

How To Choose The Right Tech For Your CX Needs

Navigating The Customer Journey And Martech Landscape

by Rusty Warner and Joana de Quintanilha

June 29, 2021 | Updated: July 7, 2021

Why Read This Report

Customer-obsessed firms must break down organizational silos to focus on the needs of their customers. But disparate and overlapping technology investments severely hamper their collaboration efforts. It is critical to understand when and why to implement various technologies as components of the enterprise customer experience (CX) ecosystem. This report explains the business rationale associated with four different solutions: customer journey orchestration (CJO), real-time interaction management (RTIM), cross-channel campaign management (CCCM), and customer data platforms (CDPs).

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Functional Overlaps Complicate Technology Investment Decisions

There are many functional overlaps in customer journey orchestration (CJO), real-time interaction management (RTIM), cross-channel campaign management (CCCM), and customer data platforms (CDPs) (see Figure 1). At a high level, all provide customer data management and analytics capabilities plus workflows to enable organizations to leverage those insights to optimize customer engagement and CX delivery. But dig a little deeper, and you'll find differences in the way these technology solutions address business needs (see Figure 2):

- **Customer-centric teams invest in CJO to discover, optimize, and orchestrate journeys.** CJO platforms help firms use real-time data at the individual customer level to analyze current behavior (discovery) and predict and adjust future behavior in the moment (decisioning). These tools provide an integrated, actionable, and real-time view of the customer across marketing, product, and customer service journeys. CJO uses time-series or path analysis to visualize moments of truth, bright spots, and friction points in one or more journeys from the customer's perspective (journey discovery). It connects individual or groups of journeys to CX (e.g., Net Promoter ScoreSM [NPS]), employee experience (EX) (e.g., productivity), operational (e.g., cost of the journey), and business (e.g., customer lifetime value [CLV]) outcomes to help companies prioritize where to invest resources to improve key customer and employee journeys. Journey mapping and journey analytics tools complement CJO.

CJO vendors tend to be relatively small, and quite often they go to market via CX consultancies, agencies, or services partners. They sell across verticals, but we see them most often in financial-services, telecoms, utilities, online gaming, media and entertainment, travel and leisure, retail and e-commerce, consumer goods (especially for direct-to-consumer brands), and the automotive sector. Sample CJO vendors include Alterian, Kitewheel, Pointillist, Thunderhead, and Usermind.

- **Technology teams implement RTIM to address customer-facing business needs.** RTIM delivers contextually relevant experiences, value, and utility at the appropriate moment in the customer lifecycle via preferred customer touchpoints. Like CJO, RTIM tools embrace the concept

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of the customer journey, but they do not offer the same journey visualization or ease-of-use as the CJO vendors, since they focus on more technical users. They also integrate deeply into an organization's technology ecosystem, and they require considerable IT involvement.

RTIM implementations often grow out of customer relationship management (CRM) environments and involve custom integrations with applications for human-assisted channels. RTIM solutions also have a strong foundation in enterprise customer data management, real-time streaming data ingestion, and advanced analytics, including machine learning and AI to support a wide range of custom analytical models. RTIM addresses the needs of the largest organizations across sectors, especially financial services and telecommunications. Sample RTIM vendors include FICO, Pegasystems, Precisely, SAS, and Teradata.

- **Marketers rely on CCCM to power digital engagement.** CCCM provides customer data management, analytics, segmentation, and workflow tools for designing, executing, and measuring digital marketing campaigns. Though typically associated with outbound channels like email and mobile messaging, CCCM can also manage personalization for inbound channels like mobile app, e-commerce, and web. Some CCCM tools further support print (direct mail) campaigns and make campaign information available to human-assisted channels for presentation to customers.

CCCM is industry agnostic, and organizations in all sectors leverage it for their marketing needs. Many CCCM vendors go to market with CX or CJO messaging, but in most cases, they offer only marketing automation workflows. CCCM typically complements CJO or RTIM solutions to manage marketing orchestration. Sample CCCM vendors include enterprise marketing software suite (EMSS) players like Adobe, Oracle, Salesforce, SAP, and SAS, as well as myriad independent platform vendors and regional or vertical-specific solutions.

