

Digital Commerce Buyers Guide

Software Provider and Product Assessment



***ISG** Research™



Digital Commerce

In Economics 101, a commercial transaction occurs when a buyer and a seller come together and agree that the goods or services being sold meet the needs of the buyer and the offerings of the seller. Essentially, CRM systems aim to facilitate these transactions—or commerce—whether it involves a new sale, a marketing lead or a customer interaction. The goal is to match the needs of the buyer with what the seller has to offer.

ISG defines digital commerce as the process and technology that enables the interchange of purchasing of products or services by consumers or customers. For these interactions to be successful, it is essential that they can be completed with as little friction as possible from a mobile device, computer or wherever technology can make it possible.

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extension of traditional commerce. There has been a significant shift from the old linear models of business operations. In the past, businesses would procure raw materials, create products and sell them through retail or field sales representatives. Today's buyers have numerous options for engaging with businesses, including digital commerce platforms, self-service portals, inside sales partners and field sales representatives.

Modern CRM systems need to be more unified with digital commerce to accommodate these diverse channels. Customers often use multiple paths to make a purchase, and businesses must understand their customers' journeys across these various channels. The

ultimate aim is to ensure successful transactions by aligning the buyers' needs with the sellers' offerings. Integrating digital commerce capabilities within a CRM system streamlines and enhances the management of customer interactions and sales transactions across online channels.

There are several key benefits to integrating commerce with CRM systems. One significant advantage is the ability to offer a personalized shopping experience. Businesses can tailor recommendations and promotions based on customers' past purchases and browsing behavior. This level of personalization makes shopping more engaging for customers and increases the likelihood of repeat purchases. Additionally, CRM-integrated commerce platforms ensure seamless transaction processes, reducing cart abandonment and enhancing the overall shopping experience. When transactions are smooth, customers are more likely to complete their purchases and have a positive impression of the business.



Another important benefit is the centralization of data. By merging data from digital commerce with CRM systems, businesses can gain a holistic view of their customers, which aids in better decision-making and strategy formulation. Centralized data allows for more accurate customer insights and personalization to the customer, leading to improved marketing strategies and more effective sales tactics. The level of hyper-personalization possible when digital commerce utilizes AI and generative AI (GenAI) makes interactions easier for consumers. By 2026, we assert that 3 in 5 digital commerce software providers will use GenAI to enhance the UX in searching for relevant products and services to maximize successful buying engagements. Enhanced customer engagement is achieved through personalized communication, automated follow-ups and loyalty programs managed via CRM-integrated commerce platforms. These features enable businesses to maintain consistent and meaningful interactions with their customers and build long-term relationships.

Digital Commerce
Market Assertion

By 2026, 3 in 5 digital commerce software providers will use GenAI to enhance the UX in searching for relevant products and services to maximize successful buying engagements.

Stephen Hurrell
Director of Research, Office of Revenue

ISG Research™

CRM platforms are not just complementary to physical retail spaces; they can serve as standalone digital commerce platforms. The focus in B2C commerce has been on understanding the customer, including their propensity to spend money on certain products and services. The more businesses know about their customers, the more effective they can be in promoting relevant products and services. Unlike a physical retail store that may not know who a customer is and cannot offer personalized promotions, a digital commerce store can provide tailored offers based on a customer's specific interests.

On the B2B side, the adoption of digital commerce has been slower but steadily growing, especially with the rise of the pandemic and the increasing importance of digital products. The subscription economy, which started with digital products, has now expanded to include all parts of the economy. This includes bundles of products that may have both physical and digital elements. Digital products and services can be purchased and delivered online, eliminating the need for physical delivery.

Over the past decade, the tech industry and digital products have seen significant growth. Twenty years ago, purchasing software and digital products online was not an option. The rise of the internet has made digital products a reality, enabling businesses to conduct transactions and deliver services online. B2B customers are increasingly recognizing the benefits of digital commerce, which offers lower costs, greater convenience and the ability to engage with customers more effectively. Digital commerce allows transactions to occur anytime and anywhere, without the need to wait for office hours to speak with a



representative. This flexibility and convenience make digital commerce an attractive option for many businesses.

The technological evolution of digital commerce from software providers has been the level of sophistication to access and embed access through headless platforms. The advancement in product catalogues and pricing has made it easier to support a range of products and services and supporting range of capabilities in shopping carts to ensure the path to conversion. Still further that many digital commerce offerings have not been able to provide the level of product experiences for a shoppers' satisfaction and proper purchases and preventing returns. The support for configure price and quote (CPQ) has not been as sophisticated to support B2B commerce requirements.

