

Customer Journey Management Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY



***ISG** Research™



Customer Journey Management

Customer Journey Management (CJM) software is a component of broader experience management platforms that allows organizations to design the pathways that 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 having to wait for customers to decide to engage.

CJM software helps automate that process. It makes the reactive processes smoother and easier, and uses the information gathered about interaction context to provide context for agents, self-service systems and anyone else in the organization who faces the customer. CJM turns the passive act of responding to service calls into a deliberate, organized effort at optimizing customer experiences, and through that, relationships.

By 2027, one-third of enterprises will have developed initiatives to map and manage customer journeys by integrating sales, service and marketing processes. 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 communications happen through the contact center, it is in most enterprises' interest to carefully design inbound and outbound pathways that go further than just reacting to expressed customer desires. For a long time, organizations have wanted to be able to personalize interactions at scale, but the technology was not available able to make that easy. The technology landscape has changed significantly enough that orchestrating experiences is not only possible, but it should also be the next logical step in technology deployment and process design. Organizations now have access to tools, platforms and analytic capabilities that help them map customer journeys, integrate channels, personalize experiences and automate processes.

This report evaluates a set of software providers and products that support dedicated capabilities related to CJM, one of the five core areas that make up CXM suites. We took into consideration how products align processes across different departments; how software tracks customer information at different stages of the customer lifecycle, and who it provides

Customer Experience Management
Market Assertion

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Keith Dawson
Director of Research, Customer Experience

ISG Research



that information to; and how it tracks customer outcomes and helps users derive insights related to behavior, sentiment and revenue at different stages.

We also considered features related to orchestrating specific customer outcomes, including preference management, planning out proactive communications and preserving a 360-degree view of the customer throughout the journey. A separate Buyers Guide on Customer Experience Management and Knowledge Management are available to more specifically examine those software categories and requirements of enterprises.

To be included in this Buyers Guide, products must have included CJM capabilities as part of an overall CXM platform. This report evaluates the following software providers that offer products that deliver Customer Journey Management applications as we define them: Adobe, Emplifi, Freshworks, Genesys, NICE, Salesforce, Sprinklr, 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



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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.

This ISG Research Buyers Guide: 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 customer journey management 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 customer journey management 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 customer journey management 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 customer journey management 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 customer journey management 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 Verint and NICE. Companies that place in the top three of a category earn the designation of Leader. Salesforce has done so in all seven categories; Verint in five; NICE in five; Adobe in two; Zoho in one and Genesys 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.

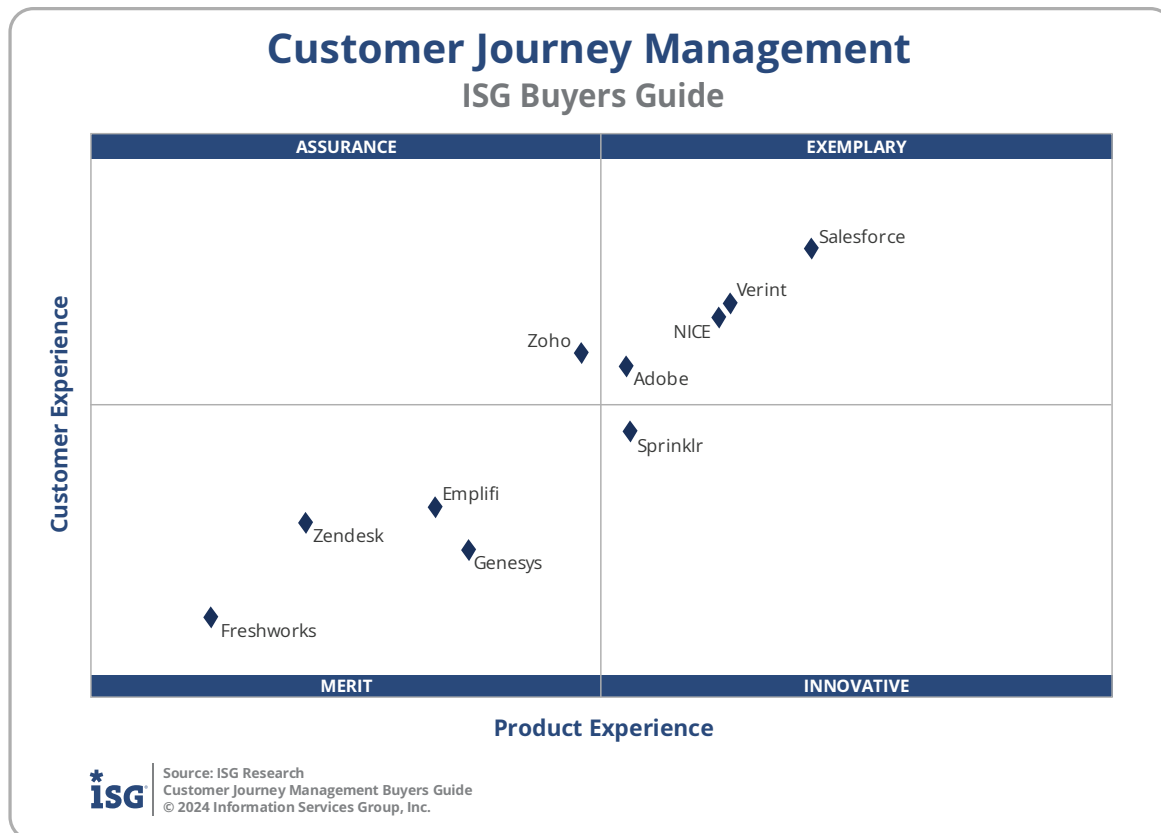
The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers’ overall weighted performance.

