The Forrester Wave™: Customer Loyalty Solutions For Midsize Organizations, Q1 2016

The Seven Providers That Matter Most And How They Stack Up

by Emily Collins
January 4, 2016

Why Read This Report

In this Forrester Wave™ evaluation of customer loyalty solutions for midsize organizations, we identified the seven most significant customer loyalty solutions — 500friends, a Merkle company; Aimia; Clutch; CrowdTwist; DataCandy; Deluxe Corporation; and Inte Q Global — and researched, analyzed, and scored them. This report details our findings on how well each vendor fulfills our criteria and where it stands in relation to other vendor solutions in order to help customer insights (CI) professionals supporting loyalty strategy to select the right partner for their customer loyalty initiatives.

Key Takeaways

CI Pros Look For Providers With Differentiated, Reliable, And Technology-Enabled Solutions
The customer loyalty solution market is growing because more customer insights professionals see loyalty technology and services as a way to increase customer retention and engagement, as well as enrich customer relationships.

Three Vendors Offer Leading Solutions For Midsize Organizations
Forrester’s research uncovered a market in which 500friends (a Merkle Company), CrowdTwist, and Aimia lead the pack. Clutch and DataCandy offer competitive options. Deluxe Corporation and Inte Q Global lag behind.

Leaders In This Space Will Push Client Loyalty Strategies To The Next Level
As legacy loyalty offerings become more commoditized, improved engagement, strategy, and customer experience (CX) capabilities will dictate which providers will lead the next evolution of loyalty solutions.
The Forrester Wave™: Customer Loyalty Solutions For Midsize Organizations, Q1 2016
The Seven Providers That Matter Most And How They Stack Up

by Emily Collins
with Srividya Sridharan, Christian Austin, and Tyler Thurston
January 4, 2016

Table Of Contents
2 Improving Customer Loyalty Is A Top Priority
2 The Loyalty Market Combats Commoditization
4 New Markets, Delivery Models, And Capabilities Will Drive Growth
5 Customer Loyalty Vendor Evaluation Overview
   Evaluation Criteria Target Loyalty Strategy, Management, And Marketing Capabilities
   Evaluated Vendors Meet Size And Feature Criteria
7 Leading Providers Offer Flexible, Fast Solutions
9 Vendor Profiles
   Leaders
   Strong Performers
   Contenders
12 Supplemental Material

Notes & Resources
Forrester conducted product and service evaluations in Q3 and Q4 2015 and interviewed and/or surveyed seven vendors and 24 user companies.

Related Research Documents
Be A Loyalty Company, Not A Company With A Loyalty Program
Navigate The Complex Customer Loyalty Ecosystem
Improving Customer Loyalty Is A Top Priority

Customer relationships are now the only remaining source of competitive advantage, which makes earning customer loyalty mission-critical in the age of the customer. Our data shows that improving customer loyalty is likely to be a top marketing priority for 82% of global marketing decision-makers at midsize organizations in the next 12 months. As a result, they seek loyalty solutions that help companies identify and track customers, reward behavior, and drive deeper engagement and relationships. In fact, nearly all marketing decision-makers at midsize organizations that are using marketing automation tech indicated that they are planning to, or have implemented customer loyalty technologies or services. This includes a quarter who are planning to expand or upgrade their solutions. Forward-thinking companies lean on these solutions to do more than simply manage rewards programs — instead they want to apply loyalty insights to improve customer experiences, branding, and even acquisition marketing.

