

Rethinking Marketing — Optimizing for SaaS

Sage Cloud Partner Profitability Series

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Executive Summary

Optimizing Marketing is one of a series of eBooks written on the topic of partner profitability. It is intended to help Sage business partners prepare for the global changes in the market for technology and business applications, caused by the growth in demand for cloud — specifically, software-as-a-service (SaaS) solutions.

This eBook is specifically targeted at business owners, marketing executives, and marketing practitioners within the Sage business partner community. It will focus on the need to digitally transform your marketing activities to respond to changes in customer buying behavior and the need for better, digital customer engagement in the cloud era.

We recommend taking the time to complete the [cloud readiness assessment tool](#) featured in this report. It will enable you to better understand how your organization is positioned in relation to your peers. After completing the assessment and reading the eBook, you will be able to perform a gap analysis to determine how the current state of your business compares to where you want to be and to devise a plan specific to your own requirements.

This should be a blueprint to optimizing your marketing approach in a phased manner by:

- Modernizing your overall marketing processes and frameworks
- Exploring new digital marketing channels
- Understanding how the customer buying journey has evolved and where it is headed
- Exploring new types of digital content and understanding how to fit these to target personas and stages of the buyer journey
- Identifying the skills gaps that may exist within your marketing organization and potentially either train or acquire this expertise



“The days of ‘sledgehammer’ lead generation using mass mailing and emailing of glossy brochures are over. Customers want to purchase at their own convenience, and when and how they like.”

Why is a Modern Marketing Strategy Critical for SaaS?



A Modern Marketing Approach is a Critical Component in Achieving the Three Key Metrics for a Successful SaaS Business:

Scale, Renewals, and Upsell

- In IDC's eBook reports on [partner profitability](#) and [rethinking sales](#) we talk about how a successful SaaS business runs on three key metrics: scale, renewal, and upsell. We also introduce the principle of customer lifetime value, which is all about ongoing customer engagement to ensure high renewals. To build a lucrative SaaS business, you need to be laser focused on keeping your rate of churn (losing customers) low while continuously acquiring new customers.
- All marketing activities need to also be designed with these objectives in mind: ensuring growth in mind share and wallet share within your existing base in addition to recruiting and attracting new customers. Digital marketing and social selling become important tools for reaching and influencing new customers at scale. Tactics like account-based marketing, social engagement, and targeted digital content can help you market within your customer base to ensure active customer engagement and create opportunities for upselling.
- Because of easy access to information online, customers are self-educating and, in general, are far more informed. In fact, IDC's research shows that 65% of B2B buyers only engage a sales representative after they've already made a decision. With this in mind, you need to make sure that information on your products and solutions is accessible, current, clear, persuasive, and available across multiple channels.
- In addition to information about your portfolio and what you do as a company, in this digital era, customers are looking for valuable content that informs and educates them on key trends in their industry and a clear link between how the technology you are ultimately bringing to market addresses or will help achieve the key business outcomes they are focused on.



“As a business partner, we have to be visible. We all know that people digest content in a very different way now. It's not about having a 26-page glossy brochure. It's about being front of mind 24 x 7, but being front of mind for the right reasons”

Marcus Leathwood, Acuity Solutions Ltd., Sage Platinum Partner (U.K.)



Customers are Educating Themselves Online and Expect Readily Available Information via Multiple Digital Channels

- If you want to be where your customers are researching purchases, you must have a well-positioned digital presence. Customers expect easily accessible content that helps them educate themselves and in the format they prefer and they expect to have readily available information through their trusted social media sources. As customers move more and more toward self-education, the importance of digital marketing increases. Business partners have to be where their customers are looking for information.
- But the reality is that most business partners have built their businesses with a technology sales focus and have limited digital presence and marketing expertise. Digital marketing is hard to do well, especially for smaller teams. A typical small or medium-sized partner may have only one marketing resource in-house. But a digital marketing team needs to have expert knowledge on website design, search engine optimization (SEO), search engine marketing (SEM), digital advertising, creative design, social media, copywriting, video editing, and so on. A single staff member is not likely to possess this range of skills and most partners could not build such a large and diverse team internally.
- The net result is that the vast majority of business partners are not exploiting digital marketing effectively despite knowing that they need to.



