The Right Way to Select Marketing & Customer Experience Technology

Tony Byrne – October, 2020

Digital Leadership Forum Online Edition 2020

Real Story GROUP
MAKE BETTER TECHNOLOGY DECISIONS

Agenda

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Part 1: Background

Part 2: New Stack for the 2020s

Part 3: Wrong Way to Select…

Part 4: Right Way: …Step by Step

Part 5: Wrap up

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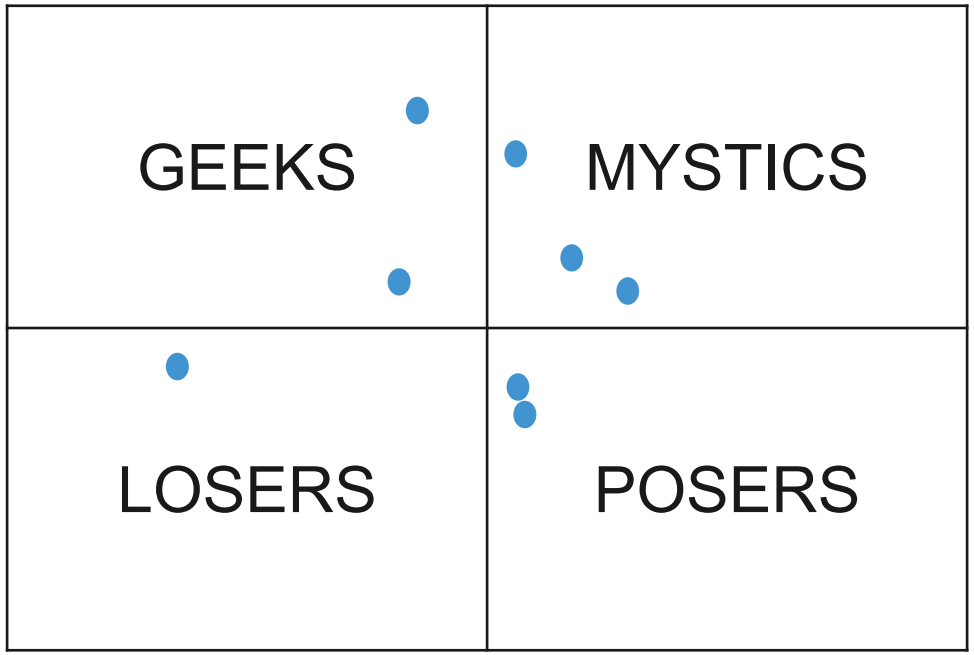
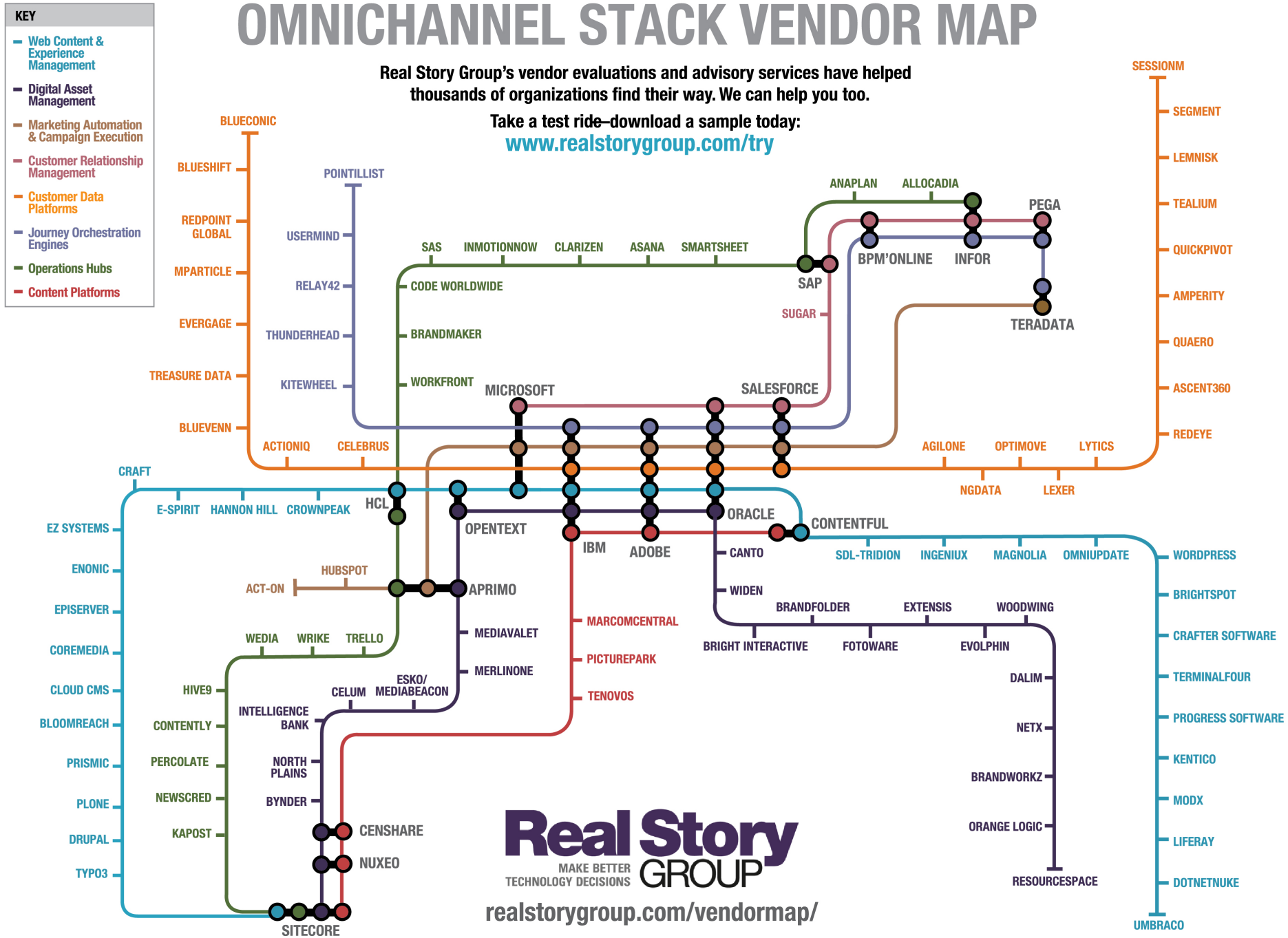
A Story…



