

A Forrester Total Economic  
Impact™ Study  
Commissioned By  
Beckon

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April 2016

# The Total Economic Impact™ Of Beckon

Cost Savings And Business Benefits  
Enabled By Beckon

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### ABOUT FORRESTER CONSULTING

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## Executive Summary

Beckon commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying Beckon, a marketing intelligence platform. The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Beckon on their organizations to optimize their marketing budgets, reallocate their investments more frequently to maximize financial impact, and gain a single source of truth for marketing performance data through easy-to-use dashboards, scorecards, and analytics tools.

To better understand the benefits, costs, and risks associated with a Beckon implementation, Forrester interviewed and surveyed 11 customers with multiple years of experience using Beckon. Beckon is a SaaS-based platform that brings together marketing spend and performance data in one place from all channels for analysis. It's an integrated data hub that enables omnichannel marketing insight, real-time decision support, and analytics and reporting for marketing leaders.

Prior to Beckon, customers had no single system of record for marketing performance data that was continuously updated for real-time analysis and optimization. Typically, organizations analyzed marketing performance in hindsight, for example, after a campaign had been completed, which allowed no room for optimization. Furthermore, the process of collecting marketing performance data across siloes in the organization was a painful, lengthy process. It left no time to make proactive changes in investment because the collection, normalization, and tagging process was difficult — if not impossible — to do in time to make adjustments that had an impact on the organization's return on marketing spend. Beckon automates the reporting process, provides real-time dashboards of marketing performance, and provides insights that can lead to optimization improvements. In this way, marketing leadership can get data insights that help them optimize discretionary marketing spend and, throughout the month, reallocate marketing funds to drive marketing investment performance. Said one managing director of digital marketing of a bank: "Beckon is a foundational platform that enables my department to use data to optimize and manage marketing spend. I don't think you'd be taken seriously in a digital marketing enterprise without a tool like this. Even those who don't understand the fundamentals intrinsically understand that in digital marketing, you should be able to measure every breath you take."

### BECKON ENABLES MARKETING BUDGET OPTIMIZATION WHILE REDUCING COSTS

Our interviews and surveys with 11 existing customers and subsequent financial analysis found that a composite organization based on these interviewed organizations experienced the risk-adjusted ROI, and benefits, shown in Figure 1.<sup>1</sup>

The composite organization analysis points to benefits of \$8,503,341 versus a total cost of ownership of \$1,386,420, adding up to a net present value (NPV) of \$7,116,921. These estimates are based on a composite of the interviewed organizations and are intended to represent an organization with a marketing budget of \$100 million annually. Organizations with smaller marketing budgets or fewer data streams would have a lower total cost of ownership for Beckon.

With Beckon, marketing budget optimization improvements averaged 12.7% and were reported to be as high as 20%, resulting in over \$9 million in improved return on marketing investment (ROMI). The composite organization experienced additional savings in the cost to create reports and for marketing analytics headcount.

**Beckon drives marketing optimization decisions that maximize the effectiveness of marketing spend, improving return on marketing spend by up to 12.7% on average.**

**The customers surveyed and interviewed for this study reported:**

- **Benefits of over \$8.5 million over three years.**
- **On average, 12.7% marketing budget optimization improvement as a result of Beckon, and as high as 20% reported.**
- **The ability to optimize or reallocate marketing budgets more frequently based on performance results, typically moving from quarterly to monthly.**
- **A \$1 million reduction in reporting costs.**

**FIGURE 1**  
**Financial Summary Showing Three-Year Risk-Adjusted Results**



Source: Forrester Research, Inc.

› **Benefits.** The composite organization experienced the following risk-adjusted benefits that represent those experienced by the interviewed and surveyed companies:

- **Return on marketing spend increased by an average of 12.7%, resulting in \$9 million of improvements.** The average return on marketing spend improved by 12.7% as a result of using Beckon. Marketing leaders could review performance data more frequently, gather insights, and make investment changes to optimize the budget. Before Beckon, they would have not been able to collect the data insights quickly enough to reallocate across their performance categories (such as channels, regions, and agencies) to maximize their investments.
- **Reduced costs to create marketing reports by over \$364,000 per year.** Without a reporting, dashboard, and analytics tool, the marketing team spent, on average, almost 7 hours a week creating reports. This involved a team member or several members pulling data from different systems and sources, cleaning the data up and preparing it to be presentation-ready. The process of report creation was automated by Beckon, reducing the time spent by marketers to almost zero.
- **Reduction in marketing data analytics headcount, resulting in savings of around \$54,000 per year.** Organizations using Beckon reported a .75 reduction in full-time equivalents (FTEs) because they had automated the process of collecting data from different internal siloes, normalizing it, and creating reports for analysis. Some organizations had up to 30 marketing analytics team members creating reports and dashboards and producing insights with no consistent tool or process. Others had very few to no internal resources dedicated to reporting and analytics and spent hours preparing presentations for management.

› **Costs.** The composite organization experienced the following risk-adjusted costs:

- **Data source loading and ongoing customer support costs of \$400,000 per year.** These annually recurring fees are \$10,000 per data source and are paid to Beckon. The composite organization loaded 40 data sources into the system. The fee includes:
  - Automation of data source ingestion.
  - Automation of data cleaning and normalization.
  - Continuous monitoring and maintenance of all data feeds.
  - Unlimited access to robust data visualization and reporting tools.
  - Access to Beckon's customer success team for marketing data strategy guidance and support and ongoing education.
- **Internal labor cost to support Beckon of \$150,000 per year.** This annual, recurring internal labor fee is a cost incurred by the composite organization for assigning a resource (or part of a team) to the implementation and ongoing management of the tool. This resource frequently plays the role of deriving insights from the tool to inform investment decisions.

## Disclosures

The reader should be aware of the following:

- › The study is commissioned by Beckon and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.
- › Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the report to determine the appropriateness of an investment in Beckon.

- › Beckon reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.
- › Beckon provided the customer names for the interviews but did not participate in the interviews.

## TEI Framework And Methodology

### INTRODUCTION

From the information provided in the interviews, Forrester has constructed a Total Economic Impact (TEI) framework for those organizations considering implementing Beckon. The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision, to help organizations understand how to take advantage of specific benefits, reduce costs, and improve the overall business goals of winning, serving, and retaining customers.

