

The Aragon Research Tech Spectrum™ for Customer Journey Mapping, 2019

Reaching for Exceptional Customer Engagement in the Digital Age

January 16th, 2019 | Research Note 2019-1

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Summary


Customer journey mapping (CJM) technologies are exploding in numbers and in influence for designing and implementing a better customer experience for customers, employees, and partners alike. CJM technologies capture the voice and behaviors of customers to improve the real-time experience customers have—and hopefully enjoy. We evaluate 27 key providers who are leading the charge in the CJM market.

Introduction

Traditionally, organizations have tried to improve customer experiences by adding more channels, moving the experience to mobile devices, and improving the user interface. While these are still strategic moves, creating an engaging customer experience requires more. Customer journey mapping enables enterprises to evaluate the real-time customer journey and take an outside-in approach to create a transformed journey that yields a better experience.

Topic: Customer Journey Mapping

Issue: Who are the vendors battling to lead the customer journey mapping revolution?



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Different Approaches to Support Better Customer Experiences

There are a number of approaches to improve and even revolutionize the customer experience. One approach is to leverage personas, or types of people, involved with reaching customer outcomes. This approach takes the goals, needs, and desires of a particular group of people and represents their existing or future experiences and implements them. Often these end up as specialized work places or work benches that take a specific persona’s viewpoint to heart. In some cases, the end result is an experience that converges multiple personas and their journeys in one work place.

Another approach is to create a map of the actual customer experience by collecting data of the experience and showing that data in a visual representation. The data can then be analyzed in ways that seek to improve the existing customer experience. This is a true data-driven approach. Finally, a third approach is to map a future journey, which can then be shared and collaborated on by many parties in many locations.

While several combinations of these three approaches exist, Aragon believes that all three need to be present to design the best experience. See Figure 1 below for a representation of these three approaches and the data that they leverage.

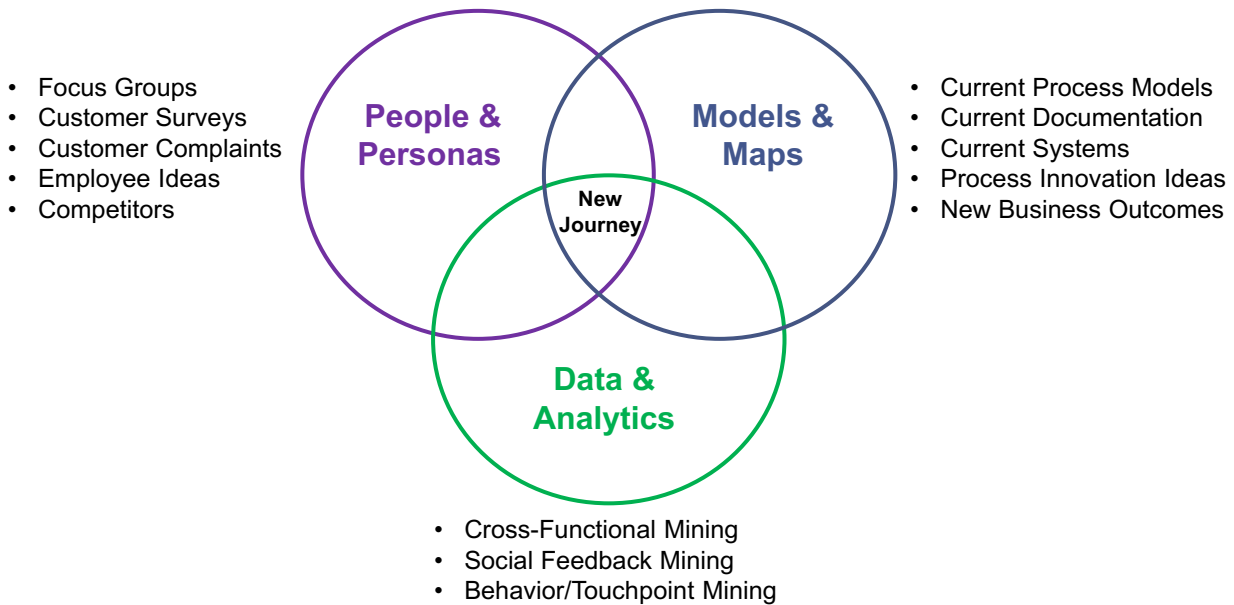


Figure 1: The Three Worlds of Customer Journey Mapping.

Why Are CJM Technologies Needed to Support Customer Experience Efforts?

There are three reasons to embrace CJM technologies. The first is that CJM technologies can properly and easily address the multiple layers of detail that are required to create a

compelling and complete journey map. The second reason is that these technologies are capable of sharing the resulting journey map in a decentralized fashion, a critical requirement as most organizations are not located in one place and often span multiple time zones. Finally, the frequency of change and distribution involved in the customer experience warrants a technology that delivers these journey maps quickly. CJM technologies are the answer.

