

# B2B Marketing Agencies, North America, Q1 2019

Forrester's Overview Of 39 Service Providers Serving B2B Marketers

by Jay Pattisall and Laura Ramos

February 8, 2019 | Updated: March 4, 2019

## Why Read This Report

You can use B2B marketing agencies to supplement your resources with leading expertise; elevate your creative and content; and drive value from data, analytics, and martech investments. But to access these benefits, you first have to select from a diverse set of agencies that vary by size, capability, and B2B focus. B2B CMOs should use Forrester's Now Tech report to understand the value they can expect from a B2B marketing agency and select agency partners based on size and functionality.

## Key Takeaways

### **Increase Marketing Capacity And Proficiency With B2B Agencies**

CMOs turn to B2B agencies to shape strategy, elevate creative and messaging, and augment overall marketing capacity. While B2B marketing agencies work with clients in a broad range of areas, core capabilities today focus on creative and content, data enrichment, insights, and technology proficiency.

### **Select Agencies Based On B2B Scale And Capability**

Create an agency shortlist by first determining the extent of the specific B2B expertise you require or if a combination of B2B and B2C capabilities would be a better fit.

### **Raise The Bar On Understanding Your Customers' Customers**

The best-fit agency demonstrates an understanding of your audience through its creative strategy, campaign and content execution, sales support, and marketing technology prowess.

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## Increase Marketing Capacity And Proficiency With B2B Agencies

Increased access to information through technology and a combination of learned and native digital behaviors has tipped the balance in business purchasing from sellers to buyers.<sup>1</sup> To keep up with the pace of change and better address the information, content, and experiential demands of these digitally adept customers, many B2B marketers turn to services providers to deliver, support, or supplement their marketing strategy, creative, campaign, digital, PR, and sales support needs. Forrester defines B2B marketing agencies as a select class of service providers that:

*Strategize, plan, create, and manage marketing activities on behalf of clients to help increase the overall exposure of the company and its products, generate demand for offerings, enable sellers and partners, and deepen business relationships with target audiences and current accounts.*

Marketing organizations of all sizes use agencies for a wide variety of reasons, from simple staff augmentation to the delivery of a specific outcome — like a website redesign, campaign creative, or the launch of a new offering. Other marketers form long-term relationships for ongoing support of strategy development and execution or to outsource specific functions like PR, social marketing, or marketing operations. As all aspects of marketing become more digitally focused, B2B marketing agencies can play an important role as marketers use these service providers to:

- › **Supplement resources with cutting-edge thinking and expertise.** As channels, tactics, and approaches diversify, B2B CMOs struggle to hire or train experienced talent to keep pace. Agencies provide a pool of seasoned professionals who can help you experiment with new media and digital tactics, foster customer-centric thinking, and learn leading practices.
- › **Elevate creative, communications, and content.** Maintaining relevant content to support campaigns and engage buyers challenges most B2B teams; digital approaches have only made this harder.<sup>2</sup> Whether large or small, most of the agencies we reviewed deliver creative/content strategy and execution to clients more consistently than any other project.
- › **Drive value from data, digital, and martech investments.** Customer obsession is more than just a commitment to becoming customer-centric.<sup>3</sup> You need tech, rich data, and smart insights to win and retain digitally empowered business buyers. Agencies offer data analytics and management skills and help you get more value from your martech investments.

## Select Agencies Based On B2B Scale And Capability

While most agencies prefer to tackle strategy work, ad hoc, project-centered demand deeply fragments the market — with service providers ranging from a few large global agencies to many regional players to a vast number of small businesses and freelancers. In recent years, the landscape has grown more complex as a broad range of business consultancies, tech giants, and systems integrators have acquired or added agency capabilities to their rosters.<sup>4</sup> To zero in on the most

