VoC applications enable application leaders supporting the customer experience to better manage it through a deep understanding of customer needs and perceptions. The resulting insights trigger recommendations and actions across the enterprise. This research profiles 14 of the most advanced vendors.

**Market Definition/Description**

Gartner defines a voice of the customer (VoC) application as one that integrates feedback collection, analysis and action into a single interconnected platform that helps understand and improve the customer experience. Sources of feedback extend beyond direct surveying to include other, more indirect and inferred sources. For a solution to be considered to be a VoC application, it must meet three criteria:

**Data collection** — The ability to collect all three types of VoC data:

- **Direct feedback** — Feedback that customers intend to provide directly to the organization, either when asked to do so or when motivated to do so by their experience. This feedback typically takes the form of a survey, with responses gathered through multiple channels, such as email, websites, paper, SMS, voice, video, a mobile application, in-app, kiosks and computer-assisted telephone interviewing (CATI).

- **Indirect feedback** — Feedback derived from instances when the customer talks about an organization without specifically intending to provide feedback to the organization. This feedback includes insights gathered from review sites, social media and customer care interactions via phone, email and chat.
Inferred feedback — Operational and behavioral data associated with a customer experience (CX) or customer journey, such as a website's clickstream data, mobile app location data or contact center operational data.

**Analysis and insight** — The ability to analyze and derive insight from a diverse set of structured and unstructured feedback datasets using a variety of visualization and analytical techniques. These techniques may include dashboards, word clouds, journey maps, diagnostic tools and predictive and prescriptive models.

**Action** — The ability to act upon derived insights through the use of alerts, workflows, case assignment and recommendations. Actions may encompass a combination of root-cause problem-solving (outer loop), closed-loop triggering of an employee intervention (inner loop) and automated triggering of other applications with no human intervention (auto-loop).
Magic Quadrant

Figure 1: Magic Quadrant for Voice of the Customer

Source: Gartner (November 2021)
Vendor Strengths and Cautions

Alchemer

Alchemer is a Niche Player in this Magic Quadrant. The company’s Alchemer application has a wide range of data collection channels, strong dashboard analytics and easy-to-configure integration with third-party applications such as CRM. Alchemer has 142 employees and over 14,000 customers, 90% of which have fewer than 10 users. Gartner estimates that Alchemer generated revenue of over $30 million in 2020. Alchemer has expanded local support from North America into Europe. Its customers tend to be in the midmarket and self-service focused. Its top three industries are business services, nonprofit and high-tech. Alchemer is investing in improving feedback collection for customer-facing employees, expanding enterprise administration features and no-code workflow, including an autoloop capability.

Strengths

- **Self-service:** Alchemer goes way beyond survey tool functionality and provides the core functionality needed to start a VoC program. One of its particular strengths is its ability to support self-service administration by business users.

- **Speed to value:** Alchemer’s solution is easy to set up with limited or no IT involvement. It is sold on a per-seat basis, and almost all of its customers pay less than $10,000 per year in total.

- **Flexibility:** The Alchemer application has been designed as a platform that can be easily configured to a customer’s specific use-case needs. It is not intended to do all that is possible in terms of functionality, but it is meant to be adaptable to fit requirements.

Cautions

- **Functional depth:** The solution lacks advanced capabilities in several areas, including program management/governance, indirect and inferred data collection, journey mapping/alignment, and complex workflow and case management.

- **Analytics:** Beyond dashboards and descriptive analytics, the solution’s diagnostic, predictive and prescriptive analytics capabilities are limited.

- **Consulting partners:** Although Alchemer has customers across 140 countries, it relies heavily on its self-service heritage and remote support model, based out of the U.S. and its European support center in Romania. It does not have partnerships for additional local assistance.
Alida

Alida is a Visionary in this Magic Quadrant. The company's Alida CXM platform supports a range of VoC and research applications. Alida has 460 customers, of which Gartner estimates 80 have now implemented the VoC application. Gartner estimates that Alida generated revenue of over $200 million in 2020, of which $44 million came from VoC. Alida's vision is to combine its background in customer research, where its focus has been on qualitative insight, with VoC to provide enhanced business value. Alida concentrates on five industries: retail/consumer goods, high-tech, financial services, media and healthcare. Alida will continue to invest heavily in 2022, with at least 60 new features. A central data lake is core to its R&D plans, as is furthering its AI-driven analytics and visualization capabilities.

Strengths

- **Alignment with research**: Alida CXM offers VoC and customer research capabilities that combine two software categories for quantitative and qualitative research into one integrated suite on a common architecture that produces both broad and deep insights based on feedback from customers.

- **R&D investment**: Alida has the most aggressive R&D program of the vendors in this Magic Quadrant, and this pace of monthly releases is set to continue as it aims to quickly close the gap on leading vendors.

- **Partners**: The company has rapidly built partnerships with both enterprise software vendors, such as Adobe, and consultants, such as Deloitte. Alida now has over 100 certified APIs and ingests data from over 100 social review platforms.

Cautions

- **Functional catch-up**: Alida is in VoC catch-up mode. It is adding functionality rapidly (123 features over the past two years), but still trails leading vendors. There are several current omissions that will need to be addressed over time. These include: support for more diverse data collection channels (such as voice, CATI, kiosks and chatbots); predictive analytics to surface potential issues for automated intervention; more prebuilt APIs to common partner applications; and zero-touch automations.

