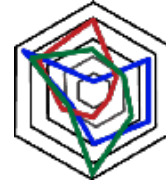
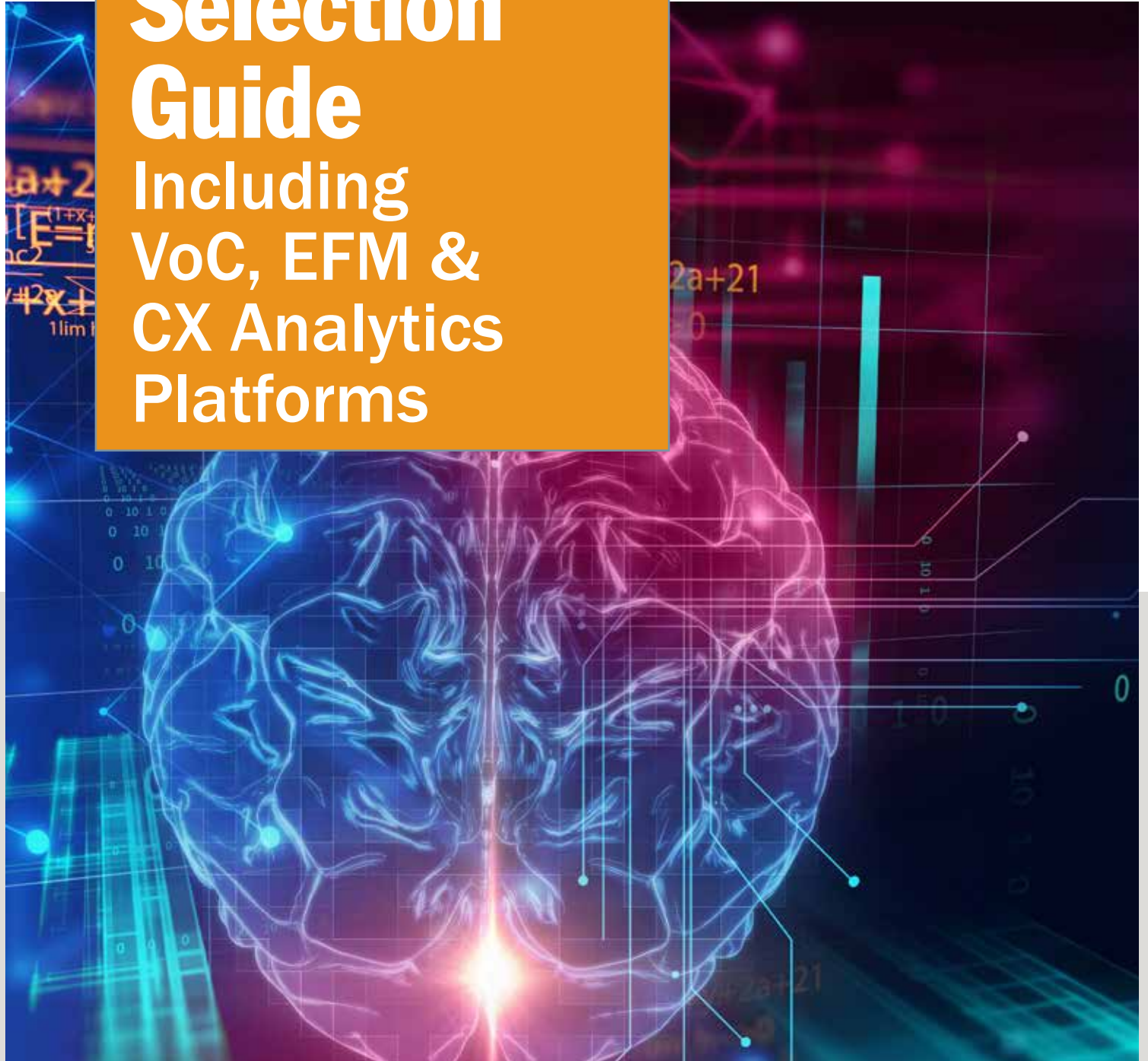


CX Technology Selection Guide

Including
VoC, EFM &
CX Analytics
Platforms



Customer Results
Results Matter



With technology platforms critical to **CX Success** and hundreds if not thousands of **CX platform** solutions in today's market this straightforward guide helps **CX leaders** select the right enhancements to your **CX Tech Stack**.



