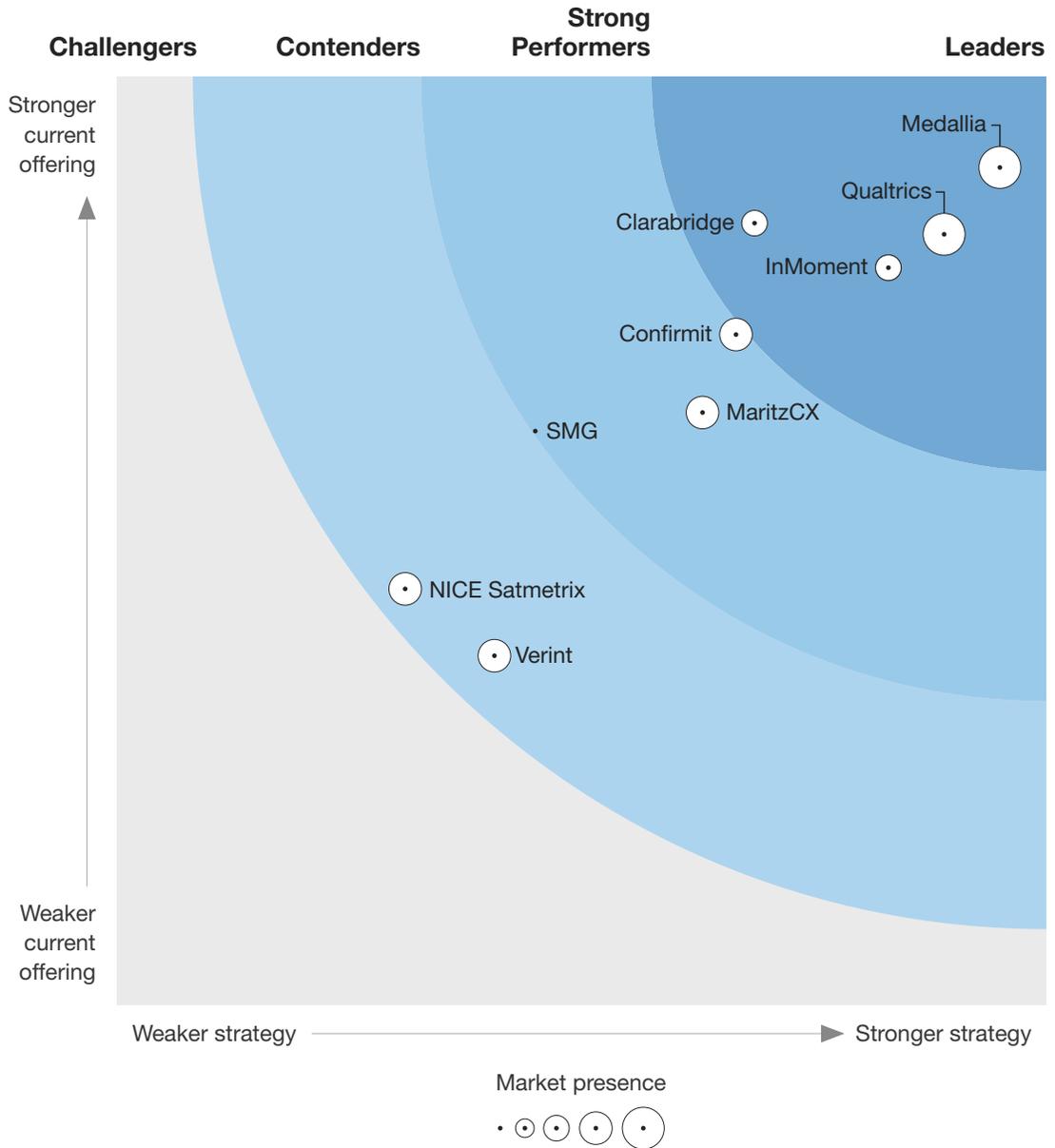
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FIGURE 3 Forrester Wave™: Customer Feedback Management, Q4 2018