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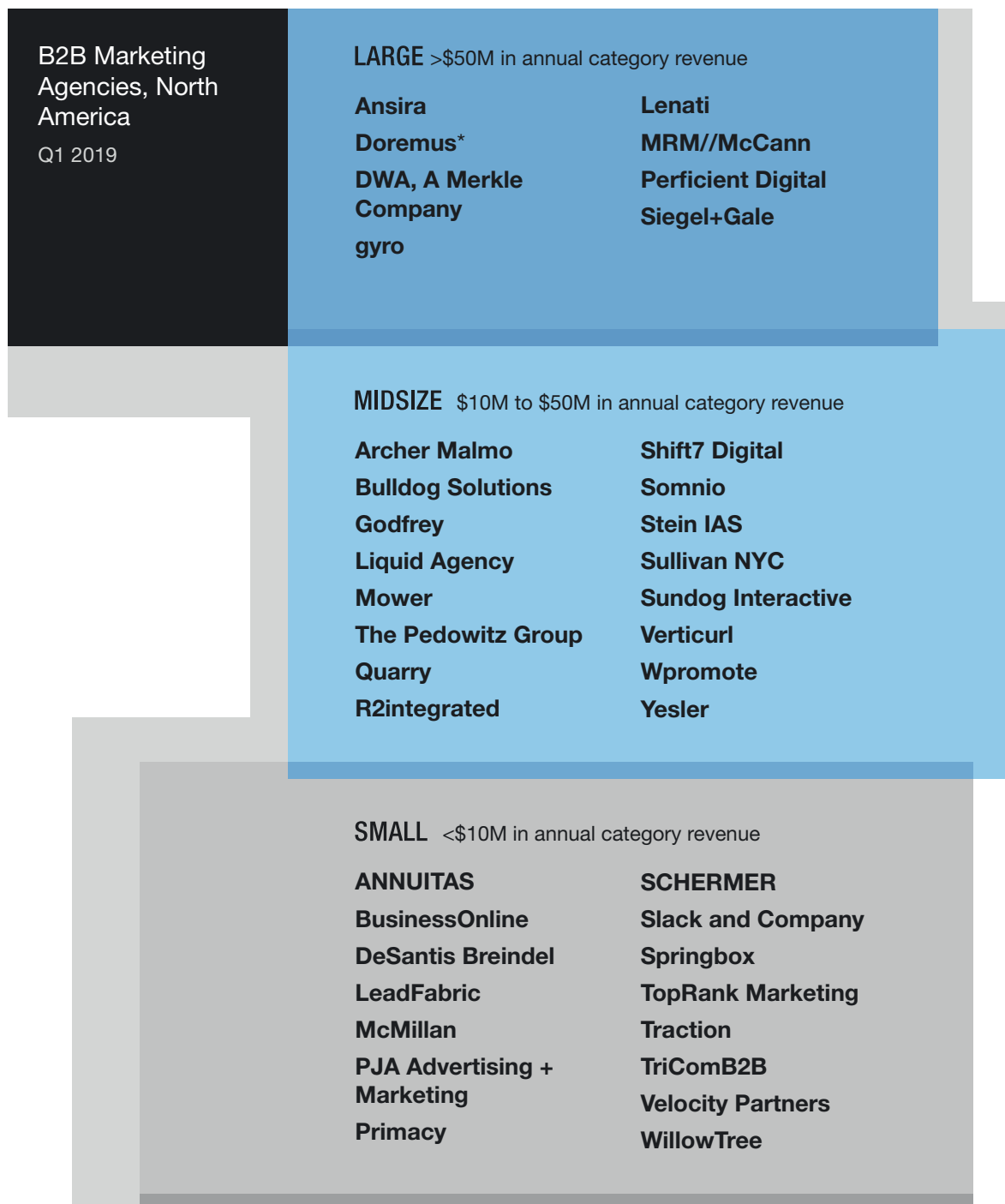
important and relevant players serving companies that sell primarily through direct or partner channels, we based our analysis of the B2B agency market in North America on two factors: 1) market presence as determined by the amount of B2B client work and 2) recent capabilities provided to clients.