Market Overview & Key Aspects of Customer Journey Mapping

While a better customer experience is a key initiative in digital transformation, customer interaction improvement is a baseline activity of leading organizations. The CJM market as it exists today is particularly inclined to create highly visible journey maps to help analyze customer touchpoints and the customer interactions with an organization's people, systems, and software. The source of the maps today is often created in a manual fashion and uses analytics to verify and validate the resulting maps. Over time, more mining of actual experiences will generate the initial and ongoing journey maps. While maps will still be the common visualization and communication mechanism, the data for creating them will become more automated and incremental in fashion.

Prediction: by YE 2021, 90 percent of enterprises will significantly improve their customer journeys to compete effectively and tap into new revenue opportunities.

The product requirements have taken this into account and the weights have been adjusted for today's typical use.

- **Journey Map Creation:**

Journeys can be captured manually or generated from the behavioral data of actual experiences for various logs. For organizations that are looking to plan out their journeys ahead of time with the intent of adjusting later, they will likely capture journeys in a manual fashion assisted by friendly software, through visualization tools or voice annotation capabilities. Organizations that want to start with the current processes using actual journeys are likely to use various audit trails. The better practice here is to support manual and automated modeling. The best software will allow for various approaches to picture customer, employee, or partner journeys.

Examples include, but are not limited to, the ability to self-describe customer lifecycles, stories, heat maps, personas, overlaid statistics, and various combinations. Most software solutions will support various approaches to detail drilldown and summarization. A plus would be to show differences before and after improvement across various versions that are visible on a variety of support

devices. Maps are best visualized on devices with more screen and paper real estate.

- **Map Collaboration:**

Journeys have to be shared across the whole organization for review, co-creation, commenting, and creating consensus. Ideally, this secure software can be leveraged in the cloud for multiple geographical organizations. These kinds of tools must be highly collaborative and support lots of reviewers inside and outside the organization who are simultaneously co-creating maps or projects. There should be a significant number of areas where notes, comments, findings, and recommendations, etc., can be placed for ease of interaction. A multitude of display options (i.e. on a variety of devices and printing) are a must.

- **Information Mining & Capture:**

Journeys imply a goodly number of data sources that need to be brought together in order to evaluate and design better approaches to servicing customers, engaging employees, and enabling partners. The information sources include, but are not limited to, touchpoints, processes, systems, personas, surveys, scores, audit trails, and mining sources. The methods for aggregating and visualizing these data sources must be easy and intuitive and not require significant support from the vendors. There should be features to capture custom data for further analysis and visualization.

- **Emotion Elicitation & Capture:**

The key to having good journeys is creating a compelling, intellectually stimulating, and effective experience. In order to evaluate these aspects of a journey, emotions must be measured and included in the journey analysis process. A customer's emotional state should be captured and categorized in a number of ways including pain points, barriers, best practices, and delightful moments. This should include doing, thinking, and feeling scores and representations. Any assists in storytelling are a great advantage in this requirements category.

- **Visualization & Analysis:**

Engaging journey visualization and analysis are the keys to designing and improving the user experience in an ongoing basis. Visualization gives perspectives that are typically horizontal and relational in respect to reach conclusions and point to alternative actions to improve the user experience. Examples of typical visualization approaches include actor step action maps, heat

maps, statistical representations/scores, persona views, life cycle maps, and day-in-the-life timelines—all with drilldown capabilities. Deeper analysis can promise potential changes in net promoter scores, a greater return on investment, and workload impacts. The better tools allow for the integration of additional outside analytical capabilities.

- **Administration:**

The tools must have a robust permissions capability where each instance of the software has individual log in/passwords for each user that is client controlled. Each user account can be restricted by view or edit. Concurrent updates must have a planned/known approach.

- **Methodology Assists:**

Tools should have guidance for usage and leverage for each known step of creating and updating journey maps. Some tools have methodology built into their operations. The very best tools allow for custom extensibility and should be seriously considered as often each journey effort is unique today. Some tools allow for the management of ongoing projects that are a result of the journey mapping efforts.

Listed below are the rated vendors and their major functionality contributions to any organization.