THE FORRESTER WAVE™

Customer Feedback Management Platforms

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FIGURE 4 Forrester Wave™: Customer Feedback Management Scorecard, Q4 2018

	Forrester's weighting	Clarabridge	Confirmit	InMoment	MaritzCX	Medallia	NICE Satmetrix	Qualtrics	SMG	Verint
Current offering	50%	4.21	3.61	3.97	3.19	4.51	2.24	4.15	3.09	1.88
Feedback and data collection capabilities	25%	5.00	3.00	4.00	3.00	4.00	2.00	4.00	3.00	2.00
Text analytics	10%	5.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00	1.00
Analysis capabilities	20%	4.30	3.70	3.50	3.50	4.80	2.60	4.00	3.00	2.30
Driving action and monitoring	20%	3.80	4.00	4.70	3.00	5.00	1.70	4.70	3.70	1.50
Scalability	5%	5.00	3.00	5.00	3.00	5.00	1.00	3.00	3.00	1.00
Security	5%	3.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00	3.00
Professional service offerings	5%	3.00	3.40	4.20	3.80	5.00	3.00	4.20	5.00	1.80
Usability and accessibility	5%	2.80	3.90	3.90	3.90	5.00	3.00	5.00	3.90	2.10
Employee experience and recognition	5%	3.00	5.00	4.40	3.00	5.00	1.60	5.00	3.00	2.40
Strategy	50%	3.43	3.33	4.15	3.15	4.75	1.55	4.45	2.25	2.03
Customer strategy	25%	3.00	3.40	4.60	3.40	4.60	1.60	4.00	3.60	1.40
Product strategy	25%	5.00	3.00	4.40	3.00	5.00	1.00	5.00	1.00	1.60
Past performance and execution	15%	3.00	3.00	5.00	3.00	5.00	1.00	5.00	3.00	1.00
Global and enterprise strategy	15%	3.50	3.50	4.00	3.00	5.00	2.00	4.00	1.00	2.50
Partner ecosystem	10%	3.00	5.00	3.00	3.00	5.00	1.00	5.00	3.00	5.00
Employee ecosystem	5%	1.00	3.00	1.00	3.00	3.00	3.00	5.00	1.00	3.00
Pricing strategy	5%	2.00	2.00	4.00	4.00	4.00	4.00	2.00	3.00	2.00
Market presence	0%	2.40	3.70	2.40	3.70	4.30	3.10	4.40	1.00	3.70
Customer base	35%	3.00	5.00	3.00	3.00	3.00	5.00	5.00	1.00	5.00
Enterprise customer base	35%	3.00	3.00	3.00	5.00	5.00	3.00	5.00	1.00	3.00
CFM revenue	30%	1.00	3.00	1.00	3.00	5.00	1.00	3.00	1.00	3.00

