Customer Journey Management Buyers Guide

Software Provider and Product Assessment

EXECUTIVE SUMMARY

iSG Research

Customer Journey Management

ISG Research defines Customer Journey Management (CJM) software as a component of broader experience management platforms that allow organizations to design the pathways customers take as they interact with businesses. The underlying metaphor behind managing customer experiences is that of the journey: Customers follow a path through distinct stages, with different needs and modes of contact at each stage. The default mode for controlling experiences has long been to react to what the customer does and, to a great extent, build an enormous and costly infrastructure around waiting for customers to decide to engage.

CJM software helps automate that process. It makes the reactive processes smoother and easier. The information gathered about interactions provides context for agents, self-service systems and anyone in the enterprise who faces the customer. CJM turns the passive act of responding to service calls into a deliberate, organized effort to optimize customer experiences and, through that, relationships.

> **When an enterprise can map the journey or life cycle, it can potentially identify moments of influence that can be used to drive added business or turn customers into advocates.**

As journey management developed into a discipline, it has acquired some aspects of the customer success process as part of its framework. This makes sense, as post-sales engagements with customers require a highly detailed, logically sequenced series of contacts measured for their impact on customer health and longevity.

The point of journey management is to strengthen an enterprise's ability to influence customer behavior. When an enterprise can map the journey or life cycle, it can potentially identify moments of influence that can be used to drive added business or turn customers into advocates. CJM software includes capabilities for orchestrating interactions, personalizing them to individual (or group) preferences and managing proactive communication efforts by marketing and sales teams.

Even though most customer communication happens through the contact center, it is in most enterprises' interest to carefully design inbound and outbound pathways beyond reacting to expressed customer desires. For a long time, organizations wanted to personalize interactions at scale, but the technology was not available or able to make it easy. Orchestrating experiences now is not only possible but should also be the next logical step in technology deployment and process design. Software providers are improving the tools, platforms and analytic capabilities to help businesses map customer journeys, integrate channels, personalize experiences and automate processes. By 2027, one-third of enterprises will be

using AI applications to map and manage customer journeys that integrate sales, service and marketing processes.

The ISG Buyers Guide™ for Customer Journey Management evaluates a set of software providers and products that support dedicated capabilities related to CJM, one of the core areas that make up CXM suites. We considered how products align processes across different departments, how software tracks customer information at different stages of the customer life cycle and who receives that information. We also examined how this software tracks customer outcomes and helps users derive insights related to behavior, sentiment and revenue at different stages.

Customer Experience Management
Market Assertion

By 2027, one-third of enterprises will have be using AI applications to map and manage customer journeys that integrate sales, service and marketing processes.

Keith Dawson
Director of Research, Customer Experience

ISG Research

To be included in this Buyers Guide, products must include CJM capabilities as part of an overall CXM platform. We considered features related to orchestrating specific customer outcomes, including preference management, planning proactive communications and preserving a 360-degree view of the customer throughout the journey. The capability model for CJM in this research included: analytics, customer journey management, marketing and sales support and resource management. Separate Buyers Guides on Customer Experience Management and Knowledge Management are available to more specifically examine those software categories and requirements of enterprises.

This research evaluates the following 28 software providers that offer products that deliver customer journey management as we define it: Adobe, Braze, CSG, eGain, Emplifi, Exotel, Freshworks, Gainsight, Genesys, HubSpot, Insider, Medallia, Microsoft, MoEngage, Netcore, Nextiva, NICE, Oracle, Qualtrics, Salesforce, SAP, SAS, ServiceNow, Sprinklr, SugarCRM, Verint, Zendesk 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 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.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.**

The ISG Buyers Guide™ for Customer Journey Management 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 CJM 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 CJM 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 CJM 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 CJM 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 CJM 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 Verint. Providers that place in the top three of a category earn the designation of Leader. NICE and ServiceNow have done so in six categories; Salesforce in four; and Adobe, Genesys, SAP, Verint and Zendesk 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.

Customer Journey Mgmt.
Overall

Providers	Grade	Performance
Salesforce	B++	*Leader* 80.9%
Oracle	B++	*Leader* 78.2%
Verint	B++	*Leader* 77.9%
NICE	B++	77.3%
Adobe	B++	76.3%
Sprinklr	B++	75.5%
Genesys	B++	75.2%
Zoho	B+	74.7%
ServiceNow	B+	73.2%
SAP	B+	73.2%
Zendesk	B+	73.1%
Emplifi	B+	70.7%
Gainsight	B+	69.7%
Freshworks	B+	69.4%
Microsoft	B	68.6%
Netcore	B	66.6%
HubSpot	B	66.4%
SAS	B	64.8%
SugarCRM	B	64.4%
Qualtrics	B-	61.5%
Nextiva	B-	61.1%
MoEngage	B-	60.5%
CSG	B-	58.9%
Braze	B-	57.2%
Medallia	C++	54.1%
Exotel	C+	49.6%
eGain	C+	48.6%
Insider	C+	47.1%