- **Operationalization evidence**: Alida has added functionality for operational action-taking, such as case management. However, Gartner sees limited evidence of Alida rolling these projects out with customers and governing the operational use of feedback by large numbers of end users outside the marketing organization.
Concentrix is a Niche Player in this Magic Quadrant. It is a global provider of multichannel contact center business process outsourcing (BPO) and consulting services, with 650 customers and revenue of $4.7 billion in 2020. Gartner estimates that the Concentrix VoC business unit has 1,200 employees and 100 customers, which generated an estimated $65 million in VoC revenue in 2020. Its top three industries are telecommunications, banking and insurance. The company's ConcentrixCX VoC application typically competes against offerings of Leaders and Challengers for large, complex deals, mostly within B2C customer service organizations. Concentrix is investing in integrating asynchronous messaging and mobile app development tools, expanding nonsurvey feedback and text analytics, and modularizing the product for improved third-party vendor selling.

**Strengths**

- **Customer service:** Concentrix has extensive experience in customer service due to its longtime presence in the BPO services market. This means it can combine VoC with digital customer self-service features such as chatbots and conversational messaging, social service, speech analytics, contact center operations and agent coaching.

- **Value realization:** Concentrix has one of the largest in-house professional services teams of the VoC vendors evaluated in this Magic Quadrant. It takes ownership of delivering results. The company is well-suited to organizations with few or no in-house resources that want a VoC application delivered as part of a BPO or CX consulting project.

- **Action teams:** Concentrix has strong functionality to support teams that project manage the identification of root cause problems and then co-create or ideate with both customers and employees to develop solutions.

**Cautions**

- **Visibility:** Gartner sees very few deals for which Concentrix is on the shortlist. Concentrix primarily sells its VoC application and services to its installed base as part of a larger customer service suite solution, which makes it difficult to compare with alternatives.
CustomerGauge

CustomerGauge is a Niche Player in this Magic Quadrant. The company’s CustomerGauge application is primarily targeted at midsize to enterprise-level B2B organizations with numbers of end users typically ranging from 500 to 5,000, and typically focused on the sales-generating functions that are tasked with improving the account experience. It helps enable frontline staff, customer success managers, relationship and account managers to monetize their Net Promoter Score (NPS) programs. CustomerGauge has 120 employees distributed across its headquarters in Europe and two small satellite offices in the U.S. and Australia. Gartner estimates it has 300 customers and generated revenue of $30 million in 2020. Its top three industries are consumer packaged goods, high-tech and telecommunications. CustomerGauge is investing in churn prevention and absence of signal tracking, promoter activation and referral value tracking, and more in-app benchmarks.

**Strengths**

- **Business-to-business (B2B):** CustomerGauge focuses almost exclusively on the B2B account experience. It blends customer success/relationship management with VoC to deliver financial results by investing in areas such as complex account hierarchies, risk alerting, B2B CX program playbooks and benchmarking.

- **Value measurement:** CustomerGauge focuses on the monetization and ROI of CX programs, particularly those run by companies aiming to improve their NPS. It succeeds in improving customer retention, reducing churn and running advocacy programs, and provides evidence of the resultant financial benefit.

- **Simple pricing model:** CustomerGauge has a simple pricing model, with its solution typically priced at $1,000 per user per year.

**Cautions**

- **Consulting partners:** Concentrix relies only on its own consultants and professional services and has not developed a consulting partner ecosystem to provide choice for buyers. Given the involvement of its consultants, it is limited in its ability to enable self-service.

- **Integration and automation:** Concentrix has partnered with Tray.io, an enterprise integration platform provider that provides integrations with over 500 applications. While this greatly widens the possible applications that can theoretically be integrated with ConcentrixCX, it means that Concentrix does not have the same level of hands-on experience with API-based automations as the market Leaders.
Forsta

Forsta is a Leader in this Magic Quadrant. The company’s Forsta platform combines Confirmit Horizons (VoC), FocusVision (market research) and Dapresy (visualization) technologies as part of an integrated offering that manages both qualitative and quantitative feedback. Its revitalized operations (under the Forsta brand, following the merger of Confirmit and FocusVision) are dispersed across 10 countries, supporting 5,800 customers. Gartner estimates 1,250 of these are VoC customers, and that the company generated $150 million in 2020, of which an estimated $90 million came from VoC. Forsta’s four main industries are business services, banking, insurance and healthcare/pharmaceuticals, where customers typically have complex hierarchical needs. Forsta is investing in artificial intelligence (AI) for better causation and employee assistance, and self-service through better program templating and connectors for third-party data ingestion.

Strengths

- **Scale and complexity**: Forsta thrives in environments where there is a high degree of complexity within organizational hierarchies across multiple regions. It provides hands-on services to assist with complicated programs as needed.

- **Alignment with research**: Through acquisition, Forsta has a strong ability to collect and align both qualitative and quantitative feedback in one architecture, and thus provide deeper insight to help drive strategic CX decisions.

- **Operational execution**: Under the stewardship of Verdane and EQT, its private equity firm owners, Forsta is demonstrating much greater competency across each aspect of its operations, including product, pricing, employees, services and partnerships.

Cautions

- **Business-to-consumer (B2C)**: CustomerGauge is focused on the needs of B2B and business-to-business-to-customer (B2B2C) organizations. It is not focused on B2C with its product, methodology or professional services.

- **Functionality**: The CustomerGauge application lacks support for various data collection channels, types of analytics techniques and options for operationalization, when compared with the Leaders in this Magic Quadrant.

- **Scale**: CustomerGauge’s limited size and number of resources restrict its ability to deploy multiple large-scale international programs concurrently, especially when extensive consulting is required.
InMoment

InMoment is a Leader in this Magic Quadrant. The company’s Experience Improvement (XI) platform combines a broad set of VoC technologies as part of an integrated offering that focuses on blending services and software to help fulfill its clients’ evolving CX ambitions. The company has established operations around the world, with a notable presence in Asia/Pacific. It supports over 1,400 customers, of which Gartner estimates 1,100 deploy the VoC application. InMoment generated an estimated $173 million in revenue in 2020, of which $108 million came from VoC. Its top three industries by revenue are banking, retail and business services. InMoment is investing in intelligent self-service and workflow automation to help simplify the user experience (UX), while furthering its vision to support four tailored XI clouds for CX, employee experience (EX), product experience (PX) and market experience (MX).