- **Marketers fill data management and analytics gaps with CDPs.** CDPs ingest customer data and provide tools for analysis, segmentation, and activation. Many CDPs provide workflows on top of the data layer, primarily focused on marketing and personalization use cases. As a result, many CDP vendors compete as CCCM vendors, and most CCCM vendors offer CDP capabilities. CJO vendors build their solutions on top of existing CDP environments — possibly multiple CDPs, depending on the environment — and then they add their own ingestion capabilities based on behavioral data and journey analytics. RTIM vendors ingest data from multiple CDPs to inform their decision engines.

CDPs help solve a long-standing problem for marketers: effective customer data management, commonly called the 360-degree view of the customer or single version of the truth. In reality, no single tool can deliver on that promise, but CDPs can certainly help. That's why Adobe, Oracle, Salesforce, and SAP are all building their CDP strategies, and it's behind a recent spate of acquisitions in the CDP space (Bloomreach/Exponea, Upland/BlueVenn, Sitecore/Boxever, Episerver/Zaius, Twilio/Segment, etc.). Other CDP vendors include mParticle, NGDATA, Redpoint Global, and Treasure Data.

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FIGURE 1 Functional Overlaps In CJO, RTIM, CCCM, And CDPs

	CJO	RTIM	CCCM	CDP
Enable a cross-functional view of customers	●	●	●	●
Empower users with access to customer data	●	●	●	●
Address data quality and governance	●	●	●	●
Facilitate customer profiles and analytics	●	●	●	●
Include predictive analytics, ML, and AI	●	●	●	●
Ingest digital intelligence data	●	●	●	●
Personalize customer experiences	●	●	●	●
Trigger responses to customer behavior	●	●	●	●
Align actions with outcomes and KPIs	●	●	●	●
Provide journey discovery and mapping	●			
Power journey testing and optimization	●	●		
Automate journey orchestration	●	●		
Determine next best experience	●	●		
Manage and curate business rules	●	●		

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FIGURE 2 Business Requirement Differences In CJO, RTIM, CCCM, And CDPs

	CJO	RTIM	CCCM	CDP
CX goals	Multiple objectives for complex journeys across all verticals	Complex marketing, sales, and service objectives for large banks, insurance, and telecommunications firms	Marketing objectives for acquisition, conversion, retention, loyalty, etc., across all verticals (complementary to CJO and RTIM)	Marketing objectives for uplift via event- or behavior-triggered responses and personalization across all verticals (complementary to CJO and RTIM)
Action taken	Customer-led action, continuous real-time listening and adjusting, lifecycle, and journey discovery	Real-time response and two-way dialogue during interaction, re-arbitration of offers, and adjustment to journey and subsequent offers	High-volume outbound digital marketing communications, with audience building and activation	Real-time data capture to trigger actions in other systems — typically outbound digital (email and mobile) or inbound digital (web and e-commerce)
CX context	Time-series analysis, path, persistent moments of truth, longitudinal journeys, and next best experience	Next best experience in the context of larger journey, customer outcomes, and business impact	Personalized offers or recommendations across marketing channels	Personalized offers or recommendations across marketing channels using CCCM for delivery
Level of focus	Individual journey discovery and individualization	Individual analysis and personalized offers, with rules for segments and audiences	Segment and audience-based with marketing-focused personalization for individuals	Segment and audience-based with marketing-focused personalization and triggered responses for individuals

Note: Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld

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FIGURE 2 Business Requirement Differences In CJO, RTIM, CCCM, And CDPs (Cont.)

	CJO	RTIM	CCCM	CDP
Type of analysis	Journeys (past, present, future steps), emotion, and rules-based decisioning with analytical inputs	Individual customer intent, needs, outcomes, and value via sophisticated predictive analytics, machine learning (ML), and AI with complex business rules	Audiences and funnels with predictive analytics and ML for propensity, personalization, optimization, and attribution	Analysis and triggers based on events and behavior with predictive analytics and ML for propensity, personalization, optimization, and attribution
Measurement	Journey completion, issue resolution, CLV, Net Promoter Score SM (NPS), churn, revenue, etc.	Revenue, profitability, customer outcomes, ROI, CLV, NPS, etc.	Clicks, opens, conversions, CLV, revenue, ROMI, etc.	Marketing metric uplift, revenue uplift, ROMI, etc.