“the mystical quadrant”

INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

OMNICHANNEL STACK VENDOR MAP



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MARTECH / CX STACK FOR THE 2020s

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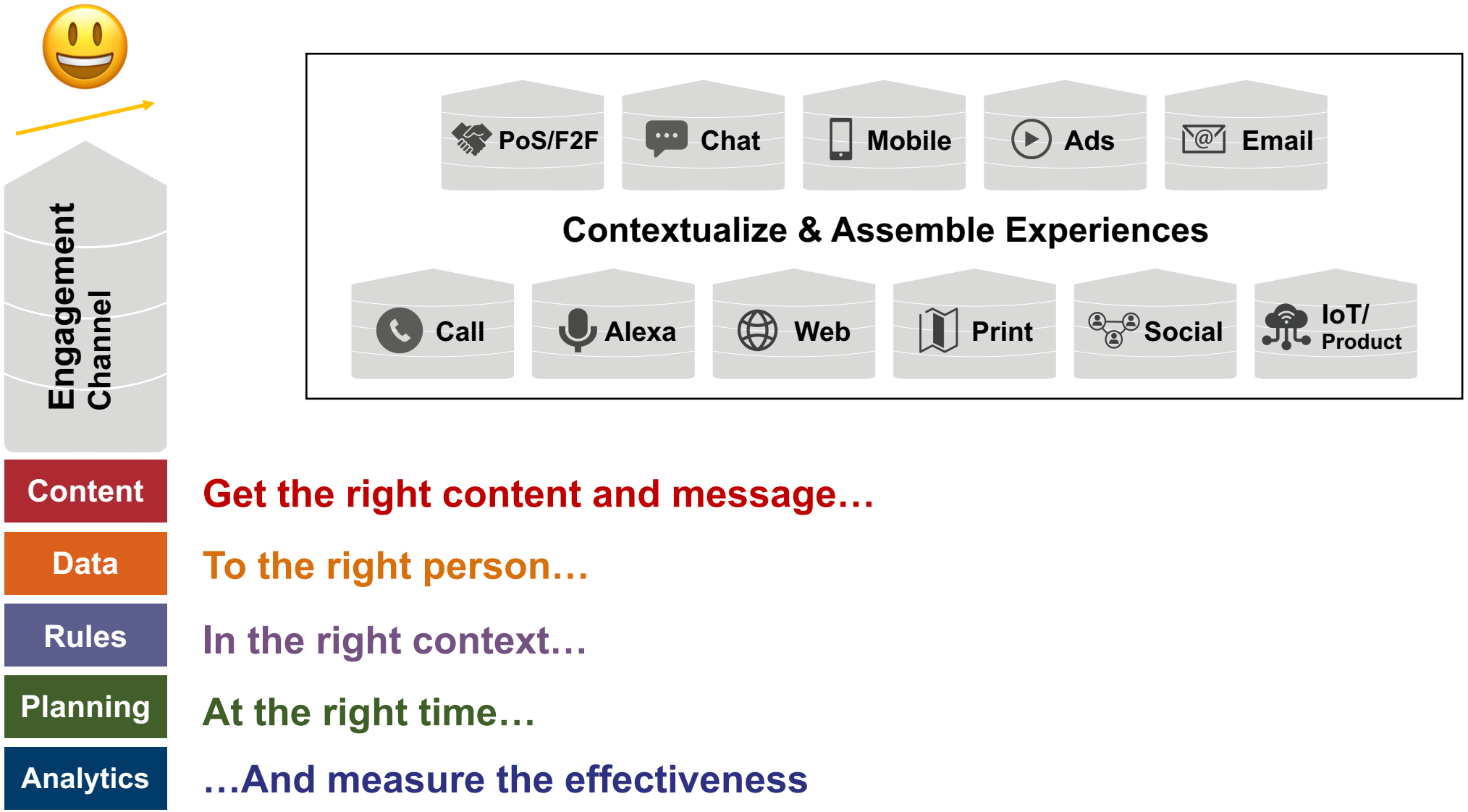
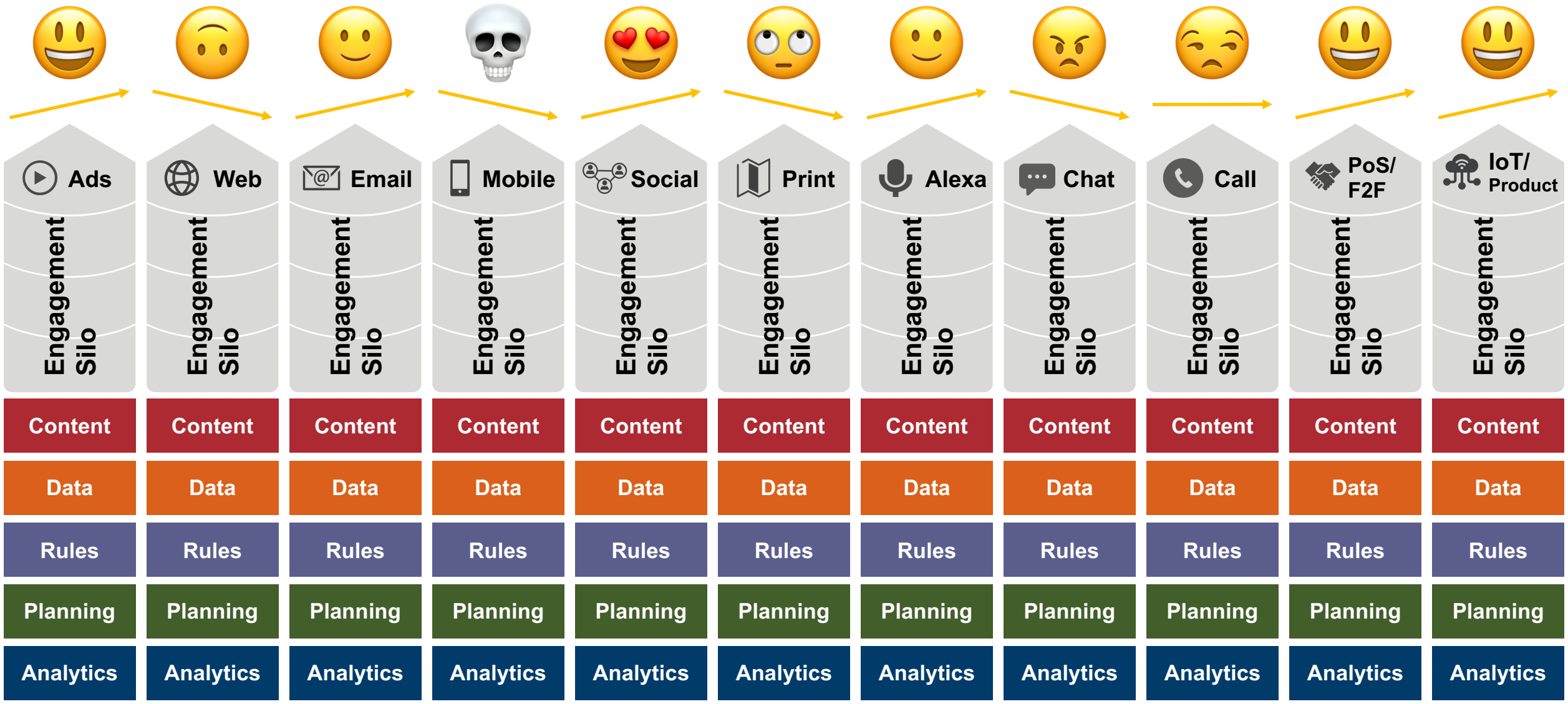
Context: Ideal Customer Engagement



