

**JANUARY
2023**

**Q4 2022
MARTECH
INNOVATION &
YEAR END
REVIEW**



The latest marketing technology introductions, feature updates, and acquisitions



2022 Year in Review

376	NEW PRODUCTS
376	FEATURE ANNOUNCEMENTS
245	ACQUISITIONS
\$28.4B	MARTECH FUNDING

2022 saw notably less in funding compared to previous years, but there were significantly more new product announcements, feature updates, and M&A activity throughout the year.

To receive our weekly new product update and future issues of this report please subscribe to the CabinetM newsletter. Vendors, we encourage you to send your product and feature announcements to eross@cabinetm.com.

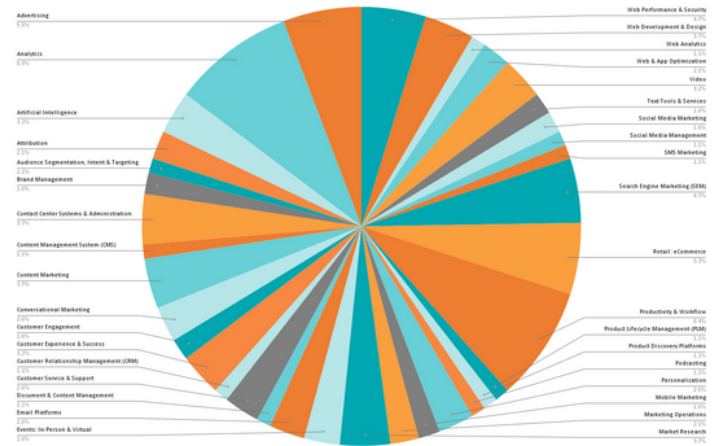
Allyson Delaney
CabinetM Marketing

245 ACQUISITIONS

= \$54.8B

AMOUNT DISCLOSED

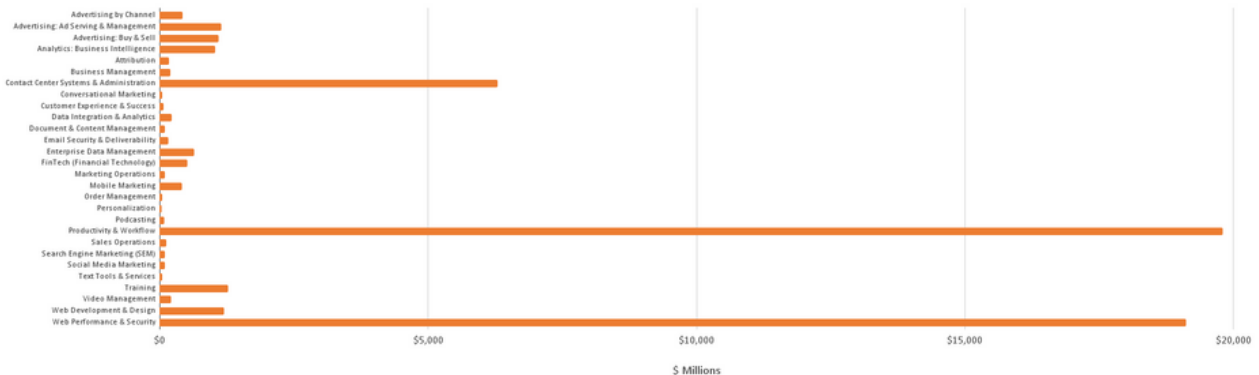
Categories of Acquisition by # of Companies



TOP ACQUISITIONS BY \$\$ IN 2022:

Category	Acquisition	Value (Millions)
Productivity & Workflow	Vista Equity Partners acquired Citrix	\$16,500
Web Performance & Security	Thoma Bravo acquired SailPoint	\$6,900
Contact Center Systems & Administration	Ericsson acquired Vonage	\$6,200
Web Performance & Security	Permira acquired Mimecast	\$5,800
Web Performance & Security	Google acquired Mandiant	\$5,400
Productivity & Workflow	HP Inc. acquired Poly	\$3,300
Web Development & Design	TELUS Corporation acquired WillowTree	\$1,200
Advertising: Ad Serving & Management	AppLovin acquired MoPub	\$1,050
Advertising: Buy & Sell	Microsoft acquired Xandr	\$1,000
Analytics: Business Intelligence	Snowflake acquired Streamlit	\$800
Training	Blackbaud acquired EVERFI	\$750
Web Performance & Security	SentinelOne acquired Attivo Networks	\$617
Training	Skillssoft acquired Codecademy	\$525
FinTech (Financial Technology)	TransUnion acquired Verisk Financial Services	\$515
Advertising by Channel	AppLovin acquired Wurl	\$430
Enterprise Data Management	Alteryx acquired Trifacta	\$400
Mobile Marketing	ironSource acquired Tapjoy	\$400
Web Performance & Security	Newfold Digital acquired MarkMonitor	\$303
Data Integration & Analytics	Verisk acquired Infutor	\$225
Analytics: Business Intelligence	Verisk acquired Opta	\$220

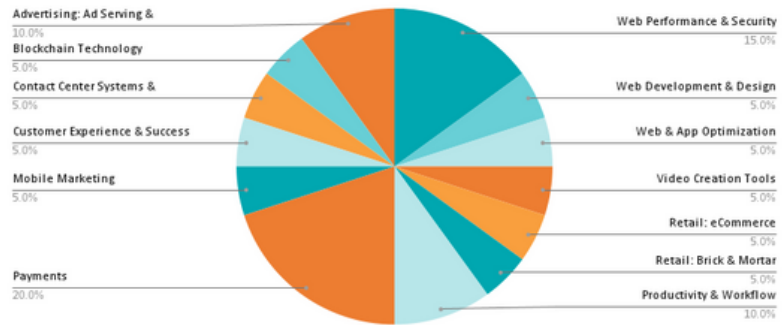
Categories of Acquisition by \$\$



\$28.4B FUNDING



Categories of Investment by # of Companies



TOP RAISES OF 2022:

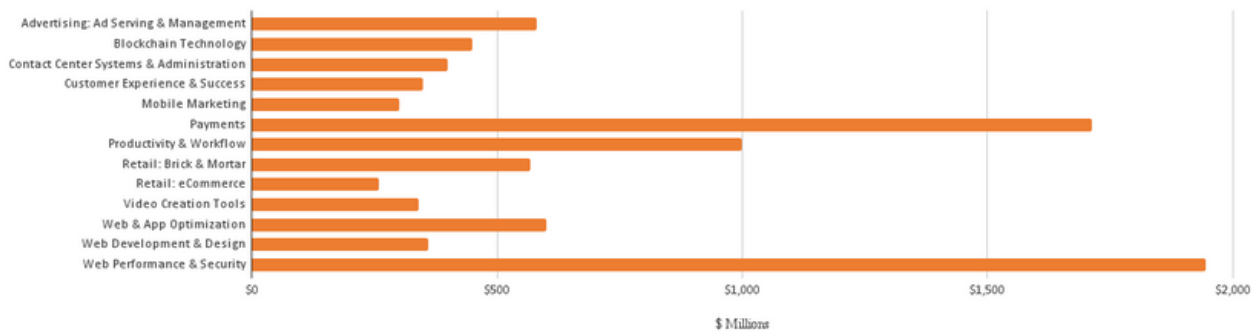
Web Performance & Security
 Payments
 Web Performance & Security
 Productivity & Workflow
 Web & App Optimization
 Retail: Brick & Mortar
 Blockchain Technology
 Contact Center Systems & Administration
 Productivity & Workflow
 Web Development & Design
 Customer Experience & Success
 Video Creation Tools
 Advertising: Ad Serving & Management
 Web Performance & Security
 Payments
 Mobile Marketing
 Payments
 Payments
 Retail: eCommerce
 Advertising: Ad Serving & Management