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

Customer Journey Management
ISG Buyers Guide™

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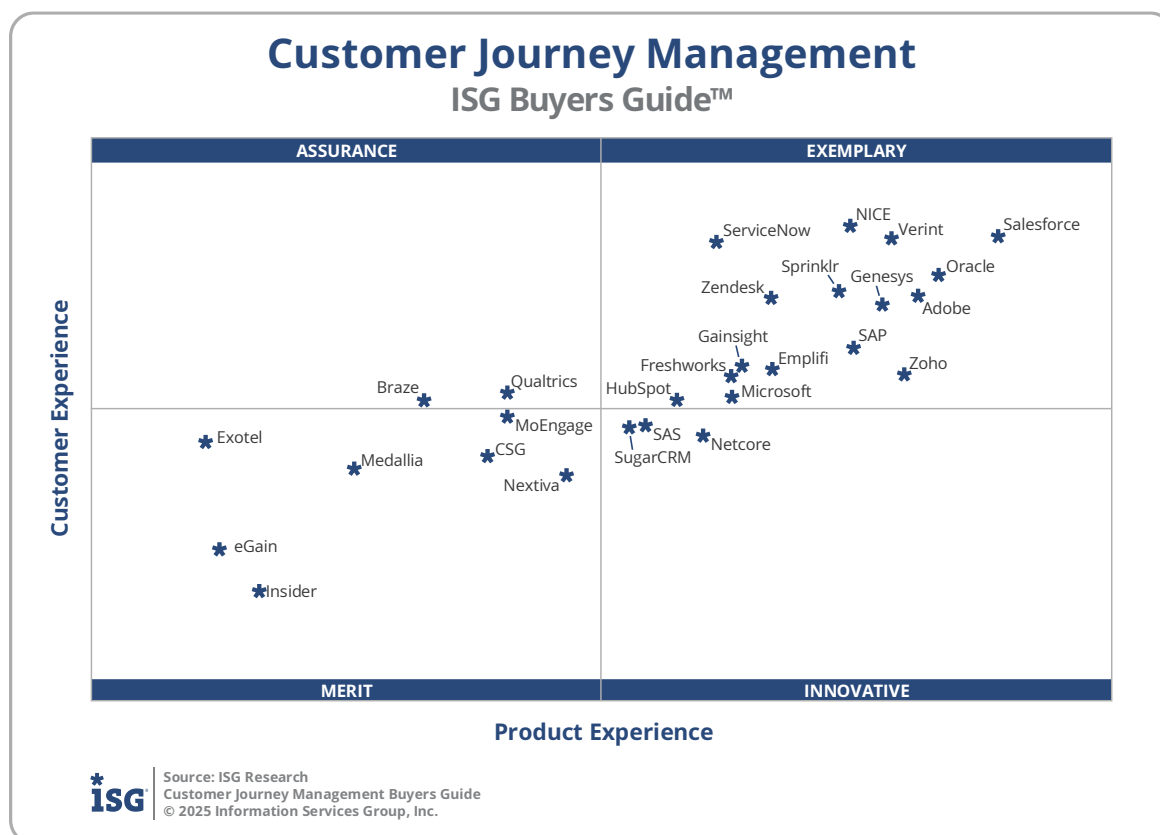
Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Adobe, Emplifi, Freshworks, Gainsight, Genesys, HubSpot, Microsoft, NICE, Oracle, Salesforce, SAP, ServiceNow, Sprinklr, Verint, Zendesk 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: Netcore, SAS and SugarCRM.

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: Braze and Qualtrics.

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: CSG, eGain, Exotel, Insider, Medallia, MoEngage and Nextiva.

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 CJM, 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 (10%), Capability (40%), Reliability (10%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research.

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

Customer Journey Mgmt.
Product Experience

Providers	Grade	Performance
Salesforce	B++	Leader 62.9%
Oracle	B++	Leader 61.0%
Adobe	B++	Leader 60.2%
Zoho	B+	59.8%
Verint	B+	59.4%
Sprinklr	B+	59.1%
SAP	B+	58.1%
NICE	B+	58.0%
Genesys	B+	57.7%
Emplifi	B+	55.5%
Zendesk	B+	55.4%
Gainsight	B	54.4%
Freshworks	B	54.2%
Microsoft	B	54.1%
ServiceNow	B	53.6%
Netcore	B	53.2%
HubSpot	B	52.3%
SAS	B	51.2%
SugarCRM	B	50.7%
Nextiva	B-	48.6%
Qualtrics	B-	46.9%
MoEngage	B-	46.8%
CSG	B-	46.2%
Braze	C++	43.9%
Medallia	C++	41.6%
Insider	C+	38.5%
eGain	C+	37.2%
Exotel	C+	36.6%

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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 NICE, Salesforce and Verint. These category leaders best communicate commitment and dedication to customer needs. While not a Leader, ServiceNow was also found to meet a broad range of enterprise customer experience requirements.