Silo Problem: Isolated, Disjointed, Inconsistent Customer Experiences



Enterprise Target Reference Model for an Integrated Customer Experience

Ads | Web | Email | Mobile | Social | Print | Alexa | Chat | Call | PoS/ F2F | IoT/ Product

Engagement Silo

FOUNDATION SERVICES

Omnichannel Operations: Cross-team collaboration and planning

Unified Customer Data: Single source for definitive customer data & segments

Journey Orchestration: Omnichannel personalization and next-best-action rules

Omnichannel Content: Single source of the truth for re-usable assets

Customer Intelligence: Analytics, reporting, and modeling

CUSTOMER BENEFITS

Consistent messaging

"They know me…"

Coherent interaction

Story consistency

Relevant options

Reference Architecture Model for the 2020s: Omnichannel CX Stack

ENGAGEMENT CHANNELS

Ads | Web | Email | Mobile | Social | Print | Voice | Chat | Call | PoS/ F2F | IoT/ Product

INTERACTION & DELIVERY ENVIRONMENTS

Advertising	Sites	Applications	E-commerce	Distribution	Contact Centers
Generate demand	Deliver Information	Deliver services	Sell things	Deliver via channel	Answer questions

CONTENT & ENGAGEMENT MANAGEMENT PLATFORMS

Service & Support	CRM & SFA	Social Engagement	Email & Marketing Automation	WCM	DAM / MAM
Address customer inquiries and problems	Salesforce Automation & Relationship Mgmt	Engage in social media & communities	Manage outbound messaging	Manage web content & inbound experience	Manage image, video, & audio assets