### APPROACH AND METHODOLOGY

Forrester took a multistep approach to evaluate the impact that Beckon can have on an organization (see Figure 2). Specifically, we:

- › Interviewed Beckon marketing, sales, and consulting personnel, along with Forrester analysts, to gather data relative to Beckon and the marketplace for Beckon.
- › Interviewed and surveyed 11 organizations currently using Beckon to obtain data with respect to costs, benefits, and risks.
- › Designed a composite organization based on characteristics of the interviewed organizations.
- › Constructed a financial model representative of the interviews using the TEI methodology. The financial model is populated with the cost and benefit data obtained from the interviews as applied to the composite organization.
- › Risk-adjusted the financial model based on issues and concerns the interviewed organizations highlighted in interviews. Risk adjustment is a key part of the TEI methodology. While interviewed organizations provided cost and benefit estimates, some categories included a broad range of responses or had a number of outside forces that might have affected the results. For that reason, some cost and benefit totals have been risk-adjusted and are detailed in each relevant section.

Forrester employed four fundamental elements of TEI in modeling Beckon's platform: benefits, costs, flexibility, and risks.

Given the increasing sophistication that enterprises have regarding ROI analyses related to IT investments, Forrester's TEI methodology serves to provide a complete picture of the total economic impact of purchase decisions. Please see Appendix A for additional information on the TEI methodology.

**FIGURE 2**  
TEI Approach



Source: Forrester Research, Inc.

## Analysis

### COMPOSITE ORGANIZATION

For this study, Forrester surveyed customers and conducted in-depth interviews with representatives from the following companies, which are Beckon customers from the United States and the UK (this is a sampling of those interviewed for the study):

- › A British multinational hotels company headquartered in the UK with over \$8.5 billion in revenue. It has over 710,000 rooms and 4,800 hotels across nearly 100 countries. It has large amounts of marketing performance data flowing through Beckon that is optimized on a frequent basis.
- › A homebuilding company based in the United States, with over \$2.4 billion in revenue. It is one of the largest and most recognized homebuilders in the United States and an industry leader in sustainability, building innovative and highly energy- and water-efficient new homes. The marketing organization uses Beckon for marketing optimization and analyzes marketing data weekly through the platform.
- › An American full-service bank with 398 branches in California, Washington, and Oregon that also has commercial branches in Dallas, Houston, New York City, and Chicago, as well as two international offices. It is a subsidiary of a holding company with \$113 billion in assets. The marketing organization submits daily data for analysis.
- › A British telecommunications company that serves the United Kingdom, providing television and broadband Internet services and fixed-line telephone services to consumers and businesses in the United Kingdom. It is the UK's largest pay-TV broadcaster, with 11 million customers. The marketing organization uses Beckon to track and optimize spend.
- › An American shoe company with a production output that primarily consists of sportswear and lifestyle brand footwear. The company sells other items globally through retailers in over 160 countries and through approximately 75 company-owned retail stores across the US. With Beckon, the marketing organization moved from annual "hindsight" reporting to in-flight optimization of campaigns, all based on the data flowing into Beckon.
- › A leading technology provider of modern communication and collaboration solutions for businesses, with over \$170 million in revenue. The company's technology products help employees, partners, and customers work better together. They flow marketing performance data weekly into Beckon, analyze it daily, and optimize campaigns in flight.

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an associated ROI analysis that illustrates the areas financially affected. The composite organization that Forrester synthesized from these results represents an organization with the following characteristics:

- › The composite organization is a traditional, brand-focused business-to-consumer (B2C) organization with over \$100 million in annual marketing budget to spend across channels.

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*“We had the challenge of having a substantive amount of data and marketing activity but no correlational relationship between them. We evaluated the competitors, and the general data model behind Beckon is better than any other. Every single part of our marketing spend should be positively impacted by Beckon.”*

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~ CMO, open source software company



- › The organization has five lines of business, dozens of products, and as many verticals into which it sells.
- › The organization has 40 data sources for its marketing performance data from which it generates reports, 40% of which are system-generated and 60% of which are custom, manually generated reports.
- › The organization had around 30 marketers throughout the organization creating reports on a weekly basis to share the results with marketing management.

The organization went through the following steps to select a marketing performance data provider:

- › The organization discussed internally with its IT department some of the possibilities for creating analysis-ready reports, but it didn't speak the same language around data. The existing BI solutions in place were much broader-scale and not specific to the marketers' needs. This led the organization to seek an alternative solution.
- › It then researched vendors and providers for selection. It priced out the creation of a custom system and saw that it would cost \$1 million plus maintenance. The team considered broader BI tools, but they were not specific enough to marketing. Beckon was an emerging company that solved these challenges and caught the eye of the marketing leader.
- › The organization evaluated the handful of companies that provided specific marketing performance tools to marketers. It selected Beckon for its data model, ease of use, and customer support. Once it made its decision to work with Beckon, the composite had to determine how many channels of data to pull into the system.

The organization went through the following steps to get started with the Beckon platform and create its marketing data strategy:

- › The organization worked closely with the Beckon customer success team through facilitated working sessions to define the criteria and taxonomy of the data. The taxonomy informed the presentation of the data and how queries would be run. The process included customer design sessions where they discussed how to set up and organize the data (e.g., by line of business, products offered, and geography). Based on the agreed upon taxonomy, the Beckon team applied those decisions to the software, and the system was ready for use within one month.
- › Once data was actively flowing into the Beckon system, the marketing organization continued to collaborate with Beckon on its marketing data strategy. In addition to providing full access to Beckon dashboards, scorecards, and data visualization tools, Beckon guided marketers from the organization through the creation of its entire measurement and reporting program. Through trainings, general account support, and ongoing education, the marketing team had access to data analysis and platform optimization help, as well as best practices for KPIs, metric prioritization, and marketing data frameworks.

## INTERVIEW HIGHLIGHTS

The implementation of Beckon led to a transformation in the collection of marketing performance data and enabled the more frequent use of it for the good of the organization.

### *Situation*

Historically, the marketing organization's leadership took an annual waterfall approach to marketing budgeting, planning their budgets and tactics at the beginning of the year. However, this approach was not keeping pace with the fluidity of the digital marketing tactics and all of the data that was now readily available to them. Since marketing is expected to drive future growth, maximizing the budget devoted to it is expected to yield strong results. Yet marketing leaders were having difficulty collecting and using all of the available data in a timely fashion to optimize both their spend and campaign performance and link marketing activities to business outcomes. Offline and online performance and spend data, brand tracking data, and business outcome data from sources such as media spend reports, Google Analytics, Omniture, ExactTarget, Facebook, Twitter, DoubleClick Campaign Manager, internal sales reports, brand tracker reports, and others abounded, but they were

viewed and managed in siloes by the marketing managers responsible for those channels. Before Beckon, the process of collecting marketing performance data across siloes in the organization was a painful, lengthy process that left no time to make proactive changes in investment because the collection, normalization, and tagging process was difficult — if not impossible — to do on a timely basis.