Vendor	Persona Supports	Journey Mapping Supports	Empirical Data Supports	Custom Extensibility
Adobe		✓	✓	
Altocloud		✓	✓	
Axellience	✓	✓	✓	✓
Capsifi	✓	✓	✓	✓
ClickFox		✓	✓	
CustomersFirst Now	✓	✓	✓	✓
ENGAGEcx		✓	✓	
ExperienceFellow		✓	✓	
Gainsight		✓	✓	✓
Genpact	✓	✓	✓	✓
Journifica	✓	✓		
Kitewheel		✓	✓	
MEGA International	✓	✓	✓	✓
Microsoft	✓	✓	✓	
Oracle		✓	✓	
Pegasystems	✓	✓	✓	✓
Salesforce	✓	✓	✓	✓
Signavio	✓	✓	✓	✓
Smapply	✓	✓		✓
Software AG	✓	✓	✓	✓
Strativity	✓	✓	✓	✓
SuiteCX	✓	✓	✓	✓
Thunderhead		✓	✓	
Trisotech	✓	✓	✓	✓
Usermind		✓	✓	
UXPressia	✓	✓	✓	✓
Verint		✓	✓	

Table 1: Major functionality contributions of vendors.

Tech Spectrum Overview

The Aragon Research Tech Spectrum is our newest market evaluation tool that graphically represents analysis of both emerging and mature markets and the vendors that participate in them. We use a rigorous analysis of each vendor using two dimensions that enable comparative evaluation of the participants in a given market. The Tech Spectrum looks at a focused set of criteria that helps enterprise planners understand and navigate the market of technology provider options.

The Aragon Research Tech Spectrum for Customer Journey Mapping is segmented into three sectors, representing high and low on both the product/service and performance dimensions. Vendors fit into one of the following sectors:

Leaders

Leaders are the providers who have comprehensive strategies and products/services that align with industry direction and market demand, and who effectively perform against that strategic backdrop. Leaders help to drive a market and in a majority of cases, have a vision for the future.

Contenders

Contenders are those providers with strong performance, but with more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

Promising

Providers who are Promising have strong strategic understanding and objectives, but have yet to perform effectively across all elements of that strategy. This includes breakout or emerging players who maybe focusing on specific capabilities.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer Experience:** Feedback on the product, installs, upgrades, and overall satisfaction.

- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is heading. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Inclusion Criteria

The *Aragon Research Tech Spectrum for Customer Journey Mapping, 2019* will help clients differentiate between the many vendors who offer technologies to let enterprises manage and plan better customer experiences and journeys.

The inclusion criteria for this Aragon Research Tech Spectrum are:

- **Revenue:** a minimum of US \$1 million in primary revenue for customer journey mapping or customer experience services.
- **Shipping product:** product must be announced and available with 90+% of the key capabilities listed above in their native product offering.

Exclusions

The following vendors were excluded from this Aragon Research Tech Spectrum because they did not have enough functionality, user usage, or revenue aimed at CJM:

- ***Autopilot***
- ***Bagheera***
- ***Creately***
- ***Clarabridge***
- ***Giffy***
- ***Heap***
- ***Lucidchart***
- ***Mapovate***
- ***MaritzCX***
- ***Mindly***
- ***MURAL***
- ***NICE***
- ***Pointillist***
- ***RealtimeBoard***
- ***SugarCRM***
- ***Transformation.ai***
- ***XMind***
- ***Zoomifier***

The Tech Spectrum™ for Customer Journey Mapping, 2019

(As of January 16th, 2019)