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Implementation And Time-To-Value Differ Significantly Across Tools

There are multiple differences across CJO, RTIM, CCCM, and CDP tools when it comes to implementation, user profiles, and time-to-value (see Figure 3). Reference customers for these four tools report different environmental specifications, vendor selection criteria, and functional use cases (see Figure 4). When reviewing your needs and investment options, consider how you will deploy the solution for your initial use cases and how this will evolve and scale over time (see Figure 5). Before you embark, define how you will measure success and determine return on investment (ROI) goals aligned with your business objectives and your chosen technology capabilities (see Figure 6):

- **CJO can be deployed tactically on microjourneys and for journey management at scale.**

CJO is typically deployed on a use-case-by-use-case approach. Companies invest in CJO to optimize key moments of truth in a journey by leveraging historical context and real-time activity and quickly prove the value of journey orchestration. Microjourney orchestration use cases include preventing drop-off in key moments to reduce churn and improve conversion or reducing the cost of the journey by monitoring and guiding channel switch. Over time, companies add more channels, touchpoints, and journeys. Advanced use cases tackle complex, multistep journeys, like onboarding, that have a variety of objectives that play out over time. More advanced CJO also connects sequential, parallel journeys to help firms prioritize micro- and macrojourneys and drive improvements to profitability, operational efficiency, and loyalty (see Figure 7).

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- **RTIM is a complex next-best-experience solution for enterprises.** RTIM solutions are typically present in the largest and most scalable enterprise environments. They offer significant return on investment (ROI) opportunities, but they require complex, multiyear implementations embedded in enterprise data and digital transformation strategies. RTIM capabilities extend beyond marketing to include contact centers and agent-assisted or self-service channels for sales, services, and operations. RTIM integrates with CCCM tools for digital channels, so firms commonly implement RTIM for real-time decisions plus CCCM for channel orchestration. RTIM vendors also offer their own CDP capabilities and build rich customer profiles based on multiple data sources, often connecting to specialist CDPs like Celebrus or Tealium (see Figure 8).
- **CCCM focuses primarily on digital marketing communications.** Today's CCCM solutions are an amalgamation of former CRM and database marketing tools, marketing automation workflows, and a diverse range of channel-specific delivery capabilities. With its focus on ensuring consistent cross-channel engagement, CCCM is a critical component of any martech ecosystem. But on its own, CCCM is not a complete CX solution because it focuses primarily on marketing use cases versus the full gambit of customer touchpoints. CCCM, integrated with channel-specific delivery tools, typically manages "the last mile" of offer orchestration. CJO and RTIM solutions leverage CCCM when a marketing offer is the recommended next best experience in a customer journey (see Figure 9).
- **CDPs provide marketers with actionable insights.** Understanding customer behavior is a core marketing responsibility, and it hinges on reliable technology investments for customer data management and customer analytics. Marketers have struggled with data and analytics requirements for decades, and CDPs are the latest in a long succession of potential solution alternatives. As noted, RTIM and CCCM solutions embed CDP capabilities, and CJO solutions append journey analytics data to customer profiles typically managed via CDPs. A firm's particular requirements might dictate a best-of-breed CDP as a complementary investment to its martech ecosystem. Many CDPs offer basic marketing automation workflows, especially for behavior- or event-triggered actions. As CJO, RTIM, CCCM, and CDP solutions may all coexist, it is critical to define decision-making workflows and arbitration rules across platforms (see Figure 10).

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FIGURE 3 Implementation Differences In CJO, RTIM, CCCM, And CDPs

	CJO	RTIM	CCCM	CDP
Business implementation	Marketing and CX	Marketing and CX	Marketing	Marketing
Technical implementation	Implementation, operations, and integration experts	Enterprise architects, data scientists, plus implementation, operations, and integration experts	Implementation, operations, and integration experts	Data scientists plus implementation, operations, and integration experts
External support	Agencies	Systems integrators	Agencies and marketing services providers	Systems integrators and marketing services providers
Users	Business users from marketing and CX	Tech-savvy business analysts and data scientists, but end users are sales, service, and marketing staff	Digital marketers and marketing managers	Marketing analysts with data/technology skills
Time-to-value	1 to 12 months	3 to 18 months	2 to 12 months	3 to 12 months
• First use case	• 1 to 3 months	• 3 to 6 months	• 2 to 3 months	• 3 to 4 months
• Average	• 3 to 6 months	• 6 to 9 months	• 3 to 6 months	• 4 to 6 months
• Complex	• 6 to 12 months	• 12 to 18 months	• 6 to 12 months	• 6 to 12 months