While individual marketing channel owners were able to view performance data in their silos, management-level reporting to bring together the big picture in real time was difficult. There was no single system of record for that data that could be continuously updated for real-time analysis and optimization. The organization relied on outside agency partners to supply critical reports monthly or quarterly, but this process was expensive and riddled with potential errors and conflicts of interest. Reports created internally were often outdated by the time the data could be collected and analyzed. The organization wanted to optimize its discretionary marketing spend and, throughout the month, reallocate and optimize marketing funds as needed. Marketing leadership decided to find a tool that automates the reporting process, provides real-time dashboards and scorecards of marketing performance, and provides insights that can lead to optimization improvements. In this way, they can proactively provide reports and data insights to drive marketing investment performance.

The marketing analytics organization provides monthly reports to four lines of business and ad hoc reports to other areas of the business. In the past, creating reports spanning data sources or “on a moment’s notice” would have been difficult, expensive, and time-consuming. With Beckon, those reports can be run easily once the data sources are loaded and KPIs established. With Beckon, the composite organization has the following goals:

- › Create a single “source of truth” for marketing performance data that is updated continuously.
- › Enable marketing leaders to manage the effectiveness of their marketing programs across online and offline channels.
- › Provide “marketer-ready” insights in a dashboard configuration and with data storytelling features that can be enabled.
- › Respond to requests from different business units about the performance of marketing tactics.

#### *Solution*

The composite organization selected Beckon for its strong underlying data model, its easy-to-use interface, and the very supportive implementation team who assists in defining taxonomies, normalizing data, receiving ongoing updates to those data streams, and advising on KPI selection and best-practice dashboard and scorecard design.

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*“Our challenge is management-level reporting and bringing together the big picture in a timely way. Marketing people are not data people, and marketing is diffused. The value that Beckon brings begins with their ability to help you build the taxonomy, which makes the visualization more manageable. Beckon is a dashboard and a centralized repository, and they understand what matters to marketers.”*

~ Director of marketing analytics, hospitality industry

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## Results

The interview revealed:

- › **An increase in the frequency of analyzing marketing performance data, enabling an “agile marketing” approach.** Fifty-eight percent of Beckon customers surveyed for this study were able to monitor their performance monthly — as opposed to quarterly — since their implementation of the technology. These senior-level marketers were able to monitor campaigns, channels, markets, regions, and agency performance more frequently, which is an important step in adopting an “agile” approach to marketing. Their campaign and channel managers were able to monitor weekly or even daily to gain insights that could have an impact on their allocation and investment decisions. Said one CMO from a technology company: “I see my managers and me reviewing the data at a minimum of every one to two weeks. That weekly cadence for the leadership team enables us to have proactive communication with the executive team in which we can share pieces of performance data that is available because of Beckon. Every month, I would like to do a reallocation of funds.”
- › **On average, a 12.7% improvement in the return on marketing spend, totaling over \$9 million in ROMI.** With a shift toward more frequent monitoring of marketing performance data and weekly or monthly shifts in digital investment dollars, the composite organization saw an increase in its return on marketing spend. Customers reported average optimization improvements of 10.1% for campaigns, 6.2% for channels, 4.7% for markets, 3.4% for regions, and 2.3% for agencies. Furthermore, they identified a 3% to 20% improvement in their overall return on marketing spend, averaging about 12.7%.
- › **A reduction in costs by providing a system of record and “one source of truth” for marketing performance data.** The composite organization reported spending hundreds of hours of time — imagine 30 marketers across the enterprise spending over 6 hours weekly on report creation — collecting data and creating reports. Marketing managers and marketing analytics professionals had to spend hours collecting data from various sources and preparing it for analysis by combining it with other data sources and creating PowerPoints to tell the data story behind the numbers. This took time and resources. After Beckon, marketer-ready insights and reports were automated, and the visual storytelling could be done by Beckon’s dashboard and scorecard features. In addition to the report creation time savings, the organization estimated that it could reduce headcount by a half to a full-time equivalent. Said one director of marketing analytics from the hospitality industry: “Our challenge is management-level reporting and bringing together the big picture in a timely way. We’ve been doing a lot of things in Excel, but a lot of compromises are made around granularity, file size, and speed. We have lots of different data sources and many vendors to consider — 64 programs in total. Pulling that data together is a challenge, and we can’t keep up with the volume.”
- › **The removal of the “fox from the henhouse” when it comes to evaluating agency performance.** The composite organization described a situation common to many marketers: It relies heavily on its agency partners to provide reporting and analytics to the organization. This has long been the case, but it is riddled with complexities. The agency is often responsible for allocating and executing the tactics that marketers wish to gather marketing performance data around. It has a vested interest in showing positive performance. Frequently, the agency owns the performance data, and the marketing organization cannot access it readily. So, when reports were requested throughout the organization —

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*“We spent \$100,000 for every custom report we had the agency create. There were about 200 of these reports being requested from across the company. Not only was this expensive, but having our agency create the reports on their own performance was like letting the fox in the henhouse.”*

~ IT professional serving marketing, consumer products company

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reported by one large consumer products company to be as many as 200 times per year — the agency was paid to create reports on its own performance. Or, if the company changed agencies, the data typically remained under agency ownership rather than with the internal organization. The composite organization cited Beckon as a means of bringing marketing performance data ownership back within its control. It also gave the organization a means to save on the often exorbitant fees it paid to have custom reports created. In some cases, it needed a full-time resource assigned to its account from the agency for report creation but could avoid that cost with Beckon.

- › **A data center of excellence mindset to the organization.** When the organization began using Beckon, it was the first time that it brought together the people and the disparate data sources that were siloed throughout the organization. The process of collecting that data, meeting internally with the help of the Beckon customer support team to define taxonomies, and making decisions on marketing KPIs had never been done before and aligned the team on their marketing strategy. Beckon brought a “data center of excellence” mindset to the organization through the process of marketing performance data collection, integration, and normalization. Said one managing director of digital marketing of a bank: “When I started, there was no digital marketing function and no reporting or analytics to measure and manage digital marketing performance. We were going to disparate sources of data to capture, format, and create a 10-page PowerPoint. Now, the data is in Beckon, and we can go in there and run queries where you define the time range, and the possibilities are infinite. We want to use what is there to inform optimization and future spend. Beckon was generous on the amount of hours and professional services they provided to set it up.”