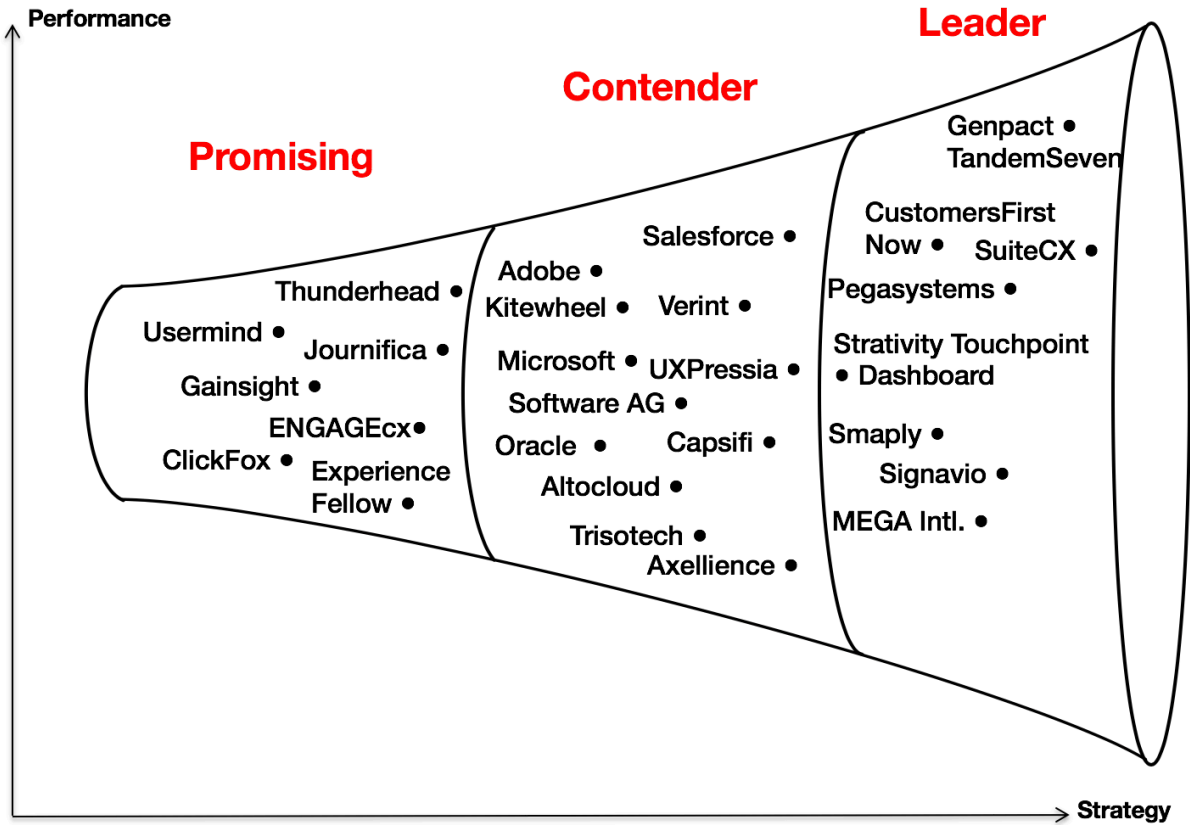


Figure 2: The Tech Spectrum™ for Customer Journey Mapping, 2019

Leaders

CustomersFirst Now

CustomersFirst Now (CFN), based in Denver, Colorado, is dedicated to creating the best customer experience possible from a customer's point of view. To this end, CustomersFirst Now concentrates on identifying and prioritizing actions that improve the customer experience by analyzing customer touchpoints in the context of a customer journey map. Understanding the journey is one thing, but enabling the right actions to continually deliver the optimal customer experience is the goal of CFN and its customers.

CFN Insight™ is CFN's journey mapping solution. It consists of a customer journey drag and drop interface, customer journey dashboard, action scorecards, and an emotions rating report to document and enable actions to enhance the customer journey in an ongoing basis. The dashboard is another feature that helps manage activities and allows for easy viewing of summary data and the many reports available. This not only helps customers, but also enables key executives and stakeholders to become engaged in the success of various customer experience programs.

Strengths

- Great vision for journey mapping
- A great quick wins program
- A bench of deep consulting experience
- Advanced visualization features to show progress
- Helps manage improvement efforts seamlessly

Challenges

- Larger partner network
- Flies under the radar

Genpact TandemSeven

TandemSeven, a Genpact company based in Boston, MA, focuses on being the one source of truth about your customers, and leverages real data, surveys, and maps. The emphasis on visual dashboards helps identify brewing problems as they emerge. TandemSeven can service tactical and enterprise levels of journey mapping, analysis, and monitoring.

With the Genpact acquisition, TandemSeven has moved into a larger arena of digital opportunities. TandemSeven's reputation and track record of success that delivers rapid results will put it in a position to be involved with larger digital efforts. Since Genpact has significant prowess and domain knowledge in selected industries and horizontal functions, TandemSeven will become involved with significant transformation efforts going forward.

Strengths

- Great vision for customer journey mapping
- Significant customer success to promote
- Easy to get a quick start for business results
- Advanced enterprise level features
- Easy-to-consume dashboards

Challenges

- Worldwide market awareness
- Taking advantage of recent opportunities with large organizations (Fortune 500)

MEGA International

MEGA International, based in Paris, France, is known for enterprise architecture management software that can be especially leveraged for digital transformations. MEGA started in business process analysis software in the 1990s and has progressed to truly data-linked enterprise architecture design and management.

MEGA has enabled organizations to create customer journey maps with the ability to identify and measure customer touchpoints, as well as categorize and analyze personas while linking these touchpoints and personas to processes, applications, and resources. Because of the integration to new and existing architectures, efforts, and programs, MEGA is unique in helping to identify and managing transformation efforts in a holistic fashion.

Strengths

- Strong brand presence in Europe
- Great vision for digital business
- Significant analysis software portfolio
- Integrated data for accurate impact analysis
- Strong customer references available

Challenges

- Worldwide market awareness
- High skill levels are required to fully leverage

Pegasystems

Pegasystems, based in Boston, Massachusetts, has been a driving force in the shift to digital customer hubs. The company pioneered the shift to applying a smart platform to real business solutions and desired outcomes. This approach has driven broad international awareness and rapid growth of smart platforms that leverage process, intelligence, decisions, and predictive next-best action for operational efficiency while providing an adaptable platform that organizations can build with change in mind. Change is the fuel of digital transformation and Pegasystems is one of the best at adapting to change.