Securionix
 Klarna
 1Password
 Avaya
 Contentsquare
 RELEX Solutions
 ConsenSys
 Uniphore
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 eSentire
 GoCardless
 Branch
 SpotOn
 Xendit
 Whatnot
 Seedtag

Millions

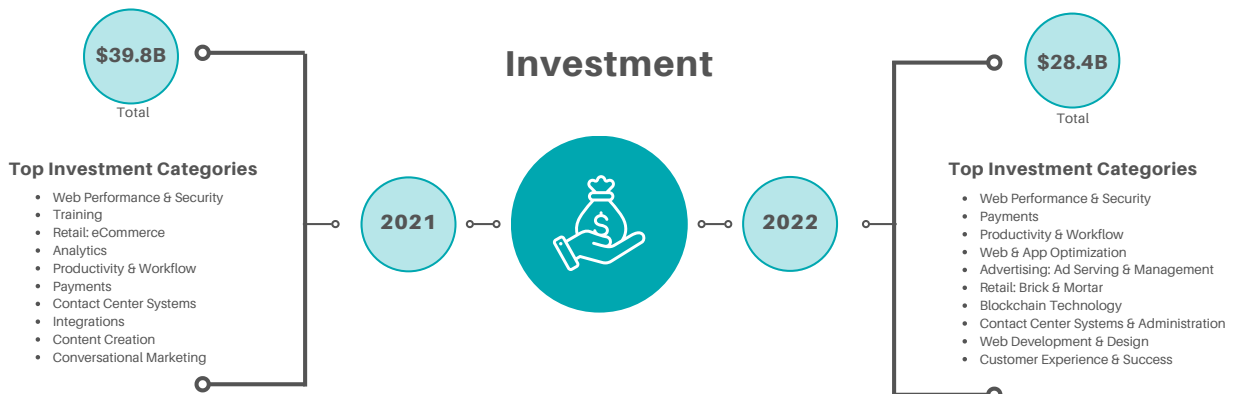
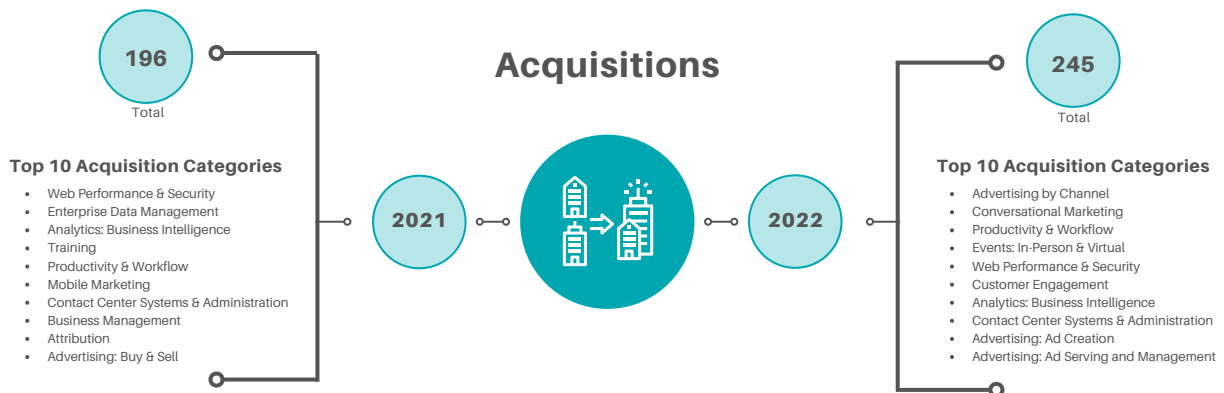
\$1,000
 \$800
 \$620
 \$600
 \$600
 \$568
 \$450
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 \$360
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 \$312
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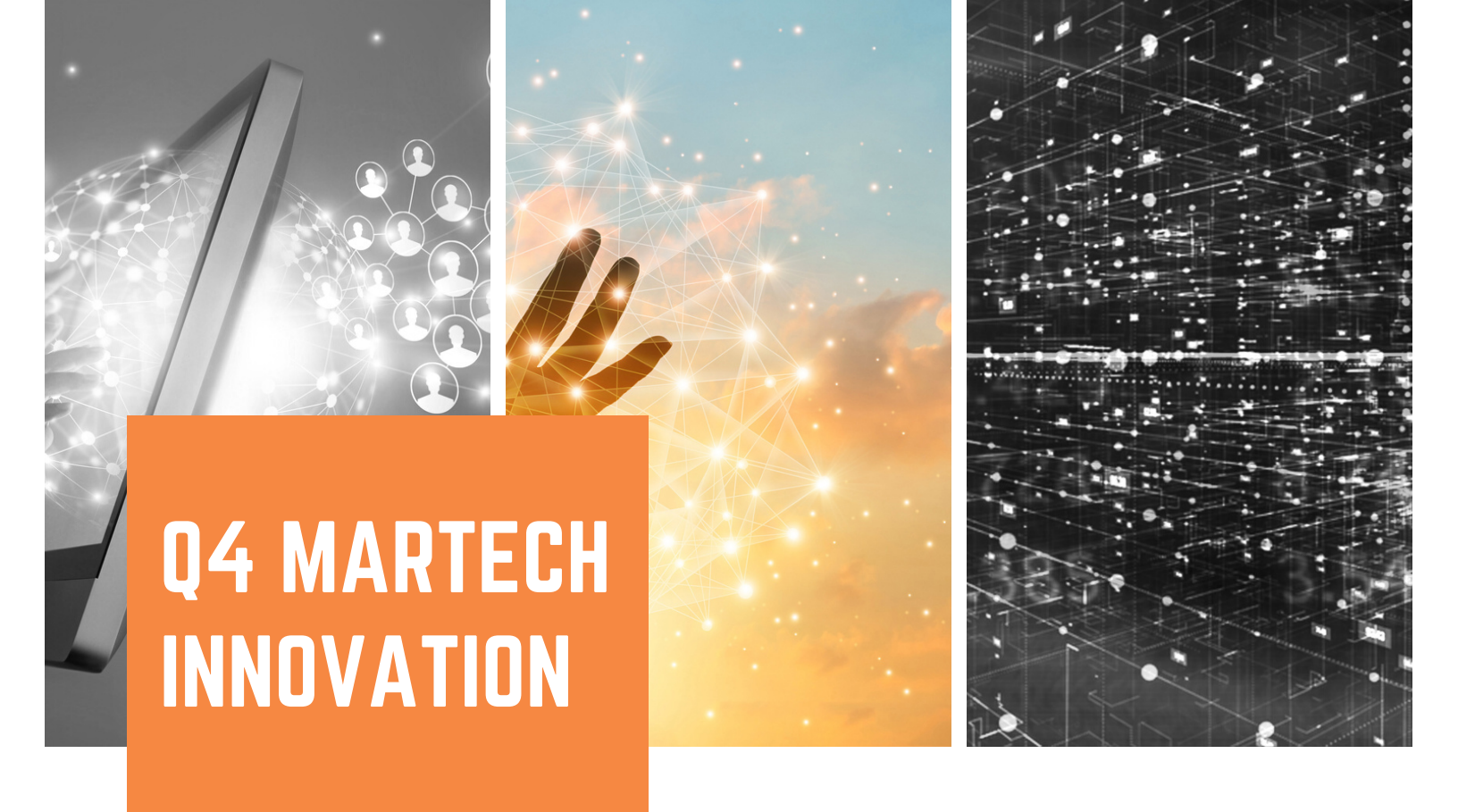
Categories of Investment by \$\$