ENTERPRISE FOUNDATION PLATFORMS

Operations Hubs
Creative & Content Development, Campaign Scheduling, Resource Mgmt

Journey Orchestration Engine
Omnichannel engagement and personalization: rules and decisions

Omnichannel Content Platform
Content object store for base components

Customer Data Platform (CDP)
Definitive consumer data & segments

Intelligence Hubs: Processing, Analytics, Reporting & Visualization, Predictive Modeling, Dashboards

CIAM: Customer Identity & Access Management, and SSO

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TRADITIONAL METHODS

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Traditional Ways to Select Technology: Horse Race

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Traditional Ways to Select Technology: Blind Love

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Traditional Ways to Select Technology: My Cousin Vinny

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Traditional Ways to Select Technology: We Already Have a Drill

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Traditional Ways to Select Technology: Happiness is a Warm Set of Binders

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Don’t Let it Come Down to Guessing!

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APPLY DESIGN THINKING

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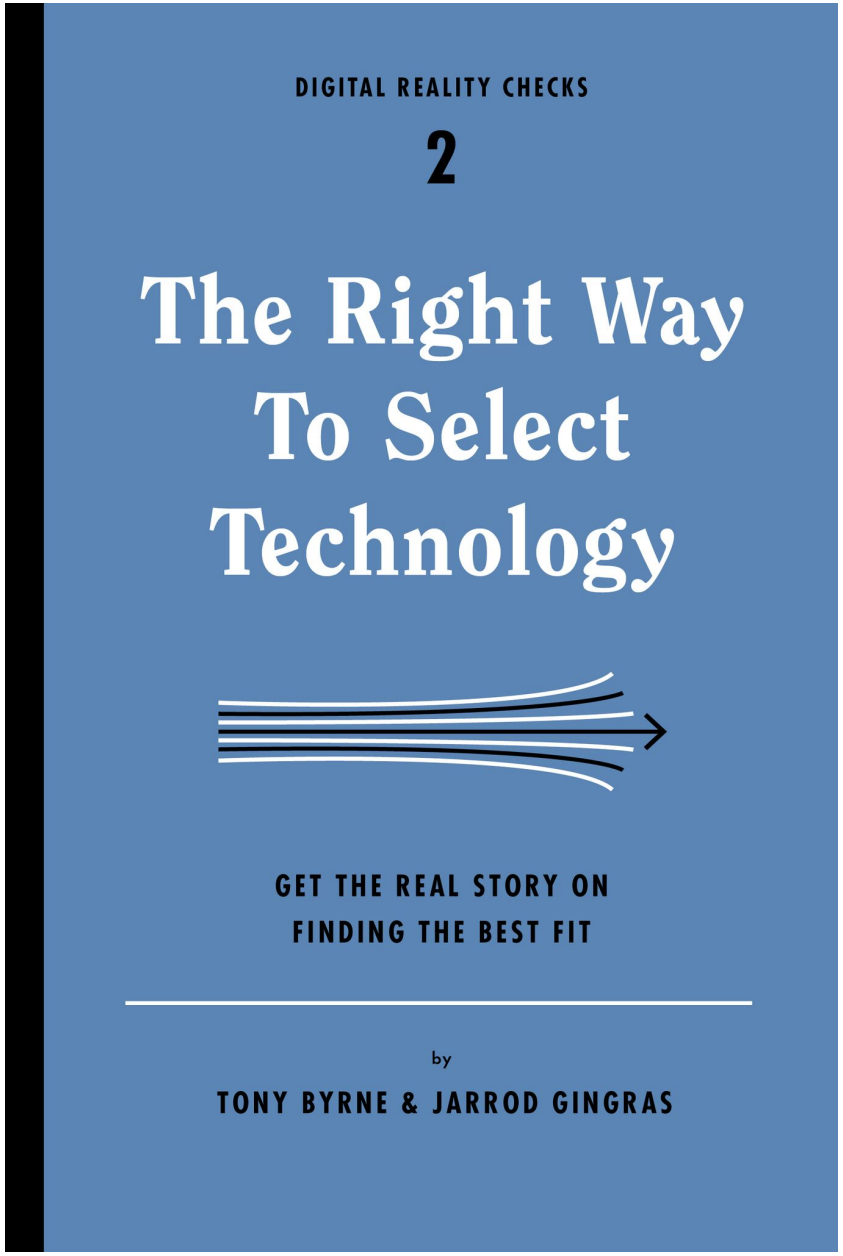
Term of the Day….