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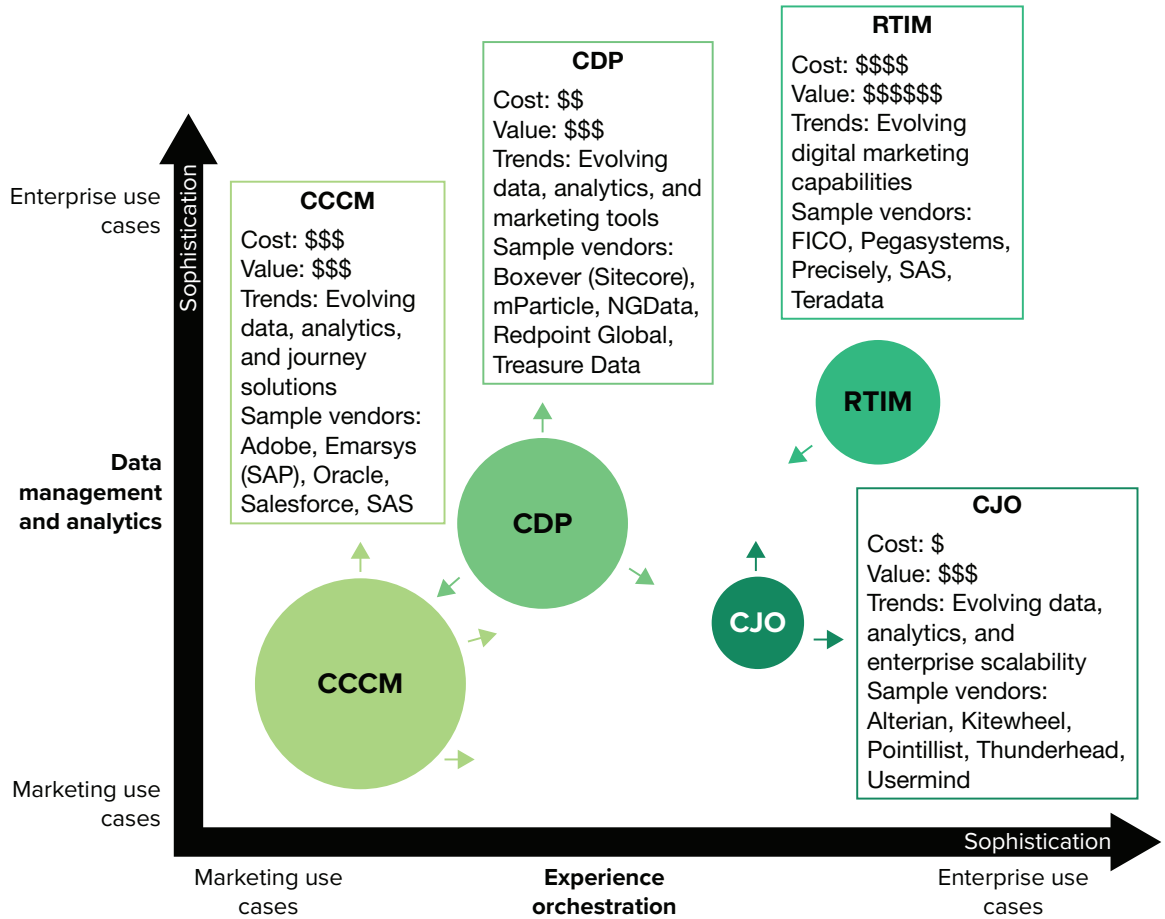
FIGURE 4 Typical Environments For CJO, RTIM, CCCM, And CDPs