Note: InMoment’s 3Q21 acquisition of Lexalytics was concluded too late to be included in this assessment.

Strengths

- **Packaged implementations**: Forsta’s programs tend to be modular and “one-off,” rather than implementations of standard products like those of its competitors. This necessitates more spending on professional services than some customers would like.

- **Analytical sophistication**: Although the acquisition of Dapresy has provided a good visualization capability, Forsta lacks proven viability within its core predictive and prescriptive analytics capabilities.

- **Consulting partners**: Forsta has fewer application software partners across CRM, ERP and supply chain domains than most of its competitors, which complicates integration.

- **Professional services**: InMoment’s established in-house CX professional services, originating from the acquisition of MaritzCX in 2020, help customers define their CX goals and help ensure each program delivers business value.

- **Industry expertise**: InMoment has deep knowledge of several industries, with benchmarking, tailored services and industry-specific survey templates, APIs and analytical models. The company has notable experience in the automotive and utilities sectors.
Life cycle/journey approach: InMoment adopts a strong customer-journey-oriented approach with its VoC application and overlaying services that enable clients to delve deeply into each phase of the customer life cycle.

Cautions

Consulting partners: InMoment has an underdeveloped consulting partner program, compared with the other Leaders in this Magic Quadrant. This complicates its participation in large global CX transformations, which are often run by Tier 1 management consultancies.

Use-case alignment: InMoment’s application lacks specific productized use-case capabilities (such as for customer service, marketing and frontline operations), compared with those of its main competitors.

Diversity of actions: InMoment’s application lacks sophistication in its outer-loop (project/ideation management) capabilities and support for autoloop/zero-touch automation.

Medallia

Medallia is a Leader in this Magic Quadrant. Its Medallia Experience Cloud product was initially aimed at the largest organizations. As a result, Medallia has the highest average software revenue per customer and the most average departments per program of the vendors in this Magic Quadrant. Medallia has since expanded its focus to include midmarket organizations with prepackaged solutions. It has 2,600 employees, over 1,200 customers and revenue of $477 million for 2020. Its initial public offering (IPO) was completed in 2019, but the company was taken private again by Thoma Bravo in October 2021. Medallia is the biggest VoC vendor in 10 industries, and its top three are retail, banking and investment services. Medallia is investing in all three core functional areas of VoC, particularly in automations and tools for administrators and developers.

Strengths

Value realization: Medallia has a proven ability to measure and deliver a positive ROI from VoC programs in multiple use cases in large, complex, multisite and departmental installations with thousands of users.
- **Functional innovation**: Medallia has set the pace for competitors in adding new functionality (new data collection channels, capabilities for managing complex organizational hierarchies, video analytics and workflows, and enterprise-grade features like sandboxes). It has been expanding the scope of its VoC applications over the past 10 years, through both in-house development and acquisitions (such as LivingLens, Strikedeck, Decibel and Stella Connect).

- **Consulting and ISV partners**: Medallia has very strong relationships with the leading strategy and management consultants, and proven commercial and technical partnerships with leading independent software vendors (ISVs) such as Salesforce, Adobe and ServiceNow.

### Cautions

- **Total cost of ownership**: The main reason identified by Gartner clients for not buying Medallia is its price, although Medallia clients target projects with a functional scope broader than the average for this market. Similarly, the main reason they have identified for ceasing to be customers of Medallia is the additional cost of professional services for complex configuration, survey management and reporting.

- **B2B2C experience**: Medallia's B2B2C-specific functionality is less developed than that for the other use cases it serves. The company lacks momentum for this emerging use case, except in a few specific industries, primarily insurance, investment services and high-tech.

- **International**: Although Medallia has large customers operating in multiple countries, it has fewer customers headquartered in Asia/Pacific than some of its peers in this Magic Quadrant.

### Momentive

Momentive (formerly SurveyMonkey) is a Niche Player in this Magic Quadrant. The company is well-known for its freemium SurveyMonkey survey tool, but it has over 9,400 “enterprise” customers for its SurveyMonkey Enterprise and GetFeedback CX product lines. In 2020, Momentive unified its GetFeedback and Usabilla acquisitions into GetFeedback CX. This product is its core VoC application, which generated an estimated $50 million of Momentive's total revenue of $375 million in 2020. Its top three industries are high-tech, retail/digital commerce and financial services. Momentive is investing in integrating with more Salesforce clouds and other CRM systems, and expanding its automation layer and AI for recommendation wizards, enhanced sentiment analysis and predictive insights.
Note: In 4Q21 Zendesk announced a definitive agreement to acquire Momentive. The transaction is expected to close in 1H22 and is not considered in this assessment.

**Strengths**

- **Self-service:** Momentive has strong knowledge of self-service buying, setup and usage, due to its traditional focus on smaller organizations.

- **Viability and potential:** Momentive has rapid revenue growth, 350,000 (mostly SurveyMonkey) installed base customers to sell to, and the third-largest R&D organization of the vendors in this Magic Quadrant. It has the highest potential for improvement in the short term.

- **Salesforce focus:** Momentive is the only vendor with an application that runs natively on top of Salesforce platforms. It is dedicated to maintaining this close alignment.

**Cautions**

- **Functional gaps:** Momentive is in catch-up mode. It lacks the ability to collect data from a wide range of direct sources, such as inferred feedback, advanced analytics (like journey analytics), and predictive and prescriptive modeling. It also lacks sophisticated functionality for action taking. This limits its current use-case suitability.

- **Consulting:** Momentive has very few consulting partners and does not offer the in-house professional services expected by this market's larger and more complex buying organizations.