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

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Leaders

- › **Medallia drives CX improvement from the top down and the bottom up.** Medallia clients rave about the way the vendor enables a culture of CX, democratizing insights by bringing the VoC to the frontlines and incorporating the voice of the employee. This year, the vendor updated its text analytics capabilities and introduced new features like Conversations, which lets customers provide real-time feedback across messaging platforms such as SMS and Facebook Messenger, and VoC Anywhere, which lets companies collect feedback natively through various internet-connected devices or platforms. Clients continue to praise Medallia for its partnership and thought leadership, as well as its ability to manage complex enterprise programs with what one reference client deemed “flawless execution.” That’s high praise because the vendor operates at scale: All its reference clients had complex enterprise-level programs, and some of its clients have over 100,000 active users.
- › **Qualtrics’ “land and expand” strategy continues to pay off.** Qualtrics was once known as a simple DIY self-service survey tool, but its offerings continue to rapidly evolve. The vendor has made significant investments in both its platform and services since our last CFM Forrester Wave, strengthening its position in this space. Qualtrics lets clients meet customers wherever they are, collecting feedback across a variety of channels and locations. In 2018, the vendor made significant investments in its analytics capabilities by adding the ability to conduct complex conjoint analysis in as little as a day and introducing Predict iQ, which lets clients move from being reactive to proactive by identifying at-risk customers. In addition to its CX offering, the vendor is making a name for itself with its comprehensive “XM” offering — bringing brand, product, and employee experience together. As more companies realize that EX is a critical component to driving CX, this strategy is resonating with new buyers and current Qualtrics customers alike.
- › **InMoment continues its momentum.** Though smaller than either Medallia or Qualtrics, InMoment punches well above its weight by blending strengths in strategy, technology, services, and people. Long known for its retail, hospitality, and travel expertise, InMoment proved in 2018 that it is capable of being a strong partner in new industries, including heavily regulated ones like healthcare and insurance. InMoment customers praise the vendor for being a strong partner that is consultative — not pushy and prescriptive — and helps them make the most of current programs while also working to future proof them. The vendor aims to help clients think about the future beyond surveys — an inevitability that many struggle to accept. Reference clients also value the vendor for its innovation, impact on process, and for helping them move from metrics to meaningful analysis. What’s more, clients highlight InMoment’s flexibility in bringing together survey data from other CFM tools used across the enterprise.
- › **Clarabridge excels with integrations and helping clients understand the “why.”** Clarabridge differentiates from the rest of the CFM pack through its strong focus on data integrations and the power of best-in-class text analytics. This approach enables the platform to be the brain for CX programs, helping clients make more intelligent decisions by making the most of data they already

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collect. The vendor is known for its abundance of industry models spanning vertical and horizontal use cases in multiple languages — outpacing all other vendors in the CFM Forrester Wave.⁷ Clients say they use Clarabridge to measure topic, sentiment, emotion, and intent — something we seldom heard from reference clients of other vendors. Clients praise the vendor for its strong omnichannel capabilities, which include aggregating disparate data sources — sometimes from other CFM vendors — and its ability to reduce their exposure to risk by identifying times when they were out of compliance so they could take corrective action. The vendor is also seeing an uptick in interest from contact center buyers, buoyed in part by its recent strong performance in the speech analytics Forrester Wave.⁸

Strong Performers

- › **Confirmit differentiates through its strength in the B2B space.** Confirmit demonstrates its prowess in the B2B space with a strong focus on enabling everyone across the enterprise to drive business outcomes by improving CX. The vendor aims to help clients bring together the vast amount of data they have sitting in silos and use it to drive outcomes. Clients praise Confirmit for helping them bring organizational alignment, develop insights, equip teams to act, and monitor progress over time. As a result, clients say they can demonstrate high ROI on their CFM investment. Reference clients also touted Confirmit's Account Health feature, which allows clients to see customers who may be at risk to churn and show the implications for revenue. Reference clients also touted the vendor's distribution-friendly licensing structure and its flexibility.
- › **MaritzCX aligns technology, research services, and relationships.** MaritzCX is known for its feedback collection, text analytics, Spotlight data mining tool, and action planning. The vendor continues to invest in the future of the MaritzCX platform, offering updates and new features since our last CFM Forrester Wave, such as enhanced dashboard functionality and multimedia collection and mining. The vendor also brings the added value of acting as a “one-stop shop” for clients who are looking for both a CFM platform and a robust research services firm. And MaritzCX's strengths go beyond its technology and research chops. The vendor receives praise from clients for its approach to partnership; in many cases, it acts as an extended part of the client's team.
- › **SMG empowers clients with actionable insights and strong partnerships.** SMG is a great fit for clients who need managed services. It takes a hands-on approach, acting as a trusted partner that helps clients go from data to insights and then action. Moving beyond its traditional strength and thought leadership in service industries — mostly retail and restaurant — the vendor has taken numerous steps since our last CFM Forrester Wave to demonstrate a compelling offer to CFM buyers across other industries. SMG has invested in more integrations, improved its text analytics offering, and incorporated more self-service features. The vendor has some differentiated strengths that are worth noting, like its proprietary BrandGeek market intelligence tool that provides location analytics and benchmarking data about shopping behavior and satisfaction. Reference clients say they chose — and stick with — SMG for its insights, benchmarking, reporting, and client service.