MarTech INNOVATION

2021 → 2022





Q4 MARTECH INNOVATION

75

NEW PRODUCTS

In comparison to last quarter, new product announcements were down 23%, and feature announcements were down 17%.

84

FEATURE
ANNOUNCEMENTS

Acquisitions were down roughly 83% with 35 acquisitions across 25 categories in Q4.

35

ACQUISITIONS

Investment in MarTech companies this quarter was \$3B, down 97% over the last quarter. See more details on where investments were made on page 28.

\$3B

FUNDING

Q4 2022 NEW PRODUCTS BY CATEGORY



ADVERTISING BY CHANNEL

Emodo launched Adapt, a dynamically-optimized native ad offering that drives increased engagement and higher impact for brands and advertisers.

ADVERTISING: AD SERVING & MANAGEMENT

Wishpond announced that Braxy.io has launched Braxy, an AI-powered advertising solution that automatically creates and optimizes campaigns to allow businesses to attract more customers in less time.

ADVERTISING: BUY & SELL

Gale Force Digital Technologies launched AdForce, its demand-side platform that allows users to purchase static, video, CTV/OTT, and audio inventory across 95% of ad spaces.

ANALYTICS: BEHAVIORAL

AnalyticsIQ launched Connection+, their business-to-consumer linkage solution that gives B2B organizations access to the richest source of B2B2C linkage data.

Pixability announced a contextual data solution for CTV, which will provide more insight around the suitability and contextual relevance of CTV content so advertisers know more about where their ads run ahead of time.

Q4 2022 NEW PRODUCTS BY CATEGORY



Appier launched AIRIS, the next-generation AI-powered CDP to support brands and marketers to achieve the fastest time-to-insight with smarter decision-making and execution by leveraging its advanced AI and ML technologies.

ANALYTICS: BUSINESS INTELLIGENCE

Ignite Visibility released CertaintyTech, a platform designed to help marketers achieve the best ROI when it comes to digital marketing channels.

IBM announced Business Analytics Enterprise, a suite of business intelligence planning, budgeting, reporting, forecasting, and dashboard capabilities that provides users with a robust view of data sources across their entire business.



ARTIFICIAL INTELLIGENCE

Ezoic launched Flickify, its AI text-to-video tool that requires no video editing skills, video equipment or special training.

Tailwind released its generative AI tool Ghostwriter that helps users of the small business marketing platform to generate natural-sounding, effective copy for their digital marketing efforts.

Press Hook announced a free press release generator tool that allows companies to produce rapid, automated press releases relating to their products or services.

Q4 2022 NEW PRODUCTS BY CATEGORY



Tome launched as an AI-powered generative storytelling tool that enables creators to generate entire narratives from scratch, complete with intelligent titles, outlines, pagination, page layouts and page content supported by GPT-3 and AI-generated images.

Originality.AI launched as a tool that can predict when text has been created by artificial intelligence tools, in order to help web publishers check for plagiarism.

Vermillio launched its initial set of AI-powered text-to-image and image-to-image styling tools and lineage tracing technology.

AUDIENCE SEGMENTATION, INTENT & TARGETING

Foundry launched Foundry Intent, an intent data product that helps you identify intent across your website, the public web, industry content, and Foundry's opted-in audience to provide a meaningful view of in-market buyer behavior.

Fast Simon announced its Personalization at Scale module that allows merchants to create relevant and personalized targeting by selecting suggested customer groups.



BRAND MANAGEMENT

FADEL announced Brand Vision, a unified platform for ensuring brand compliance by managing and monitoring marketing content and its license terms across the entire content lifecycle from pre-production to post-distribution.

Q4 2022 NEW PRODUCTS BY CATEGORY



BUDGETING & FINANCIAL MANAGEMENT

Datadog announced Cloud Cost Management, a solution that helps to unify cost and observability data so that teams can understand and take control of cloud costs.

BUSINESS PROCESS AUTOMATION BY INDUSTRY

Automation Anywhere revealed the Automation Success Platform, designed to accelerate business transformation by making automation accessible for everyone.

Teramind announced an Intelligent Business Process Optimization solution to help companies adapt to a complicated business environment, enabling teams to optimize business processes at a critical time.

CHANNEL & PARTNER MARKETING

KORE Software launched the Portfolio Optimization Platform that provides users with a place for managing, measuring and optimizing your portfolio all in one.

Q4 2022 NEW PRODUCTS BY CATEGORY



COMPETITIVE INTELLIGENCE (CI)

Perpetua launched Prism, a fully-integrated market and competitive intelligence solution bringing efficiency and precision to how brands advertise on Amazon.

CONTACT CENTER SYSTEMS & ADMINISTRATION

NICE announced ElevateAI, an AlaaS solution that brings the power of Enlighten AI, its purpose-built CX AI, to the developer community.

CONTENT CREATION: DESIGN & ILLUSTRATION

Bynder unveiled Studio, the next-generation solution for scalable content creation and templating of on-brand content in the form of images, videos and GIFs.

CONTENT CREATION: WRITTEN CONTENT

Brightidea launched Brightidea Memo, designed to help memo writing teams write longform narrative memos fast, while organizing the entire program all-in-one place.

Q4 2022 NEW PRODUCTS BY CATEGORY



Scribble launched as a tool to create unlimited professional eBooks that business owners can edit and customize to publish within minutes.

CONTENT MARKETING: PLANNING & MANAGEMENT

Contentful announced their Contentful Studio™ that empowers customers to streamline content workflows, development, and publication in one central location.

CONTENT MARKETING: PRODUCTION & DISTRIBUTION

Vbrick launched Producer, giving users the ability to remotely capture, produce, and distribute studio-quality video directly from a web browser.

Lumina Datamatics introduced JournalXPress that automates the publishing workflow, and also has a payment collection feature for open-access payment acceptance that speeds up the payment process to the publishers.

CONVERSATIONAL MARKETING

Got It AI announced a product suite that uses generative AI models to create a complete and fluid conversational virtual agent from historical conversation logs.