- **APIs for software partners:** Momentive has only 15 prebuilt APIs to connect with partner applications, including those of Salesforce, Adobe and Zendesk. This potentially adds time and complexity to deployments. The Leaders in this Magic Quadrant each have over 100 APIs.
NICE

NICE is a Challenger in this Magic Quadrant. The company’s acquired Satmetrix VoC solution is combined with NICE CXone technologies as part of an integrated offering focused on providing an end-to-end, experience-focused application portfolio. NICE’s extensive global operations support over 25,000 customers, from which it generated total revenue of $1.6 billion in 2020. Gartner estimates approximately 4,000 of these used some form of VoC functionality and generated $200 million in the same period, split 60:40 between software and professional services. The vendor’s top three industries are financial services, healthcare and utilities. NICE is investing in how VoC insight can influence customer experiences in real time through delivery of in-process guidance and interaction improvements.

**Strengths**

- **Contact center:** NICE has deep contact center expertise, with leading workforce engagement management (WEM) and contact-center-as-a-service (CCaaS) applications. This, combined with its established competency in speech and text analytics, provides a strong offering for a contact-center-experience-oriented use case where the agent is at the center of the experience.

- **Customer journey:** NICE’s UX is better than that of its competitors in terms of management and alignment of direct, indirect and inferred feedback types at each stage of the customer journey/life cycle. The same UX principles are used to present dashboards and associated causality analysis.

- **Net Promoter Score:** Satmetrix was one of the cofounders (with Bain & Co.) of NPS. NICE has an established global NPS benchmarking program and extensive experience of running it.

**Cautions**

- **Use-case breadth:** NICE’s contact center focus lessens its focus on other VoC use cases, such as sales, marketing and frontline operations, as well as its demonstrated ability to support an enterprisewide VoC program for multiple use cases.

- **Architecture:** A large portion of NICE’s development work is for CXone, rather than the stand-alone Satmetrix platform. This complicates ownership for customers.
Qualtrics

Qualtrics is a Leader in this Magic Quadrant. The company’s XM platform is underpinned by three core components that provide data management, analytics and workflow. It is overlaid by dedicated solutions to help centralize the management of its clients’ customer, employee, brand and product experiences. Qualtrics’ large global operations support over 5,500 XM VoC customers of all sizes, ranging from fewer than 10 users to over 50,000. Qualtrics generated an estimated $600 million in VoC revenue in 2020. It has a publicly communicated ambition to increase its VoC revenue to $1 billion in 2021, following its IPO at the beginning of the year. Qualtrics is the biggest VoC vendor across 10 industries, with the top three being high-tech, business services and banking. Qualtrics is investing heavily in multiple areas, including advanced analytics, journey orchestration, use-case-based packaging, identity management and cross-XM solution workflows.

Note: In 3Q21 Qualtrics announced definitive agreements to acquire Clarabridge (now completed) and Usermind, but these announcements came too late to be considered in this assessment.

Strengths

- **Executive focus:** NICE tends to lead with CXone, and its commitment to VoC as a stand-alone functionality seems secondary to its core business. There is little evidence of the existence of stand-alone VoC functionality on NICE’s website and corporate communications at any level, which raises questions about whether it is being prioritized beyond the contact center “add-on” use case.

- **Platform innovation:** Qualtrics has invested heavily in its XM platform and associated customer directory architecture. It provides both high scalability and granularity across a variety of experience and operational data types, and supports identity matching to help build an experience profile for each individual.

- **Partner ecosystem:** Qualtrics has very strong relationships with the CX strategy practices within leading implementation and consultancy service providers. It also has a broad selection of software partners for the integration and enhancement of business workflows.

- **Safe choice:** Qualtrics is a market leader, with a proven, functionally rich product and value-based measurement, making it the obvious safe choice for procurement departments to opt for without investigating further. It is supported by clear product packaging and marketing (for example, for employee, customer, brand, digital and product experience).
Cautions

- **Price:** A relatively high price is the main reason why buyers look for an alternative provider to Qualtrics.

- **Use-case functionality:** Although Qualtrics XM is a leading platform with a strong set of core VoC functionalities, Qualtrics is still developing additional use-case-specific, complementary, out-of-the-box functionality, which some competitors already provide.

- **Sales engagement:** Qualtrics’ has relentless tenacity when pursuing new business, which can be off-putting for potential buyers. This determination also sometimes results in existing customers experiencing a lack of engagement with their account team.

QuestionPro

QuestionPro is a Niche Player in this Magic Quadrant. QuestionPro’s Customer Experience Management Platform, which blends VoC with qualitative customer research functionality, is aimed at midsize businesses that demand value for money. QuestionPro provides all of the core features needed to start a VoC program. This small but global company has 230 employees and 28,000 customers, from which it generated an estimated $35 million of revenue in 2020. Its “sweet spot” is 26 to 50 users, though it also has customers with over 10,000 seats. Its top three industries are travel and hospitality, retail and automotive. QuestionPro is investing in extending the use of AI and push technology to learn from users which analytics are most relevant to improve the CX.

Strengths

- **Value for money:** QuestionPro’s application has much of the same functionality as more expensive offerings. Its pricing is simple, and it provides unlimited numbers of surveys for that price.

- **Midmarket focus:** QuestionPro focuses directly on the midsize-company segment through its dedicated in-house sales and marketing departments. It has extensive experience of meeting the needs of this segment.

- **Alignment with research:** QuestionPro is notable for combining VoC and other forms of customer research. It collects quantitative and qualitative research and provides a customer insight community. It is among the market leaders in terms of providing tools to project manage the identification of the root causes of problems, and then co-creation or ideation.
Cautions

- **Complex enterprises:** Although QuestionPro's application scales, the vendor has limited experience of supporting the most complex large enterprises. Its solution lacks advanced features that these organizations sometimes require, such as the ability to track users as their jobs move between departments.