Customer Journey Management

Overall

Providers	Grade	Performance
Salesforce	A-	Leader 83.2%
Verint	B++	Leader 80.0%
NICE	B++	Leader 79.9%
Sprinklr	B++	76.3%
Zoho	B++	76.2%
Adobe	B+	74.5%
Emplifi	B+	72.0%
Genesys	B+	71.6%
Zendesk	B	67.5%
Freshworks	B	62.9%

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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, NICE, Salesforce and Verint.

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 provider rated Innovative is: Sprinklr.

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 provider rated Assurance is: Zoho.

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: Emplifi, Freshworks, Genesys and Zendesk.

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 customer journey management, 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, Verint and NICE were designated Product Experience Leaders.

Many enterprises will only evaluate capabilities for workers in IT or administration, but the research identified the criticality of Usability (10% weighting) across a broader set of usage personas that should participate in customer journey management.

Customer Journey Management Product Experience

Providers	Grade	Performance
Salesforce	A-	Leader 61.8%
Verint	B++	Leader 59.5%
NICE	B++	Leader 59.4%
Sprinklr	B++	57.8%
Adobe	B+	57.7%
Zoho	B+	56.8%
Genesys	B+	54.6%
Emplifi	B+	53.6%
Zendesk	B	50.0%
Freshworks	B-	48.3%

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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, Adobe and Verint. These category leaders best communicate commitment and dedication to customer needs. While not Leaders, Verint and NICE were also found to meet a broad range of enterprise customer experience requirements.

Some software providers we evaluated did not have sufficient information available through their website and presentations. While many have customer case studies to promote success, others lack depth in articulating their commitment to customer experience and an enterprise's customer journey management journey. As the commitment to a software provider is a continuous investment, the importance of supporting customer experience in a holistic evaluation should be included and not underestimated.

Customer Journey Management Customer Experience

Providers	Grade	Performance
Salesforce	A-	Leader 16.6%
Verint	B++	Leader 16.2%
NICE	B++	Leader 16.1%
Zoho	B++	15.9%
Adobe	B++	15.7%
Sprinklr	B++	15.2%
Emplifi	B+	14.3%
Zendesk	B+	14.1%
Genesys	B+	14.0%
Freshworks	B	13.2%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Research Customer Journey Management Buyers Guide for 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 18 months.

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 customer journey management 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 Journey Optimizer	n/a	June 2024
Emplifi	Emplifi CX Cloud	n/a	July 2024
Freshworks	Freshworks Freshmarketer	n/a	June 2024
Genesys	Genesys Cloud CX, Pointillist	n/a	June 2024
NICE	CXone	24.2	June 2024
Salesforce	Salesforce Marketing Cloud	Summer '24	June 2024
Sprinklr	Sprinklr Unified CXM Platform	19.5	May 2024
Verint	Verint Open Platform	24.4	April 2024
Zendesk	Zendesk Service	n/a	June 2024
Zoho	Zoho One	n/a	Feb 2024

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	>100 Customers	Complete CJM Coverage
ContentSquare	Customer Journey Analysis	Yes	Yes	No
Custelligence	Custelligence	Yes	Yes	No
UXPressia	UXPressia Enterprise	Yes	Yes	No
Medallia	Medallia Platform	Yes	Yes	No



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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