Q4 2022 NEW PRODUCTS BY CATEGORY



Aivo launched Video Conversational AI, a solution that gives companies a new way to interact with their customers using AI and video.

CUSTOMER ENGAGEMENT

MoEngage announced MoEngage Inform, a unified messaging infrastructure that enables brands to build and manage multichannel transactional alerts through one API.

CUSTOMER EXPERIENCE & SUCCESS

AnyRoad unveiled FullView, a solution that enables brands to collect GDPR-compliant, first-party data and feedback from every guest that attends an experiential activation or event, not just the primary booker.

Emporix launched the Emporix Commerce Execution Platform, offering businesses the opportunity to dynamically personalize customer journeys based on real-time, and end-to-end process intelligence.

Quantiphi launched Collective.CX, a one-stop experience management platform that enables organizations to provide AI-powered customer, agent, and employee experiences.

CUSTOMER JOURNEY / LIFECYCLE MANAGEMENT

Heap announced Journeys, a tool that visually maps the paths users take through a digital product.

Q4 2022 NEW PRODUCTS BY CATEGORY



DATA MIGRATION

Wipro announced Wipro Data Intelligence Suite, a one-stop solution for accelerating cloud modernization and data monetization.

EMAIL CREATION

Knak launched its Inspiration Centre, providing marketers with collections of creative emails and landing pages based on successful campaigns, to help you go from inspiration to creation with no coding required.

EMAIL PERSONALIZATION & TARGETING

6sense announced their Conversational Email solution that enables companies to engage in conversations with leads at scale to address missed revenue opportunities due to organizational constraints.

EMAIL SECURITY & DELIVERABILITY

OPSWAT announced MetaDefender Cloud Email Security, an email security solution that gives the added benefits of reduced costs, scalability, ease of operation and improved efficiency.



ENTERPRISE DATA MANAGEMENT

Matillion announced The Data Productivity Cloud, a platform and ecosystem designed to help teams get data business-ready, faster, accelerating time-to-value and increasing the impact data can have.

Seek AI launched its B2B SaaS platform that allows data teams to automate and oversee database query projects.

Qualtrics announced CrossXM, a product that gives leaders automated insights into how their employee, customer and brand experiences impact one another.

Veritas Technologies launched Veritas Alta, a cloud data management platform that helps enterprises transition mission-critical workloads to the cloud.

AllCloud launched Matillion One Click, an offering that accelerates customers' journey to the cloud for data analytics by helping them acquire data faster and at scale.

Bearer announced the Bearer Data Security Platform, a SaaS platform that enables scalable deployments and workflow automation for security management.

EVENTS: IN-PERSON & VIRTUAL

Stova launched as a comprehensive event management solution for delivering exceptional experiences for global enterprise clients by combining Meetingplay, Aventri, and eventcore into one.

Q4 2022 NEW PRODUCTS BY CATEGORY



Airmeet released their Event Experience Cloud, an all-in-one virtual and hybrid event platform for unlimited connection with anyone, anywhere, anytime.

AudienceView released an integrated, white-label mobile app platform that allows clients to uniquely configure a fully branded consumer app experience in order to significantly expand their relationship with all event attendees.

INTEGRATIONS

Alation announced Alation Connected Sheets, enabling business users to pull trusted, governed, and up-to-date data from data sources into spreadsheets, including Google Sheets and Microsoft Excel, via Alation Data Catalog.

LEAD GENERATION

ActionIQ announced its CX Hub for Acquisition Marketing, a solution that allows advertisers and marketers to prospect and acquire new customers in a world without third-party cookies.

MARKET RESEARCH

Alida announced a Conversational Surveys product that helps organizations retain and increase loyalty of existing customers, and drive improved business performance – all within one seamlessly integrated platform.



Q4 2022 NEW PRODUCTS BY CATEGORY



MARKETING AUTOMATION

Dynamic Yield launched Experience OS, an operating system that creates one place for customers to seamlessly manage their consumer experience programs across teams and channels.

Bloom Intelligence unveiled their automated restaurant reputation management tool, allowing restaurateurs to dramatically increase and improve online ratings and reviews.

MARKETING OPERATIONS

Tailwind launched Copilot, a personalized marketing plan creation tool.



MOBILE MARKETING

GEORA announced its innovative platform that uses beacon technology to share location-specific content, as well as increase customer engagement and obtain feedback more quickly and accurately than ever before.

OMNICHANNEL MARKETING

Taradel launched its new omni-channel marketing platform designed to help advertisers easily create, manage, and measure local marketing campaigns integrated across today's most popular media channels.

Q4 2022 NEW PRODUCTS BY CATEGORY



PRIVACY, COMPLIANCE & RISK

Veratad Technologies announced Veratad VX, a global age and identity verification platform designed to deliver a no-code journey orchestration and automated verification experience.

Transcend released Assessments, a privacy risk management product that helps reduce the work and risk associated with processing personal data.

PRODUCTIVITY & WORKFLOW

Jotform launched Jotform Sign, an e-signature product that allows businesses to effortlessly send out signable documents.

Box announced Box Notes, its real-time content collaboration and project management solution.

Workflow Labs launched HelpDesk, an innovative eCommerce workflow management tool that will allow businesses operating on the Amazon eCommerce platform to reduce time spent on repetitive tasks.

Wrike announced Wrike Lightspeed which includes a streamlined user experience, artificial intelligence capabilities, and powerful new features.

Jotform launched Jotform Teams, a collaboration platform that enables users to create forms, tables, e-signature documents, reports, approvals and apps within a shared workspace.



Q4 2022 NEW PRODUCTS BY CATEGORY



LocaliQ launched their new appointment scheduling software created to help small business owners take control of their time.

RETAIL: ECOMMERCE

Prodigy Commerce launched as a hosted eCommerce platform for WordPress that's free at any scale and brings together the benefits of WordPress and a hosted eCommerce platform.

SEARCH ENGINE MARKETING

Scorpion announced Ranking.AI, a solution to help bring the power of AI to businesses by improving search engine rankings, generating leads and ultimately driving more revenue.

Gale Force Digital Technologies announced LocalForce, its newest platform for local search optimization, designed to build a vast online presence for any business and maximize its online visibility.



SOCIAL MEDIA MANAGEMENT

Gale Force Digital Technologies announced SocialForce, its software for social media management that allows businesses to take charge of online profiles at scale with advanced integrations.

Q4 2022 NEW PRODUCTS BY CATEGORY



TEXT TOOLS & SERVICES

FineShare launched FineVoice, its voice processing product that can transform voice and record sound from multiple sources with ease and offers a variety of features including text to speech, speech to text, audio extractor, and file voice changer.

VIDEO CREATION TOOLS

Spatial announced the Spatial Creator Toolkit that takes away the friction for digital designers and architects by allowing them to publish first-class visuals and interactive spaces across mobile, desktop web and VR in one click.



WEB ANALYTICS

Demandbase announced a completely free Account Identification solution that identifies accounts with unparalleled accuracy and match rates.

WEB & APP OPTIMIZATION

Eppo announced that it has partnered with Snowflake and launched an A/B experimentation platform that will allow customers to run more trustworthy experiments faster.