The Tech Enabled CX Operating Model is Essential to Business Results



TO DELIVER BUSINESS RESULTS AT TODAY'S SPEED OF BUSINESS REQUIRES TECHNOLOGY SUPPORT FOR YOUR CX OPERATING MODEL (CXOM)



No-one is arguing about the criticality of delivering the best, personalized, digital first but not digital only, multichannel customer experiences to achieve and sustain competitive business success.

And everyone agrees the need to activate a CX Operating Model (CXOM) combining Strategy, Customer Understanding, Interaction Channels and your Business Operating Model to put your Customers' (and Employees and Partners) Experiences at the center of your business.

Activating and operationalizing this CXOM at the speed and agility of today's business demands a layer of Technology supporting Experience Design, Execution and Measurement & Improvement. This is your CX Tech Stack comprising the elements of your Enterprise Architecture that support your CX functions and capabilities.

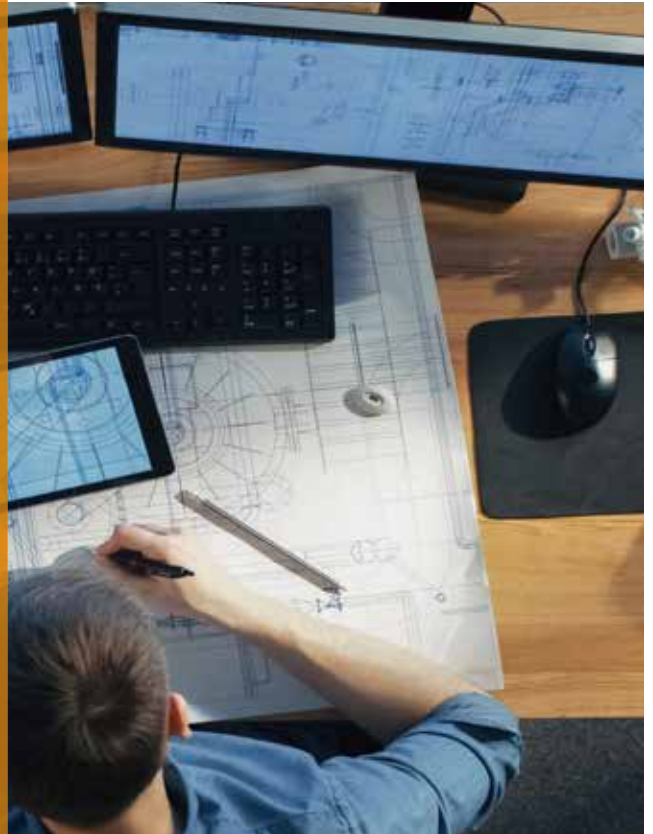
All enabled by a continuous Measure Everywhere, Act Anywhere Performance Management & Improvement System to stay ahead of ever changing Customer expectations.

Ensuring you have the right technologies in your CX Tech Stack means constantly reevaluating your technologies' ability to support your needs and considering emerging market solutions and capabilities.

As CX specialists we have customized the standard 'Tech Selection' process to focus on the evaluation and selection challenges for the CX professional.

Including the most popular CX technology selections underway of Voice of Customer (VoC) or Enterprise Feedback Management (EFM) and targeted CX Analytics, Visualization and Experience Orchestration tools.

The 3 Essential Layers of Your CX Tech Stack



YOUR CX TECH STACK COMPRISES THE TECHNOLOGIES THAT ENABLE & SUPPORT YOUR CUSTOMER EXPERIENCE INTERACTIONS

CX Design & Visualization

DESIGNING THE EXPERIENCE

The most immature of the three layers are the tools for Designing 'Digital First But Not Digital Only Multichannel Experiences' including creating Journey Maps, Persona, Audience, Segmentation & Personalization Models. Especially important and challenging is showing how these Designs map to your actual Business Operating Model elements (People, Process, Products, Partners, Technologies etc) and integrate with your Execution & Measurement Tech platforms.