- **Functional depth:** QuestionPro is limited in its use of indirect and particularly inferred feedback data sources, and predictive and prescriptive analytics. It is also limited in its functionality for taking action and operationalizing implementations.

- **ISV partners:** QuestionPro's software partner ecosystem is limited. The number of prebuilt APIs for third-party software lags behind the market leaders.

Reputation

Reputation enters this Magic Quadrant as a Niche Player. The company's Reputation Experience Management (RXM) platform primarily blends consumer ratings and reviews, social listening and surveying technologies as part of an integrated VoC offering that differentiates itself by how it helps enhance online reputation. Reputation's operations are primarily U.S.-based, but it also has satellite offices in the U.K. and Germany. It has over 600 employees who support approximately 1,000 customers. The company generated an estimated $75 million in revenue in 2020, of which $50 million came from VoC. Reputation focuses on multi-location-based, brand-sensitive B2C sectors that are passionate about understanding and reinforcing online brand perception through positive ratings and reviews on search engines like Google. Reputation's top three sectors are automotive, healthcare and hospitality. Reputation is investing in its survey experience and supported channels, more advanced sentiment analysis, and improved journey analysis through ingestion and presentation of a broader set of operational and feedback data sources.

Strengths

- **Location-based online brand management:** Reputation specializes in helping its clients increase brand awareness and perception through careful management and exploitation of online reviews and social sentiment. It has particular expertise in physical-location-based industries.

- **Reputation score:** Reputation has an established “reputation score” that is generated for each customer and used to benchmark companies against their industry peers.
Cautions

- **Functional completeness**: Reputation's platform lacks important functions of market-leading VoC applications. Core functional limitations include support for a diverse range of survey and inferred data sources, the sophistication of its analytics (beyond text analytics) and the ability to operationalize through role-based personalization and autoloops.

- **Industry diversity**: Reputation’s focus on location-based industries means it lacks the product and service competencies needed by some industries (particularly B2B-oriented ones) and departmental use cases such as sales (customer success management) and customer service (employee coaching).

- **Consulting support**: Reputation relies on its own customer service and success management teams, and does not formally partner with any of the main consultancies. It significantly trails the market leaders in terms of the size of its in-house professional services organization.

SMG

SMG is a Visionary in this Magic Quadrant. The company’s smg360 application is a VoC platform that enables a custom UX designed specifically for each customer’s multi-location-specific needs by SMG’s own professional services. SMG’s operations are predominantly U.S.-based, but it also has satellites in London, U.K. and Tokyo, Japan. SMG has a specific focus on large, B2C, location-based industries such as restaurants, retail, healthcare, convenience stores and hotel chains. Its operations support approximately 270 customers across 465 brands worldwide, and generated estimated revenue of $65 million in 2020, of which $57 million came from VoC. In response to COVID-19, SMG provided concession and deferred payments, enabling brands to utilize software and services free of charge to support their operations. This impacted SMG’s 2020 revenue relative to its main competitors, as a greater percentage of its customers were affected. SMG’s programs support as many as 40,000 users. SMG plans to invest in self-service, UX enhancement and more predictive analytics.

**Strengths**

- **Text analytics**: Reputation relies heavily on text analytics to extract customer feedback from reviews, social comments and unstructured surveys. This feedback is then used to categorize topics, identify areas to improve and spot opportunities for brand reinforcement (for example, the posting of a positive survey as a review on the main public review sites).
- **Multilocation industries**: SMG’s solution is designed to accommodate the needs of large-scale organizations, but SMG has particular expertise in multiple physical-location-based industries. The application has tailored dashboarding to provide local and regional insight for roles ranging from executive to store worker. SMG’s “all-in-one” pricing is aligned with this multisite use case.

- **Methodology-driven value realization**: SMG has a clear mission involving, and a focus on, the use of the service profit chain methodology. It also has a strong focus on improving financial performance through CX enhancement, driven by engaged employees. This is reflected in its product design and how it delivers services as a “software-with-a-service” (SwaS) brand.

- **ISV partners and APIs**: SMG has a broad portfolio of partnerships with mainstream application providers (such as CRM application providers) and industry-specific specialists. This simplifies program rollout for customers.

**Cautions**

- **B2B suitability**: SMG’s focus on specific B2C industries significantly reduces the applicability of its product and services to many B2B industries. The company is moving into B2B2C domains, such as financial services, but currently has very little experience relative to its competitors.

- **Consulting partnerships**: SMG relies greatly on its own in-house professional services and does not formally partner with any of the main consultancies.

- **Revenue growth**: SMG’s specialty focus on the retail and hospitality sectors has resulted in flat revenue and a slightly reduced employee headcount over the past two years, due to the impact of COVID-19.

**Verint**

Verint is a Challenger in this Magic Quadrant. The company’s Verint Experience Management (XM) platform combines native and acquired technologies as part of an integrated offering that focuses on omnichannel customer service management. Verint’s extensive global operations support thousands of customers, and generated $860 million in revenue in 2020, of which Gartner estimates $220 million came from VoC, and of that $70 million from VoC software. Clients tend to be large customer-service-focused B2C organizations. Verint’s top three industries are banking, retail and insurance. Verint is investing in the expansion of communication channels, supported by indirect listening and advanced analytics to help identify customers’ struggles, assist agents and automate actions.
Strengths

- **Customer service use case**: Verint has extensive experience in customer service, with thousands of existing customers using its customer engagement center, digital customer service (DCS) and WEM applications. The combination of these applications with VoC provides a full option for this use case, where the ability to influence service processes and agent actions is key. For example, the embedded knowledge management capability can help resolve issues and drive inner and autoloop actions.