“Design-Thinking”

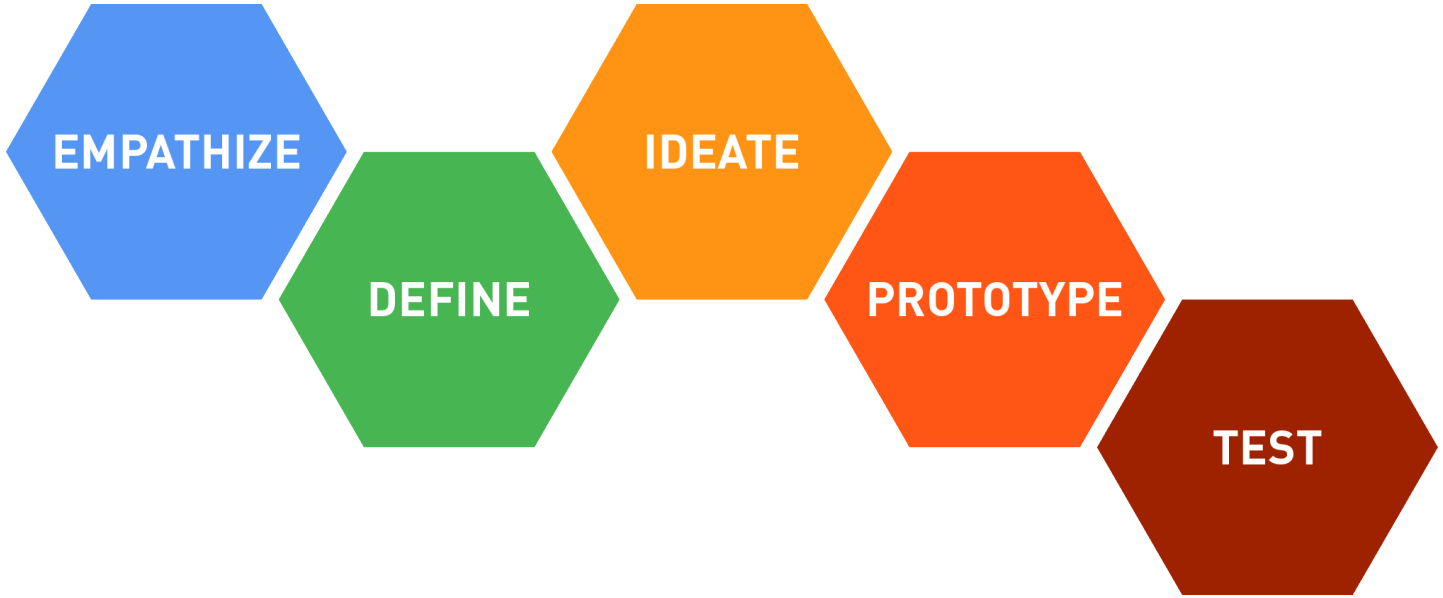
Team
Empirical
Iterate
Adapt



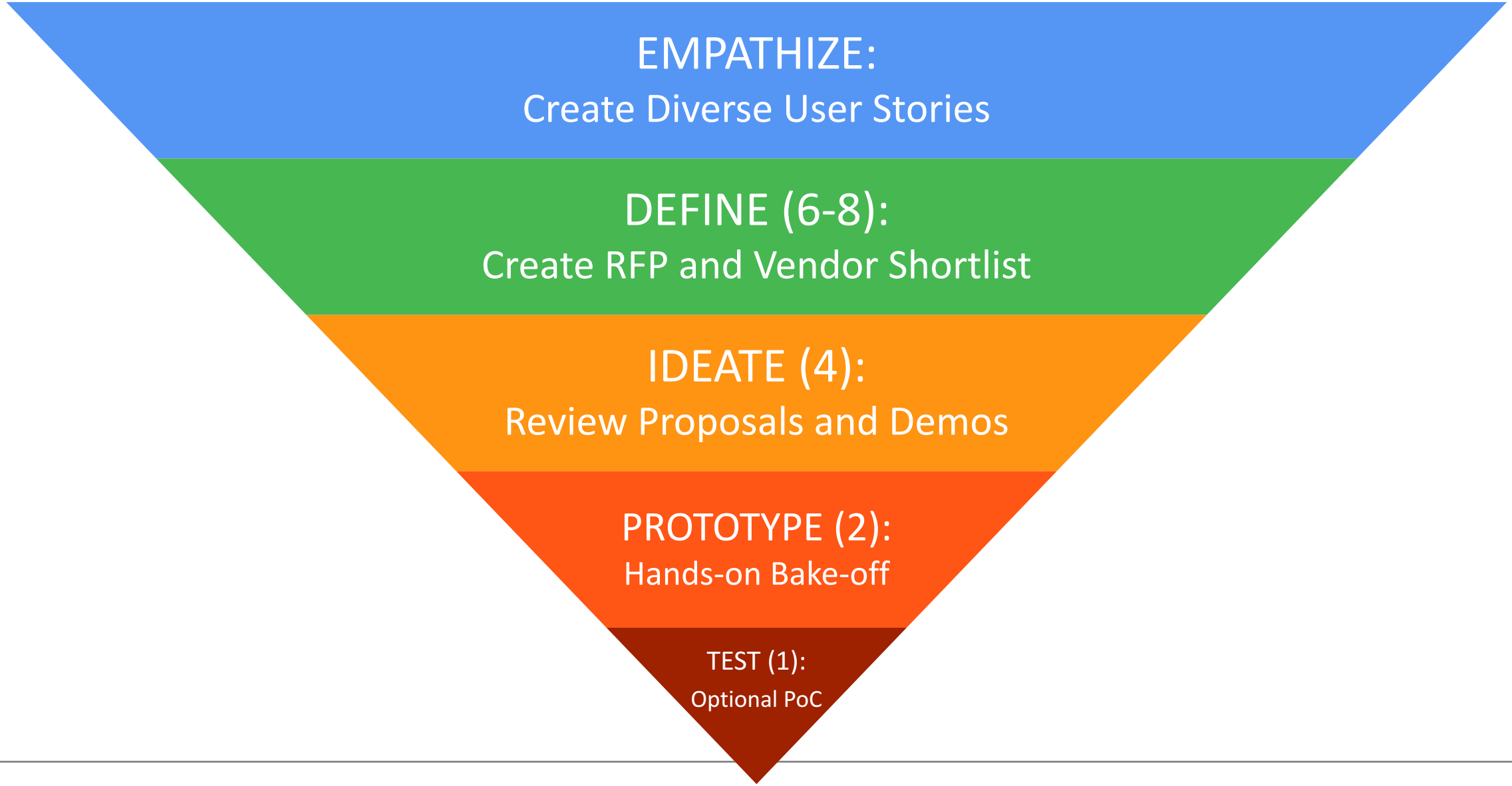
What Is Design Thinking?