**B2B Agency Market Presence Segments**

We segmented the agencies in this market into three categories, based on B2B-specific marketing services revenue: large established players (more than \$50 million in B2B marketing revenue), midsize players (\$10 million to \$50 million in revenue), and smaller players (less than \$10 million in revenue) (see Figure 1). We did not include agencies that we estimated to have less than \$1 million in revenue coming specifically from B2B client projects, fewer than 25 employees, or less than 25% of their business coming from B2B clients.

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**FIGURE 1** Market Presence Segments: B2B Marketing Agencies, North America, Q1 2019

\*Forrester estimate; new information suggests B2B-specific revenue amounts for this agency may be less than depicted here.

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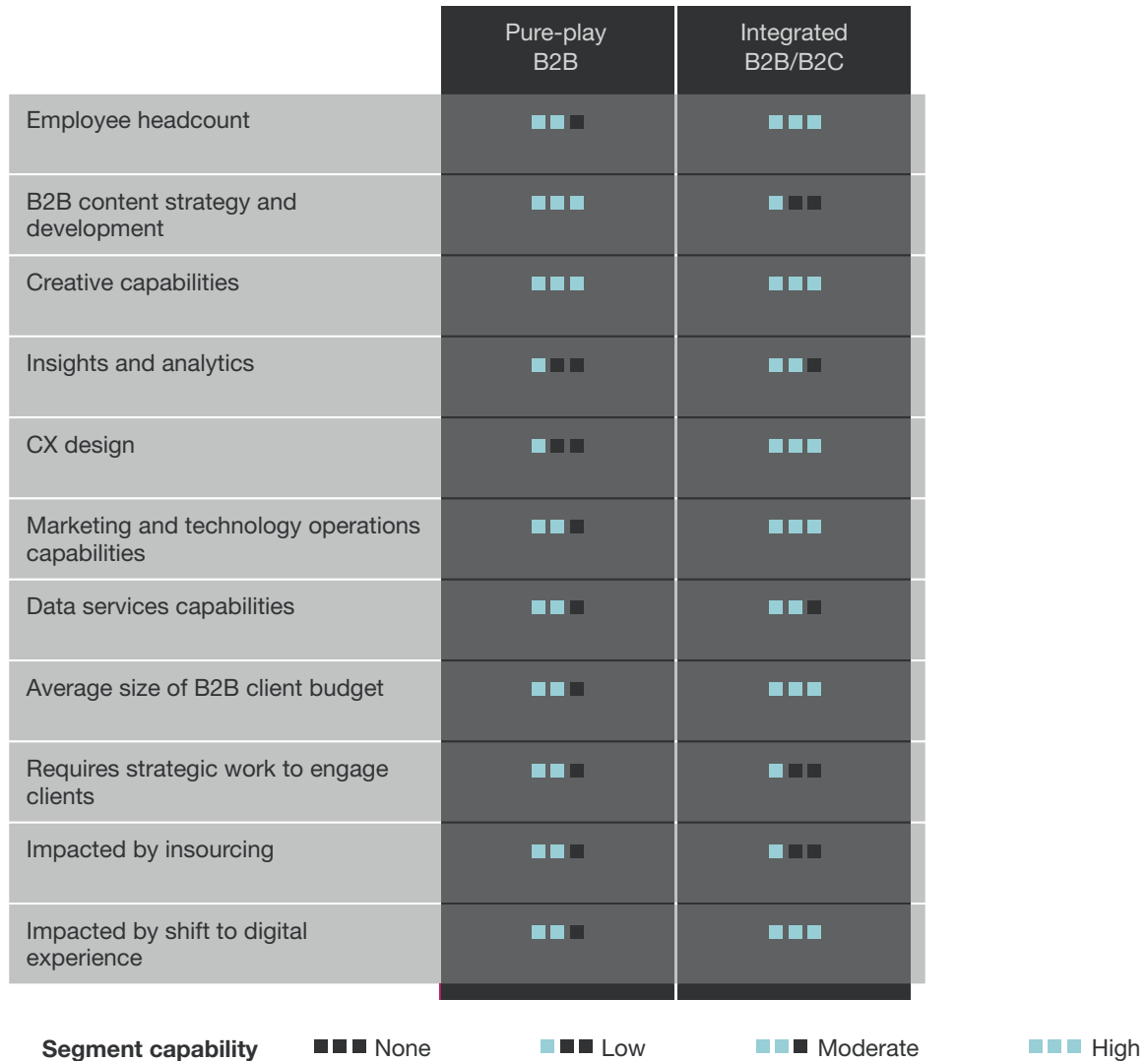
**B2B Agency Capability Segments**