- **Digital feedback**: Verint's acquisitions of ForeSee, OpinionLab and m-pathy provide advanced web feedback and inferred data capabilities, as well as many years of associated experience that helps the vendor apply its own custom methodologies and industry-tailored frameworks. This is further enhanced by Verint's DCS applications that can facilitate conversational feedback from numerous messaging channels.

- **CX leader dashboard**: Verint XM provides an impressive aggregated view for CX leaders. It enables them to appraise the overall situation, yet also delve into specific customer journeys. It even lets them replay customers’ actual experiences via session replays.

Cautions

- **Use-case innovation**: Although Verint has a strong set of core VoC functionalities, its solution lacks some out-of-the-box use-case-specific functionality that some of its competitors provide. It is still evolving the drill-down functionality required for use cases beyond its two strongest, namely customer service and digital.

- **Multiple architectures**: While Verint continues to bring its acquired solutions into a common platform, the vendor still faces a challenge to unify the numerous native and acquired products that make up Verint Experience Management. Additionally, Verint's services are typically aligned with these solutions’ individual domains, which complicates customer ownership (for example, Verint's speech analytics consultants have little or no experience of dealing with digital feedback and vice versa).

- **ISV and consulting VoC partners**: Verint has limited VoC-focused ISV and consulting partners, relative to its main competitors. This restricts customer choice and protracts implementations.
Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

■ Reputation was added to this Magic Quadrant due to its ability to blend consumer ratings and reviews, social listening and surveying technologies as part of an integrated VoC offering.

Dropped

■ Questback was dropped from this Magic Quadrant as it has split its product into two offerings and the VoC one did not meet the revenue criteria.

■ Upland was dropped from this Magic Quadrant as it did not meet the revenue criteria.

Inclusion and Exclusion Criteria

A Magic Quadrant identifies and analyzes the most relevant providers in a market. To be included in this Magic Quadrant, each vendor had to demonstrate that it satisfied certain criteria. To qualify for inclusion, each vendor was required to:

■ Have generated over $25 million in VoC revenue in 2020.

■ Provide a robust multichannel survey tool to capture the direct voice. It must cover at least the following channels: web, mobile web, mobile app, messaging, voice, SMS, social media and email.

■ Ingest social media data and other text-based forms of indirect feedback.

■ Ingest inferred behavioral and operational feedback data.

■ Provide role-based dashboards and reports for different types of users.

■ Convert data into insights via some form of analytics.
- Provide alerts, workflow and some form of case management and CRM integration to automate actions based on customer feedback.

- Demonstrate global execution through multiregional support for sales, marketing and customer service.

- Carry out market activity across a range of Gartner-observed sources, such as inquiries, conferences, the Peer Insights platform, primary research and external data points.
Evaluation Criteria

Ability to Execute

**Product or Service:** This criterion assesses the depth and breadth of a vendor’s VoC-related application functionality and supporting professional services. This includes current product/service capabilities, quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the Market Definition and detailed in the subcriteria.

We specifically look for ability to:

- Collect data from a wide range of channels, which must include all three of direct, indirect and inferred forms of feedback.
- Analyze customer feedback in a wide variety of ways.
- Act based on customer insight in a wide variety of ways.

**Overall Viability:** Viability includes an assessment of the overall organization’s financial and operational health. This includes demonstrating that it has a strong product development team to support current and future releases, and a clear product roadmap. This criterion also covers a vendor’s financial health — its size, growth and profitability — with emphasis on the financial health of its VoC business (for those whose solutions extend beyond the VoC market). It also looks at aspects such as cash reserves and operational expenditure.

We specifically look for:

- Evidence of financial strength.
- Evidence of customer growth and retention.
- Evidence of other drivers of viability.

**Sales Execution/Pricing:** The vendor’s capabilities in all presales activities and the structure that supports them. This criterion assesses a vendor’s ability to provide global sales and distribution coverage for its VoC suite directly and/or through partnerships. Each vendor must have experience of selling to a diverse set of buying centers. Each must demonstrate the ability to support comprehensible pricing structures that support the diverse needs of both large enterprises and SMBs.
We specifically look for:

- Direct and indirect sales revenue and customer growth.
- Competitive win rate.
- Pricing clarity, flexibility, affordability, value for the money spent, innovation.

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor’s history of responsiveness.

We specifically look for:

- Mergers and acquisitions (M&As) in response to market demand.
- R&D of new functionality.
- Evidence of listening to, adapting to and aligning with customer needs.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message. These programs are intended to influence the market, promote the brand and business, increase awareness of the products and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotion, thought leadership, word of mouth and sales activities.

We specifically look for:

- Evidence of brand awareness, perception and strength.
- Evidence of go-to-market differentiation.
- Partner ecosystem, customer community, advocacy and customer success program strength.
**Customer Experience:** This criterion assesses aspects related to ensuring that each customer has ongoing success with its VoC deployment. Aspects considered include a vendor's global technical support (whether provided directly or via partners), account management, user groups and panels, and customer communities. Each vendor must provide sufficient proof of the ongoing viability and acceptance of its product(s) in the market.

We specifically look for:

- Evidence of high CX metric scores.
- Customer community, advocacy and customer success program strength.
- Mature CX business capability.

**Table 1: Ability to Execute Evaluation Criteria**

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<tr>
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<td>Customer Experience</td>
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<tr>
<td>Operations</td>
<td>NotRated</td>
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Source: Gartner (November 2021)
Completeness of Vision

**Market Understanding:** This criterion assesses the degree to which a vendor understands the future needs and wants of VoC buyers and embeds them into its VoC product and service vision.

We specifically look for understanding of:

- The future wants and needs of VoC customers.
- The current and future competitive markets.
- Future overlap with adjacent software markets.