Source: IDC Sage Partner Survey, July 2016, n = 522

The Customer Buying Journey Has Changed and Continues to Evolve



In the era of digital transformation, your ability to influence decision making through traditional means becomes more challenging. It is also critical that you are able to tailor your customer engagement based on where your customers are in their buying journey:

- **EXPLORATION:** The process where customers are educating themselves and investigating how they can improve a process, determining whether they need to invest in a solution to overcome a problem, and investigating possible alternatives (features they may need, etc.).
- **EVALUATION:** The middle stage of the purchase process includes constructing a short list of specific technologies and determining implementation challenges and solutions.
- **PURCHASE:** The final stage of the purchase process includes getting answers to final questions, reaching consensus, and negotiating terms and conditions.

The key is to identify what stage your customers are in and to try to apply the right marketing approach to their stage. So if a customer is at the explore stage, a case study, particularly one from its industry, or use case might be effective. If it is already at the evaluate stage, a cloud trial and/or demo might be more effective — and so on. Ideally, marketing activities need to be tied to these stages and keep pace as customers progress through their buying journey. In addition to the above, additional buyer journey stages post the purchase are perhaps just as critical in a cloud computing context. These stages include **expand, renew, and advocate**. In most cases partners engaging in a SaaS sale will often take a “land and expand” strategy.

Subscription renewals and avoiding customer churn are critical activities/objectives for a SaaS business. Sales and customer experience teams will also play a significant role in these stages while marketing will need to ensure that they facilitate and drive customer advocacy.

“ Cloud buyers complete 70%–90% of the sales journey before they approach the partner. It doesn’t make sense that we market in the same way. We needed to adjust our business because these buyers find us when they are making the journey.

Francisco Civit and Manuel Jimenez, Dos Control, Spain



Rethinking the Marketing Process

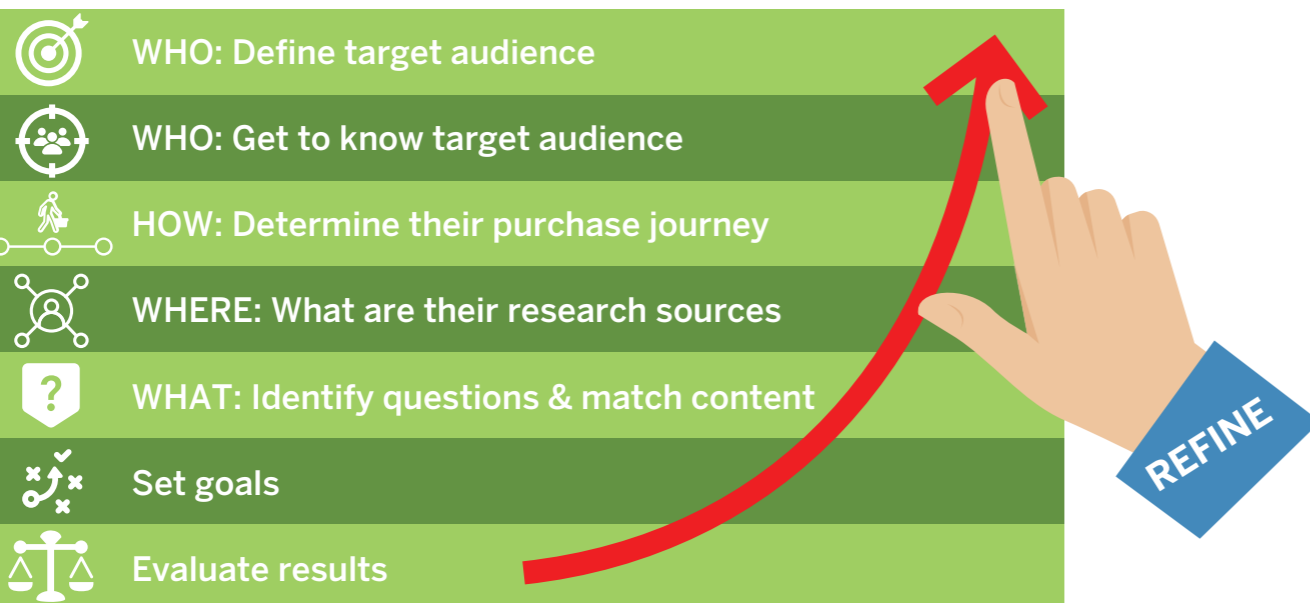
Plan, Define, Iterate, Refine — The Digital Marketing Process