Q4 2022 NEW PRODUCTS BY CATEGORY



WEB DEVELOPMENT & DESIGN

SAP announced SAP Build, a low-code solution that empowers business users to create and augment enterprise applications, automate processes, and design business sites with drag-and-drop simplicity.

WEB PERFORMANCE & SECURITY

ABBYY launched an all-in-one solution that offers instant identity proofing and affirmation anytime, anywhere - to simplify document-centric digital onboarding processes while giving organizations confidence that customers, constituents, employees, and partners are who they say they are.

VENDOR ACTIVITY

SCAN THE NEW FEATURE LIST TO SEE IF YOU NEED TO CHAT WITH YOUR VENDORS.

Category	Product	Description
Account-Based Marketing	Folloze ABX	Folloze announced the latest version of their Buyer Experience Platform, which now allows B2B organizations to empower all marketers to build rich personalized experiences, in a simple, no-code environment.
Account-Based Marketing	RollWorks	RollWorks launched new capabilities for Hubspot users that allow customers to view their advertising campaign engagement metrics and other important account-level data from RollWorks in HubSpot.
Advertising by Channel	FreeWheel	FreeWheel announced an enhancement to its premium programmatic industry suite of offerings, namely a new, unified yield set of capabilities for publishers that protects the value of high quality, premium video while automating yield optimization.
Advertising by Channel	Quora Ads	Quora expanded their brand advertising business with new video ads to help brands more effectively tell their story.
Advertising by Channel	MGID	MGID announced the launch of interactive rich media ads across its portfolio of premium publishers, driving effectiveness for advertisers through increased audience engagement and attention.
Advertising by Channel	Scala Digital Signage	Scala announced new features for their Digital Signage solution, including the ability to monitor and stop plan generation tasks with the click of a button, providing users with an overview of past, current and future plan generation tasks and letting them cancel certain jobs before they start.
Analytics: Behavioral	Alteryx Analytics Cloud	Alteryx announced new enhancements to the Alteryx Analytics Cloud platform that will help put powerful machine learning tools in the hands of everyone.
Analytics: Behavioral	Qualtrics XM	Qualtrics announced new XM Platform innovations to offer organizations the most flexibility to gain a complete understanding of their customers' wants and needs, and take automatic action to deliver personalized experiences at scale and in real-time.
Analytics: Business Intelligence	Fivetran	Fivetran announced an extended partnership and new product capabilities with Microsoft Azure to help joint customers accelerate their data-driven digital transformations.
Analytics: Business Intelligence	ThoughtSpot Everywhere	ThoughtSpot announced the launch of ThoughtSpot for Sheets, an entirely new web plug-in that brings modern, true self-service analytics directly to data in Google Sheets.
Analytics: Business Intelligence	CS Insights	Contentsquare announced it has enhanced its CS Insights product with new AI-powered capabilities that will improve the way businesses fix user frustration at scale.
Artificial Intelligence	Picsart Quicktools	Picsart introduced two new features to further enhance the creative workflow of its AI tool, including AI Background, and AI Replace.
Artificial Intelligence	Jasper.ai	Jasper announced Jasper Chat, a new way of engaging with its AI that helps remove much of that learning curve associated with generative AI tools by making it as easy to converse with Jasper as you would talk to a human assistant.
Artificial Intelligence	Picsart Quicktools	Picsart announced new generative AI tools within their Quicktools suite of free-to-use photo, video and document editing tools, including an AI Image Generator, and AI Writer.
Attribution	VISIT Local	Reveal Mobile announced the release of enhanced attribution reports available in its geofencing platform, VISIT Local.
Brand Management	Yext Listings	Yext announced a new Listings Verifier feature for their Listings product that gives customers the ability to measure Listings Accuracy in Report Builder and view field-by-field comparisons to confirm that the information on a listing matches content stored in the Yext Knowledge Graph.
Campaign Management	Iterable	Iterable launched new capabilities that allow marketers to quickly build and deploy effective, personalized, and harmonized cross-channel campaigns that fit the evolving needs of their customers.
Campaign Management	Iterable	Iterable introduced a new SMS feature with simplified pricing that allows marketers to deliver deeply personalized experiences to customers where they are most engaged and responsive.
Channel & Partner Marketing	Chatmeter	Chatmeter announced platform enhancements designed to drive real-time CX agility and improve customer loyalty and growth for multi-location enterprises.
Contact Center Systems & Administration	Invoca for Multi-Location CX	Invoca announced new capabilities to their conversation intelligence solution including enhanced Conversational IVR technology, and Ring Group Call Routing to help brands answer more sales calls.
Contact Center Systems & Administration	Five9	Five9 announced new capabilities that help businesses deliver more engaging and unified customer journeys across digital and voice channels and between virtual and live agents.
Content Creation: Design & Illustration	Piktochart	Piktochart added a screen recording option for users to create videos of their visual content.
Content Creation: Design & Illustration	Visme	Visme introduced a new digital whiteboard feature, allowing users to create and collaborate on projects in real time.
Content Creation: Design & Illustration	Piktochart	Piktochart released new improvements to their tables and charts to meet the need for personalized customization options, now allowing users to change font size, font family, and even colors to fit their needs while being on-brand.

VENDOR ACTIVITY

ARE YOU FULLY UTILIZING ALL YOUR TOOLS?

Category

Content Creation: Design & Illustration
Content Creation: Design & Illustration

Product

Piktochart
Marq

Content Creation: Written Content

Grammarly

Content Management System (CMS)

Ceros

Content Management System (CMS)

Contentful Composable Content Platform

Content Management System (CMS)

Ceros

Content Marketing: Curation & Discovery

The BloomReach Personalized Discovery Platform

Content Marketing: Curation & Discovery

The BloomReach Personalized Discovery Platform

Conversational Marketing

Signals

Conversational Marketing

Conversational Cloud

Customer Data Platform (CDP)

Acquia Customer Data Platform

Customer Engagement

Factoreal

Customer Engagement

CleverTap

Customer Engagement

CleverTap

Customer Engagement

ebbo

Customer Experience & Success

Gainsight Customer Success Platform

Customer Experience & Success

Freshdesk

Customer Service & Support

Pega Customer Service

Customer Service & Support

Zoho Desk

Description

Piktochart introduced over 100 new business templates that focus on data visualization.

Marq announced the release of Marq Advanced Analytics, in-platform insights to give brands the visibility they need to make better design decisions and equip teams with templates they will actually use.

Grammarly launched tone rewrite suggestions, helping individuals and teams ensure their tone is positive, confident, or personable at the click of a button, even in the most difficult workplace conversations.

Ceros announced the newest iteration of the Ceros creative ecosystem with updates to the three core platform suites—Studio, MarkUp, and Chartblocks, which now operate in one product ecosystem.

Contentful unveiled several new platform orchestration capabilities that help reimagine the way organizations compose and connect content to deliver customer experiences at scale. Ceros released Editor, a Ceros Studio add-on that allows designers to grant limited editing powers to non-designers, allowing them to edit and update designated sections of a project without risk of changing the design.

Bloomreach announced a new Bloomreach Discovery feature to bridge the gap between marketing and merchandising, connecting any Email Service Provider with active and up-to-date product catalogs.