Average metrics	CJO	RTIM	CCCM	CDP
Customer profiles	12 million	69 million	24 million	9 million
Annual interaction volume	10 million to 1 billion	50 million to 500 billion	10 million to 10 billion	50 million to 10 billion
Users of the solution	24	240	24	24
Current channels	4	9	3	5
Channels to add in 2 years	6	5	2	4
Tenure with provider	2 years or more	5 years or more	3 years or more	1 year or more
Requirements	CJO	RTIM	CCCM	CDP
Top 3 vendor selection criteria	<ol style="list-style-type: none"> 1. Ability to manage interactions across multiple channels 2. Ease of integration with other data sources and systems 3. Rapid product iteration/new features or functionality 	<ol style="list-style-type: none"> 1. Ability to service business needs 2. Ability to manage interactions across multiple channels 3. Ease of integration with other data sources and systems 	<ol style="list-style-type: none"> 1. Ability to service business needs 2. Standard features and functionality 3. Ability to manage interactions across multiple channels and total cost of ownership 	<ol style="list-style-type: none"> 1. Ease of integration with other data sources and systems 2. Ability to manage interactions across multiple channels 3. Standard features and functionality, user experience, and ability to service business needs
Top 5 use cases	<ol style="list-style-type: none"> 1. Customer experience management 2. Decision or offer management 3. Next best action or offer 4. Web personalization 5. Digital intelligence or web analytics 	<ol style="list-style-type: none"> 1. Decision or offer management 2. Next best action or offer 3. Enterprise or digital marketing 4. Web personalization 5. Customer analytics or profiles 	<ol style="list-style-type: none"> 1. Customer experience management 2. Enterprise or digital marketing 3. Customer analytics or profiles 4. Web personalization 5. Digital intelligence or web analytics 	<ol style="list-style-type: none"> 1. Customer analytics or profiles 2. Decision or offer management 3. Next best action or offer 4. Customer experience management 5. Web personalization

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FIGURE 5 Investment Considerations For CJO, RTIM, CCCM, And CDPs

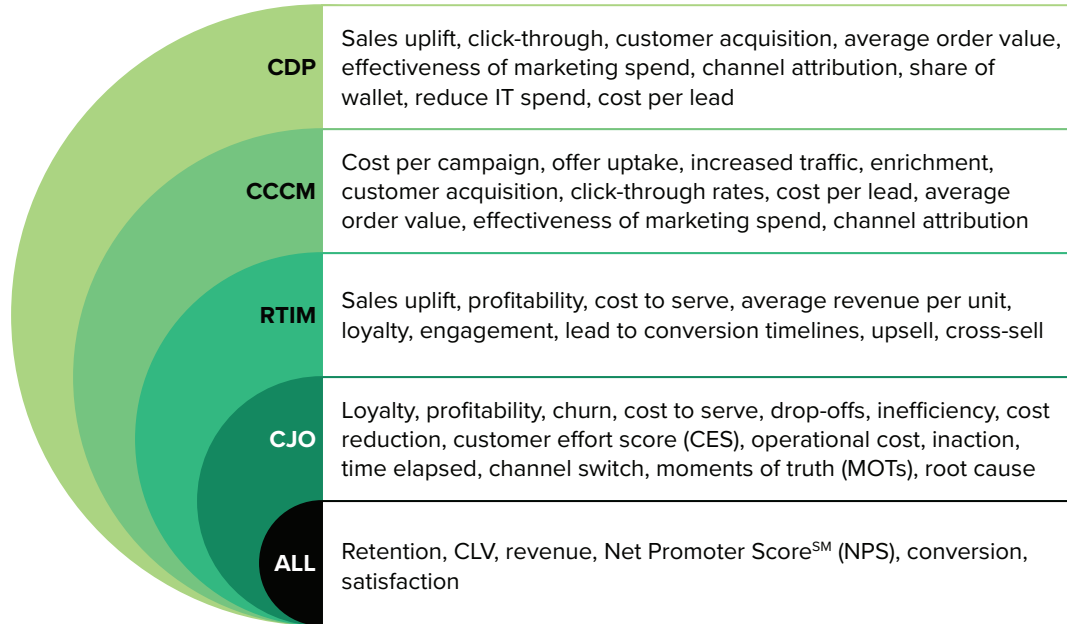


Size of bubble = scale in terms of market size

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FIGURE 6 Measuring CJO, RTIM, CCCM, And CDP Implementations

6-1 Success metrics for CJO, RTIM, CCCM, and CDP implementations



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FIGURE 6 Measuring CJO, RTIM, CCCM, And CDP Implementations (Cont.)**6-2 Example ROI figures for CJO and RTIM implementations**