## BENEFITS

The composite organization experienced a number of quantified benefits in this case study:

- › Marketing budget optimization improvements.
- › Reduced cost to create marketing reports.
- › Reduced marketing personnel expense devoted to report creation.

Another important benefit mentioned by the composite organization was that the process of readying data streams for Beckon provided an opportunity for the organization to agree on key performance indicators. The process of creating a global taxonomy for the data improved the overall data quality and consistency for these customers. It furthered them in the process of creating a marketing “data center of excellence” mindset in the organization. It also provided them ample tools for data visualization and storytelling, which are both important capabilities for presenting data insights to company leadership. Customers also cited the ease of use of Beckon as a key benefit of the product, along with the very responsive and knowledgeable customer care team behind the tool.



### Marketing Budget Optimization Improvements

The composite organization indicated that a key benefit from the Beckon implementation was a 12.7% increase in return on marketing spend (on average) due to marketing leadership’s ability to optimize marketing investments on a more frequent basis. Prior to Beckon, the marketing leadership of the composite organization planned the marketing budget annually, reviewed its performance quarterly, and made less frequent updates to marketing investments. While campaign and channel managers could review performance data on a more frequent basis, they were relying on the individual marketing technologies, such as ad servers and agency partners, to provide the reporting and analytics and then made investment decisions in a silo. As a result, the composite organization’s marketing leadership did not have the ability to get a comprehensive management view of the performance of the 40-plus simultaneous marketing data sources to make informed decisions across those investments.

Following the Beckon implementation, the composite organization improved its return on marketing spend by a range of 3% to 20%, averaging 12.7%. This is because the marketing leadership was able to increase the frequency of marketing performance monitoring from quarterly (on average) to monthly (and often even more frequently). Armed with more accessible and better data across campaigns, channels, regions, and agencies, the marketing leadership could discuss insights and advise changes in investments. The majority of customers interviewed for this study increased the frequency of their budget allocations. The organization, which has a \$100 million dollar marketing budget, found that the majority of that spend, 68%, was optimizable if the data streams from disparate marketing technologies and tactics could be brought into one location. Assuming an average return on marketing investment of 5:1, the organization saw an increase of 12.7% on that return. For this model, a conservative estimate of 6% improvement on return on marketing spend was used, but individual improvements were reported to be as high as 20%. As a result, with a budget of \$68 million that can be optimized, the organization recognized over \$4 million in improvements every year. In Year 1, the optimization improvement was calculated after six months, assuming the implementation process for Beckon requires a few months for an organization to hold design workshops, determine a global taxonomy, and establish a systematic process for reviewing marketing performance data. Furthermore, Beckon is an enabling technology that provides the data and tools for marketers to make decisions, but the insights and investment decisions depend on a person to make effective changes. To account for this, Forrester Research attributes 20% of the marketing return on spend improvement to Beckon as the enabling technology. The total benefit resulting from marketing budget optimization improvements over the three years was \$10.2 million, or about \$255,000 per marketing data stream loaded into Beckon.

Interviewed organizations provided a broad range of percentage improvements on marketing spend and varying average return on marketing spend, since every campaign and tactic can have a different ROMI. To compensate, this benefit was risk-adjusted and reduced by 10%. The risk-adjusted total benefit resulting from marketing budget optimization improvements over the three years was \$9.18 million, or about \$229,500 per marketing data stream loaded into Beckon. See the section on Risks for more detail.

**TABLE 1**  
**Marketing Budget Optimization Improvements**

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
A1	Marketing budget			\$100,000,000	\$100,000,000	\$100,000,000
A2	Percent of budget than can be optimized	68% Source: Forrester Research		\$68,000,000	\$68,000,000	\$68,000,000
A3	Return on marketing spend before Beckon	For every \$1 spent, \$5 return		\$340,000,000	\$340,000,000	\$340,000,000
A4	Optimization improvement	For every \$1 spent, \$5.30 return <i>Note: 3%-20% reported increase in return on marketing spend; 12.7% average; 6% used as conservative estimate</i>		\$20,400,000	\$20,400,000	\$20,400,000
A5	Percent improvement attributed to use of Beckon technology	20%		20%	20%	20%
At	Marketing budget optimization improvements	$A3 \times 0.06 \times A5$ Year 1 calculated benefits for 6 mos.	\$0	\$2,040,000	\$4,080,000	\$4,080,000
	Risk adjustment	↓10%				
Atr	<b>Marketing budget optimization improvements (risk-adjusted)</b>		<b>\$0</b>	<b>\$1,836,000</b>	<b>\$3,672,000</b>	<b>\$3,672,000</b>

Source: Forrester Research, Inc.



### Reduced Cost To Create Marketing Reports

Beckon customers cited the reduction in time to create marketing reports as one of the key benefits provided by the platform. Prior to Beckon, marketers from across the organization — as many as 30-plus in the composite organization — were responsible for creating their own marketing performance reports to provide marketing leadership. While the technology used for their specific channel or campaign may have provided data and



reports, they had to bring together year-over-year data for analysis, create PowerPoints painstakingly, or request the data from agency partners. The process of report creation was complex and frequently riddled with errors. Furthermore, marketers across the organization had no consistent taxonomy for labeling and tracking performance across marketing efforts. This meant that even if they could report back on results, those results were only relevant within the context of the individual marketing execution tool but not available side by side with other data sources. Marketing professionals across the organization were spending over 6 hours per week assembling reports prior to Beckon, or they were paying an agency to create custom reports for them. Customers reported a minimum cost of \$120,000 annually and as much as \$2 million when they had to rely on those partners. In the case where they did use agencies for reporting, there was frequent staff turnover on the agency side, as retaining marketing data analytics professionals was difficult, and the quality and objectivity of the data were called into question at times. Agencies owning company marketing performance data and reporting on their own performance was viewed as the “fox in the henhouse” dilemma: They had a financial incentive to represent themselves in the best possible light. After implementing Beckon and loading marketing data sources, the process of report creation was automated. Marketers across the company saved hundreds of hours per year. The total benefit resulting from the reduced cost to create marketing reports over the three years was \$1,214,951, or about \$40,498 per marketer who created reports.

Interviewed organizations provided a broad range of hours saved in the creation of reports, and the size of their marketing teams varied depending on the industry and focus of the organization. Furthermore, salaries for marketers vary depending on industry and region. To compensate, this benefit was risk-adjusted and reduced by 10%. The risk-adjusted total benefit resulting from the reduced cost to create marketing reports over the three years was \$1,093,456, or about \$36,449 per marketer creating reports. See the section on Risks for more detail.