CX Execution

DELIVERING EXPERIENCES FOR BUSINESS SUCCESS

CX success is all about actually Delivering or Executing Experiences. CX Execution is the most mature and robust CX Tech portfolio. Encompassing Digital Experience Platforms (DXP's), CRM, email, mail, print, mobile, contact center, social, chat, IM, branch, store, kiosks and ATM's, robotics, intelligent experiences, machine learning, VR/AR, IOT environmental sensing, API enabled experience ecosystems, middleware technologies and others.

CX Measurement & Improvement

MEASUREMENT FOR IMPROVEMENT

In today's Agile business world, constantly evolving customer expectations mean you need to continuously measure your customer experience across all channels driving both immediate responses to issues and systemic experience impacting improvement of your Operating Model. Voice of Customer (VoC), Voice of Partner (VoP), Voice of Employee (VoE) and Voice of Analytics (VoA), Customer Analytics, Insights and Enterprise Feedback Management (EFM) tools continue to evolve and improve every day with AI and Machine Learning adding even more energy to this tier.

Our Proven Process for Selecting The Right CX Technologies



6 Straightforward Steps To The Right CX Tech For Your Business

Activity	ACTIVITIES & WORK PRODUCTS	IN T
1. Review Business Case & Create Plan	1.1 Business Imperative, Drivers & Benefits of change 1.2 Cross organizational success criteria 1.3 Changes, risks and challenges	Define why and how this new technology or replacement of existing technology will deliver demonstrable business value including the measurable success criteria for the changes required and the risks and challenges expected.
2. Define High Level Requirements	2.1 Business Strategy, Customer Strategy & CX Strategy Impacts 2.2 Customers Impacted (Personas, Audiences, Segments & Journeys) 2.3 Experience Impacts (where Journeys meet Interaction Channels) 2.4 CX Operating Model impacts 2.5 CX Tech Stack, Enterprise Architecture & Data Impacts 2.6 Performance Requirements (Size & Scale) 2.7 Other Impacts (including other Business Imperatives)	Define the requirements in the context of the Customer Experience Operating Model components of Strategy, Customer Understanding, Interaction Channels, Business Operating Model (People, Process, Information, Tech, Partners, Products/ Services), CX Tech Stack and Measurement & Improvement Systems plus key related elements to effecting change such as performance and relationship to other enterprise initiatives
3. Scope Solution	3.1 Business KPI's 3.2 Functionality 3.3 Architectural & Data 3.4 Implementation, Support and Management 3.5 Investment Model 3.6 Supplier Preferences 3.7 Credentials	Scope the solution in terms of all the key requirements areas which must be met to define success including specific prioritized functionality, architectural compliance (including compatibility with enterprise standards and platform investments and security and privacy), Implementation and Support Requirements and Timelines and Investment Parameters (available budget, hurdle rates. Incremental, pay on completion models). Supplier preferences revealed or not to bidding providers and supplier credentials such as leaders, innovators and market players to be invited.
4 Define Selection	4.1 Clarify and agree scoring mechanism 4.2 Stakeholders and participants 4.3 Identify selection tools (Scout, Ariba etc) 4.4 Refine selection plan and milestones 4.5 Create internal and external selection Briefs, RFI's or RFP's	Ensure the selection process is well defined, well socialized and agreed including the scoring (which may require procurement and legal approval), stakeholders (representing decision makers and those impacted), key participants (core team and additional), the selection plan (including key participants at each stage and milestone) and creating and approving both internal (employee and leadership) and external (supplier and partner) briefs.
5. Conduct Selection	5.1 Identify and invite participant portfolio (traditional, leaders and innovators) 5.2 Issue brief 5.3 Collect responses 5.4 Iterate, score, prioritize and down select 5.5 Finalize (primary & secondary) 5.6 Contract	Activate a structured and controlled process to select the right technology and supplier from identifying the vendor portfolio, issuing the brief (or rfp), collecting responses (which may involve written submissions and oral presentations and then iteratively down-selecting and filtering and continuing to engage and score until the finalist is identified (We recommend a finalist and backup because as we have learned nothing is complete until the contract is finalized validating all the promises made and understanding gained during the selection cycle).
6. Implementation & value realization	6.1 Complete integration & implementation 6.2 Educate and steward the organization to use it effectively 6.3 Track value received 6.4 Decommission old replaced solutions 6.5 Celebrate completion	To quote one of our clients "you haven't done anything until you have implemented something and you haven't done that until you have stewarded it to realize the benefits you projected" and even more on point "if you are replacing something else then you need to switch that off to declare victory.