Bloomreach announced Bloomreach Discovery has deepened its AI capabilities with easier customization for its search algorithms, giving users the ability to create product discovery experiences that are optimized for revenue generation based on the unique buying patterns of their customers.

ChatFunnels rebranded as Signals, the digital conversational marketing platform which will now reflect Signals' broader company focus beyond its original approach as a chat bot and sales funnel company, to focus on the emerging approach of Signal Marketing.

LivePerson announced four new AI-powered capabilities to its Conversational AI including AI Search, On-Demand Recommendations, "Small Talk" NLU, and Repeat Intent Rate measurement.

Acquia introduced enhancements to its customer data platform (CDP) including a unified data layer, direct SQL access, and integration with Acquia DAM, all of which help to expand the ways marketers and data scientists can work with information managed by Acquia CDP and strengthen the product's central role in composable customer data strategies.

Factoreal announced enhancements to their customer engagement platform that make it easier to deliver hyper-personalized consumer experiences that increase ROI across online, on-site, social, and mobile channels.

CleverTap announced the launch of CleverTap for Startups (C4S), and will now offer a full stack retention platform to all budding digital-native brands, in order to help them personalize and optimize all customer touchpoints, improving user engagement and conversion.

CleverTap unveiled RenderMax, a proprietary technology that can increase mobile push notification render rates up to 90% on low-end Android devices.

Clarus Commerce officially rebranded as ebbo, signifying the company's movement in comprehensive loyalty and customer engagement capabilities to deliver end-to-end solutions for brands of all sizes.

Gainsight announced updates to its Customer Success Platform including a new Customer Goals feature that enables cross-functional teams to collectively capture, track, and report on customer goals to drive collaboration and showcase value.

Freshworks announced new AI-powered support features across their customer experience solutions Freshchat™, Freshdesk™, Freshsales™ and Freshmarketer™ that will help agents improve response times, and help sales and marketers increase productivity.

Pegasystems announced the latest edition of its Pega Infinity™ software suite with enhancements to Pega Platform™, Pega Customer Decision Hub™, and Pega Customer Service™, to empower brands with enterprise-wide AI that works behind the scenes to increase efficiency, speed innovation, and improve customer interactions for optimal results. Zoho Corporation launched new tools for Zoho Desk, which includes Blended Conversations, a seamless combination of human-driven and bot-powered conversational service experiences.

VENDOR ACTIVITY

DO YOU KNOW WHAT YOUR VENDORS ARE UP TO?

Category	Product	Description
Direct Mail Platforms	Every Door Direct Mail	Taradel announced the launch of a free online design tool that enables users to choose from postcard format and size options, search for templates by keyword, and save or edit existing design projects – all within their Every Door Direct Mail production and fulfillment services.
Email Creation	Litmus	Litmus launched new Email Testing Profiles that level up the process of email optimization by giving users the ability to control and customize testing.
Email Platforms	Klaviyo	Klaviyo announced the launch of the Klaviyo SMS Assistant, an SMS tool that automates copywriting.
Email Platforms	GetResponse	GetResponse announced AI Product Recommendations, a new feature that employs artificial intelligence to revolutionize the customer journey and experience.
Enterprise Data Management	Immuta	Immuta announced its latest product enhancements and integrations designed to deliver advanced data security and monitoring across key cloud platforms at scale.
Enterprise Data Management	Pega Customer Decision Hub	Pegasystems announced the latest edition of its Pega Infinity™ software suite with enhancements to Pega Platform™, Pega Customer Decision Hub™, and Pega Customer Service™, to empower brands with enterprise-wide AI that works behind the scenes to increase efficiency, speed innovation, and improve customer interactions for optimal results.
Enterprise Data Management	Collibra Data Intelligence Cloud	Collibra unveiled new innovations including a new usage analytics dashboard designed to make data intelligence easy and accessible to more data users.
Enterprise Data Management	Starburst Galaxy	Starburst announced the launch of foundational Data Products capabilities for Starburst Galaxy that simplifies and streamlines the traditional ETL process for the curation of Data Products, accelerating data querying, access and analytics across the organization.
Human Resources	FWI Cloud	Digital signage company Four Winds Interactive (FWI), the workplace management innovator SmartSpace, and the employee communications company Poppulo, announced that they have combined under the Poppulo name.
Influencer & Advocacy	Employee Advocacy by Sprout Social	Sprout Social announced the launch of its rebranded advocacy solution, Employee Advocacy by Sprout Social, that enables users to manage both social media and employee advocacy in one place.
Influencer & Advocacy	Tagger	Tagger announced its rebrand, including a new integrated affiliate marketing solution as part of their marketing platform that enables businesses to track and manage performance-based partnerships seamlessly through a single dashboard.
Market Research	Voxco	Voxco introduced four new powerful features including Text Analysis, NPS Dashboard, Automated Translation, and New Distribution Status, all to make it easy for users to gather, measure, uncover, and act on data.
Market Research	Suzy	Suzy announced enhancements to its consumer insights platform, including video open ends, MaxDiff, and Data Explorer, that will help simplify advanced research methodologies.
Marketing Automation	Bloomreach Engagement	Bloomreach announced the launch of Contextual Personalization, a new feature from Bloomreach Engagement that allows marketers to tap into the missed revenue opportunities presented by traditional A/B testing.
Marketing Automation	Weave	Weave has launched a new Phone Reporting Analytics feature to drive meaningful insights and efficiencies for multi-location practices.
Marketing Automation	Integrate Demand Acceleration Platform	Integrate announced new product features for their Demand Acceleration Platform that enables marketers to be more precise and powerful in their account-based marketing strategies.
Marketing Automation	Inflection.io	Inflection.io announced the general availability of their Salesforce integration to supercharge product-led growth with new audience and personalization capabilities.
Marketing Automation	Inflection.io	Inflection.io introduced a WYSIWYG email editor that makes creating personalized emails a breeze with consistent brand elements and product-led content using the Visual editor.
Mobile Marketing	Scout	Scout relaunched their martech solution that delivers conditional messages at the moment of purchase.
Payments	Recurly	Recurly announced new ramp pricing to enable recurring revenue companies to dynamically increase or decrease pricing within subscriptions.
Privacy, Compliance & Risk	BigID	BigID announced Hotspot Reporting, a new feature that gives organizations the power to quickly and easily visualize and remediate their riskiest data.

VENDOR ACTIVITY

DO YOU KNOW WHAT YOUR VENDORS ARE UP TO?