Define your target market: The first step in any good marketing campaign is to clearly define your target market, but in the digital world, you need to go one step further. Not only do you need to get to know the market, but you also need to find out where it sources its information. For example, a partner focusing on SMB in the financial services industry or one targeting large public sector organizations will require very different content to appeal to those customers, and it is likely that those partners will be looking at different information sources. You have to be where your customers are looking for information. If you are not, you will miss out on opportunities without even knowing you missed out on them. The more tailored the content to a specific market, the more effective it will be.

Define your personas (IT vs LOB and level of seniority): A “persona” is a marketing term used to describe a user type that might use or evaluate a product in a similar way. It is a means to describe a **set of behaviors, goals, or desires**. In your own industry, it would be reasonable to expect that within your target client organizations, the personas of the CIO, CFO, and CEO are related, but different in specific areas.

For example, although potentially a generalization, when evaluating an accounting solution the CIO is likely to be more concerned about uptime, cost of operation, and data management considerations. The CFO, on the other hand, will take more interest in the depth of functionality and potential ability of the solution to drive a more efficient financial close. Having said that, in today’s digital transformation era, disruptive CIOs are behaving more as business leaders than they used to.

Use digital marketing technology to **create and deliver targeted marketing messages** and content to these personas, keeping in mind that in the cloud world the purchasing power of the LOB buyer is significant.



Define your objectives: Once you have the right content in the right place for the personas your are targeting, it is important to establish goals and track metrics to evaluate the results. One of the benefits of digital marketing is that everything is trackable and has associated metrics. This trackability of digital media allows your marketing teams to bring higher ROI to the company.

Continuously improve: Digital marketing needs to be fast moving. Iterating multiple campaigns at one time is feasible in digital media, and this enables you to try a content approach quickly and rapidly get metric feedback on how to improve that campaign. It is best to try something and fail fast, making modifications as you go, than to try to get it right on the first try. This process allows you to continuously improve your marketing and better match content to prospects’ needs. Additionally, digital marketing generates massive amounts of data about prospects and customers, which can produce insights that allow you to continuously refine your targeted content and messaging.

Rethinking Presence

An Optimized Website is Core to Digital Marketing Success

Most business partners have a website but these are often outdated and not optimized for search engine algorithms. Websites that are suboptimal may eliminate partners from prospect searches, limiting their opportunities for new customers, particularly the new breed of digitally oriented SaaS customers that do most of their research online.

Many business partners have recognized this, and some are updating their websites on a weekly, even daily basis, as new blogs are created, new products and services are launched, and in response to changes in the market.

Search engine algorithms need to be updated frequently since out-of-date metadata and tags can reduce partners' prospects. But staying on top of best practices for website design, SEO, and SEM is complex so many choose to leverage external experts and agencies to help them.



Social Media Marketing is Critical

In the final stage of the purchasing process, when stakes are the highest, online professional networks are buyers' number 1 information source.

IDC's Social Buying Study found that 75% of business-to-business (B2B) buyers and 84% of C-level/vice president executives use information from social media to make purchase decisions.

Blogs and content shared on LinkedIn and/or Twitter are a good starting point. These are often the two most trusted sources for prospective buyers. Most partners use social media as a vehicle to disseminate content, but this is only a one-way conversation. Savvy partners are also listening and collecting information about their prospects on social media sites. Social listening can be a very productive activity, as it allows content to be tailored to targeted individuals.