Pegasystems is leveraging its ability to capture real-time customer activity and suggest a series of next-best actions to reach the perfect balance of value and customer satisfaction while achieving organizational goals. This is a unique approach in the CJM market and tightly integrates maps, data, and predictive options in real-time. While it is called marketing, it is much more.

Strengths

- Innovative management
- Strong brand recognition and presence
- Smoothly integrated functionality
- Innovative yet practical use of AI for workforce management and customer engagement
- Rich predictive platform with reusable algorithms
- Pre-built smart solutions
- Change-enabled architecture

Challenges

- Organizations that want to start with maps first will find Pegasystems' approach to be new
- Requires a citizen data scientist level of skill for predictions
- Gravitates towards central control solutions

Signavio

Signavio, based in Berlin, Germany, focuses on linking customer journeys to processes in a pragmatic fashion. The emphasis on creating innovative customer journeys with an outside-in perspective, and leveraging imagineering techniques in a true customer life cycle linked to practical linkages to processes, decisions, and business architecture makes Signavio one of the compelling new Leaders in our CJM ratings.

Signavio has been known for operational improvement traditionally and is now additionally aimed at larger transformation efforts leveraging its CJM/process linkages and ability to customize its look, feel, and behavior around individual organization's needs.

Strengths

- Great vision for customer journey mapping
- Strong links to processes encouraged
- Easy to get a quick start for operational excellence
- Advanced features for transformations
- Easy-to-consume dashboards

Challenges

- Worldwide market awareness
- Deliver larger transformation case studies

Smaply

Smaply, based in Innsbruck, Austria, focuses on leveraging quick and easy development of customer journey maps, personas, and stakeholder maps. Because of its easy-to-use and highly visual approach, Smaply has a large number of successful customer stories. The unique stakeholder maps help organizations to zoom out and understand the ecosystem and their products and services to get a clearer picture of what they are trying to accomplish. Additionally, Smaply allows the comment and export options to PDF, PNG, Excel, and PowerPoint as core features.

Smaply is a tool made by the company “More than Metrics.” In addition to Smaply, the team offers a research tool called ExperienceFellow (rated under Promising). Both Smaply’s and ExperienceFellow’s separate products are already strongly known in Europe.

Strengths

- Easy provider to work with for results
- Significant customer success to promote
- Easy to get a quick start for business results
- On many shortlists because of solid reputation
- Advanced speed development features

Challenges

- Worldwide market awareness
- Competing with already integrated vendors
- Partner network

SuiteCX

SuiteCX, based in Oakland, California, has been a driving force in the shift to a better customer experience. The company pioneered the customer experience diagnostic assessment and has a deep and rich customer journey mapping tool. While SuiteCX supports the usual journey mapping, personas, and moments of truth and pain point tags, it also captures a robust breadth of data and offers broad and deep types of scoring on analytical models. Not only does SuiteCX offer a complete tool, but it excels at training and knowledge transfer to fully leverage its rich capabilities.

SuiteCX has integration to and from a number of voice of the customer (VOC) vendors (Medallia, SurveyMonkey, Qualtrics) and automation clickstream tools such as Kitewheel, a leading cloud-based journey hub, and Thunderhead. This will greatly enhance the analysis, planning, and executions capabilities of multiple customer bases. This allows SuiteCX to focus on top-down strategy while enabling bottom-up automation vendors to target and drive behavior.

Strengths

- Innovative management
- One click templates for quick starts
- Integrated rich functionality
- Deep analysis capabilities
- Change enabled architecture

Challenges

- Complex to use (lots of levers)
- Mindshare

Strativity Touchpoint Dashboard

Strativity Touchpoint Dashboard (TPD), based in Hackensack, NJ, focuses on customer experience via its customer journey mapping dashboards. TPD allows for the inclusion of business data on top of its maps for greater clarity. The ability to have multiple views of the journey maps are helpful along with the various forms of multi-media to enhance and document the journey documentation.

Since Strativity bought Touchpoint, it gave it greater exposure and has allowed it to expand deeper into multiple markets and more significant transformations. In October of 2018, Strativity delivered a significant improvement in its own user experience. This should greatly accelerate the use of Touchpoint Dashboard.

Strengths

- Great brand
- Large number of customer case studies
- Training hub and communities
- Easy to get started
- Visual methodology driven

Challenges

- Worldwide presence
- Case studies with larger scoped efforts

Contenders

Adobe

Adobe, based in San Jose, California, focuses on delivering customer experience analytics as well as pleasing, content-rich process capabilities. Adobe leverages its marketing cloud to test content and content flow to optimize the customer experience. Adobe offers the Adobe Experience Cloud that leverage the Adobe Marketing Cloud, the Adobe Advertising Cloud, and the Adobe Analytics Cloud. The analytics portion is the linchpin set of technologies that link to customer journey mapping.