Category	Product	Description
Privacy, Compliance & Risk	MyPreferences	PossibleNOW announced the launch of its new and improved zero-party data platform, MyPreferences 3.0, giving enterprises a reimagined CX engine.
Product Lifecycle Management (PLM)	Productboard	Productboard unveiled new customer-centricity, strategic planning, and enterprise collaboration capabilities to help companies innovate, drive operational efficiency, and accelerate time-to-market.
Productivity & Workflow	Weave	Weave announced new features in its Online Scheduling tool that gives offices the ability to customize their online calendar with appointment types, providers, and schedule availability.
Productivity & Workflow	Sharegate	GSoft announced enhanced features to ShareGate, including provisioning, reporting, and automation, that will provide added usability to companies who have migrated using ShareGate, and those looking to manage their already-migrated environments with added ease and efficiency.
Productivity & Workflow	Miro	Miro announced the launch of several new features and a suite of integrations designed to advance the visual collaboration experience for users.
Productivity & Workflow	RingCentral MVP	RingCentral announced it's expanding its End-to-End Encryption (E2EE) beyond support for video to include both phone and messaging within its flagship RingCentral MVP product, to prevent any unauthorized third party from accessing users' communication content.
Productivity & Workflow	LiquidPlanner	LiquidPlanner announced new features including a 'Work Limit' that allows users to place a cap on the number of hours that should be spent on a work item, and 'Schedule Insights' have been made more accessible to users so they can quickly see and manage potential project risk.
Retail: Brick & Mortar	Uberall CoreX	Uberall announced a Messages feature to their CoreX platform that helps multi-location businesses shorten their customer's path to purchase via live agents and lifelike local AI chatbots.
Sales Operations	Freshsales	Freshworks announced new AI-powered support features across their customer experience solutions Freshchat™, Freshdesk™, Freshsales™ and Freshmarketer™ that will help agents improve response times, and help sales and marketers increase productivity.
Sales Operations	ValueCloud	DecisionLink announced Express Value Insights, a new capability of the ValueCloud platform that, when enabled, promotes an easier, faster way to create a compelling value hypothesis for customers.
Social Media Management	SocialFlow	SocialFlow by Piano announced a new 'Link in Bio' feature for Instagram, that provides a dedicated page for every client Instagram handle powered by SocialFlow.
Supply Chain Management	FarEye	FarEye introduced new solutions on-top of their all-in-one low code/no code delivery logistics platform oriented to key areas in the order-to-door delivery journey including, Ship, Track, Route, Execute, and Experience.
Video Creation Tools	Vyond	Vyond announced new AI-powered capabilities that make video creation more accessible and easy for business users, as well as new advanced charts, characters, and actions.
Video Creation Tools	FlexClip	FlexClip announced its auto subtitle feature that enables individuals to quickly add subtitles to any video, without the need for expensive editing equipment, specialized knowledge, or time-consuming effort.
Video Marketing Platforms	Wistia	Wistia unveiled Wistia Live, a feature that empowers B2B marketers to easily create, host, market, and analyze the impact of webinars and live events.
Web & App Optimization	Freshmarketer	Freshworks announced new AI-powered support features across their customer experience solutions Freshchat™, Freshdesk™, Freshsales™ and Freshmarketer™ that will help agents improve response times, and help sales and marketers increase productivity.
Web Development & Design	Pega Platform	Pegasystems announced the latest edition of its Pega Infinity™ software suite with enhancements to Pega Platform™, Pega Customer Decision Hub™, and Pega Customer Service™, to empower brands with enterprise-wide AI that works behind the scenes to increase efficiency, speed innovation, and improve customer interactions for optimal results.
Web Development & Design	Unqork	Unqork announced two major new product features, Unqork OS and Codeless Data Experiences, both of which will meet the evolving needs of enterprise customers looking for easier ways to manage software applications, with a focus on integrability and data functionality.
Web Performance & Security	NordPass	NordPass announced new features including Shared Folders and Items Transfer, both of which benefit business users who are working on various projects simultaneously, or users who lose a fellow employee.
Web Performance & Security	Uptycs	Uptycs announced the addition of agentless scanning, enabling security teams to scan 100% of their cloud workloads quickly to detect risk including misconfigurations, policy violations, exposed secrets, vulnerabilities, and malware.

M&A ACTIVITY

DOES 1 + 1 = 3?

Category	Company	Description	Acquired by
Advertising: Ad Serving & Management	Nectar 9	Tailwind has acquired Nectar 9, a paid advertising management platform that combines artificial intelligence and automation to help marketers save time and maximize ads results while cutting their cost of customer acquisition.	Tailwind
Analytics: Behavioral	Woopra	Appier announced that it has completed the acquisition of Woopra, a customer journey analytics SaaS company that together will allow businesses to integrate and synchronize customer data via one-click integrations, analyze every touch point throughout the customers' journeys in real-time and apply the full strength of Appier's AI-based decision and execution capabilities.	Appier
Analytics: Behavioral	Fiftyfive5	Accenture has acquired Fiftyfive5, a customer insights and advisory business, strengthening Accenture Song's ability to help clients tap data insights and performance marketing to accelerate growth and innovation.	Accenture
Analytics: Business Intelligence	Cloudcraft	Datadog announced it has acquired Cloudcraft, a visualization service for cloud and system architects to create real-time diagrams of their cloud infrastructures.	Datadog
Artificial Intelligence	Frase	Copysmith has acquired Frase and Rytr, launching Copyrtr; a collective of AI-powered content and SEO marketing solutions that support millions of creators worldwide.	Copysmith
Artificial Intelligence	Rytr	Copysmith has acquired Frase and Rytr, launching Copyrtr; a collective of AI-powered content and SEO marketing solutions that support millions of creators worldwide.	Copysmith
Attribution	Roivenu	ScanmarQED has acquired Roivenu, a cloud-based marketing attribution and digital data integration platform.	ScanmarQED
Audience Segmentation, Intent & Targeting	SOPRISM	Audiense announced the acquisition of SOPRISM, the digital consumer insight tool which supports leading agencies and brands in developing their audience understanding.	Audiense
Contact Center Systems & Administration	Callstats	Spearline acquired Callstats analytics, diagnostics and optimization technology for WebRTC from 8x8, which together will help provide the best in class solution for testing and monitoring critical business telecommunication services for its global client base.	Spearline
Content Management System (CMS)	Recostream	GetResponse announced that it completed its acquisition of Recostream, an AI/ML personalized recommendations technology company, that will help businesses using GetResponse display personalized product and content recommendations to their website's visitors and grow their conversions.	GetResponse
Content Marketing: Curation & Discovery	Pixlee TurnTo	Emplifi announced the acquisition of Pixlee TurnTo, a provider of user-generated content, ratings and reviews, and influencer marketing solutions.	Emplifi
Customer Engagement	Epoq	AB Tasty announced that it has acquired Epoq, an AI-driven recommendation and smart search solution, accelerating both companies' shared vision of empowering digital teams to deliver relevant and engaging shopping experiences along the consumer journey.	AB Tasty
Customer Experience & Success	SuiteCX	QuestionPro has acquired SuiteCX, the customer experience and journey mapping platform provider, that together will create a "full stack customer experience" platform that offers capabilities across the lifecycle of the customer experience.	QuestionPro
Customer Experience & Success	REVIEWS.io	AppHub announced it acquired REVIEWS.io, the platform that helps businesses enhance the power of their customers' voices to increase sales and build brand trust using its review, loyalty, survey and user-generated content solution.	AppHub
Customer Relationship Management (CRM)	Nutshell	WebFX announced the acquisition of Nutshell, a CRM and email marketing platform that helps B2B organizations work together to close more deals.	WebFX
Document & Content Management	FormSwift	Dropbox announced it has acquired FormSwift, a cloud-based service that gives individuals and businesses a simple solution to create, complete, edit, and save critical business forms and agreements.	Dropbox
Events: In-Person & Virtual	HelpGetSponsors	Events.com has acquired HelpGetSponsors, an event sponsorship technology company, that will help provide their customers with the tools and skills to find, sell, and manage sponsors, in-kind partners, vendors, and expo sales.	Events.com

M&A ACTIVITY

DOES 1 + 1 = 3?