The Loyalty Market Combats Commoditization

The loyalty market is mature, and the lines dividing various types of loyalty providers are blurring. Vendors that were traditionally considered service providers continue to productize and improve their technology platforms, and pure-play loyalty technology platform providers are shoring up their professional services offerings. Furthermore, structured loyalty capabilities like currency, rewards, and redemption management are now commoditized. Each of the leading vendors in this mature market offers similar features and functionality. And, conversations with clients reveal they are looking for holistic loyalty solutions — increasingly including service providers, agencies, and software-as-a-service (SaaS) technology platforms in the same request for proposal (RFP). As such, we now see a market with three main categories of providers that deliver loyalty-related technology, services, or a combination of both (see Figure 1):

- **End-to-end loyalty solutions for large, midsize, and small organizations.** These vendors offer purpose-built solutions for customer loyalty with functionality to support a full range of loyalty requirements, including strategy development and program design, customer and member data management, operational support, measurement, and analytics. The breadth and depth of capabilities varies based on target market needs — for example, vendors targeting enterprises offer feature-rich solutions capable of supporting large and complex programs and integrations, whereas vendors targeting small organizations focus on simpler, plug-and-play solutions with a lower total cost of ownership. Example vendors include: Aimia, CrowdTwist, DataCandy, Epsilon, and Kobie Marketing. We do see some market overlap in solutions, especially among vendors that target large and midsize organizations. This report highlights the leading customer loyalty solutions for midsize organizations in the market.

- **Specialized loyalty solutions.** These vendors offer point solutions that focus on one piece of the loyalty value chain, such as program design or rewards fulfillment, are targeted to a specific vertical, or a larger solution of which loyalty is a key component. For example, points management
and rewards solutions that are embedded within point of sale (POS) solutions. They typically have resources — including products, services, sales, and/or account management — dedicated to customers who want loyalty-related solutions. Example vendors include: DBG Loyalty, LoyaltyOne, Points, rDialogue, and Welcome Real Time.

› **Complementary loyalty solutions.** The providers in this bucket offer solutions that are closely related to or enhance existing loyalty implementations. The solutions do not solely serve the loyalty market, but typically offer ancillary support through sophisticated campaign management mobile offers, deeper digital engagement, or member surveys. These vendors often establish partnerships with end-to-end solution providers or engage clients directly and include Adobe, SAP Hybris, SoHalo T3, Vibes, and Walker.

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**FIGURE 1 Three Core Categories Of Providers Offer Loyalty And Loyalty-Related Technology And Services**

<table>
<thead>
<tr>
<th>End-to-end solutions</th>
<th>Specialized solutions</th>
<th>Complementary solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>For large organizations:</strong></td>
<td><strong>Loyalty strategy:</strong> Hanifin Loyalty, Lavender Communication, Lenati, LoyaltyOne, rDialogue, The LacekGroup, Walker Information</td>
<td><strong>Marketing automation and analytics:</strong> Adobe, IBM, Oracle, Salesforce, SAS, SAP Hybris</td>
</tr>
<tr>
<td>Aimia, Bond Brand Loyalty (formerly Maritz Loyalty Marketing), Brierley+Partners, Comarch, Epsilon, Kobie Marketing, ICF Olson 1to1, TIBCO Software</td>
<td><strong>Loyalty Technology:</strong> Oracle (Siebel), SAP CRM, Stellar Loyalty</td>
<td><strong>Customer feedback management:</strong> Medallia, Forsee, Allegiance, Walker Information</td>
</tr>
<tr>
<td><strong>For midsize organizations:</strong></td>
<td><strong>Promotions and offers providers:</strong> Access Development, Cardlytics Cartera Commerce, Catalina Marketing, Choose Digital, DBG Loyalty, GiveX, Loyalty Works, Loylogic, Points</td>
<td><strong>Digital experience and CI services:</strong> 84.51°, 89 Degrees, Digital LBi, dunnhumby, KMB Group, Rosetta, Sapient, T3</td>
</tr>
<tr>
<td>500friends, a Merkle Company, Aimia, Clutch, CrowdTwist, DataCandy, Deluxe, Inte Q Global, ICLP, Exchange Solutions</td>
<td><strong>Rewards and fulfillment providers</strong> Access Development, Cardlytics Cartera Commerce, Catalina Marketing, Choose Digital, DBG Loyalty, GiveX, Loyalty Works, Loylogic, Points</td>
<td><strong>Social and digital engagement:</strong> Badgeville, Bunchball, Gigya, LoyaltyMatch, SoHalo, SoInteractive</td>
</tr>
<tr>
<td><strong>For small organizations:</strong></td>
<td><strong>POS and payments processors:</strong> EpicorSoftware, First Data, FIS, Fujitsu, Micros Systems, NCR, Welcome Real Time</td>
<td><strong>Mobile:</strong> CodeBroker, Mobile RQ, Mocapay, Outspoken, SessionM Urban Airship, Vibes</td>
</tr>
<tr>
<td>Belly, FiveStars, FanAppz, Thanx</td>
<td><strong>Vertical expertise:</strong> Paytronix, Amadeus, Coniq, Joingo, Meridian Enterprise Corporation</td>
<td><strong>Referral and word of mouth marketing:</strong> Crowdly, Extole, RewardStream</td>
</tr>
</tbody>
</table>
New Markets, Delivery Models, And Capabilities Will Drive Growth