COMMON WEBSITE MISTAKES:



Infrequently updated



Static content



Landing search on a generic home page rather than to specifically requested content



Squeezing prospects for contact details too early

Rethinking Content Approaches



Customer-Driven Content

During their journey through exploration and evaluation of potential solutions, your customers are likely to access information on your products and services across multiple media, devices, and applications. Rich, up to date, regularly refreshed, **integrated cross-channel content** is vital. As are the systems and processes to manage client interactions across multiple touchpoints.

Think Digital Transformation

Concentrate your content marketing programs around end-user themes such as industry disruption, driving innovation, generating game-changing insights, and creation of new digitally enabled revenue streams, and link these to your technology propositions.

Helping Clients Find What They Need

In certain scenarios, it may be possible to help the client in manually navigating through your offers based on scripts or even parametric search. Depending on your business model, it may be viable to personalize site navigation and content served up to clients and prospects, based on their profile, as they access your site. Also consider the use of chatbots (internal or external) to allow the client to ask specific questions online/real-time and be directed instantly to the the content/answers or personnel that they need. Chatbots are increasingly enabled with AI/machine learning. Remember that these interactive marketing systems must be integrated with customer service and CRM systems over time to turn existing client questions into generators of new business.



Visually Led, Dynamic, Unique, and Compelling Content

Replace static webpages overloaded with text with video content, live and archived. Content could include sections on customer testimony/references, consultant tips, demonstrations of your specific software modules and IP. Consider offering free advice/training: create stickiness and return visits to your website and social media accounts by providing limited video training and employee workshops. Invite clients to participate and provide their content to your clients and prospects. Use influencers specific in your market to add value and make your site the "go to" place for expertise among your client base.

Video Blogs/Social Media

Evaluate the use of social media technology to distribute your approved bespoke content. Live/streamed video blogs can be set up using the facilities provided by the likes of Facebook Live, Periscope, and Instagram. Do you have a highly respected employee or other influencer within your network who could become a spokesperson for your regular scheduled blogs or video updates? Ensure you identify these individuals and leverage them to the best of your ability.

Reposting/Redirecting to Third-Party Content

There is a wealth of information available from Sage marketing, along with other organizations within your own ecosystem, that could be useful to your clients and prospects. Develop stronger connections to your counterparts in digital marketing to find out how to reuse content. Look to develop bipartisan relationships with content flowing both ways and make your content shareable by building in the capability for clients, prospects, and partners to share content across the web and social media channels. Provide and promote links to trusted third-party sources/advisors whose content or opinion strengthens your own proposition.

Download Facility

One way to **significantly increase lead generation** is to offer online self-service downloads of software, either limited version or trial period software. Properly managed, this can bring down the cost of new-customer acquisition and speed up sales cycles. This applies to Sage, third-party, and bespoke internal IP, subject to terms and conditions.

“When a customer clicks on your website they've chosen to open a door to your storefront. The trick is to make them walk through and browse, rather than turn and leave.”

Rethinking Marketing Skills



Digital Natives

You can teach an old dog some new tricks, but there's no doubt that there is a new breed of marketer that has grown up with **digital marketing** and has a clear understanding of managing digital content. For digital native marketers, it's likely that their job title isn't important, whereas their proven skills set/experience is. This might include:

- **SEO and SEM skills:** knowing how to get your digital content at the start page of your clients' navigation during product or topical searches
- **Pay-per-click ads and banners:** understanding how to leverage search-driven placement of your content on social media and other websites
- **Image/video production/weblog:** with more and more marketing content becoming visual and interactive, having someone in-house with audio visual skills could be cost effective and you more productive and quicker to market
- **Social media/mobile apps:** look for a marketer who understands how to leverage social media in a business context
- **Expertise in a digital marketing platform,** e.g., from Adobe, Salesforce, Oracle, HubSpot, Marketo, or the specific platform that you have evaluated/chosen

Multidisciplinary Marketing Teams

Consider enhancing your marketing teams with people who can add digital marketing skills to the team. This will mean embracing the fact that you will need to bring people on board who understand the concept of digital transformation and are familiar with marketing in the 3rd Platform technology stack — cloud, mobile, social, and Big Data/analytics. However, ensure that these new hires are fully integrated with your existing teams. For the immediate future at least, you will need to operate traditional and digital marketing in parallel as your organization balances both its traditional on-premise business with your faster-growing cloud business.