The ISG Buyers Guide™ for Digital Commerce evaluated software providers and products based on specific capabilities that support digital transactions, whether a B2C shopfront, B2B self-service portal, or direct to consumer (D2C) manufacturing. The evaluation focused on the ease of integration to fulfillment, order and subscription management, accounting and financial systems of record, how the product supports product catalogues, shopping carts, orders and payments to delivery, the evaluation of roles and preferences, and business collaboration to support the evolving use of AI and machine learning. It also examined the investment by the software provider in resources and improvements.

This research evaluates the following software providers that offer products that address key elements of Digital Commerce as we define it: Adobe, Akinon, BigCommerce, commercetools, Elastic Path, HCLSoftware, HubSpot, Intershop, Kibo, Microsoft, NetSuite, Oracle, Salesforce, Sana, SAP, Shopify, Shopware, Spryker, VTEX and Zoho.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Digital Commerce is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for digital commerce software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for digital commerce to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of digital commerce technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment



time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of digital commerce software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating digital commerce systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise’s established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Salesforce atop the list, followed by Oracle and Adobe. Companies that place in the top three of a category earn the designation of Leader. Salesforce has done so in seven categories; HubSpot and Oracle in five; Adobe and SAP in two and Zoho in one category.

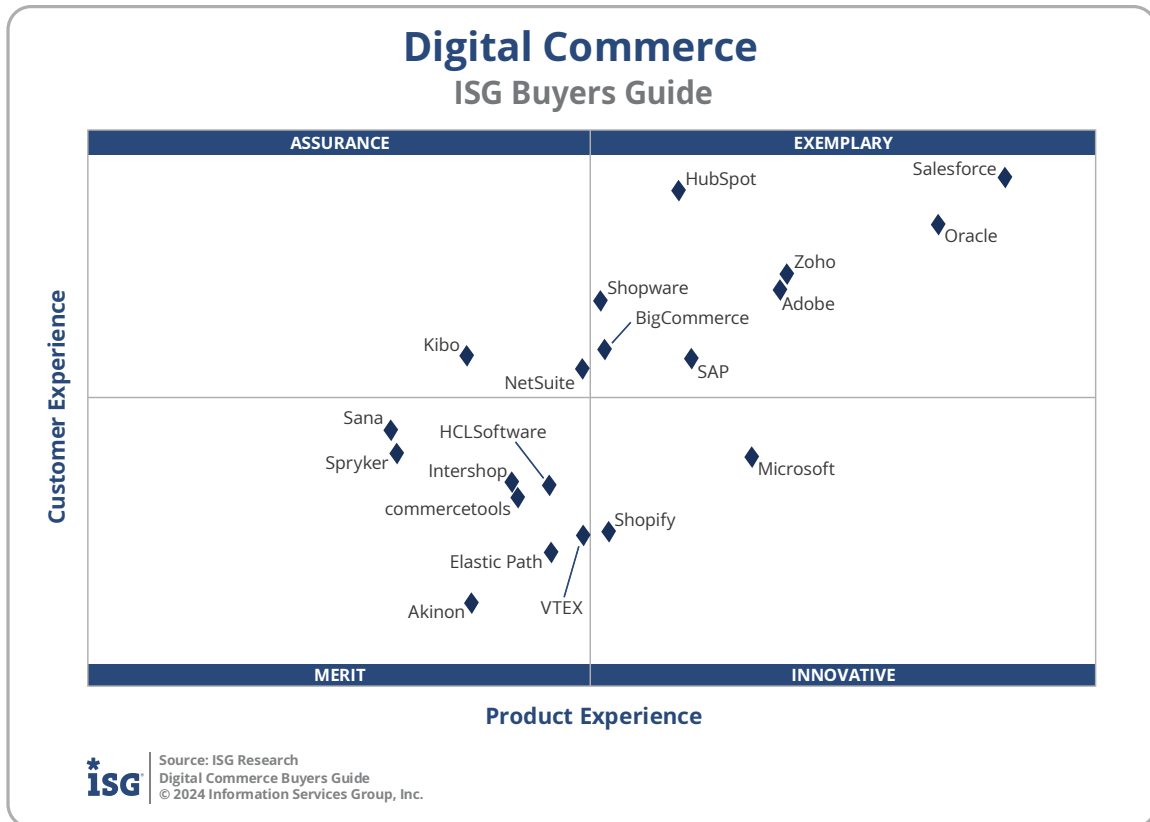
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers’ overall weighted performance.