With the recent acquisition of Magento, Adobe can participate in larger transformational efforts that leverages customer or partner interactions with B2B activity and long tail dynamic value chains. Recently, Adobe also bought Marketo, which provides an opportunity to link to lead management, thereby expanding Adobe's influence on prospect journeys as well.

Strengths

- Significant inventory of software infrastructure
- Worldwide presence
- Emphasis on operational intelligence & analysis
- Rich portfolio of technologies to apply to digital efforts

Challenges

- Marketing presence in the CJM arena
- Needs more touchpoint and persona support
- Integration of technology stacks

Altocloud

Altocloud, based in Mountain View, California, delivers real customer journey analytics in context to reveal what's influencing customer behavior using real-time data. It offers the ability to discover and define customer profiles based on behavior and attributes. Additionally, the ability to apply predictive analytics to specific customers and types allows for optimization in near real-time.

In August of 2017, Altocloud began to deliver leads by outcome scores. This helps inside sales teams to identify leads automatically through a specific application of machine learning technology. These machine learning algorithms will score website visitors and the likelihood of reaching a desired outcome, which helps in eliminating the loss of leads. Genesys bought Altocloud to leverage these desirable features in February 2018 to provide live, actionable insights to deliver better customer service.

Strengths

- Leveraging real-time journey data
- Reseller partnerships with Cisco & Five9
- Leverage of machine learning
- Outcome driven

Challenges

- Market awareness outside of Europe
- Focused solely on company outcomes

Axellience

Axellience, based in Lille, France, leverages a tool suite called the Axellience Agile Architecture Factory™ that puts customer journey mapping and modeling at the center of a digital transformation effort. The power of the suite is that the customer experience is linked to current/target architectures, processes, decisions, and current and future systems implementations.

Axellience's ability to link together the many aspects of digital transformation is a powerful tool, and gives organizations a holistic picture of both their efforts and the impacts they have on many of the moving parts of their digital efforts.

Strengths

- Easy-to-use customer journey tool
- Great vision for digital business
- Strong links to operational processes

Challenges

- Worldwide market awareness
- More CJM lead digital transformation case studies

Capsifi

Capsifi, based in Sydney, Australia, focuses on intelligent business transformation. It leverages a business modeling platform that supports strategic planning, business architecture, business analysis, information modeling, digital interactions with customers, and project delivery.

Capsifi aims to help organizations create a frictionless business environment for customers to interact with in this new digital age. By linking the customer journey to architecture and processing models, organizations are able to plan more complete digital transformations.

Strengths

- Integrated and complete business modeling capability
- Rich and easy-to-use customer journey capability
- Customizable business repository

Challenges

- Marketing presence in the CJM arena
- Worldwide awareness

Kitewheel

Kitewheel, based in Boston, MA, focuses on delivering a complete customer experience by leveraging the Kitewheel Customer Journey Hub. The hub orchestrates sales and marketing technologies to proactively deliver intelligent and appropriate interactions at the right time.

Combined with the Analytics Hub, Kitewheel allows enterprises to map and improve their real journeys going forward. This is especially interesting to organizations that want to improve their sales, marketing, or servicing processes. Real data, in context of processes, helps orchestrate better customer experiences.

Strengths

- Ability to orchestrate interactions in real-time
- Jumpstart journeys that are functional in nature
- Emphasis on operational intelligence & analysis

Challenges

- Marketing presence in the CJM arena
- Needs more touchpoint and persona support

Microsoft

Microsoft, based in Redmond, Washington, focuses on providing software for a multitude of devices locally as well as an industrial strength cloud platform to support digital business. Microsoft has significant functionality that soundly represents software needed in a digital transformation—but its software does not work together seamlessly.

If an organization is deeply committed to Microsoft already, Visio with templates is a reasonable choice. For those organizations that want to optimize their current experiences, they can import data from Excel and create data flows in Visio. Microsoft also offers the ability to create custom journeys via Dynamics 365, which enables a drag and drop journey designer for email campaigns and landing pages.

Strengths

- Brand & awareness
- Worldwide presence
- Great execution in the cloud arena
- Significant inventory of software products
- Emerging AI delivery
- Install base

Challenges

- Needs more integrated data and analysis features
- Needs a more dedicated touchpoint focus

Oracle

Oracle, based in Redwood City, CA, focuses on creating an industrial-strength cloud approach to support its vertical applications and its technological infrastructure software. Oracle has a reputation for database, integration, and enterprise management software horizontally. Vertically, Oracle has prowess in ERP, CRM, sales management, and merchant operations. If an organization is deeply committed to Oracle already, Oracle analytics is a reasonable short-term choice.

Oracle is known for cross-channel optimization and tracking customer behavior. Through analysis, the targeted customer journeys can be streamlined into a better experience. This would be particularly effective in the Oracle CRM offering.