“ Our new prospects find it normal to use social networks, to go to websites and so on. We have hired dedicated young people, born in the digital environment, to drive our marketing approach. We have had very good results. We have a strong investment in social and it's really part of the new digital environment. Today, we have 20 or 30 people contributing to our digital marketing, website, social, and it is very important to us.

Fabrice Hamou, Flowline, Sage Business Partner, France



www.sage.com



Rethinking Marketing Activities

Traditional Activities

It is more than likely that your organization's marketing budget is still spent on traditional marketing: basic CRM databases and tools, static content (PDFs/white papers), scheduled email and website download distribution, seminars, event participation, and so on. These methods, while remaining complex and expensive to execute, are becoming less and less productive as time goes on.

Lead Generation

In the digital marketing age, effective/productive and cost-effective lead generation is more likely to come from clients and prospects "self-serving" on targeted content that your organization has created, shared, personalised, and distributed across multiple touchpoints as well as lighter pieces of content that activate (bring customers to) more valuable gated content that you may develop.





Social

Do not ignore or underestimate the importance of incorporating social media/ social networking into your marketing programs. More and more, the lines between “social networks” and “business networks” are blurring. Individuals access social media sites in the workplace, often with the blessing of their employers. More and more organizations are investing in business applications which enable, in fact proactively encourage, their employees to set up social media accounts and leverage them to drive business relationships, generate new business leads, handle customer support questions, and spread collateral and messaging. Consider Investing in technology to empower your organization to provide employees with social media accounts and integrate corporate approved content distribution.

Thought Leadership

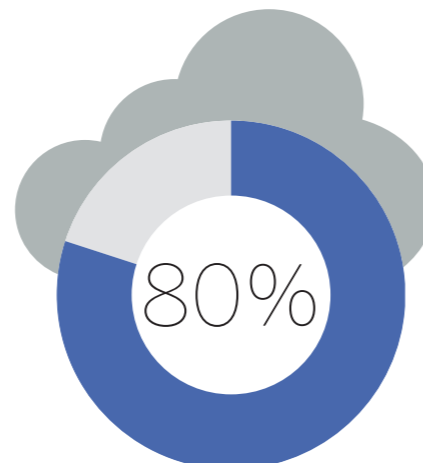
Supplying the market and your customer base with thought leadership builds credibility for your brand and fosters the perception that engaging your organization brings with it a level of intellectual capacity and competency. Consider implementing bonus schemes to include key performance indicators (KPIs) to encourage and reward execs and key technical personnel to spend time helping marketing in the creation of thought-leadership pieces. This could include blog articles, white papers, or videos.

Account-Based Marketing

Depending on your circumstances and business mix, it may be financially viable and profitable to deliver personalized account-based marketing to key target prospects and clients.

80% of business partners surveyed by IDC are currently or are considering investing more in digital marketing to market and sell their cloud offerings

Source: IDC Sage Partner Survey, July 2016, n = 522



Measurement

Use of analytics across the board in your cloud-based business will be crucial, as discussed elsewhere in this series of eBooks. It is no less important in measuring the success and/or failure of your marketing programs. The optimal approach to digital marketing is to “**trial**” new methods, approaches, and programs regularly. Don’t be afraid to change or terminate an initiative. Use analytics to determine where future marketing spend will deliver maximum results and be dynamic in your work.

Automate, integrate, industrialize, and refine the marketing function around the principle of customer lifetime value and customer satisfaction. At the same time, look to integrate more fully with sales and service to provide a 360-degree feedback and improvement loop.