We’ve seen some interesting market movement over the past two years, including acquisitions, rebranding, and positioning that includes a commoditization of key features (see Figure 2). As the vendors in this space continue to look for differentiation and face encroaching competition from other types of marketing providers, we expect to see more change in the future. Specifically, we expect loyalty providers to tackle new growth by:

〡 **Disrupting traditional loyalty delivery models.** We see several SaaS vendors — like CrowdTwist and 500friends, a Merkle Company, taking a page from the disruptor’s handbook and delivering multichannel loyalty capabilities more quickly and at a lower cost. They do trade off some constraints on customization for faster implementation times. To date, we see them getting more attention from user companies, but managing smaller scale programs. We also see vendors that target large organizations investing in on-demand options for their solutions.

〡 **Taking a global perspective.** Several vendors — especially those that target large organizations — have plans to further expand their reach into international markets. We see them taking a few different approaches to global loyalty, including repackaging their solutions, leveraging relationships gained through acquisition, partnering with local loyalty and marketing agencies, and hiring global sales talent. Brierley+Partners’ recent acquisition by Tokyo-based Nomura Research Institute (NRI) increases its exposure to loyalty opportunities in the Japanese and larger APAC market. And, Epsilon plans to slim down its current solution to meet the business needs of potential clients in developing, but less mature loyalty markets across the globe.⁶

〡 **Expanding into new markets.** Across verticals and company sizes, loyalty solutions are in demand: enterprise retailers, hotels, and credit card companies look to differentiate their current approach, while utility companies, automotive manufacturers, midsize retailers, and sports teams seek better customer understanding. We see providers responding to this market interest by repackaging existing products and services, investing in partnerships, acquiring talent or technology, and developing new products altogether. For example, Aimia acquired Smart Button in 2013 to address midmarket client requirements.⁷ And, Comarch’s recent investment in Thanks Again enhances its offering for clients in the travel vertical, and it is in the process of launching a smart city solution that will enable municipalities to leverage its loyalty management product across government, business, and community stakeholders.⁸

〡 **Chasing the customer experience opportunity.** Effectively managing complex structured loyalty programs — including currencies, customer identification, offers, and promotions — is table stakes for loyalty providers. But, loyalty goes beyond the program and we are seeing providers develop discreet customer experience and engagement competencies to complement their points and incentives capabilities.⁹ Clutch and other mid-market providers help clients reward for experiences, not just transactions. Kobie Marketing launched a CX consulting practice in 2014. And, this link between customer experience and loyalty played a part in the recent divestiture of Bond Brand
Loyalty from Maritz: Bond has a stated focus on “building loyalty across the customer experience continuum,” while Maritz’s Maritz Motivation Solutions company offers more traditional points-based and incentive programs.10

Customer Loyalty Vendor Evaluation Overview

To assess the state of the customer loyalty market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top customer loyalty vendors.