Customer Journey Mgmt.
Customer Experience

Providers	Grade	Performance
NICE	A-	Leader 17.5%
Salesforce	A-	Leader 17.3%
Verint	A-	Leader 17.2%
ServiceNow	A-	17.1%
Oracle	A-	16.4%
Genesys	B++	16.1%
Adobe	B++	16.0%
Zendesk	B++	15.9%
Sprinklr	B++	15.7%
SAP	B+	14.8%
Gainsight	B+	14.4%
Emplifi	B+	14.3%
Freshworks	B+	14.2%
Zoho	B+	14.2%
Qualtrics	B+	13.8%
Microsoft	B+	13.8%
HubSpot	B	13.7%
Braze	B	13.6%
MoEngage	B	13.4%
SAS	B	13.1%
SugarCRM	B	13.1%
Netcore	B	12.9%
Exotel	B	12.7%
CSG	B-	12.4%
Medallia	B-	12.1%
Nextiva	B-	12.0%
eGain	C++	10.3%
Insider	C+	9.4%

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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.

Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Customer Journey Management in 2025, 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 25 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 18 months.

 To qualify for inclusion in the Customer Journey Management Buyers Guides, software providers must include the ability to track and document the customer's behavior and activity across multiple phases of the customer lifecycle. Products will be evaluated on elements of journey visualization; ability to orchestrate desired journeys across multiple contact channels and interaction types; ability to measure outcomes; how it incorporates customer feedback into journey analysis; and how it enables personalization of journeys.

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 software 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 CJM 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 Experience Platform Adobe Journey Optimizer	May 2025	May 2025
Braze	Braze Platform	April 2025	April 2025
CSG	CSG Xponent	25.1	May 2025
eGain	Customer Engagement Hub	21 R. 21.20	February 2025
Emplifi	Emplifi Platform	April 2025	April 2025
Exotel	Ameyo Contact Center Exotel Voice Exotel Conversational AI	4.13.31-RN 6.7.1-RN	April 2025
Freshworks	Freshdesk Omni	March 2025	March 2025
Gainsight	Gainsight Platform	v. 6.45	May 2025
Genesys	Genesys Cloud CX	May 2025	May 2025
HubSpot	HubSpot Customer Platform	25.4	April 2025
Insider	Insider Platform	March 2025	March 2025
Medallia	Medallia Experience Cloud	2025.1 (e692)	March 2025
Microsoft	Dynamics 365 for Customer Engagement	9.2.25044.00154-Service Update 25044	May 2025
MoEngage	MoEngage Platform MoEngage Flows	April 2025	April 2025
Netcore	Netcore Cloud Orchestration Platform	2.0	May 2025
Nextiva	Nextiva Unified Customer Experience Management Platform	April 2025	April 2025
NICE	CXone Mpower	25.2	April 2025
Oracle	Oracle Cloud CX Platform	April 2025	April 2025

Qualtrics	Qualtrics XM Platform	April 2025	April 2025
Salesforce	Salesforce Marketing Cloud Journey Orchestration	Summer '25	May 2025
SAP	SAP Signavio Journey Modeler	2504 (HFC03*)	April 2025
SAS	SAS Customer Intelligence 360	2025.04	April 2025
ServiceNow	ServiceNow Customer Service Management	Yokohama	April 2025
Sprinklr	Sprinklr Unified CXM Platform	20.4 Spring Release	April 2025
SugarCRM	Sugar Automate	25.1	April 2025
Verint	Verint Customer Journey Mapping Verint Open Platform	2024R6 HFR12	May 2025
Zendesk	Zendesk Service	May 2025	May 2025
Zoho	Zoho CRMOne Zoho CRM Plus	March 2025	March 2025

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	Revenue	Customers	Functionality
Birdeye	BirdAI	Yes	Yes	No
Contentsquare	Contentsquare Platform	Yes	Yes	No
Custellence	Custellence Platform	No	No	No
Fullstory	Fullstory Analytics	Yes	Yes	No
Glassbox	Glassbox Platform	No	Yes	No
Quantum Metric	Quantum Metric Platform	Yes	Yes	No
UXPressia	UXPressia Platform	No	Yes	No

About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.