**TABLE 2**  
**Reduced Cost To Create Marketing Reports**

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
B1	Number of people creating reports	30		30	30	30
B2	Time spent creating reports weekly	6.75 hrs.		6.75	6.75	6.75
B3	Weeks per year			52	52	52
B4	Time spent creating reports after Beckon	Automated				
B5	Hourly salary	Based on \$80,000 annual fully loaded salary assumption		\$38.46	\$38.46	\$38.46
Bt	Reduced cost to create marketing reports	$B1*B2*B3*B5$	\$0	\$404,984	\$404,984	\$404,984
	Risk adjustment	↓10%				
<b>Btr</b>	<b>Reduced cost to create marketing reports (risk-adjusted)</b>		<b>\$0</b>	<b>\$364,485</b>	<b>\$364,485</b>	<b>\$364,485</b>

Source: Forrester Research, Inc.



### Reduced Marketing Personnel Expense Devoted To Report Creation

The composite organization indicated that a key benefit from the Beckon implementation was a reduction in marketing personnel expense devoted to report creation. In some cases, the customers interviewed for this research paid an agency up to \$120,000 per year as a dedicated resource for report creation. Other customers reported that they were able to reduce their marketing headcount by about one person because they now had an automated way to create reports using Beckon. Several customers had central marketing analytics teams with up to 30 people on them working to create the dashboards and reports that Beckon creates automatically. Although a resource may be required to manage Beckon internally, to oversee its implementation and the ongoing management of data streams (see the Costs section for more detail), the customer was able to offset that cost by reducing the headcount for personnel dedicated to creating marketing reports. Prior to Beckon, the composite organization needed a dedicated resource who was either internal or outsourced to an agency, to keep up with the demand for report creation. For this model, a conservative estimate of a 0.75 personnel cost for marketing resources was used to quantify this benefit. In a large B2C organization that is marketing-driven, that reduction would likely be higher. After the Beckon implementation, this cost could be reduced or allocated to a different internal demand, such as managing the technology implementation. The total benefit resulting from reduced marketing personnel expenses over the three years was \$180,000.

Interviewed organizations provided a range when asked about the number of resources that were reduced as a result of having analysis-ready marketing performance data available to them. Furthermore, salaries for marketers vary depending on industry and region. To compensate, this benefit was risk-adjusted and reduced by 10%. The risk-adjusted total benefit resulting from reduced marketing personnel expense devoted to report creation over the three years was \$162,000.

TABLE 3

Reduced Marketing Personnel Expense Devoted To Report Creation

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
C1	Salary of marketing analytics manager, fully loaded	\$80,000		\$80,000	\$80,000	\$80,000
C2	Reduction due to Beckon	0.75		0.75	0.75	0.75
Ct	Reduced marketing personnel expense devoted to report creation	C1*C2	\$0	\$60,000	\$60,000	\$60,000
	Risk adjustment	↓10%				
Ctr	<b>Reduced marketing personnel expense devoted to report creation (risk-adjusted)</b>		<b>\$0</b>	<b>\$54,000</b>	<b>\$54,000</b>	<b>\$54,000</b>

Source: Forrester Research, Inc.



## Total Benefits

Table 4 shows the total of all benefits across the three areas listed above, as well as present values (PVs) discounted at 10%. Over three years, the composite organization expects risk-adjusted total benefits to be a PV of more than \$8.5 million, or \$212,500 per marketing data source loaded into the system.

**TABLE 4**  
**Total Benefits (Risk-Adjusted)**

Ref.	Benefit	Initial	Year 1	Year 2	Year 3	Total	Present Value
Atr	Marketing budget optimization improvements	\$0	\$1,836,000	\$3,672,000	\$3,672,000	\$9,180,000	\$7,462,630
Btr	Reduced cost to create marketing reports	\$0	\$364,485	\$364,485	\$364,485	\$1,093,456	\$906,421
Ctr	Reduced marketing personnel expense devoted to report creation	\$0	\$54,000	\$54,000	\$54,000	\$162,000	\$134,290
	<b>Total benefits (risk-adjusted)</b>	<b>\$0</b>	<b>\$2,254,485</b>	<b>\$4,090,485</b>	<b>\$4,090,485</b>	<b>\$10,435,456</b>	<b>\$8,503,341</b>

Source: Forrester Research, Inc.

## COSTS

The composite organization experienced a number of costs associated with the Beckon solution:

- › Data source loading, normalizing, and management fees.
- › Internal labor cost to support Beckon.

These represent the mix of internal and external costs experienced by the composite organization for initial planning, implementation, and ongoing maintenance associated with the solution.



### Data Source Loading, Normalizing, And Management Fees

For every marketing data source that the composite organization loaded into Beckon — whether automated or manual — the organization paid a \$10,000 annually recurring data source loading and management fee. The composite organization loaded 40 data sources into the system. The fee includes:

- Automation of data source ingestion.
- Automation of data cleaning and normalization.
- Continuous monitoring and maintenance of all data feeds.
- Unlimited access to robust data visualization and reporting tools.
- Access to Beckon's customer success team for marketing data strategy guidance and support and ongoing education.

This price encompasses the initial setup process for bringing data sources into Beckon, including data design meetings, taxonomy creation, data normalization and cleansing, and loading fees. In addition, Beckon updates those data sources on a frequent basis as the organization amends or expands on the original data structure and monitors them on an ongoing basis to ensure a consistent, accurate, and timely flow of data. The fee also includes all reporting and visualization functionality, as well as access to Beckon's customer success team of marketing data experts. The data source loading, normalizing, and management fees are paid annually. The composite organization incurred data source fees for its 40 marketing data streams, for a total of \$1,200,000 in data source loading, normalizing, and management fees.

**TABLE 5**  
Data Source Loading, Normalizing, And Management Fees

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
D1	Number of marketing data sources	40		40	40	40
D2	Price per data source	\$10,000		\$10,000	\$10,000	\$10,000
Dt	Data source loading, normalizing, and management fees	D1*D2		\$400,000	\$400,000	\$400,000
	Risk adjustment	0%				
<b>Dtr</b>	<b>Data source loading, normalizing, and management fees (risk-adjusted)</b>		<b>\$0</b>	<b>\$400,000</b>	<b>\$400,000</b>	<b>\$400,000</b>

Source: Forrester Research, Inc.



### Internal Labor Cost To Support Beckon

The composite organization, in order to maximize the value of Beckon, dedicates a resource or part of the team to managing the Beckon implementation and generating insights from the tool. This cost is estimated at \$150,000 annually and is offset by the reduction in costs of personnel devoted to managing reporting (see Benefit 3 in the benefits section). Over three years, the total costs associated with internal labor to support Beckon are \$450,000.