Evaluation Criteria Target Loyalty Strategy, Management, And Marketing Capabilities

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 40 criteria, which we grouped into three high-level buckets:

› **Current offering.** Each vendor’s position on the vertical axis of the Forrester Wave graphic indicates the strength of its current loyalty offering. We looked at the strength of each vendor’s products and services against a spectrum of loyalty capabilities, including technology platform capabilities, service delivery capabilities, loyalty strategy design, loyalty management, loyalty marketing, and analytics and measurement.

› **Strategy.** A vendor’s position on the horizontal axis indicates Forrester’s assessment of its strategy and approach to the market. We evaluated and validated each vendor’s vision and road map against customer satisfaction, demonstrated R&D investment, and company performance with respect to client growth, expansion and retention. We also assessed each vendor’s pricing structure and partnership strategy.
Market presence. To determine the size of each vendor’s loyalty business, we evaluated total revenue, year-over-year revenue growth, the size of each vendor’s customer base, and average deal size.

Evaluated Vendors Meet Size And Feature Criteria

Forrester included seven vendors in the assessment of customer loyalty vendors for midsize organizations: 500friends (a Merkle company), Aimia, Clutch, CrowdTwist, DataCandy, Deluxe Corporation, and InteQ Global. Customer loyalty vendors offer solutions for executing structured — and at times, unstructured — customer loyalty strategies. Each of these vendors (see Figure 3):

- **Sells a comprehensive customer loyalty solution.** Each vendor included in this Forrester Wave evaluation has a branded proprietary technology platform for loyalty and delivers professional services to support execution. These solutions deliver end-to-end loyalty strategy, management, and marketing support.

- **Has a solution suitable for midsize organizations.** Midsize organizations and divisions of large enterprises have smaller loyalty programs and are typically more resource and budget constrained than large organizations. Therefore we looked for customer loyalty vendors that provide faster deployments, lower total cost of ownership, more out-of-the-box functionality, and self-service tools. Some of the evaluated vendors exclusively target midmarket buyers and business needs.

- **Demonstrate the ability to support the largest loyalty market.** The vendors included in this evaluation target clients in multiple industries including at least retail, financial services, and/or travel and hospitality. More than 20% of their current clients are in North America. We also looked for vendors with strong customer interest from Forrester clients and that compete for similar clients as per Forrester’s assessment of the competitive landscape.

- **Has a product now in general release and in use by at least 15 clients.** The vendors we included have a solution that was generally available at the time of data collection with at least three references available for contact.
FIGURE 3 Evaluated Vendors: Vendor Information And Selection Criteria

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product</th>
<th>Date evaluated</th>
</tr>
</thead>
<tbody>
<tr>
<td>500friends, a Merkle Company</td>
<td>LoyaltyPlus</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>Aimia</td>
<td>Smart Button</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>Clutch</td>
<td>Consumer Management Platform</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>CrowdTwist</td>
<td>CrowdTwist Enterprise</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>DataCandy</td>
<td>DataCandy Loyalty Platform</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>Deluxe Corporation</td>
<td>Deluxe Rewards</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>Inte Q Global</td>
<td>InsightsIQ</td>
<td>Q4 2015</td>
</tr>
</tbody>
</table>

Vendor selection criteria

- The vendor provides a comprehensive customer loyalty offering. This includes a branded proprietary technology platform for loyalty and professional services.
- The vendor is able to support the largest market for loyalty solutions. This includes targeting clients across five plus industries, including at least retail, financial services, and/or travel and hospitality, with more than 20% of current clients in North America.
- The vendor has a solution that is currently in use by at least 15 clients.
- The vendor demonstrates Forrester client interest through inquiry and competes for similar clients as per Forrester’s assessment of the competitive landscape.
- The vendor has a solution suitable for midsize organizations. This includes faster deployments, lower total cost of ownership, more out-of-the-box functionality, and self-service tools.