To meet clients' multiplying needs in digital, customer experience (CX), technology, and analytics, agencies continue to diversify their offerings. The median number of projects that agencies delivered to clients in the past 12 months was 18, out of a possible 23. However, when we asked them to list their top three core areas, four capabilities rose to the top: creative strategy, creative development, communication strategy, and martech management. Outside these four areas, CMOs should select partners that can prove they have done recent client work in their areas of most pressing need. To explore the capabilities presented in the current market at a deeper level and to help marketers sort through the options, we broke the B2B agency market into two segments, each with varying capabilities (see Figure 2):

- › **Pure-play B2B agencies.** These service providers focus 90% or more of their client work on B2B marketing. They orient heavily toward content strategy and development and want to be considered for strategy work above and beyond specific projects. These agencies are a strong fit for CMOs who market to a business audience across multiple channels, use both digital and traditional tactics, and need to enable a digitally progressing sales team.
- › **Integrated B2B/B2C agencies, serving primarily B2B clients.** These service providers demonstrate both B2B and B2C marketing expertise, but 50% to 75% of their client work serves B2B customers specifically. They can deliver CX projects, analytics/insights, and martech operations as well as creative strategy and delivery. They suit CMOs who market to end users and business decision makers, either directly or via channel partners.

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**FIGURE 2** Capability Segments: B2B Marketing Agencies, North America, Q1 2019

## Align Individual Agency Solutions To Your Organization's Needs

The following tables provide an overview of B2B marketing agencies in North America with details of the top capabilities they deliver, their data management maturity, and their support of emerging technology to help their clients innovate and experiment outside traditional marketing approaches (see Figure 3, see Figure 4, and see Figure 5).<sup>5</sup>

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**FIGURE 3** Large Vendors: B2B Marketing Agencies, North America, Q1 2019**LARGE** >\$50M in annual category revenue

	Primary capability segment	Data management maturity	Emerging tech capabilities	Top three core capabilities
<b>Ansira</b>	Integrated B2B/B2C	Advanced	Voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence; chat/chatbots	Technology, operations, martech management; analytics and insights; campaign design/programming
<b>Doremus</b>	Pure-play B2B	Advanced	Artificial intelligence; innovative/interactive installations	Content strategy; creative development; communications strategy
<b>DWA, A Merkle Company</b>	Pure-play B2B	Enriched	Machine learning; artificial intelligence	Media planning; programmatic media and advertising services; account-based marketing (ABM)
<b>gyro</b>	Pure-play B2B	Enriched	Machine learning; artificial intelligence	Communication strategy; media planning; creative development
<b>Lenati</b>	Integrated B2B/B2C	Advanced	Augmented reality; virtual reality; voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence; chat/chatbots	Customer experience design; analytics and insights; account-based marketing (ABM)
<b>MRM//McCann</b>	Integrated B2B/B2C	Advanced	Augmented reality; virtual reality; voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence; chat/chatbots	Data strategy; technology, operations, martech management; creative development



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**FIGURE 3** Large Vendors: B2B Marketing Agencies, North America, Q1 2019 (Cont.)**LARGE** >\$50M in annual category revenue