CJO	RTIM
ROI of 268% and net present value of \$18.58 million over three years	ROI of 489% and net present value of \$150 million over three years
Increased sales from targeted coaching \$11.6 million	Incremental revenue growth of \$107 million per year in profit loss avoided through increased retention
Increased productivity of call agent managers \$5.1 million	\$677 million revenue growth over three years based on sales uplift
Reduced cost of agent training through reduction in attrition \$3.3 million	\$578 million revenue retention over three years based on churn reduction, upsell, and cross-sell
Value of customers retained through predictive churn analysis \$5.0 million	3x reduction in product offers but 300% increase in successful applications, which is part of \$30 million annual P&L uplift
Increased net revenue due to improved fraud detection \$422,800	\$23.6 million annual profit increase based on increased offer presentation and conversion rates
Improved agent productivity \$93,300	\$50 million in revenue retention based on agent compliance with offer eligibility and validity

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FIGURE 7 Customer Samples For CJO

Vertical	Tenure	Use cases	Environment	Measurement
Automotive	Two years	Personalized content and triggered email, web, media optimization, and CRM (for scheduling test drives with appropriate dealerships)	Identity resolution from online and offline interaction data applied to audience development and media optimization	Short-term and long-term journey analytics and attribution metrics; mostly focused on cost per lead, conversion, and media spend optimization
Gaming	Two years	Real-time triggered messages for individual players via email, SMS, and push messaging	Capture interaction data in CJO and feed Salesforce for marketing, Microsoft for CRM, and Adobe for analytics and advertising	Metrics based on 7-, 14-, and 30-day activity and uplifts plus daily active player statistics
Insurance	Two years	Leads for agents based on website behavior; plan to add email and SMS (within one year) and contact centers and advertising (within two years)	Web connected to agents via Salesforce CRM to capture anonymous prospects; also supports agent recruitment and operations	Focus on leads and agent productivity today but want to shift focus to CX and CLC metrics
Retail (grocery)	Two years	Email and SMS to follow-up web interactions and e-commerce or in-store transactions; plan to add contact center, mobile app, and social advertising (within one year)	Data science sits in source systems and feeds into CJO as intelligent middleware for rules-based decisioning	Based on metrics for 60 million customers with a hold-out group to look at customer behavior and successful journeys
Utilities	Three years	Lifecycle optimization and triggered campaigns to support sales; personalized content based on behavior via email and agents; working on web portal and mobile app	Cross-functional consistency for marketing and sales via connected data warehouse, interaction data, and CRM	Next-best-action metrics plus cost savings from ensuring that agents do not downsell offers
Utilities	Three years	Leads based on interaction data from social media, web, and e-commerce; plan to add email and SMS (within one year) and contact centers and agents (within two years)	80% to 90% of customer contacts are anonymous, so used for prospecting and lead management	Metrics focused on lead generation, management, and conversion

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FIGURE 8 Customer Samples For RTIM

Vertical	Tenure	Use cases	Environment	Measurement
Automotive	10 years	Real-time decisions for email, web, chatbots, contact centers, service centers, and connected devices	Decision engine is connected to sales, service, and marketing tools (CCCM is with Adobe); strategic project with continuing enterprise investments	Marketing and services metrics, plus ARPU and long-term Net Promoter Score SM (NPS); ~\$100s of millions in ROI
Banking	Five years	Real-time interactions via email, SMS, mobile app, push messaging, web, contact centers, financial advisors, and triggered print	Part of digital transformation across all European countries, with good progress in five countries	Metrics based on uplift for each channel, plus work in progress on enterprise NPS and CX metrics
Banking	12 years	Marketing and CX via 25 channels, including outbound digital (email, SMS, push), inbound digital self-service (web, mobile app), human-assisted (contact center, bank branches, and financial advisors), and internal staff (product and service development teams)	Extensive integration with enterprise architecture and customer data management, CRM and operational systems, digital marketing, and channel delivery capabilities	Metrics based on revenue uplift, as well as CX metrics; ~\$500 million in overall commercial value, ~7x uplift in digital lending applications, and ~40% of current sales attributed to solution
Telecoms	Four years	Customer interactions via SMS, mobile app, push messaging, and email; plan to add web, digital advertising, contact centers, sales agents, and IoT	Deeply embedded in enterprise data and analytics environment, with a billion interactions annually across 100 million customers	Metrics based on uplift for marketing and sales conversions, plus customer satisfaction metrics

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FIGURE 8 Customer Samples For RTIM (Cont.)