Leading Providers Offer Flexible, Fast Solutions

The evaluation uncovered a market in which (see Figure 4):

- **500friends, a Merkle Company, CrowdTwist, and Aimia lead the field.** All three leading providers bring flexible, easy-to-integrate platforms, and strong loyalty strategy, management, and marketing capabilities to midsize organizations. 500friends, a Merkle Company and CrowdTwist are also seeing traction among enterprise clients with their omnichannel and engagement-centric solutions. Aimia’s mid-market solution caters specifically to the midsize market with a fast and stable platform backed by Aimia’s extensive analytics and service capabilities.

- **DataCandy and Clutch offer competitive options.** Both of these providers offer a broad array of loyalty, gift card, and marketing solutions targeted at midsize and small organizations with budding loyalty programs. Clients praise their account management and willingness to go above and beyond. The programs they operate tend to be smaller in scale with less mature marketing organizations. As such, they don’t go as deep in areas like predictive analytics.
Deluxe Corporation and Inte Q Global serve niche loyalty requirements. Unlike the other providers in this evaluation, Deluxe and Inte Q Global take more of a hands-on approach to deploying and managing client loyalty requirements. Deluxe Corporation goes to market with a patented approach to loyalty that delivers zero-liability points programs. Inte Q offers its CORE platform as a hosted, rather than on-demand, solution and customizes it for each client instance.

Focused on meeting client’s basic loyalty requirements, including training and marketing creative rather than building innovative or cutting-edge functionality that its clients can’t use.

This evaluation of the customer loyalty provider 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.

FIGURE 4 Forrester Wave™: Customer Loyalty Solutions For Midsize Organizations, Q4 ’15
### FIGURE 4 Forrester Wave™: Customer Loyalty Solutions For Midsize Organizations, Q4 ’15 (Cont.)

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Current Offering</th>
<th>Strategy</th>
<th>Market Presence</th>
</tr>
</thead>
<tbody>
<tr>
<td>500friends, a Merkle Company</td>
<td>3.87</td>
<td>4.25</td>
<td>2.15</td>
</tr>
<tr>
<td>Aimia</td>
<td>4.16</td>
<td>3.22</td>
<td>2.95</td>
</tr>
<tr>
<td>Clutch</td>
<td>2.70</td>
<td>3.31</td>
<td>2.00</td>
</tr>
<tr>
<td>CrowdTwist</td>
<td>3.87</td>
<td>4.04</td>
<td>1.70</td>
</tr>
<tr>
<td>DataCandy</td>
<td>2.83</td>
<td>4.46</td>
<td>1.50</td>
</tr>
<tr>
<td>Deluxe Corporation</td>
<td>2.31</td>
<td>2.97</td>
<td>1.50</td>
</tr>
<tr>
<td>Inte Q Global</td>
<td>2.36</td>
<td>2.05</td>
<td>3.60</td>
</tr>
</tbody>
</table>

**CURRENT OFFERING**
- Technology platform capabilities 25%
- Service delivery capabilities 10%
- Loyalty strategy design 10%
- Loyalty management 30%
- Loyalty marketing 10%
- Analytics and measurement 15%

**STRATEGY**
- Vision 50%
- Company performance 40%
- Pricing structure 25%
- Partnerships 10%

**MARKET PRESENCE**
- Revenue 50%
- Number of customers 10%
- Average deal size 40%

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

### Vendor Profiles

#### Leaders

- **Consider 500friends, a Merkle Company if you’re looking for a solution that can scale.** This vendor aims to be the Salesforce.com of loyalty and brings strong SaaS, self-serve omnichannel loyalty tools to the midmarket. Clients praise both the platform and the people. Specifically, they like LoyaltyPlus’ flexibility and ease of use, and indicate that implementations are typically on-time and on-budget. The vendor has its sights set on the enterprise market, and we believe it can get there. It currently operates the largest loyalty programs in this evaluation, and its acquisition by
Merkle in 2014 brings deeper pockets, services resources, and the exposure it needs to succeed with larger, more complex organizations. Clients agree. In one client’s words: “They are growing and maturing . . . the way they operate is very large enterprise oriented.”