Strengths

- Brand & awareness
- Worldwide presence
- Significant inventory of applications to leverage
- Significant inventory of infrastructure software
- Emerging cloud presence

Challenges

- Needs more integrated data and analysis features
- Needs a more dedicated touchpoint focus

Salesforce

Salesforce, based in San Francisco, California, focuses on customer relationships, via its sales, marketing, service, and community management clouds that are built on top of a powerful, yet easy to use, business platform. This platform has significant potential to help organizations in their digital transformation journey.

If an organization is deeply committed to Salesforce already, its analytics is a reasonable short-term choice. Salesforce also provides its own offering, Journey Builder, that focuses on B2C customer journeys. Journeys can be adapted based on real-time events, such as a purchase. Customer cues can be captured and analyzed for a more effective customer journey. Journey Builder allows organizations to connect every interaction across email, mobile, advertising, and the web—along with sales and service—into a seamless customer experience.

Strengths

- Great brand and worldwide presence
- Large partner network
- Out of the box solutions for sales & marketing
- Easy to use
- Open platform
- Predictive analytics
- Practically applied (AI) Einstein

Challenges

- Needs more integrated data and analysis features
- Needs a more dedicated touchpoint focus

Software AG

Software AG, based in Darmstadt, Germany, offers a full digital business platform that serves multiple industries and leverages its rich software inventory and key partnerships with IoT to deliver Industry 4.0 and digital solutions. With the recent acquisition of Zementis, an AI rich company, Software AG is poised to add more intelligence for its customers' digital solutions.

Software AG has a sweet spot in linking companies in commerce ecosystems through shared processes and integration. It has a particular strength in helping organizations with business architecture and customer journeys.

Strengths

- Worldwide presence
- Great vision for Industry 4.0
- Significant experience in real-time speed
- Customer journey mapping strength
- Significant software portfolio
- Great linking ecosystems

Challenges

- Needs more integrated data and analysis features
- Needs a more dedicated touchpoint focus

Trisotech

Trisotech, based in Montreal, Quebec, is now aimed at digital transformation, but can help with customer journeys, processes, decisions, and case optimization as well. Trisotech was born out of a services organization that saw a need to exchange process models at first and quickly became known as a “Switzerland”-like tool for model exchange. Soon, Trisotech was pressed to include decision and case models, but it pursued business architecture representation as well to support its clients' digital efforts.

Recently, Trisotech has been able to demonstrate a powerful customer journey mapping capability. The fact that the journey can link to other moving parts of the business and technical architectures makes Trisotech very useful in improving the customer experience.

Strengths

- Great vision for digital business
- Significant analysis software portfolio
- Integrated data for accurate impact analysis
- Strong customer references available

Challenges

- Needs more integrated analysis features
- Needs a more dedicated touchpoint focus

UXPressia

UXPressia, based in San Mateo, California, focuses on making customer journey mapping easy and fun. It has pre-built customer journey maps that can be leveraged, but it also supports various persona capabilities.

Organizations can enter data one way and then view it in another. After the map has been created, it can be viewed through various lenses including organizational unit, emotion, journey step, or value by company channel.

Strengths

- Highly visual and engaging maps
- Makes journey mapping easy
- Easy to work with as a partner

Challenges

- Needs more integrated analysis features
- Needs a more dedicated touchpoint focus

Verint

Verint, based in Huntington, New York, is aimed at delivering excellent customer experiences. To that end, Verint provides hardware and software to optimize customer engagement and management. Verint is known for analytics at scale and can help organizations improve their customer experiences.

Verint applies its analytics for the voice of the customer, intelligent self-service, and workforce engagement. To that end, on December 17, 2018, Verint announced it was acquiring ForeSee, a cloud voice of the customer (VoC) provider, that focuses on measuring customer experience. Verint has a very capable CJM tool, but the tool requires a solution engagement to use it.

Strengths

- Significant inventory of software infrastructure
- Worldwide presence
- Emphasis on operational intelligence & analysis

Challenges

- Marketing presence in the CJM arena
- Needs more touchpoint and persona support

Promising

ClickFox

ClickFox, based in Denver, Colorado, focuses on delivering customer experience analytics as well as showing the shape of customer behavior data. ClickFox offers jumpstart templates for selected industries to get push progress quickly in certain industries and horizontal functions.

ClickFox gives organizations real transparency into customer behavior and journeys. The view is aimed at breaking silos and giving an end-to-end view of the customer's perspective. The ultimate goal is to measure customer satisfaction and improve overall loyalty.

Strengths

- Leveraging real-time journey data
- Mining visual journeys
- Automated analytics for CJM

Challenges

- Worldwide market awareness
- Support design thinking for "future journeys"

ENGAGEcx

ENGAGEcx, based in Atlanta, Georgia, focuses on collecting and enriching in-venue customer behavior from Wi-Fi and other sensors, and translating that data into meaningful, real-time customer experience, location, and marketing analytics.