"A human-centered approach to innovation that draws from the designer's toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success."

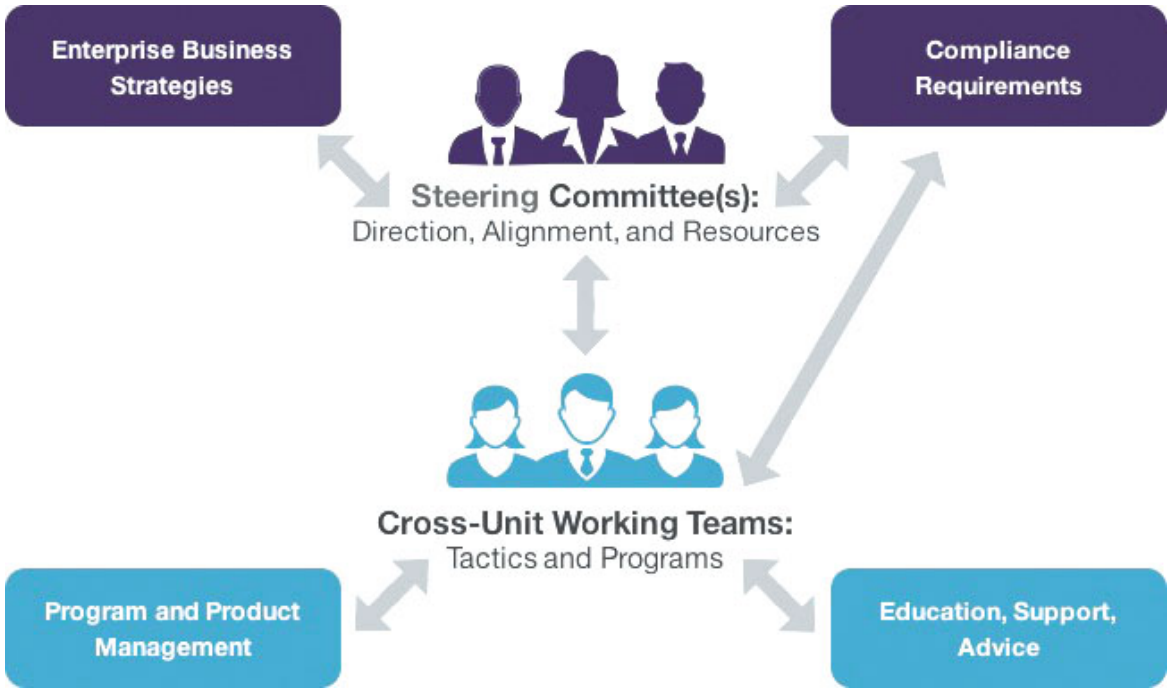
- Stanford University Professor and founder of design firm IDEO, David Kelley



How to Filter…



Governance Matters…



Why are we doing this??