There are areas where 500friends can improve its solution. Client-specific customizations are a challenge because changes to the platform impact all clients. Clients also want more enhanced reporting and analytics. The vendor’s road map addresses the latter challenge, and mid-market or small enterprise companies looking for an on-demand loyalty provider with solid social and digital chops will like what they find here.

Consider CrowdTwist if you want to reward different kinds of customer interactions. This vendor brings strong digital member engagement capabilities with its omnichannel-focused approach to loyalty — in fact one implementation has more than 100 different ways to earn points. As one client put it “We wanted to make sure we could reward them for social activities . . . interacting with blog content and imagery and watching videos . . . and they could do that for us.” From a technical perspective, clients also praise the vendor’s ability to meet integration requirements, its speed of implementation, and delivery of marketer-focused tools.

While CrowdTwist’s execution largely gets high marks, its limited predictive analytics and slow reporting hold it back. One client stated: “We sometimes have timeout issues and we have to ask them to pull the reports manually. We know it’s a good program, [but we] need to have the hard numbers to back it up.” For retailers and consumer goods companies looking to get an engagement-focused loyalty program up and running quickly, CrowdTwist is the right partner.

Consider Aimia’s solution if you want demonstrated services experience. Aimia acquired Smart Button in 2013 to offer a lower cost loyalty technology platform option for midsize companies. Customers say that that this out-of-the-box solution is easy to integrate and has a “no-frills interface, but is easy to navigate and understand.” It has some of the strongest offer and rewards management, and reporting and dashboards capabilities in the competitive set. Smart Button also brings extensive mid-market retail experience to the table.

While the platform isn’t as feature-rich as its enterprise counterpart, clients tell us that this isn’t a deal-breaker: “At the end of the day, I want a stable platform that is fast.” This vendor is best for marketers — especially retailers — looking for a stable reliable loyalty platform backed by the broad and deep services capabilities of Aimia.

Strong Performers

Consider DataCandy if tight POS integration is a key priority. This vendor offers loyalty and gift card solutions. Clients note that the solution is customer friendly and easy to use, and that the vendor is responsive, helpful, and provides good customer service and value. In the words of one client: “They are a very good partner in terms of project delivery dates.” Satisfaction with the solution’s integration capabilities likely stems from the work it has done to establish partnerships with POS providers.
Among its competitive set, DataCandy manages smaller-scale programs, with its largest program not quite clearing 5 million members. Its solution lacks breadth and depth of features around features like reporting, cross-channel communications, and predictive analytics. But, clients tell us that’s not necessarily a deal-breaker and that DataCandy is very open to feedback. This vendor is a good fit for small to medium retail, convenience, and fuel chains looking for loyalty and gift card solutions that integrate with POS.

Consider Clutch if you need marketing support that goes beyond loyalty. This vendor calls its proprietary technology a consumer management platform, and it delivers integrated loyalty and marketing modules that span traditional earn and burn loyalty, gift cards, referral programs, data management, analytics, campaign management, and email delivery. In addition to a clean and intuitive user interface, and strong metrics and key performance indicator (KPI) definition capabilities, clients commend Clutch’s responsive account management. As one client noted: “They always go above and beyond . . . even getting online in the middle of the night and putting their top developer on the project full-time to get things in motion.”

While it’s clear that Clutch is willing to evolve its product to meet growing customer demands, some of its current capabilities, including marketing automation and predictive analytics, lag behind the competitive set. But for organizations just getting started with loyalty, or looking to expand a basic program, Clutch offers a compelling solution focused on providing personalized customer experiences.

