



B2C Marketing Automation for Small to Midsize Business

Software to build and scale brand awareness and loyalty through personalized campaigns, social engagement and commerce-focused interaction

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

The modern business-to-consumer (B2C) relationship is often defined by moments—of creativity, of personalization and of engagement. For the small to midsize (SMB) organization, pulling off these highly personalized engagements can feel impossible without the budgets and the resources larger enterprises often have. This shifts marketing automation from a convenience to a critical growth tool. With the rise of AgenticAI, marketers are leaning into the idea of a digital workforce that can assist in everything from market research and analytics to creative design and asset generation.

Artificial Intelligence (AI) has started to prove it could deliver that level playing field SMBs have been looking for. With generative AI, the power of conversation, data, analytics and content generation are scalable like never before. Small teams want easy-to-use, functional marketing automation solutions with features that can grow with the business and the customer, without the need for large IT, developer or large costly specialized teams to get systems and campaigns up and running. SMB focused tools demand scalability, build to be flexible around features, functions and even licenses as teams can expend and retract quickly.

SMB marketers want business and growth driving analytics, customer segmentations and insights into market opportunities without hiring a team of data scientists. They want recommendations and personalization tips from AI they can deploy, and scale as needed and wanted. Most importantly, SMB B2C marketing teams are looking for creative tools to be quickly and easily integrated into powerful automation workflows and processes that transcend channel and cross global barriers.

LIKE WHAT YOU SEE?

Consider partnering with Constellation Research on your go-to-market-strategy. Email ShortList@ContellationR.com for more info.

To learn more about Constellation Research Shortlists visit: www.constellationr.com/ShortList

10 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. SMBs have goals for explosive growth but limited marketing resources and budget, which is factored into the selection criteria. In alphabetical order:

- ACTIVECAMPAIGN
- BRAZE
- DRIP
- HUBSPOT
- INTUIT MAILCHIMP
- ITERABLE
- KEAP
- MONDAY
- SALESFORCE MARKETING CLOUD
- GROWTH EDITION
- ZOHOMARKETING PLUS



THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Ease of use, clear and simple user interface
- Quickly and easily design and deploy multi-channel campaigns
- Intuitive visual workflow creation and management
- Audience identification and segmentation capabilities
- Multimedia asset creation, utilization and robust digital asset management
- Facilitate and track advertising mediums, including retargeting capabilities
- Social listening and engagement native to the platform
- Integrations into major social and digital networks for integrated communications and advertising orchestration
- Web and digital content, asset and campaign personalization
- Behavioral tracking and testing
- Application of machine learning (ML) and Augmented Intelligence (AI) for recommendations, data analysis and campaign optimization
- GenerativeAI tools that aid, enhance and assist human teams with copy, headline, advertising and even email options and recommendations to maximize engagement
- Product vision and road map including expansion of AI capabilities, smart assistants, creative content iteration
- Agentic AI capabilities for autonomous actions and processes to streamline, manage and optimize the work of customer engagement
- Aggregated analytics and reporting
- Integration with sales, commerce, data, and enterprise resource planning systems
- Scalable pricing and function packages; clear roadmap for AI costs and pricing
- Training programs to upskill and educate teams and talent
- Integration with new creative and AI tools including creative content solutions ideal for fast moving B2C engagement flows (eg Canva, Adobe Express, etc)
- Community for networking, sharing and connections with peers and similar users

BUSINESS THEMES



Digital Marketing & Sales Effectiveness

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.



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.