Enumerate objectives…

The Selection Team…

Business Lead

Separate PM + Procurement Specialist

Diverse set of interested stakeholders

Not too senior…

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STEP BY STEP

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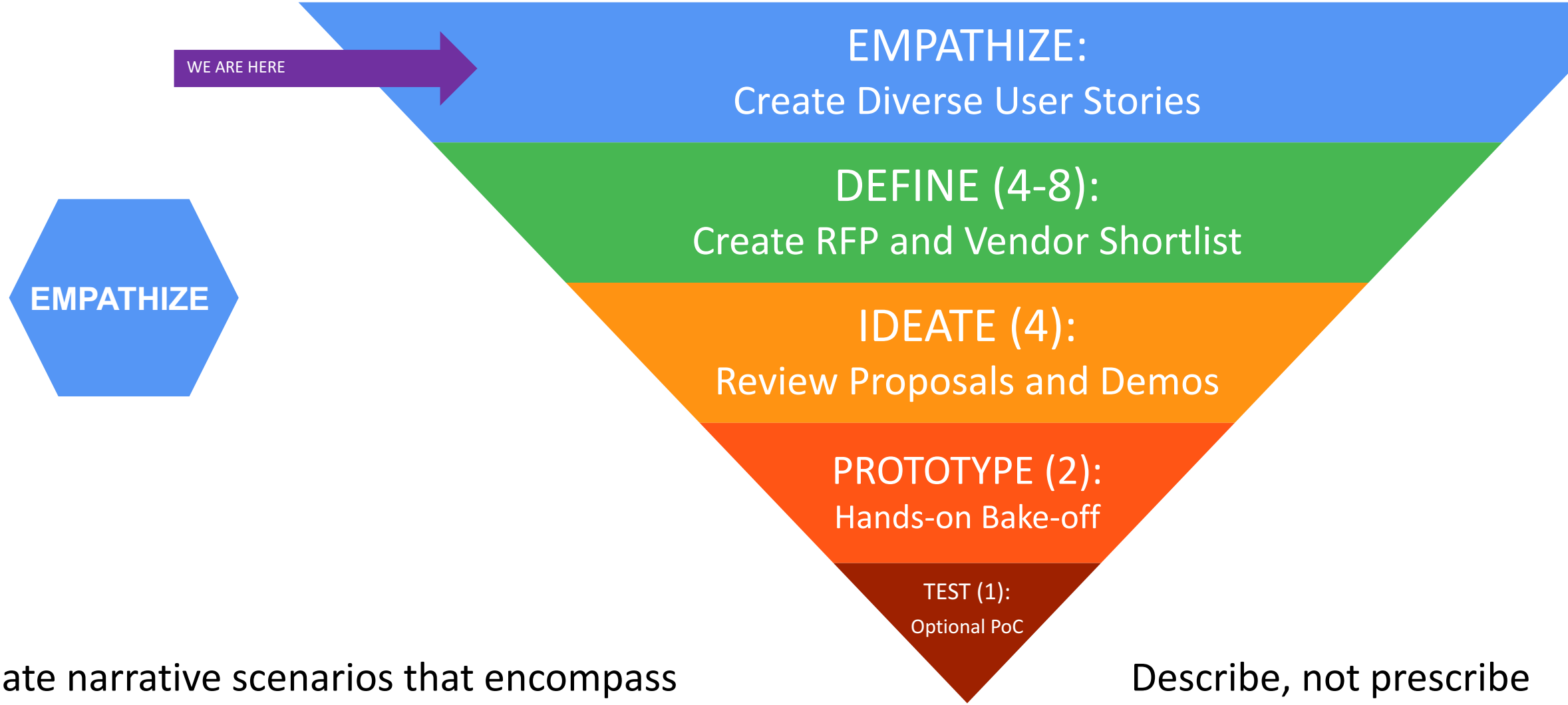
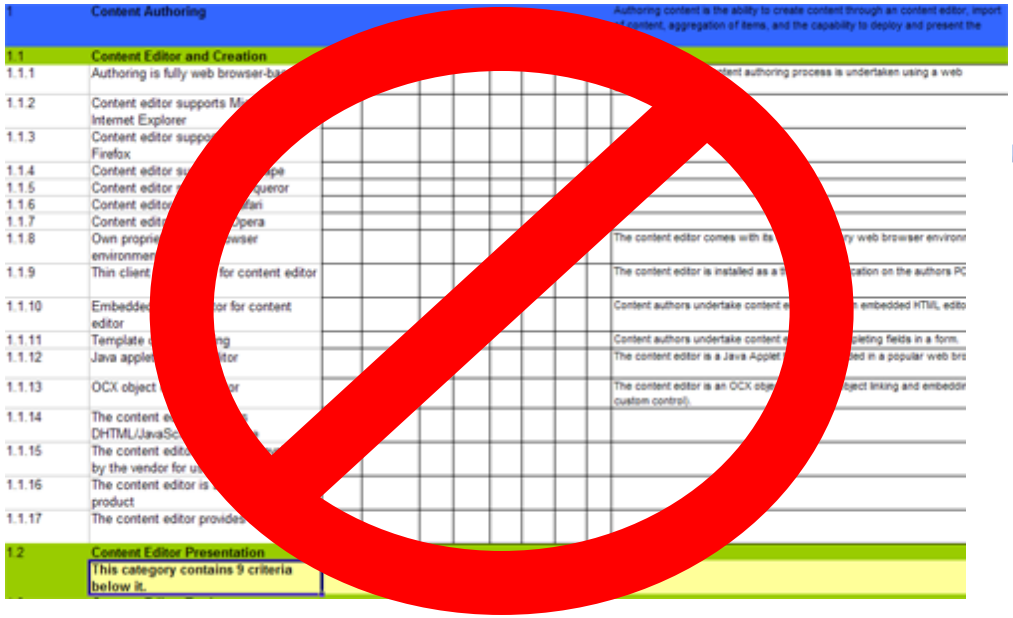


Create narrative scenarios that encompass the entire experience – not feature-based

Describe, not prescribe

Testable Narratives



Part Science, Part Art….

4.2.2 Scenario 2: Creating a new microsite

User Task Profile Targeted	Central Editor
Subject Persona	Ben, his boss Louise and Towson partner Bill
Scenario Description	Creating an Institute Microsite

Background:

Towson has created a public-private venture with Megg-Jason mutual funds to establish an "Institute for Ethical Finance." Ben has been tasked with creating an initial microsite to describe the venture and solicit individuals to sign up for more information.