Vertical	Tenure	Use cases	Environment	Measurement
Telecoms	Three years	Real-time offers for email, SMS, web, mobile app, contact centers, interactive voice response (IVR), and retail stores	Real-time data from networks, billing, CRM, data warehouse, and data lake; connected to Adobe to deliver always-on marketing	~\$500 million top-line benefit, dramatic NPS increases, and major efficiency gains
Telecoms	Five years	Real-time offers for contact centers, IVR, retail stores, web, email, and SMS	Started in customer service but now used for revenue generation; over 4,000 agents and over 600 treatments	Moved from churn to NPS to customer outcomes with offer and promotion budgets for individuals; ~\$100s of millions in ROI

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FIGURE 9 Customer Samples For CCCM

Vertical	Tenure	Use cases	Environment	Measurement
Banking	Four years	Overnight selection among 40 offers as leads for financial advisors and among five offers for mobile app users; looking at triggered email and SMS	Solution chosen for marketing campaigns, then developed a custom solution using the bank's own cloud environment for interaction management	Metrics based on Net Promoter Score SM (NPS) calculated in CRM systems
Consumer goods	Three years	Email campaigns triggered by web behavior	Integrated with mobile solution and with additional web and analytics products from CCCM vendor	Email metrics for opens, clicks, and conversions
Consumer goods	Two years	Personalized web and e-commerce offers, triggered emails, and custom audiences for social media advertising	Customer profiles, analytics, and marketing workflows for audiences, segmentation, personalization, testing, and optimization	Marketing and e-commerce metrics for conversions
Consumer goods	Four years	Personalized offers via web, e-commerce, email, SMS, mobile app, and push messaging; plan to add digital advertising	Customer profiles and analytics to support personalized product offers and recommendations	Marketing and e-commerce metrics for conversions and revenue uplift
Media and entertainment	Three years	Scheduled email campaigns; looking at triggered email and SMS	Looking at how to connect CCCM solution to existing CDP solution for more real-time, data-driven engagement	Email metrics for opens, clicks, and conversions
Media and entertainment	Four years	Personalized emails triggered on ticket sales for physical and virtual events plus transactions and subscriptions for streaming media purchases	Customer profiles and segmentation to support follow-up engagements, upsell, and cross-sell	Marketing metrics for opens, clicks, and conversions

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FIGURE 10 Customer Samples For CDP

Vertical	Tenure	Use cases	Environment	Measurement
Banking	Two years	Personalized web content and triggered emails; plan to add mobile app and push messaging	Audiences, segmentation, and personalization based on interaction data ingestion and connection to data warehouse	Conversion metrics and cost savings by encouraging customers to use lower cost digital channels
Consumer goods	Two years	Audience activation and triggered campaigns for email, SMS, web (Adobe), DMP (Salesforce), and e-commerce (SAP)	Codeveloped active data layer with vendor, using Mulesoft for integration layer (direct connection to Adobe for web channel); six markets live, but 14 have loaded data and are WIP	Metrics based on forecast and conversion data
E-commerce	One year	Primarily paid media optimization and attribution, connected to marketing and CRM for data ingestion	Solution connects CDP to Hubspot for email, Salesforce for sales and service, Adobe and Google for web, Facebook and Google for digital advertising	Metrics based on marketing and advertising responses and conversions
Gaming	One year	Personalized email and web for individual gamer recommendations; plan to add retail stores, mobile app, and push messaging	Data integration to support audiences, segmentation, personalization, testing, and optimization	Uplift metrics (small percentages applied to huge revenue figures)
Retail	One year	Audience activation for email (Oracle Responsys), Facebook, and Google; some triggered email and plan to add SMS	Live in eight weeks from vendor selection, so good time-to-value in terms of marketing use cases	Metrics based on email responses and conversions plus media touches using built-in attribution reporting
Utilities	Two years	Personalized content via web and mobile app, triggered email messages, and contact centers; plan to connect app used by service engineers	Marketing, sales, and service integration for cross-channel consistency	Metrics mostly based on engagement and conversion but some Net Promoter Score SM (NPS) metrics on services side

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Companies We Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

Adobe

FICO

Alterian

Kitewheel

Cisco (IMImobile)

NGDATA

EVAM

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