

CASE STUDY

Customer Journey Orchestration Readiness



AT A GLANCE

Challenges

- Vendor's cutting edge Customer Engagement thought-leadership created a new niche for Customer Experience (CX) tools
- CX practitioners existing and accepted means of measuring customer engagement value had not caught up to the vendor's value message
- Bridging the two required advisory and translation skills to facilitate awareness within and between the vendor and the rest of the market

Benefits

- Ability to understand and act on any gaps between the vendor's vision and the market
- Awareness and alignment within leadership of proactive next steps
- Tool to bring to analyst conversations in their shared effort to educate the market

OBJECTIVES

A leading Customer Engagement and Journey Orchestration (JO) SaaS vendor had pioneered the creation of the JO market and fostered its growth through their market-leading vision of customer-centric connected experiences. This vision called for key changes in how companies were thinking, operating and measuring engagement.

Since its inception, the vendor had helped lead analyst firms into the JO market and provided much of the backdrop in their pursuit of rationalizing and driving awareness. Furthermore, the vendor's vision was represented by a new set of terminology and underlying concepts critical to achieving customer-centric connected experiences. This lexicon was often misinterpreted, misused and misapplied.

SOLUTION

I began by outlining the vendor's main JO concepts and terms. I then provided an assessment of where a majority of the market was in their thinking within each concept, thus forming the gap in between needing to be bridged. For example, orchestrating different messages or offers across different channels at one time is multi-channel orchestration whereas omni-channel orchestration delivered by the vendor is the same message delivered anywhere the customer is in real-time. While there are considerations and benefits to both approaches, it is important to understand how they're different.

I developed a JO Readiness tool using the terminology and concept maps with translation steps between the more common B2B mindset and the pioneering vision of the vendor. The steps provided evolutionary pathways the vendor used to educate and enable brands on how to intentionally move from their current thinking and methods toward more effective and transformative customer engagement.

BENEFITS

Gap Analysis

Drove internal awareness and an awakening of the gap between the vision terminology and the market's place in adopting, from which came acceptance of various bridging steps needed.

Leadership Alignment

Demonstrating through visuals with corresponding evolutionary terminology allowed leadership to acknowledge and align on a true market pulse and where enlightenment was still needed.

Analyst Guidance

New thought-leadership tool brought into analyst conversations with tangible action steps being taken to help move brands along in customer-centric engagement pursuits.