The labor costs to support Beckon may vary by company, geography, and the number of data sources loaded in the system. To compensate, this cost was risk-adjusted up by 5%. The risk-adjusted cost of annual labor to support Beckon over the three years was \$472,500. See the section on Risks for more detail.

**TABLE 6**  
Internal Labor Cost To Support Beckon

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
E1	Salary of marketing resource to support Beckon			\$150,000	\$150,000	\$150,000
Et	Internal labor cost to support Beckon			\$150,000	\$150,000	\$150,000
	Risk adjustment	↑5%				
<b>Etr</b>	<b>Internal labor cost to support Beckon (risk-adjusted)</b>		<b>\$0</b>	<b>\$157,500</b>	<b>\$157,500</b>	<b>\$157,500</b>

Source: Forrester Research, Inc.

## Total Costs

Table 7 shows the total of all costs as well as associated present values, discounted at 10%. Over three years, the composite organization expects costs to total a net present value of a little more than \$1.38 million.

**TABLE 7**  
**Total Costs (Risk-Adjusted)**

Ref.	Cost Category	Year 1	Year 2	Year 3	Total	Present Value
Dtr	Data source loading, normalizing, and management fees	\$400,000	\$400,000	\$400,000	\$1,200,000	\$994,741
Etr	Internal labor cost to support Beckon	\$157,500	\$157,500	\$157,500	\$472,500	\$391,679
<b>Total costs (risk-adjusted)</b>		<b>\$557,500</b>	<b>\$557,500</b>	<b>\$557,500</b>	<b>\$1,672,500</b>	<b>\$1,386,420</b>

Source: Forrester Research, Inc.

## FLEXIBILITY

Flexibility, as defined by TEI, represents an investment in additional capacity or capability that could be turned into business benefit for some future additional investment. This provides an organization with the “right” or the ability to engage in future initiatives but not the obligation to do so. There are multiple scenarios in which a customer might choose to implement Beckon and later realize additional uses and business opportunities. Flexibility would also be quantified when evaluated as part of a specific project.

Beckon provides flexible and highly visual dashboard, scorecard, and analytics tools. As organizations using Beckon get over the initial hurdle of collecting all of the data sources across the company for analysis and agree to the KPIs and measures that matter for the business, the power of these tools to drive insights increases.

## RISKS

Forrester defines two types of risk associated with this analysis: “implementation risk” and “impact risk.” Implementation risk is the risk that a proposed investment in Beckon may deviate from the original or expected requirements, resulting in higher costs than anticipated. Impact risk refers to the risk that the business or technology needs of the organization may not be met by the investment in Beckon, resulting in lower overall total benefits. The greater the uncertainty, the wider the potential range of outcomes for cost and benefit estimates.

**TABLE 8**  
**Benefit And Cost Risk Adjustments**

<b>Benefits</b>	<b>Adjustment</b>
Marketing budget optimization improvements	↓ 10%
Reduced cost to create marketing reports	↓ 10%
Reduced marketing personnel expense devoted to report creation	↓ 10%
<b>Costs</b>	<b>Adjustment</b>
Internal labor cost to support Beckon	↑ 5%

Source: Forrester Research, Inc.

Quantitatively capturing implementation risk and impact risk by directly adjusting the financial estimates results provides more meaningful and accurate estimates and a more accurate projection of the ROI. In general, risks affect costs by raising the original estimates, and they affect benefits by reducing the original estimates. The risk-adjusted numbers should be taken as “realistic” expectations since they represent the expected values considering risk.

The following impact risks that affect benefits are identified as part of the analysis:

- › Interviewed organizations provided a broad range of percentage improvements on marketing spend and varying average return on marketing spend, since every campaign and tactic can have a different ROMI. To compensate, this benefit was risk-adjusted and reduced by 10%.
- › Interviewed organizations provided a broad range of hours saved in the creation of reports, and the size of their marketing teams varied depending on the industry and focus of the organization. Furthermore, salaries for marketers vary depending on industry and region. To compensate, this benefit was risk-adjusted and reduced by 10%.
- › Interviewed organizations provided a range when asked about the number of resources that were reduced as a result of having analysis-ready marketing performance data available to them. Furthermore, salaries for marketers vary depending on industry and region. To compensate, this benefit was risk-adjusted and reduced by 10%.

The following implementation risk that affects costs is identified as part of this analysis:

- › The labor costs to support Beckon may vary by company, geography, and the number of data sources loaded in the system. To compensate, this cost was risk-adjusted up by 5%.

Other risks that could have an impact on the benefits provided by Beckon that are not included in the financial model include:

- › Data ownership. There may be politics around the collection of marketing performance data, including who can access it and how publicly it may be shared.
- › Cultural transformation. The Beckon tool is most valuable within an organization that values the insights provided by marketing and wants to act on that data. Organizations that will value Beckon value access to analysis-ready data and want to increase the frequency of reporting and spend optimization.

- › The key internal stakeholder. Because Beckon is a management-level reporting tool, the marketing leader who invests in it and is the internal champion may leave the organization before the tool has rooted itself deeply enough to survive that leader's departure.
- › The people. Data insights come from people, not tools. The expertise on gathering insight from data and analysis doesn't come with a software package or tool. It must be "rented" or "bought" or built out internally, and the organization must have a culture that values marketing insights.

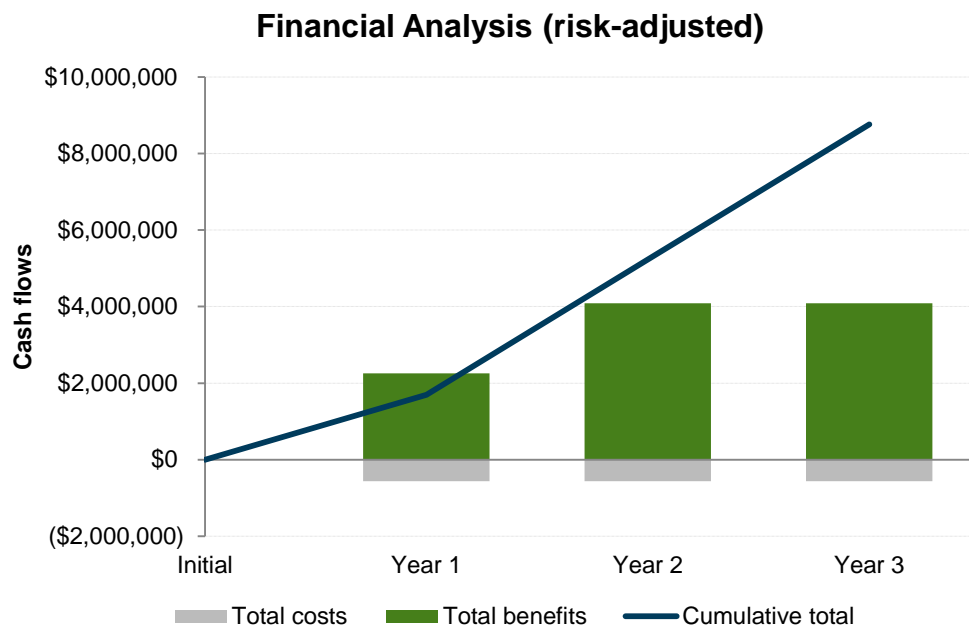
Table 8 shows the values used to adjust for risk and uncertainty in the cost and benefit estimates for the composite organization. Readers are urged to apply their own risk ranges based on their own degree of confidence in the cost and benefit estimates.