Contenders

Consider Deluxe Corporation if you want a program with zero points liability. Deluxe offers a patented zero-liability platform, which enables risk-averse clients to reward for any interaction without incurring liability. To that end, Deluxe has extensive direct merchant connections offering a comprehensive set of travel, merchandise and more than 300,000 local offers. It engages with clients on a full-service basis, including its SaaS platform management, marketing support, warehouse and fulfillment, rewards management, and call center services. Clients like its hands-on, in-house approach, and praise the price and value of the solution. And, Deluxe can get clients up and running on the system quickly: The average implementation time is 10 weeks.

Although Deluxe’s approach brings an interesting and unique spin to merchant-funded rewards, the solution is less feature-rich than other providers in the space. Customers specifically called out its lackluster reporting and analytics capabilities. However, financial institutions and telcos looking to implement a traditional rewards program will be hard-pressed to find a solution that offers the same value as Deluxe’s managed-liability services.

Consider Inte Q Global if you need more hands-on strategy and operational support. This vendor takes a full-service approach to mid-market loyalty strategy, program design, and execution. Unlike most of its competitors, Inte Q Global primarily offers its CORE platform as a hosted solution and customizes it for each client instance. Clients see Inte Q Global as a true
strategic partner and praise its implementation process, responsiveness, and understanding of unique business needs. As one client pointed out, “They always go the extra mile and they invest in our success.”

Given its technology-supported, full-service approach, Inte Q Global does not support self-service tools for program management, but does offer an interactive dashboard tool built on Tableau. Clients aren’t that impressed by Inte Q Global’s reporting, and indicate that its strategy support leaves something to be desired. Its flat-fee pricing model also drew some customer confusion. However, for mid-market retailers looking for a partner to design and manage a custom loyalty program end-to-end, Inte Q Global will fit the bill.

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Learn about interactive advisory sessions and how we can support your initiatives.

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.
Data Sources Used In This Forrester Wave
Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

› **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.

› **Executive briefings and solution demos.** We asked vendors to present their strategy, vision, and road map for their customer loyalty solutions. We also asked for demonstrations of their product’s functionality based on a demo scenario created by Forrester. We used findings from these product demos to validate details of each vendor’s product and service capabilities.

› **Customer reference calls and surveys.** To validate vendor offerings and qualifications, Forrester also conducted reference calls and an online survey with at least 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 document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we 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
All of Forrester’s research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.
Survey Methodology

Forrester’s Global Business Technographics® Marketing Survey, 2015, was fielded to 1,039 marketing decision-makers located in Brazil, Canada, China, France, Germany, India, the UK, and the US from SMB and enterprise companies with 100 or more employees (in Brazil, China, India) or 500 or more employees (in Canada, France, Germany, the UK, and the US). This survey is part of Forrester’s Business Technographics and was fielded from May 2015 to August 2015. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester’s Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Endnotes

1 The age of the customer is real and here to stay. To better understand the urgency around transforming your company into one that is customer obsessed, see the “Winning In The Age Of The Customer” Forrester report.


4 In the last loyalty Forrester Wave evaluation, we highlighted the importance of technology and acknowledged that all of the providers, even those who traditionally focused on custom-built solutions, were moving towards proprietary configurable platforms. We see this trend continuing.

5 For the top eight customer loyalty solutions suitable for large organizations, see the “The Forrester Wave™: Customer Loyalty Solutions For Large Organizations, Q1 2016” Forrester report.


9 Companies that really want to compete for their customers’ loyalty need an evolved approach that extends beyond a loyalty program designed around points and rewards. See the “Be A Loyalty Company, Not A Company With A Loyalty Program” Forrester report.


11 We see loyalty breaking out into two — often overlapping — loyalty strategies: structured initiatives center on explicit membership while unstructured initiatives originate in various departments and identify loyalty as an outcome. See the “Navigate The Complex Customer Loyalty Ecosystem” Forrester report.
We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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