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Contenders

- › **NICE Satmetrix combines rich expertise in call centers and NPS.** Forrester's 2017 Q2 Wave of CFM platforms included both NICE, known for its call center solutions, and Satmetrix, famous for co-developing Net Promoter Score (NPS).⁹ A few months later the two merged, creating NICE Satmetrix. The vendor recently added to its wide and growing portfolio of products by acquiring Mattersight — a CFM vendor known for its Predictive Behavioral Routing (PBR).¹⁰ We expect this to advance NICE Satmetrix's aim to provide clients with a complete view of customer experience while also driving organizational engagement and change. Reference clients say they appreciate the vendor's NPS expertise and thought leadership. Clients also note that functionality, ease of use, and cost are some of the reasons they chose NICE Satmetrix as a partner.

- › **Verint offers a wealth of services to enterprise clients.** Verint is largely known for its expertise in the call center. It's therefore not a surprise that it's also known for its integrated speech-to-text transcriptions and near-real-time analysis, as well as a variety of managed services like application configuration and customization or training and enablement. Through its broader portfolio of products that it continues to grow through acquisitions, Verint seeks to bring "connectedness" to clients. The vendor aims to do this by linking VoC with adjacent technologies where it has traditional strengths like agent performance management and scorecards. Reference clients state that surveys are easy to build and deploy and that they are satisfied with Verint as a vendor and as a partner.

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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.

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 7, 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 where necessary to gather details of vendor qualifications.

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- › **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 a minimum of 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 to be evaluated in this market. From that initial pool of vendors, we then 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.

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. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

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

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Endnotes

- ¹ When comparing the 2011, 2017, and 2018 Forrester Wave evaluations, it is clear that the space has seen significant growth. In the 2011 Forrester Wave evaluation, CFM revenue for 2010 ranged from \$10 million to \$30 million or more. In the 2017 Forrester Wave evaluation, revenues for 2015 ranged from \$20 million to \$180 million. And for the 2018 evaluation, vendors reported 2017 revenues starting at \$50 million and exceeding \$250 million, with even more anticipated growth.
- ² When asked, “Which of the following are the most significant obstacles to improving the customer experience your company delivers?” 40% of CX pros cited a lack of cooperation. Source: Forrester’s Q3 2017 Global State Of Customer Experience Programs Online Survey.
- ³ Among the 220 core CX pros involved in the Forrester 2017 state of customer experience survey, 43% of respondents are responsible for their enterprise CX program. In addition, 65% of respondents stated that there are other teams within their organization also responsible for CX. Source: Forrester’s Q3 2017 Global State Of Customer Experience Programs Online Survey.
- ⁴ Source: “Service Management Group acquires Catalyst Healthcare Research to bolster expertise and growth,” PR Newswire press release, August 8, 2017 (<https://www.prnewswire.com/news-releases/service-management-group-acquires-catalyst-healthcare-research-to-bolster-expertise-and-growth-300501183.html>).
- ⁵ See the Forrester report “[TechRadar™: Artificial Intelligence Technologies And Solutions, Q1 2017.](#)”
- ⁶ See the Forrester report “[Now Tech: Voice Of The Customer \(VoC\) Vendors, Q4 2018.](#)”
- ⁷ Clarabridge has over 130 industry models that span a variety of vertical and horizontal use cases in multiple languages. The next closest vendor touted 50 models, but the majority had significantly less.
- ⁸ See the Forrester report “[The Forrester New Wave™: AI-Fueled Speech Analytics Solutions, Q2 2018.](#)”
- ⁹ Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
- ¹⁰ Mattersight’s Predictive Behavioral Routing intelligently pairs customers with the agents best equipped to handle their personality style in real time.

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