Build KPIs into your business to constantly monitor the effectiveness of new programs. For example:

Brand Engagement

- Number of unique site visitors, new registrations, return visits, time spent on website, and clicks across content

Generation of Interest

- Collateral or product downloads, new account registration, shares of your content across social media or email, positive comments on website/blog, search engine ranking, etc.

Sales Impact

- Conversion rate: web hits to customer ratio, cost per sales lead

Rethinking Enablement

Never Been a Better Time to Ask for Help

The shift in customer buying patterns toward SaaS solutions is accelerating dramatically. Sage is committed and is investing heavily in developing new SaaS applications and in enabling existing installations of on-premise software with cloud extensions and access. In addition Sage recognizes the need to support its business partners in marketing of next-generation SaaS applications. For help in creating or fine-tuning your approach to marketing SaaS, don't hesitate to contact the partner team at Sage who will be happy to help you get the guidance, material, and training that you require.

Ongoing

As Sage brings new SaaS products to market and updates existing ones with new functionality, it will continue to make business partner training classes available. In the cloud world, your marketing department is an extension of your sales force, so invite your marketing people to get involved in sales training. Make sure that your marketing team is up to date and trained in the most recent product versions so that it can market effectively.

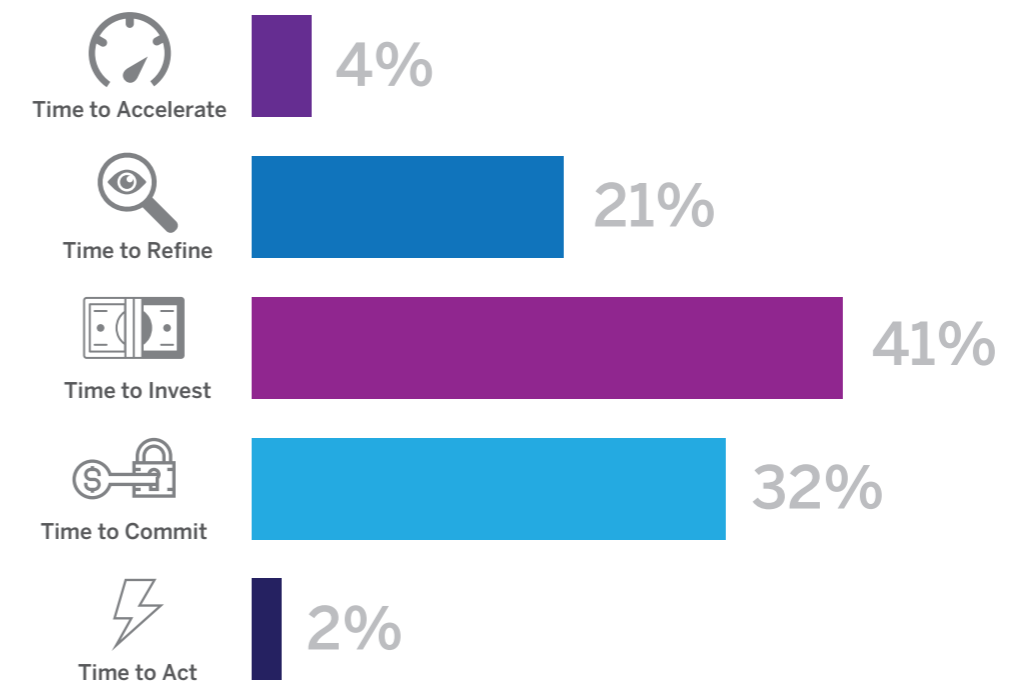
“ Thanks to a close partnership with Sage and its cooperation, we haven't had to worry about lost resell revenue, or overall profit. We don't put the whole weight of our company around the sale of software and this has helped us

René Gilomen, CEO, Gilomen EDV AG, Sage Partner (Switzerland)



Learn More: Assess Your Cloud Readiness Against Your Peers

- Over the past year, IDC has been working closely with Sage to understand the implications and opportunities that cloud presents for its partners. We've conducted a global survey of 522 software channels, half of which were Sage partners, to learn how they are building successful and profitable cloud businesses. These findings have been incorporated into a cloud-readiness assessment tool.
- This tool enables you to position your business in relation to over 500 similar organizations across the U.S. and Europe, and provides you with some essential guidance in the development of your cloud business.