Digital Commerce
Overall

Providers	Grade	Performance
Salesforce	A-	Leader 81.8%
Oracle	B++	Leader 78.5%
Adobe	B+	Leader 72.5%
Zoho	B+	72.4%
HubSpot	B+	71.7%
SAP	B+	69.8%
Microsoft	B	68.2%
BigCommerce	B	66.5%
Shopware	B	66.5%
NetSuite	B	65.7%
HCLSoftware	B-	61.9%
Shopify	B-	61.8%
Kibo	B-	61.8%
VTEX	B-	61.2%
Intershop	B-	61.1%
commercetools	B-	61.0%
Elastic Path	B-	60.3%
Sana	B-	58.3%
Spryker	B-	57.6%
Akinon	C++	55.9%

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Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Adobe, BigCommerce, HubSpot, Oracle, Salesforce, SAP, Shopware and Zoho.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Microsoft and Shopify.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Kibo and NetSuite.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Akinon, commercetools, Elastic Path, HCLSoftware, Intershop, Sana, Spryker and VTEX.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise



or for a specific process. Although there is a high degree of commonality in how enterprises handle digital commerce, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise’s needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise’s life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise’s requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (20%), Capability (25%), Reliability (15%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research.

Salesforce, Oracle and Zoho were designated Product Experience Leaders. While not Leaders, Adobe and Microsoft were also found to meet a broad range of enterprise product experience requirements.

Providers	Grade	Performance
Salesforce	B++	Leader 63.8%
Oracle	B++	Leader 61.4%
Zoho	B+	Leader 56.5%
Adobe	B+	56.3%
Microsoft	B+	55.5%
SAP	B	54.3%
HubSpot	B	53.6%
Shopify	B	50.6%
BigCommerce	B	50.5%
Shopware	B	50.4%
NetSuite	B	50.3%
VTEX	B-	49.8%
Elastic Path	B-	48.7%
HCLSoftware	B-	48.6%
commercetools	B-	47.7%
Intershop	B-	47.7%
Akinon	B-	45.9%
Kibo	B-	45.7%
Sana	C++	44.8%
Spryker	C++	43.3%

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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Salesforce, HubSpot and Oracle. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise’s journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Digital Commerce
Customer Experience

Providers	Grade	Performance
Salesforce	A	Leader 17.6%
HubSpot	A-	Leader 17.4%
Oracle	A-	Leader 16.8%
Zoho	B++	15.9%
Adobe	B++	15.7%
Shopware	B++	15.4%
BigCommerce	B+	14.5%
SAP	B+	14.4%
Kibo	B+	14.4%
NetSuite	B+	14.2%
Sana	B	13.1%
Spryker	B	12.8%
Microsoft	B	12.7%
Intershop	B-	12.2%
HCLSoftware	B-	12.1%
commercetools	B-	12.0%
Shopify	B-	11.3%
VTEX	C++	11.2%
Elastic Path	C++	11.0%
Akinon	C++	10.2%

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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Digital Commerce in 2024, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 100 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months.

For inclusion a software provider must also provide specific commerce capabilities including multimodal operation—headless, B2B support, subscription, asset and entitlement, identity and fraud management, analytics and AI and marketplace support.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant digital commerce products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
Adobe	Adobe Commerce	n/a	August 2024
Akinon	Akinon Digital Commerce	n/a	August 2024
BigCommerce	BigCommerce	n/a	August 2024
commercetools	commercetools	n/a	August 2024
Elastic Path	Elastic Path Commerce	8.6	June 2024
HCLSoftware	HCL Commerce Cloud	9.1	August 2024
HubSpot	HubSpot Commerce Hub	n/a	August 2024
Intershop	Intershop Commerce Management	7.10.41	June 2024
Kibo	Kibo Composable Commerce Platform	1.2432	August 2024
Microsoft	Microsoft Dynamics 365 Commerce	2024 release wave 1	August 2024
NetSuite	NetSuite CSuiteCommerce	2024.2	September 2024
Oracle	Oracle Commerce	24C	August 2024
Salesforce	Commerce Cloud	Summer '24	August 2024
Sana	Sana Commerce	1.101	August 2024
SAP	SAP Commerce Cloud	2408	August 2024
Shopify	Shopify	n/a	August 2024
Shopware	Shopware	6.6.5.1	August 2024
Spryker	Spryker Cloud Commerce	202404	April 2024
VTEX	VTEX	n/a	August 2024



Zoho	Zoho Commerce	n/a	August 2024
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Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Product Support	Revenue	# Customers	Marketed As
Conga	Digital Commerce	No	No	Yes	Yes
eComchain	eComchain	No	No	Yes	Yes
Fabric	Commerce Platform	No	No	Yes	Yes
Pimcore	Digital Commerce Framework	Yes	No	Yes	Yes
SCAYLE	SCAYLE	No	No	Yes	Yes



About ISG Software Research

ISG Software Research provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through our [community](#), and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premier service, ISG Software Research On-Demand, provides structured education and advisory support with subject-matter expertise and experience in the software industry. ISG Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored [Assessment Services](#) and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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