OUR CX TECHNOLOGY SOLUTION LANDSCAPE & MARKETPLACE PLAYBOOKS
RELATIONSHIPS WITH MANY OF THE LEADERS HELPS YOU GET THE BEST OUTCOME
 (THIS IS A SAMPLE SNAPSHOT)
 (BELOW IS A SAMPLE OF OUR MARKET LIST)

CX DESIGN & VISUALIZATION

PURPOSE & VALUE		ELEMENTS, FUNCTIONS & CAPABILITIES
Support the design of the 'digital first but not digital only, multichannel experience'. Today's leader and tomorrow's 'player' aspires to tools that support the design of multichannel experiences but also the ability to automatically visualize the experiences that are provided today and show how they link to the operating model.		The ability to assist with design of and visually represent customer audiences & personas, segments, journeys, experiences and how those experiences 'land' on business operating model organizations, processes, products/services, people, applications, infrastructure, technology, data, partnership ecosystems and metrics and measurement capabilities.
EXAMPLE SOLUTIONS		
Canvanizer	Cloud Cherry	CX Suite
Touchpoint Mapping	Uxpressa	Smaply

CX EXECUTION

PURPOSE & VALUE		ELEMENTS, FUNCTIONS & CAPABILITIES
Activate the customer experience both within and across interaction channels & touch-points.		The most robust of the customer experience technology portfolios spanning digital experiences (web and mobile and social), contact center, field support, store/branch and innovations like robotics & ai (e.g. chatbots & rpa) and environmental (iot & computer vision analytics and IOT), virtual & augmented reality (vr/ar) and journey experience orchestration.
EXAMPLE SOLUTIONS		
[24/7]AI	Acquia	Adobe
Alphabet / Google	Apple	Cisco
Diebold	Facebook	Genesys
Huawei	IBM	Infor
IPSoft	Kitewheel	Magento (now Adobe)
Marketo (now Adobe)	Microsoft	Mulesoft
Mulesoft	Nice Systems	Oracle
Salesforce	Samsung	Sitecore
Sprinklr	Thunderhead	Usermind

CX MEASUREMENT & IMPROVEMENT

PURPOSE & VALUE		ELEMENTS, FUNCTIONS & CAPABILITIES
"Measure Everywhere, Act Anywhere" and manage action to continuously improve the experience.		Including traditional Voice of the Customer (VoC) and Enterprise Feedback Management (EFM) capabilities but increasingly expanding to include Voice of Employee (VoE), Voice of Partner (VoP), Voice of Analytics (VoA), multichannel Measure Everywhere, Act Anywhere, Action Initiation Management & Tracking Capabilities and Artificial Intelligence and Machine Learning to drive deepest insights, most appropriate Next Best Action and beyond
EXAMPLE SOLUTIONS		
Adobe Analytics	Clarabridge	Clickagy
Cloudcherry	Confirmit	Encompass-CX
Foresee/Verint	Google Analytics	inQuba
Medallia	Pointillist	Qualtrics / SAP
Satmetrix / Nice	Stratifyd	Zacoustic

Where Our Clients Most Apply This Guide Today



4 CX TECH SCENARIOS WHERE OUR CLIENTS MOST APPLY THIS GUIDE

SELECTING VOICE OF CUSTOMER (VOC) AND ENTERPRISE FEEDBACK MANAGEMENT (EFM)

The basis for CX is Customer Understanding and a critical weapon in customer understanding is Listening or gaining the Voice of the Customer. But not just Listening to Customers but acting on feedback from all stakeholders through a closed loop Enterprise Feedback Management platform (EFM). VoC and EFM platforms are diverse and their numbers are growing and the differences between vendors are often hard to determine but picking the right solution (and the right implementation and even ongoing services partner) is critical to business success.