ENGAGEcx offers "single-click" provisioning in the cloud, and jumpstart templates for brick-and-mortar brands to understand the in-store portion of their customer journey quickly and unobtrusively. ENGAGEcx leverages real-time analytics to enhance the customer experience in flight by providing insights that can be shared and collaborated on quickly to provide responsive change.

Strengths

- Leveraging real-time journey data
- Mining visual journeys
- Automated analytics for CJM

Challenges

- Worldwide market awareness
- Support design thinking for "future journeys"

ExperienceFellow

ExperienceFellow, based in Innsbruck, Austria, focuses on delivering customer experience analytics as well as showing the shape of customer behavior data. ExperienceFellow allows organizations to collect and analyze custom data for better insights for customer experience improvements. This includes all forms of data types and sources.

The views that can be leveraged are provided for the participant and the researcher to improve customer, employee, or stakeholder journeys. ExperienceFellow also provides a mobile app that speeds up customer engagement for research projects.

Strengths

- Leveraging real-time journey data
- Mining visual journeys
- Automated analytics for CJM

Challenges

- Worldwide market awareness
- Support design thinking for “future journeys”
- Create industry “jumpstart” templates

Gainsight

Gainsight, based in Redwood City, CA, focuses on delivering customer experience analytics as well as showing the shape of customer behavior data. Gainsight offers jumpstart templates for selected horizontal functions to get results quickly in certain situations. With customer success being its primary focus, Gainsight has become one of the ways to track customer health that can trigger a change in engagement when negative feedback is received.

Gainsight also allows organizations to improve collaboration and ensure that it’s easy for the team to share customer updates. It enables the capturing of notes, emails, and to-do’s in one place with helpful formatting capabilities and integrated task workflows.

Strengths

- Leveraging real-time journey data
- Mining visual journeys
- Automated analytics for CJM

Challenges

- Worldwide market awareness
- Support design thinking for “future journeys”

Journifica

Journifica, based in Atwood, Ontario, focuses on making customer journey mapping easy, but its real strength is leveraging the power of survey data in the creation and verification of customer journeys.

Journifica provides owners and facilitators of customer, patient, business process, or learning journeys with visual documentation tools and canvasses, and a rich survey environment through which to validate customer, patient, or learner experience. Journifica also offers a free trial to allow prospective buyers to test out its software (up to 5 participants).

Strengths

- Easy to use
- Intuitive usefulness
- Survey rich verification

Challenges

- Needs more integrated analysis features
- Needs more live data feeds

Thunderhead

Thunderhead, based in London, UK, focuses on delivering customer experience analytics as well as showing the shape of customer behavior data. Thunderhead offers jumpstart templates for selected industries to get push progress quickly in certain situations.

What differentiates Thunderhead in this crowded real-time analytics approach to CJM is its application of AI. The engagement hub helps organizations understand individual customer wants and needs across all customer touchpoints in real-time.

Strengths

- Leveraging real-time journey data
- Mining visual journeys
- Automated analytics for CJM
- Leverage of AI

Challenges

- Worldwide market awareness
- Support design thinking for “future journeys”

Usermind

Usermind, based in Seattle, Washington, focuses on delivering customer experience analytics as well as showing the shape of customer behavior data. Based on the growing demand, Usermind raised a \$23.5M C Round in January 2018. Usermind offers jumpstart templates for selected industries to get push progress quickly.

Organizations that use Usermind can transform their customer engagement strategies in full context in a dynamic and effective fashion with real live data. By connecting the system of record to an engagement hub, there is an opportunity to look across siloed systems to understand a customer's behavior and create a better journey in the long run.

Strengths

- Leveraging real-time journey data
- Mining visual journeys
- Automated analytics for CJM

Challenges

- Worldwide market awareness
- Support design thinking for “future journeys”

Aragon Advisory

- Organizations need to go beyond just omni-channel support to deliver pleasing customer journeys using customer journey mapping (CJM) technologies that both model and measure real journeys in real-time.
- Organizations that want a “customer for life” will continuously invest in customer experience and engagement improvement technologies and services.
- Enterprises need to look at both short-term and long-term CJM needs when selecting a provider. Both the current and future journeys need to be cultivated for success.
- Enterprises need to ensure that any CJM provider is open, cooperative, easy to use, supports agile change; is smart, predictive, works at real time speeds, is built for innovation, and is context sensitive. All of this while being enterprise cloud-based.
- Enterprises need to look beyond just customer journeys, to employee and partner journeys as well.

Bottom Line

Brand loyalty is not static any more. It is a real time battle that requires significant and ongoing investments of time and technology. Customer journey mapping methods and technologies are a great assist to organizations. Invest now to have a more long-lived digital future or pay later when customers desert you.