## Financial Summary

The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment in Beckon.

Table 9 below shows the risk-adjusted ROI, NPV, and payback period values. These values are determined by applying the risk-adjustment values from Table 8 in the Risks section to the unadjusted results in each relevant cost and benefit section.

**FIGURE 3**  
Cash Flow Chart (Risk-Adjusted)



Source: Forrester Research, Inc.

**TABLE 9**  
Cash Flow (Risk-Adjusted)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Costs		(\$557,500)	(\$557,500)	(\$557,500)	(\$1,672,500)	(\$1,386,420)
Benefits		\$2,254,485	\$4,090,485	\$4,090,485	\$10,435,456	\$8,503,341
Net benefits		<b>\$1,696,985</b>	<b>\$3,532,985</b>	<b>\$3,532,985</b>	<b>\$8,762,956</b>	<b>\$7,116,921</b>
ROI						<b>513%</b>
Payback period		(\$557,500)	(\$557,500)	(\$557,500)	(\$1,672,500)	7 months

Source: Forrester Research, Inc.

## Beckon: Overview

The following information is provided by Beckon. Forrester has not validated any claims and does not endorse Beckon or its offerings.

### ABOUT BECKON

Beckon is a marketing intelligence platform for marketers who want to bring order to data chaos, see what's working across it all, make data-informed optimization decisions, and tell the marketing story in terms of business impact. Beckon's software-as-a-service platform provides end-to-end management of messy marketing data and delivers rich dashboards and scorecards for cross-channel marketing intelligence. Built by marketers for marketers, Beckon provides omnichannel visibility, best-practice analytics, and marketing-impact metrics right out of the box for ultra-fast time-to-marketing-value.

### PRODUCT OVERVIEW

#### *Beckon Dashboards*

Beckon has reimaged the generic marketing dashboard as a storytelling canvas for understanding and sharing omnichannel marketing performance. First, Beckon provides real-time, marketer-ready spend and ROI dashboards that put diagnostic metrics and leading indicators of marketing's effectiveness at marketers' fingertips right out of the box: ROI, cost-effectiveness comparisons by channel and tactic, buyer's journey analyses, paid/owned/earned media ratios, campaign performance versus benchmarks, and more. Then, marketers can fully customize those dashboards or create their own. Marketers can change layouts; resize elements; drag and drop charts; use rich-text blocks to add commentary and highlight key points; and embed images, video, Twitter widgets, Google Trends, and more. And because every chart in a Beckon dashboard answers a business question (displayed right above the chart), it's easy to see and share how marketing is moving the needle on business and brand outcomes and what's working best across it all.

#### *Beckon Scorecards*

Beckon marketing scorecards are automated, real-time trackers that map marketing metrics and KPIs directly to brand and business objectives, as well as to traditional frameworks like the buyer's journey, to show marketing performance at a glance. Marketers can play with the beautiful, intuitive drag-and-drop interface to design scorecards that perfectly capture their marketing achievements. They can create unlimited drafts and scorecard layouts, sharing them with others only when they're ready. Beckon scorecards make it easy for marketers to compare planned versus actual; set up templates; toggle through campaigns, regions, or brands using the same consistent lens; and tell marketing's overall story of business impact with clarity and simplicity.

#### *Beckon Answers*

Beckon's natural-language Q&A interface lets marketers get answers to critical questions about marketing performance all on their own. As we spend more on TV, what happens to the click-through rate on banner ads? Which content resonates with which segments? Are we tracking to plan? Where should we invest our next marketing dollar? Which agency delivers the most per \$1 we pay them in fees? Ask a question about marketing performance, and get the answer — it's that simple. Marketers can explore any facet of their data over any timeframe — in effect, they can "interview their data." And when it's time to build a year-in-review hindsighting deck, marketers can go to Beckon, formulate a natural-language question, and instantly get several graphs, charts, and tables that answer it. Pop one or more into a report, and they're off and running.



### *Beckon Data*

Marketing data is uniquely messy. If it's not cleaned up before it's put into data visualization tools like dashboards and scorecards, then all you have is a pretty picture with bad data. Beckon is an automated, end-to-end data management solution (no more late nights cutting and pasting in spreadsheets). It unites marketing spend and performance data once and for all. It establishes a flexible, universal marketing taxonomy (regions, business units, product lines, etc.) that's applied consistently across all marketing efforts. It provides a single home for all marketing spend and performance data along with business and brand KPIs. It integrates data from any marketing channel (online, offline, in-store, affiliate, partner marketing, and more) and any data source (data warehouse, API, Excel, .csv, reports from execution tools, PowerPoint, PDF, and more). And it works with *all* of the best-of-breed execution tools marketers are already using. Beckon data management is the first step to unlocking the true story of marketing performance.

## Appendix A: Total Economic Impact™ Overview

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders. TEI assists technology vendors in winning, serving, and retaining customers.

The TEI methodology consists of four components to evaluate investment value: benefits, costs, flexibility, and risks.

### BENEFITS

Benefits represent the value delivered to the user organization — IT and/or business units — by the proposed product or project. Often, product or project justification exercises focus just on IT cost and cost reduction, leaving little room to analyze the effect of the technology on the entire organization. The TEI methodology and the resulting financial model place equal weight on the measure of benefits and the measure of costs, allowing for a full examination of the effect of the technology on the entire organization. Calculation of benefit estimates involves a clear dialogue with the user organization to understand the specific value that is created. In addition, Forrester also requires that there be a clear line of accountability established between the measurement and justification of benefit estimates after the project has been completed. This ensures that benefit estimates tie back directly to the bottom line.