**Marketing Strategy:** This criterion assesses whether the VoC vendor has a clearly defined set of future customer segments and markets, and a plan by which to engage with them, address their needs and expand market share.

We specifically look for clarity of:

- Communication of a differentiated vision in line with likely future market needs.
- Positioning to meet the needs of new customer segments.
- How the vendor will differentiate itself in the future.

**Sales Strategy:** This criterion assesses a vendor’s approach to selling VoC products directly and through global partnership networks. It looks at how strategic account management, industry expertise, sales channels and targeting will change to meet future needs.

We specifically look for:

- New sales partner strategy.
- Self-service versus service-led sales strategy.
Offering (Product) Strategy: This criterion assesses the strategic direction of a vendor’s VoC product(s) and its R&D roadmap, as well as the impact these will have on customers. It examines a vendor’s approach to product development and delivery, emphasizing differentiation, functionality, methodology and feature set, and how they map to future requirements.

We specifically look for:

- Role-based and usability R&D investments.
- Functionality R&D investments, including those intended to support self-service versus service-led implementations.
- Architecture and platform R&D investments, including the strategy for using OEMs’ products versus self-building.

Vertical/Industry Strategy: The vendor’s strategy for directing resources, skills and offerings to meet the specific needs of individual verticals.

We specifically look for:

- Evidence of product R&D, professional services and benchmarking investments to align with industry needs.
- Evidence of sales and marketing to support industry versions.
- Evidence of a partner’s ecosystem development program to support industry versions.

Innovation: This criterion assesses how the VoC provider researches, assesses and invests in both technology and operational breakthroughs as a means of creating future differentiation and customer value.

We specifically look for evidence of:

- Product innovation into new forms of collection, analysis and action-taking.
- Operational innovation in new forms of training, education, events, licensing and organizational changes.
- Innovation through working with new forms of software and service partners.
Geographic Strategy: The vendor’s strategy to direct resources, skills and offerings to meet the specific needs of geographies, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

We specifically look for evidence of:

- Product R&D, professional services and benchmarking investments to align with local geographic needs.
- Sales and marketing to support local geographic needs.
- A partner ecosystem development program to support local geographic needs.

Table 2: Completeness of Vision Evaluation Criteria

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<td>Innovation</td>
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<tr>
<td>Geographic Strategy</td>
<td>Medium</td>
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Source: Gartner (November 2021)
Quadrant Descriptions

Leaders

Leaders have the Ability to Execute their vision through VoC products, services and demonstrably solid business results in the form of revenue and earnings. Leaders have significant successful customer deployments in a wide variety of industries, from small businesses to multiple proofs of deployment for more than 1,000 users. Leaders are often the vendors against which other providers measure themselves.

Challengers

Challengers are often larger than Niche Players and demonstrate higher volumes of new business. They have the size and product capabilities to compete worldwide, but they might not be able to provide a vision. Challengers execute well in multiple departments, sizes of business or in both B2B and B2C organizations.

Visionaries

Visionaries deliver innovative and potentially market-changing solutions, but they struggle to meet the needs of all organizations due to geographic limitations, company size constraints and/or specific product omissions. They have strong potential to influence the direction of the market, but are limited in terms of execution and/or track record.

Niche Players

Niche Players sometimes offer the best solutions for the needs of organizations of a particular size or industry, or that use a particular channel (B2B or B2C), considering the price/value ratio of their solutions. But they may lack specific functionality, support for departmental or industry requirements, or offer VoC as part of a different overall value proposition. They may offer complete portfolios, but focus on only one size of organization or one region; they may have limited ability, or even desire, to extend globally.

Context

Medallia and Qualtrics dominate the VoC marketplace, but they are not always the best fit for all companies. There is sufficient diversity among the vendors that the procurement shortlists that Gartner sees still vary significantly based on the specific requirements of the program. Differences between buyers, such as industry, company size, geography, departmental use case, price and strategic ambition, ensure that every vendor in this Magic Quadrant (and many who did not make it in) is thriving in this buoyant market.

Gartner recommends application leaders focus on the following factors when procuring and implementing a VoC application:
- **Reference customers**: They should always delve into their prospective vendor’s customer base to explore exactly what is being delivered. Having 1,000 customers each conducting some form of survey program is all well and good, but if only one of them is also ingesting social or operational journey data, then that raises concerns over that vendor’s maturity and potential viability as a holistic VoC vendor. Use Gartner’s Peer Insights platform as a resource.

- **Use cases**: VoC solutions should provide business value across a broad variety of departments and use cases, such as customer service, sales, marketing, digital commerce and frontline operations (e.g., for a restaurant chain). The needs of each participating department should be gathered and anticipated business value evaluated to ensure alignment with objectives/expectations. A representative of each participating department should be involved in the decision-making process. Vendors are not equally competent within each use case, making this a key area for consideration.

- **Selection criteria**: Beyond functional considerations application leaders should also closely scrutinize the vendor’s data architecture, administration layer, UX, associated analytics and professional services organization (both technical and business-oriented). Gartner recommends embracing a procurement process that uses a hierarchical, weighted vendor evaluation model (see How to Develop a Hierarchy of Criteria for Voice-of-the-Customer Vendor Selection and How to Find the Key Differences Between Leading Voice-of-the-Customer Applications). This analytical hierarchy process helps deliver an objective, comprehensive and transparent VoC vendor and software evaluation process.

- **Scope**: Determine the merits of aligning the VoC program with other programs as part of a broader initiative. There are often user research or market research programs, plans for investment in customer success management applications or an EX initiative, or projects focused on improving the PX. These areas are not currently factored into this research, but are becoming of increasing relevance due to the overlap in the need for similar tools.