	Primary capability segment	Data management maturity	Emerging tech capabilities	Top three core capabilities
<b>Perficient Digital</b>	Integrated B2B/B2C	Core	Augmented reality; virtual reality; voice (i.e., Alexa, Siri, Google Home); machine learning; chat/chatbots; hardware/microcontrollers; smart devices; computer vision/object detection; IoT/intelligent edge; serverless web	Technology, operations, martech management; eCommerce; customer experience design
<b>Siegel+Gale</b>	Integrated B2B/B2C	None	Virtual reality; artificial intelligence; chat/chatbots	Customer experience design; creative strategy; analytics and insights

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**FIGURE 4** Midsize Vendors: B2B Marketing Agencies, North America, Q1 2019**MIDSIZE** \$10M to \$50M in annual category revenue

	Primary capability segment	Data management maturity	Emerging tech capabilities	Top three core capabilities
<b>Archer Malmo</b>	Integrated B2B/B2C	Advanced	Augmented reality; artificial intelligence; chat/chatbots	Communication strategy; technology, operations, martech management; creative strategy
<b>Bulldog Solutions</b>	Pure-play B2B	Advanced	Machine learning; artificial intelligence; chat/chatbots	Technology, operations, martech management; customer experience design; creative strategy
<b>Godfrey</b>	Pure-play B2B	Core	Augmented reality; chat/chatbots	Creative strategy; public relations; campaign design/programming
<b>Liquid Agency</b>	Integrated B2B/B2C	Enriched	None	Creative strategy; creative development; analytics and insights
<b>Mower</b>	Integrated B2B/B2C	Enriched	Augmented reality	Communication strategy; creative development; public relations
<b>The Pedowitz Group</b>	Integrated B2B/B2C	Enriched	Machine learning; artificial intelligence; chat/chatbots	Technology, operations, martech management; customer experience design; analytics and insights
<b>Quarry</b>	Pure-play B2B	Advanced	Augmented reality; machine learning; chat/chatbots	Communication strategy; technology, operations, martech management; account-based marketing (ABM)

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**FIGURE 4** Midsize Vendors: B2B Marketing Agencies, North America, Q1 2019 (Cont.)**MIDSIZE** \$10M to \$50M in annual category revenue

	Primary capability segment	Data management maturity	Emerging tech capabilities	Top three core capabilities
<b>R2integrated</b>	Integrated B2B/B2C	Advanced	Augmented reality; machine learning; artificial intelligence; chat/chatbots	Technology, operations, martech management; customer experience design; account-based marketing (ABM)
<b>Shift7 Digital</b>	Pure-play B2B	Advanced	Voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence; chat/chatbots	Content strategy; eCommerce; customer experience design
<b>Somnio</b>	Pure-play B2B	Basic	Voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence	Communication strategy; creative development; research
<b>Stein IAS</b>	Pure-play B2B	Advanced	Augmented reality; virtual reality; voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence; chat/chatbots; marketing clouds	Communication strategy; technology, operations, martech management; creative strategy
<b>Sullivan NYC</b>	Integrated B2B/B2C	None	Augmented reality; virtual reality; artificial intelligence	Brand/communication strategy; content development; creative development
<b>Sundog Interactive</b>	Pure-play B2B	Core	Machine learning; artificial intelligence	Technology, operations, martech management; content strategy; analytics and insights
<b>Verticurl</b>	Integrated B2B/B2C	Advanced	Machine learning; artificial intelligence; chat/chatbots	Martech platform implementation; analytics and insights; campaign execution

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**FIGURE 4** Midsize Vendors: B2B Marketing Agencies, North America, Q1 2019 (Cont.)**MIDSIZE** \$10M to \$50M in annual category revenue

	Primary capability segment	Data management maturity	Emerging tech capabilities	Top three core capabilities
<b>Wpromote</b>	Integrated B2B/B2C	Enriched	Voice (i.e., Alexa, Siri, Google Home); machine learning	Paid search buying (SEM); search engine optimization; social marketing
<b>Yesler</b>	Pure-play B2B	Advanced	Virtual reality; voice (i.e., Alexa, Siri, Google Home); machine learning; artificial intelligence; chat/chatbots	Content development; marketing automation/ operations; campaign design/programming

