

# B2B Marketing Automation for Small and Midsize Business

*Software that enables small and midsize companies to attract, engage and nurture customers while delivering measurable, repeatable and profitable results*

## 2025 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research. This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis and briefings with vendors and partners.

### ABOUT THIS SHORTLIST

Small to midsize (SMB) business-to-business (B2B) organizations must engage customers and prospects through a wide range of online and offline channels to rapidly influence sales decisions. SMBs operate at “enterprise velocity” without enterprise budgets, but now, with the promise of an authentic AI digital workforce, many SMB Marketers are eager to “punch above their weight” with autonomous actions powered by robust personalization and deep account intelligence. To level the playing field, SMBs are actively looking to target decision-makers and influencers to accelerate and sway decision cycles and outcomes, curate and ingest broad account and market data for more focused, individualized engagements from interest through to acquisition and success. One-dimensional email campaigns won’t move the needle—transmedia marketing automation is a requirement.

Nurturing relationships that span complex account decision structures and an expanding list of engagement channels that must be monitored, managed and automated are often top of mind for the SMB marketing team, which is also asked to deliver results that rival much larger firms with much larger budgets. Marketing teams must focus to more effectively streamline and prioritize engagements that most directly contribute to revenue.

SMBs demand the power without the fuss and complications of large-scale enterprise tools. They want sophisticated tools, workflows and strategies in right-sized and flexible packages to fit the realities of smaller teams and scaling budgets. Bring on the generative AI and all the advanced productivity tools...in easy to deploy instances that don't require massive IT support and a team of data scientists. These solutions often blur the lines between sales and marketing engagements for smaller, more integrated teams that must act quickly to stay ahead of the curve.

### LIKE WHAT YOU SEE?

Consider partnering with Constellation Research on your go-to-market-strategy. Email [ShortList@ConstellationR.com](mailto:ShortList@ConstellationR.com) for more info.

To learn more about Constellation Research Shortlists visit: [www.constellationr.com/ShortList](http://www.constellationr.com/ShortList)

## 8 SOLUTIONS TO KNOW

Constellation evaluates 50 solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share and internal research. Constellation also considered client company size and marketing resources to recommend solutions suitable for enterprises and SMBs. In alphabetical order:



**BREVO**



**CONSTANT CONTACT**



**HUBSPOT MARKETING HUB**



**INTUIT MAIL CHIMP**



**ONTRAPORT**



**SALESFORCE MARKETING CLOUD**

**(GROWTH EDITION)**



**THRIVY**



**ZOHO MARKETING PLUS**



## THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Ease of use with simple, intuitive user interface
- Web and mobile access and management
- CRM integration, quick connections to data sources
- Quickly and easily design campaigns with out of the box, editable templates
- Intuitive visual workflow creation and management
- Identify and manage key accounts to support account-based marketing
- Seamless integration of cross-channel communication tools (mobile, social, web)
- Attribution of campaign ROI
- Product vision and road map with expansion of integrations and connectors
- Aggregated analytics and role-based reporting and dashboards
- Flexible workflow creation for compliance, privacy and regulatory demands
- Integration with advertising platforms including social media and content syndication
- AI- and machine language-powered recommendations for productivity, data and analytics support, lead and opportunity analysis, and campaign optimization
- Fully integrated generative AI tools to assist with content creation, audience segmentation and asset personalization
- Well-thought-out architecture, API connections and marketplace
- Automated alerts and integrated sales/revenue generating workflows including appointment scheduling, follow-ups
- Scalable, modular functions and upgrades to grow with the business

## ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

## FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

## EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.

## BUSINESS THEMES



Marketing Transformation



**Liz Miller**

VP & Principal Analyst

Liz Miller focuses on the needs of modern chief marketing officers to power the strategies and teams they lead—from the technologies that drive optimized customer engagements to the key trends that accelerate growth and innovation. She also provides insight into the security space, especially at the intersection of the customer and security, where the trust economy becomes the new measure of brand strength.