This Magic Quadrant is not only designed to aid your VoC application purchase evaluation, but also to help you explore the market further to assess the capacity of each vendor to address your unique business problems and technical concerns. Your shortlist should be determined by the complexity and scale of your requirements. This Magic Quadrant is not designed to be the sole tool for creating a vendor shortlist — use it as part of your due diligence, in conjunction with discussions with Gartner analysts and the associated Critical Capabilities report.
Magic Quadrants are snapshots in time. To be impartial and to complete our analysis, we stop our data collection efforts at a consistent time for all vendors. In this case, the product/service capabilities needed to be in production and generally available at the end of March 2021 in order to be considered in our evaluation.

**Market Overview**

The VoC application market is maturing rapidly and we have observed several important developments over recent years. These include:

- **Market size:** Despite the COVID-19 pandemic, the market grew by around 20% in 2020, which has progressed the size of the VoC application software market beyond $2 billion per year.

- **Market forecast:** Market revenue growth has averaged between 15% and 25% over the last decade and it looks set to continue at the upper end of this range in the coming years.

- **$1 billion vendors:** Large-scale vendors are emerging, Qualtrics will hit $1 billion in annual revenue by the end of 2021, and others will achieve that scale too in the next few years.

- **Mergers and acquisitions:** Significant mergers and acquisitions are changing the dynamics of the marketplace. Since 2016, we have seen the following vendors acquired: Clarabridge, CloudCherry, Customerville, Dapresy, Decibel, Engagor, FocusVision, ForeSee, GetFeedback, Lexalytics, LivingLens, MaritzCX, Nexidia, OpinionLab, Satmetrix, Statwing, Temkin, Usabilla, Usermind, Voci and Zingle.

- **Investor interest:** Recent years have seen several investments by private equity firms, such as Thoma Bravo (acquired Medallia), Verdane (acquired Confirmit) and Madison Dearborn Partners (acquired InMoment/MaritzCX), along with vendors backed by VC funding, such as Alida (formerly Vision Critical).

- **Big name entrants:** Gartner has observed increased interest from organizations in big-name application software vendors, such as Salesforce and Microsoft, that entered the market in 2020 but did not meet the inclusion criteria for this Magic Quadrant.
AI-driven analytics: Advances in analytical features enable data to be converted into insights, and provide actionable diagnostic, predictive and prescriptive advice. Increasingly sophisticated AI-driven analytical capabilities are designed to ingest, parse, understand and obtain insight from unstructured data of both text and voice, including customer service calls, chatbots, social media posts and open-ended survey questions.

User experience: Gartner observes an increased focus on the respondent’s UX which makes the feedback process more enjoyable. Gartner also observes improvements in the presentation of analysis to employees in more digital-media-friendly formats, such as blogs, magazines and newsletters.

Alignment with research: User and market research are increasingly aligned with VoC. This expands the variety of methodologies supported to include techniques like A/B testing, customer diaries, research panels/forums/communitys, card sorting and expert interviews.

Beyond customers: Applications are moving beyond a focus on customers. They now also handle employees’, partners’ and others’ experiences.

Use-case product variants: The use cases for this software are expanding to provide solutions for advert-testing managers, product managers, brand managers, diversity, equity and inclusion (DEI) managers, digital UX managers, and many more. This range looks set to widen rapidly.

Boundary expansion: Vendors have increasingly been focusing on the “act” phase. As such, they have been buying or building functionality in adjacent software markets, such as journey mapping, customer communications, customer success management and employee coaching.

API explosion: Increasingly, VoC applications have prebuilt integrations via APIs to a wider array of internal end-user applications. These include: intranets; email, internal messaging and collaboration tools; customer service, sales and marketing applications; and HR, finance and supply chain applications.

Orchestration: The leading VoC vendors are becoming more strategic, taking greater responsibility for managing the CX. The result is the emergence of new experience platforms that are intended to become core mission-critical investments and provide greater prebuilt connectivity to (and influence over) operational systems, such as CRM systems.
<table>
<thead>
<tr>
<th>Acronym</th>
<th>Glossary Term</th>
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<tbody>
<tr>
<td>AI</td>
<td>artificial intelligence</td>
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<td>API</td>
<td>application programming interface</td>
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<td>BPO</td>
<td>business process outsourcing</td>
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<tr>
<td>B2B</td>
<td>business-to-business</td>
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<tr>
<td>B2C</td>
<td>business-to-consumer</td>
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<td>CATI</td>
<td>computer-assisted telephone interviewing</td>
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<td>CCaaS</td>
<td>contact center as a service</td>
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<td>CRM</td>
<td>customer relationship management</td>
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<td>CX</td>
<td>customer experience</td>
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<td>DCS</td>
<td>digital customer service</td>
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<td>DEI</td>
<td>diversity, equity and inclusion</td>
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<td>EX</td>
<td>employee experience</td>
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<td>IPO</td>
<td>initial public offering</td>
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<td>ISV</td>
<td>independent software vendor</td>
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<tr>
<td>M&amp;A</td>
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<td>NPS</td>
<td>Net Promoter Score</td>
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<td>OEM</td>
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<td>product experience</td>
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<td>R&amp;D</td>
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<tr>
<td>SMB</td>
<td>small/midsize business</td>
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<tr>
<td>SwaS</td>
<td>software with a service</td>
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<tr>
<td>UX</td>
<td>user experience</td>
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<tr>
<td>VoC</td>
<td>voice of the customer</td>
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Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.
Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Document Revision History
Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

How Markets and Vendors Are Evaluated in Gartner Magic Quadrants
How to Operationalize Your VoC Program
How to Measure the ROI of a Voice of the Customer Program
How to Develop a Hierarchy of Criteria for VoC Vendor Selection
How to Find the Key Differences Between Leading VoC Applications
Market Guide for Customer Journey Analytics
Market Guide for Social Analytics Applications
Technology Trends in Service 2021: VoC and Analytics
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