### COSTS

Costs represent the investment necessary to capture the value, or benefits, of the proposed project. IT or the business units may incur costs in the form of fully burdened labor, subcontractors, or materials. Costs consider all the investments and expenses necessary to deliver the proposed value. In addition, the cost category within TEI captures any incremental costs over the existing environment for ongoing costs associated with the solution. All costs must be tied to the benefits that are created.

### FLEXIBILITY

Within the TEI methodology, direct benefits represent one part of the investment value. While direct benefits can typically be the primary way to justify a project, Forrester believes that organizations should be able to measure the strategic value of an investment. Flexibility represents the value that can be obtained for some future additional investment building on top of the initial investment already made. For instance, an investment in an enterprisewide upgrade of an office productivity suite can potentially increase standardization (to increase efficiency) and reduce licensing costs. However, an embedded collaboration feature may translate to greater worker productivity if activated. The collaboration can only be used with additional investment in training at some future point. However, having the ability to capture that benefit has a PV that can be estimated. The flexibility component of TEI captures that value.

### RISKS

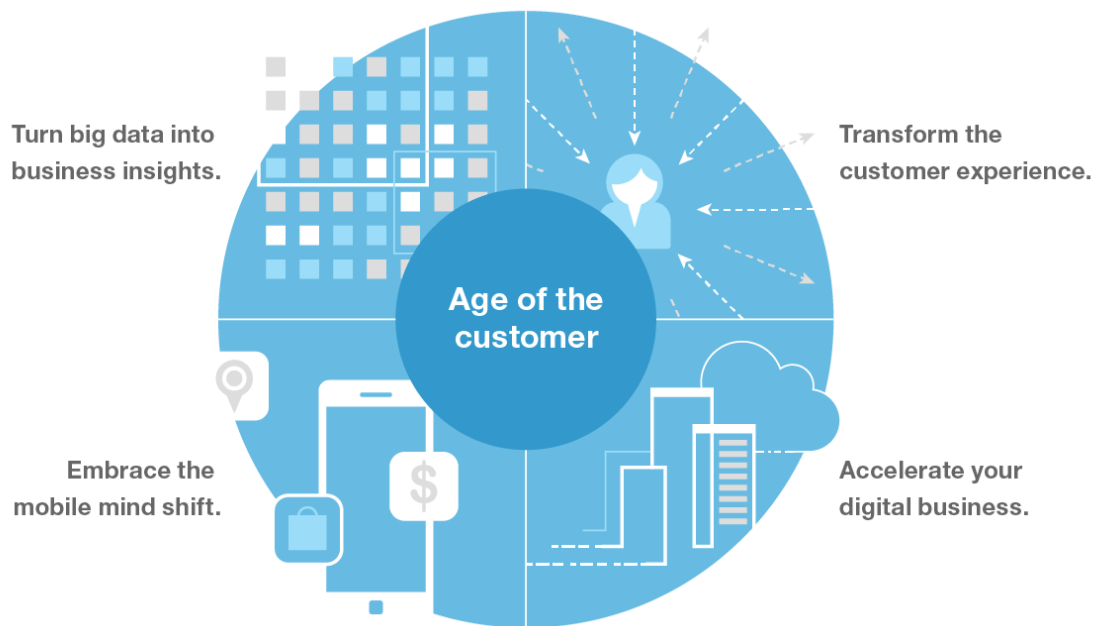
Risks measure the uncertainty of benefit and cost estimates contained within the investment. Uncertainty is measured in two ways: 1) the likelihood that the cost and benefit estimates will meet the original projections and 2) the likelihood that the estimates will be measured and tracked over time. TEI risk factors are based on a probability density function known as "triangular distribution" to the values entered. At a minimum, three values are calculated to estimate the risk factor around each cost and benefit.

## Appendix B: Forrester And The Age Of The Customer

Your technology-empowered customers now know more than you do about your products and services, pricing, and reputation. Your competitors can copy or undermine the moves you take to compete. The only way to win, serve, and retain customers is to become customer-obsessed.

A customer-obsessed enterprise focuses its strategy, energy, and budget on processes that enhance knowledge of and engagement with customers and prioritizes these over maintaining traditional competitive barriers.

**CMOs and CIOs must work together to create this companywide transformation.**



Forrester has a four-part blueprint for strategy in the age of the customer, including the following imperatives to help establish new competitive advantages:



Transform the customer experience to gain sustainable competitive advantage.



Accelerate your digital business with new technology strategies that fuel business growth.



Embrace the mobile mind shift by giving customers what they want, when they want it.



Turn (big) data into business insights through innovative analytics.

## Appendix C: Glossary

**Discount rate:** The interest rate used in cash flow analysis to take into account the time value of money. Companies set their own discount rate based on their business and investment environment. Forrester assumes a yearly discount rate of 10% for this analysis. Organizations typically use discount rates between 8% and 16% based on their current environment. Readers are urged to consult their respective organizations to determine the most appropriate discount rate to use in their own environment.

**Net present value (NPV):** The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made, unless other projects have higher NPVs.

**Present value (PV):** The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.

**Payback period:** The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

**Return on investment (ROI):** A measure of a project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits minus costs) by costs.

### A NOTE ON CASH FLOW TABLES

The following is a note on the cash flow tables used in this study (see the example table below). The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1. Those costs are not discounted. All other cash flows in years 1 through 3 are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations are not calculated until the summary tables are the sum of the initial investment and the discounted cash flows in each year.

Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

TABLE [EXAMPLE]  
Example Table

Ref.	Metric	Calculation	Year 1	Year 2	Year 3

Source: Forrester Research, Inc.

## Appendix D: Supplemental Material

### *Related Forrester Research*

“Q&A: The Seven Things You Need To Know About Unified Marketing Impact Analytics,” Forrester Research, Inc., December 11, 2015

“Link Insights To Action With A Measurement-Driven Organization,” Forrester Research, Inc., October 28, 2015

“Embrace Unified Marketing Impact Analytics To Deliver Value Across Interactions,” Forrester Research, Inc., October 2, 2015

“Embrace The New Marketing Performance Measurement Standard,” Forrester Research, Inc., October 2, 2015

“Fuel High-Performance Marketing With Modern Measurement Mechanics,” Forrester Research, Inc., August 10, 2015

“Evaluate Your Marketing Performance Measurement Maturity,” March 31, 2015

## Appendix E: Endnotes

<sup>1</sup> Forrester risk-adjusts the summary financial metrics to take into account the potential uncertainty of the cost and benefit estimates. For more information, see the section on Risks.