- We suggest that you click on the link and spend the next few minutes completing the survey. The results will be emailed back to you with a report which provides you with both context, in terms of positioning your organization against your peers, and recommendations on how to progress your organization toward a profitable and successful future in cloud.
- This online assessment tool helps you benchmark your cloud business against your peers and competitors in the industry across multiple dimensions. These include cloud strategy and vision, cloud processes and skillsets, marketing for cloud, cloud sales, and your business mix. This should enable you to make better use of this eBook and review your own business in the context of the recommendations.

 [Go to IDC's Cloud Assessment Tool](#)



Call To Action 'Starting Out' 0-6 Months

Audit and Assessment

- Take a look at the current state of your marketing operations. Using the **Cloud-Readiness Assessment Tool** referred to in this eBook is a good start. Evaluate how you compare to your cohort and to where you would like to be.
- Using this **gap analysis**, focus on the areas which need immediate improvement, given your position on the readiness timeline, **build a plan** to get you where you want to get to, outlining the changes required and a target agenda for achieving it. With a view to your short-term, mid-term, and long-term skills requirements, you should look to understand where you are falling behind and where investments need to be made in your marketing setup.

Voice to the Customer

- Take the time to fully understand what is **unique about your offering** and build a clear value proposition and set of messages to build into your digital marketing programs. Remember the importance of things like **theme**-based campaigns, **persona**-driven messaging, and so on.
- Your voice will include advice, educational content, and the clear communication of relative advantages and disadvantages of cloud versus on-premise. Start by leveraging some of the syndicated content available from your vendor partners, but look to lend your own voice and customize to your market and audience.



Learn More: Research & Assets

Over and above this eBook and assessment tool, additional resources for you to use include:

- **Partner of the Future:** A short, succinct report highlighting the importance of incorporating cloud in your portfolio, how to make money from it, and the implications it has for partners in terms of what you do, how you do it, and who you do it with.
- **Partner Success Guides:** These short, content-rich reports go a little deeper into some of these elements, essentially acting as a "how-to guide" across three critical areas of building a cloud business: optimizing process and skillsets for cloud; rethinking sales (this eBook), and rethinking marketing.
- **Partner Best-Practice Videos:** IDC has also held in-depth discussions with partners that have successfully incorporated SaaS into their business. Highlights from these interviews have been captured in videos that will be available to all Sage partners via your Sage partner portal.

 [Click here](#) to see Alan Laing (Sage EVP Partners & Alliances) and IDC's Margaret Adam discuss the cloud opportunity and challenges for Sage Partners

Analyse and Plan

- Carry out analysis of your **current marketing programs** to understand and **document performance** against common marketing KPIs. Look into **available resources**, skills, and partnerships, and consider how they might be repurposed or migrated to digital marketing programs.
- Based on your current situation and business model and taking into consideration some of the guidance in this document and elsewhere, consider how digital marketing can benefit your own organization. **Identify key initiatives that can bring immediate business value** and understand what changes and investment will be needed to bring them about.
- Evaluate any **digital marketing technology components** that you might need to bring on board to carry out your new marketing programs.
- Build a plan to implement **initial initiatives** and allocate responsibility for the activity, ensuring that it can be done with minimal disruption to your existing business operations. **Segment and target** your existing customer base, focusing on areas that deliver marketing success and approaches that have historically delivered the best returns. Rather than a random approach to communications, **repurposing content and evolving messages** to specific audiences is a recommended approach.
- Understand what resources and personnel you will need to reallocate or bring on board and on what timeframe. Create a hiring program to bring in digital-native marketing personnel with specific skills.