SELECTING DIGITAL EXPERIENCE, CONTACT CENTER AND OTHER CX EXECUTION TECHNOLOGIES

The most populated layer of the CX technology stack is the digital, contact center, store, field, mobile etc platforms that actually deliver your experiences to the customer or at least to the employees and partners that deliver it to the customer. These platforms are constantly evolving and new innovations constantly arriving for your consideration.

SELECTING EXPERIENCE DESIGN & VISUALIZATION TECHNOLOGIES

Sophisticated and powerful Experience Design solutions are the most difficult to find (Microsoft Visio, Excel and Powerpoint still dominate) but this is an area the entire CX community is longing to see evolve and new solutions are arriving and major players are evolving theirs. Picking the right tools that meet your requirements, are appropriately priced now and for the long term and are compliant with other elements of your technology environment is crucial

EXPERIENCE TECHNOLOGY INNOVATIONS ESPECIALLY CX ANALYTICS, AI & ROBOTICS

Technology and Innovation go hand in hand. Whether it is Artificial Intelligence, Chatbots, Robotics, Augmented & Virtual Reality, Blockchain, Machine Learning or Environmental Sensing successful companies need to constantly explore and utilize new technologies in order to stay ahead of competitors. Specifically we see an explosion underway in CX Analytics and AI and Machine Learning Application to CX.

Why Our Clients Ask Us To Help ?



OUR CLIENTS ASK US TO HELP FOR SPECIFIC REASONS

“It’s so confusing. There are too many technology options! How do I assess them and select the right ones for me?”

The number 1 reason people call us. We know the feeling. In Nov 2018 Gartner identified ‘1000 technology companies with a CX / VoC message’ and that number continues to grow. The CX Tech Stack is a model and tool designed to help you think through what you need, identify and evaluate specific options and strategies and our Selection Guide applies that to help you navigate your way through the options. We don’t know all the players but we know many or even most of them so we can help you do the right thing.

“Everyone here has their favorite, we need some independence”

This is the number 2 reason to engage us. For many years executives and procurement organizations have advised (and often mandated) that there is a knowledgeable and hopefully independent third party involved in major technology selections. Strong political constituencies permeate business, IT and other stakeholders. Especially when a major innovation is being considered a strong independent voice with less inclination to political bias and maintaining a firm view on the reasons for success is critical.

“We just need a little guidance along the way”

Even when an organization does not want someone embedded in or running the selection process they often want an occasional clinic or checkpoint audit of where they are or the work products being produced and often to sit in on the vendor presentations and help translate the ‘sales speak’ to reality (and even ask a really hard question once or twice). We are here for you.

“We need to use your proven tools”

Over the years we have developed spreadsheets and other tools to assist with the selection process. We provide those tools to clients we work with.

“THE BUSINESS IMPACT IS HUGE AND WE AREN'T GOING TO DO THIS SELECTION AGAIN ANYTIME SOON SO WE SPENT A LITTLE EXTRA TO PUT THE RIGHT TEAM ON IT TO GET IT RIGHT THE FIRST TIME” VP CX \$1.5B INSURANCE PROVIDER



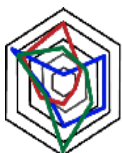
**The Right CX
Technology
Components in
your CX Tech
Stack will help
deliver Experience
Excellence and
Business Results**

“It Starts With Our Name ‘Customer Results’.

**You Can Be Assured You Can Trust Us To Help You
Deliver The Best CX Driven Business Results & The Best
Digital First But Not Digital Only Multichannel Customer
Experiences & CX Capabilities”**

GRAHAM CLARK

FOUNDER, CUSTOMER EXPERIENCE & DIGITAL TRANSFORMATION LEADER



Customer Results
Results Matter

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