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**FIGURE 5** Small Vendors: B2B Marketing Agencies, North America, Q1 2019**SMALL** <\$10M in annual category revenue

	<b>Primary capability segment</b>	<b>Data management maturity</b>	<b>Emerging tech capabilities</b>	<b>Top three core capabilities</b>
<b>ANNUITAS</b>	Integrated B2B/B2C	Advanced	Machine learning; predictive; autonomic	Technology, operations, martech management; content strategy; measurement and attribution
<b>Business Online</b>	Pure-play B2B	Enriched	Machine learning; artificial intelligence	Data strategy; analytics and insights; account-based marketing (ABM)
<b>DeSantis Breindel</b>	Pure-play B2B	Basic	None	Creative strategy; campaign design/programming; research
<b>LeadFabric</b>	Pure-play B2B	Enriched	Machine learning; artificial intelligence; chat/chatbots	Data strategy; technology, operations, martech management; account-based marketing (ABM)
<b>McMillan</b>	Pure-play B2B	Basic	Augmented reality; virtual reality	Go-to-market (brand experience); creative strategy; creative development
<b>PJA Advertising + Marketing</b>	Integrated B2B/B2C	Basic	None	Communication strategy; creative strategy; creative development
<b>Primacy</b>	Integrated B2B/B2C	Advanced	Virtual reality; chat/chatbots	Customer experience design; creative development; campaign design/programming

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**FIGURE 5** Small Vendors: B2B Marketing Agencies, North America, Q1 2019 (Cont.)**SMALL** <\$10M in annual category revenue

	Primary capability segment	Data management maturity	Emerging tech capabilities	Top three core capabilities
<b>SCHERMER</b>	Pure-play B2B	Basic	Machine learning; artificial intelligence	Communication strategy; content strategy; creative strategy
<b>Slack and Company</b>	Pure-play B2B	Advanced	Voice (i.e., Alexa, Siri, Google Home); artificial intelligence	Communication strategy; technology, operations, martech management; creative strategy
<b>Springbox</b>	Integrated B2B/B2C	Basic	Artificial intelligence	Content strategy; customer experience design; account-based marketing (ABM)
<b>TopRank Marketing</b>	Pure-play B2B	Basic	Machine learning	Content development; influencer marketing; campaign design/programming
<b>Traction</b>	Integrated B2B/B2C	Enriched	Chat/chatbots	Communication strategy; creative strategy; creative development
<b>TriComB2B</b>	Pure-play B2B	Core	Virtual reality	Communication strategy; creative strategy; campaign execution
<b>Velocity Partners</b>	Pure-play B2B	Core	Chat/chatbots	Content strategy; content development; creative development
<b>WillowTree</b>	Integrated B2B/B2C	None	Augmented reality; artificial intelligence	Technology, operations, martech management; content strategy; creative development

## Recommendations

### Raise The Bar On Understanding Your Customers' Customers

The best B2B agency will not only help you better understand the right audiences for your products and services but will also use that insight to help drive the best creative strategy, campaign and content execution, sales support programs, and marketing technology decisions. How well an agency can do this for you will be revealed in any work they show you that demonstrates that they “get” the unique market, sales, channel, and competitive issues you face. You will form a more relevant agency partner shortlist when you:

- › **Identify your data shortfalls and analytics gaps.** The challenges associated with data quality and insights mastery will increase as marketing moves to solving real customer problems through immersive experiences.<sup>6</sup> Agencies can help marketers get their analytics in order, but you need to assess the state of your data — and your maturity with data management practices — before expecting your agency to step in. Then together, you will be able to identify the foundational must-haves for mastering insights; determine gaps; cultivate the skills, tools, and leadership to fill those insights gaps; and establish a foundation for advancing and innovating insights in the future.<sup>7</sup>
- › **Insist on more than creative-only solutions.** Nearly all the B2B agencies in this report offer deep creative and content capabilities. But CMOs should beware of looking at creative alone. Consider the capabilities that agencies use to transform their creative solutions into business solutions as well: For example, enhancing creative with sophisticated data analytics, robust technology and marketing operations enablement, and dynamic media and programmatic capabilities will yield stronger outcomes.
- › **Blend marketer and agency talent to cross-pollinate expertise.** Agencies and marketers will bring new thinking and practices into one another's organization. Capture and share that knowledge by blending your marketing and agency experts.<sup>8</sup> A blended model deliberately mingles in-house and external resources for more effective collaboration, sharing resources and ideas. This will ensure that internal marketers retain new skills and that agency partners feel appreciated for the expertise they develop across your marketing organization.
- › **Create an active collaboration, not a dependent partnership.** Leading CMOs learn to hold their agencies close — but not *too* close. To ensure your agency creates powerful work that turns your brand promise into a differentiated customer experience, embed select agency personnel in your marketing team early to foster close collaboration and to understand each other's thinking and strengths. Have your agency solve marketing problems, not just complete projects. Rotate agency program managers and talent periodically to avoid outsourcing your brains and talent entirely, ensuring everyone is fully invested in your goals and objectives.

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- › **Incubate emerging technology investments.** Managed services relationships provide a great way to test-drive new technology and experiment with process and operational models before fully committing. New choices present themselves almost daily. Work with your agency to create a test bed with a specific set of expectations and objectives based on business outcomes — like pipeline health or number of engaged accounts — and hold your agency accountable to that goal. Determine an ROI number that will guide technology investments, and then bring those advances in-house once they pass that threshold.

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## Supplemental Material

### Market Presence Methodology

We defined market presence in Figure 1 based on factors such as percentage of revenue derived from B2B client work, number of employees as a proxy for capacity, and the percentage of the business dedicated to B2B work; these were supplied to us by the agencies or estimated when information was not made available.

To complete our review, Forrester requested information from agencies. If agencies did not share this information with us, we made estimates based on available secondary information. We've marked agencies with an asterisk if we estimated revenues or information related to capabilities or dedicated B2B work output. Forrester fact-checked this report with agencies before publishing.

## Endnotes

- <sup>1</sup> See the Forrester report "[Leadership In The Age Of The Customer.](#)"
- <sup>2</sup> See the Forrester report "[Empathetic Content: The Key To Engaging B2B Buyers](#)" and see the Forrester report "[Peer Stories And Credible Data Attract And Engage B2B Buyers.](#)"
- <sup>3</sup> See the Forrester report "[Empathy: The Hallmark Of The Customer-Obsessed B2B Marketer.](#)"
- <sup>4</sup> Source: "Accenture, Deloitte and McKinsey spent \$1.2 billion on agency acquisitions," Consultancy.uk, February 5, 2018 (<https://www.consultancy.uk/news/15825/accenture-deloitte-and-mckinsey-spent-12-billion-on-agency-acquisitions>) and Rezwana Manjur, "Consulting firms outpace ad world giants in new acquisitions," Marketing Interactive, January 23, 2018 (<https://www.marketing-interactive.com/consulting-firms-outpace-ad-world-giants-in-new-acquisitions/>).
- <sup>5</sup> We assessed data management maturity in the following way: basic: provides basic list development for campaign use; core: provide cores data clean-up and management services; enriched: adds enrichment and analysis on top of core data services; advanced: adds advanced predictive analytics and insights delivery on top of data enrichment services. Source: Forrester's Q3 2018 North America B2B Agency Now Tech Online Survey.
- <sup>6</sup> See the Forrester report "[The Model For Modern Marketing.](#)"
- <sup>7</sup> See the Forrester report "[Seven Steps To Kick Off A Customer-Obsessed Insights Program.](#)"
- <sup>8</sup> See the Forrester report "[Make Your In-House Agency Your Digital Agency.](#)"

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