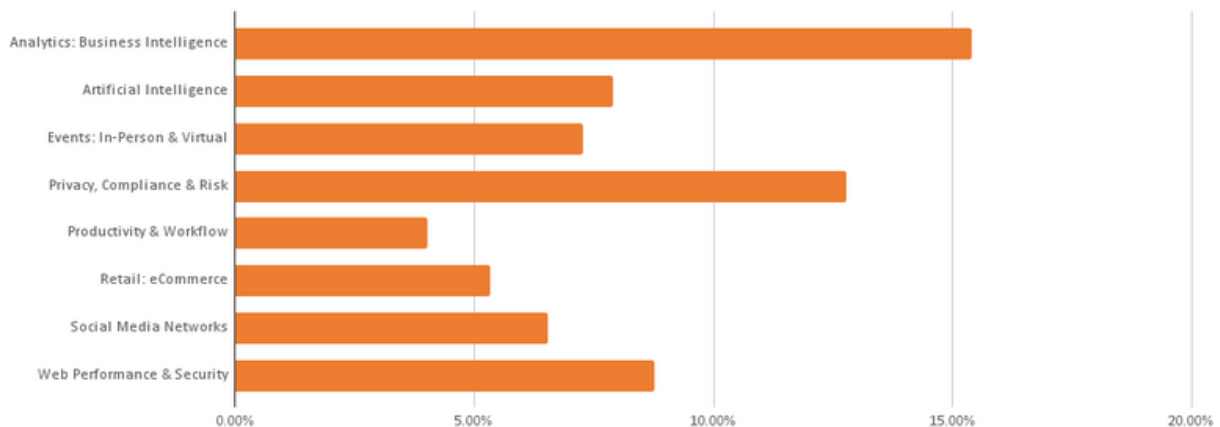
Category	Company	Description	Acquired by
List Development & Management	ZipInfo.com	Melissa has acquired ZipInfo.com, a longtime provider of ZIP code data, which strategically aligns with Melissa's comprehensive product suite, grounded in address verification, correction, and enhancement.	Melissa
Market Research	Qzr	Riddle announced the acquisition of Qzr, the online quiz maker, which will help expand their suite of high-end interactive content creation tools for publishers.	Riddle
Market Research	Further	Toluna announced the acquisition of Further's qualitative research technology platform, and will provide customers with the most advanced end-to-end, quantitative-to-qualitative insights platform on the market.	Toluna
Personalization	ButterCMS	Tiugo Technologies announced the acquisition of ButterCMS, a provider of headless CMS software tools and solutions for developers.	Tiugo Technologies
Product Discovery Platforms	Findologic	Nosto announced its acquisition of AI-powered product discovery platform, Findologic.	Nosto
Productivity & Workflow	Evernote	Bending Spoons announced that it has acquired Evernote, the note-taking and task management app.	Bending Spoons
Productivity & Workflow	eversign	PDFTron Systems announced the acquisition of cloud-based electronic signature innovator, eversign.	PDFTron Systems
Productivity & Workflow	Vizir	LumApps announced it has acquired Vizir, an innovative no-code digital assistant technology that various business departments can use to automate mundane tasks and improve employee access to knowledge, resources, and third-party applications.	LumApps
Public Relations	Factmata Limited	Cision has acquired Factmata Limited, an advanced social and news media monitoring and analytics product that uses AI to identify and track narratives online through articles, blogs, tweets and other social chatter, highlighting the ones that could either help or hurt brand reputation and value.	Cision
Retail: eCommerce	Openbravo	France based DL Software announced the acquisition of Openbravo, the Spanish vendor of a unified commerce platform for agile and innovative commerce.	DL Software
Retail: eCommerce	IntentX	Ad.net announced its purchase of IntentX, the commerce platform for publishers at scale to increase their revenue.	Ad.net
Social Media Marketing	Alter	Google has acquired Alter, an artificial intelligence avatar startup that helps creators and brands express their virtual identity.	Google
Web & App Optimization	ilumino	Crownpeak announced the acquisition of ilumino, a digital accessibility services and consulting firm, expanding Crownpeak's automated accessibility scanning technology with ilumino's subject matter expertise in digital accessibility and usability.	Crownpeak
Web & App Optimization	PingPong	Hotjar has acquired UX research platform PingPong to bring user research capabilities to its customers.	Hotjar
Web Development & Design	WillowTree	TELUS Corporation announced a definitive agreement to acquire WillowTree, a premier, full-service digital product provider focused on end user experiences, such as native mobile applications and unified web interfaces.	TELUS Corporation
Web Development & Design	Napkin.io	Klaviyo announced it acquired Napkin.io, a company that provides developers with an easy and secure way to write and deploy code directly from a browser.	Klaviyo
Web Performance & Security	MarkMonitor™	Newfold Digital announced that it has completed its acquisition of MarkMonitor™, the enterprise-level provider of domain management solutions from Clarivate.	Newfold Digital
Web Performance & Security	Passage	1Password announced the acquisition of Passage, a developer-first passwordless authentication company, and will launch a passwordless authentication platform for enterprises using their technology.	1Password

LOOKING AHEAD

WHERE INVESTMENT IS HAPPENING (Q4 2022)

Q4 brought in much less than all other quarters of 2022 for MarTech and MarTech-related companies. We identified a total of **\$3B** in investment this quarter.

Funding was spread across **37 categories** with no category representing more than 15% of the total.



50% of funding went to **10 companies** whom each raised **\$100M** or more.

Top raises:

	Millions
Analytics: Business Intelligence	\$200
Privacy, Compliance & Risk	\$200
Web Performance & Security	\$196.5
Advertising: Ad Serving & Management	\$170
Social Media Networks	\$170
Artificial Intelligence	\$170
Analytics: Business Intelligence	\$125
Analytics: Business Intelligence	\$123
Events: In-Person & Virtual	\$100
Events: In-Person & Virtual	\$100
Dataiku	\$100
Drata	\$100
Snyk	\$100
Zappi	\$100
OpenWeb	\$100
Jasper	\$100
Alation	\$100
Near	\$100
Banzai	\$100
Events.com	\$100

**JANUARY
2023**



CabinetM helps modern marketing and sales teams manage the technology they have and find the tools they need. The CabinetM marketing technology management platform enables full lifecycle support around technology discovery, qualification, implementation, and management.

Marketing teams using CabinetM gain critical visibility and leverage to save time, money, drive revenue, and manage digital transformation.

The company has built the industry's most comprehensive database of over 15,000 marketing tools across 500+ categories, and currently has the largest set of marketing technology adoption data as a result of hundreds of marketing stacks that have been built, and are being managed, on the platform. CabinetM subscribers have full access to the aggregated, anonymized data through StackInsights.

Questions? Contact Erica Ross (eross@cabinetm.com)