Call To Action “Growing the Business” — 6–18 months

Empower

- Install, implement, and roll out your **new technology platform**.
- Continue to build your **digital marketing capabilities** across the organization as part of a broader marketing transformation journey. As part of this process focus on aligning your marketing messages and digital content to the **cloud buyers’ journey**. This discipline will help you tie your value proposition and marketing activities to each potential stage of a client’s buying process. Also look to tailor syndicated content, often available from Sage and your other partners, to fit your customer proposition.
- Provide the necessary training for legacy marketers, sales, service, and other personnel in the use of your new marketing tech.
- Use the new digital-native hires to evangelize the new marketing techniques, train existing employees, and gain acceptance and engagement for the new digital marketing program. Remember that content creation relies on the **“buy in” of key personnel** across all business functions.
- Roll out new or amended **bonus schemes to reward participation** in digital marketing initiatives, for example the creation of new content, suggestions, or implementation of new processes.
- Engage with third-party/partner/client marketing groups to **create and share content** and develop marketing “ecosystems.”
- **Expand online presence**. Build a plan for recruitment (or partnering) for additional digital resources and a series of digital activities. Look at awareness building, social selling (lead generation), and establishing thought-leadership objectives. Regularly refresh your website and look to pull in new clients through visuals and relevant and insightful content.

Measure

- Use digital marketing analytics tools to review the performance of programs. For example, evaluate visitors to content, click through, content downloads, content sharing, software downloads, new client sign-ups, and so on.
- Use these analytics to fine-tune programs, invest more in them/clone them, or if necessary can them. Analytics are important, but more important is the setting of KPIs and the action taken when objectives are exceeded or not met. Focus on lead qualification and generation and cover every marketing activity and channel, including traditional events-based marketing, outbound marketing, for comparison. Also analyze the impact of your digital marketing programs on awareness building and brand recognition/reputation.

Call To Action: “Moving To Maturity” — 18 Months+

Optimize

Specialization/Personalization/Segmentation

- At this point, you are focused on creating fairly sophisticated segmentation of your target base, with some utilization of marketing automation software and tools. You are also focused on the delivery of appropriate content to specific individuals now that you have a digital marketing operation in progress.
- Prioritize account-based or persona-specific personalization of your messaging and programs.

Marketing/Sales Integration

- Marketing should no longer be simply generating warm leads — they should be able to deliver prospects to sales with high probability of sale or even trial/sign up status. This requires a portfolio of digital content tools and delivery channels, and integration with the sales and onboarding systems.
- Look again at compensation, rather than simple kickers or KPI-based bonuses. Marketing should be aligned completely with the sales team for remuneration purposes. Your marketing team is an extension of your sales team.

Advanced Analytics

- Use analytics and measurement to look at ways to drive a lower cost-per-close target. Campaign results should be analyzed automatically according to KPIs, to drive even greater levels of efficiency. Use analytics to drive maximum ROI from investment in personnel, programs, and technology.

Thought Leadership

- Broaden your stable of expert thought leaders and trusted advisors to include more LOB representatives (sales, marketing, services, solutions, executive leadership). Engage and continue to incentivize them to take part in marketing content creation and campaigns. This runs across a large number of client touchpoints — speaking at events, writing blogs, creating videos, and driving social content, for example. Look out for and attract thought-leadership candidates externally, from the media, analyst community, within partners, and ideally within your own customer base.



About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives.

IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. Further information is available on our websites at www.idc.com



About Sage

Sage is the market leader for integrated accounting, payroll and payment systems, supporting the ambition of the world's entrepreneurs. Sage began as a small business in the UK 30 years ago and over 13000 colleagues now support millions of entrepreneurs across 23 countries as they power the global economy. We reinvent and simplify business accounting through brilliant technology, working with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers. And as a FTSE 100 business, we are active in supporting our local communities and invest in making a real difference through the philanthropy of the Sage Foundation.

Sage – a market leader for integrated accounting, payroll and payment systems, supporting the ambition of the world's entrepreneurs.

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