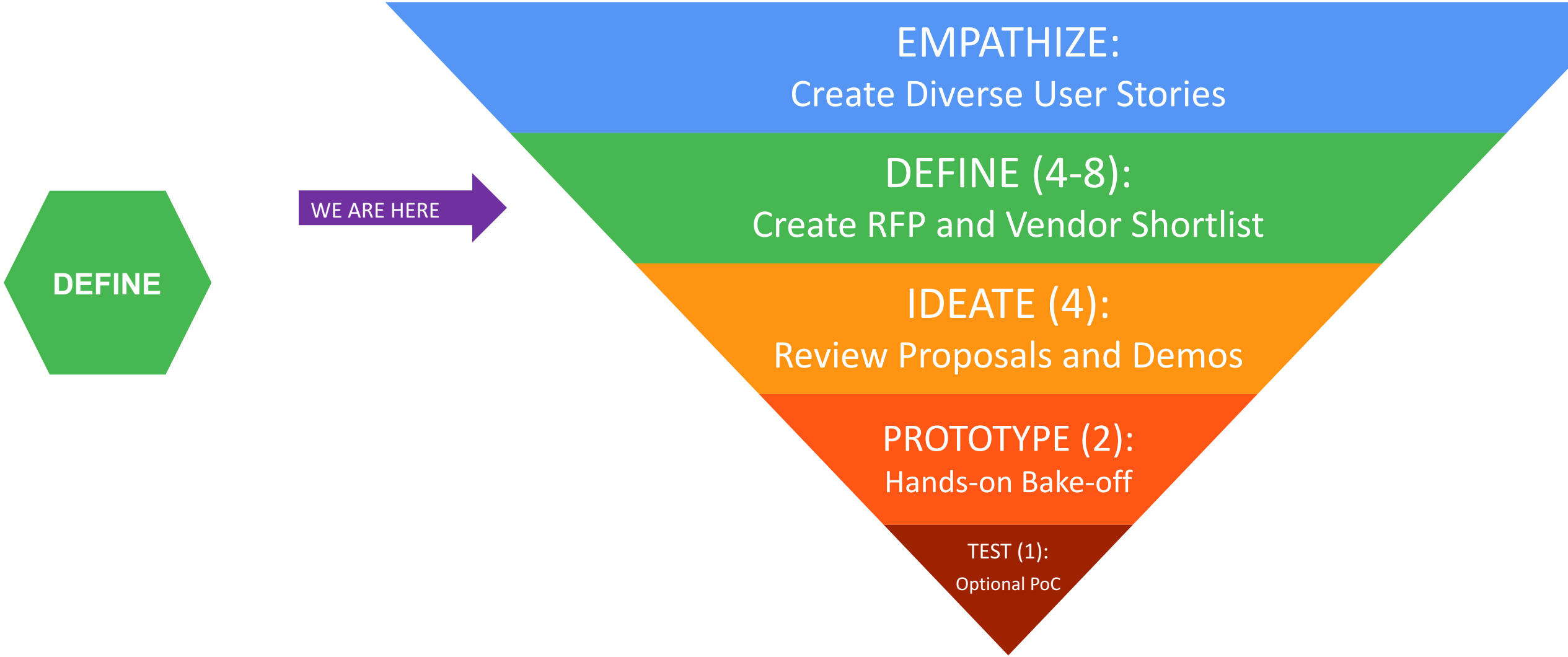
Objective:

Towson needs to spin out basic microsites from an existing microsite template on a regular basis.

Narrative:

Ben logs into the CMS and navigates to the area where he can select among existing microsite templates. The system allows him to create a new one from a master template or clone an existing site. The microsite master has some basic Towson branding and simple navigation for four or five pages plus a lead-generation form.

Ben then configures the entire microsite, including:



Shortlist vendor options whose fundamental strengths align with your unique needs

CDP Logo Landscape

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Suite Vendors

Pure-Play Platforms

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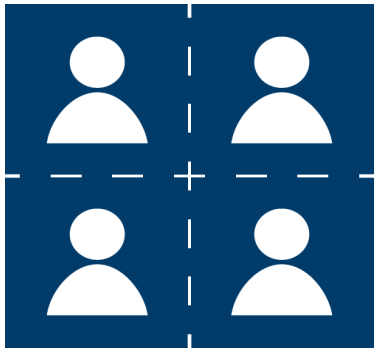
Ten Potential CDP Business Use Case Categories

Advanced Customer Data Management

Predictive Analytics



Outbound Marketing Campaign Support

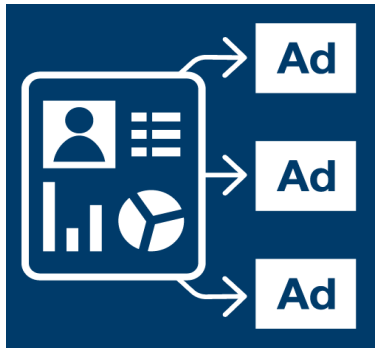
Online Personalization & Experience Optimization

Ecommerce Recommendations & Optimization

Omnichannel & Offline Aggregation

Realtime Behavioral Analysis

B2B / Household / Channel Support



Digital Advertising Support

Loyalty & Rewards Management

Key Considerations:

- Not all CDP vendors support all use cases, or support them evenly
- Best practice to prioritize business importance among them

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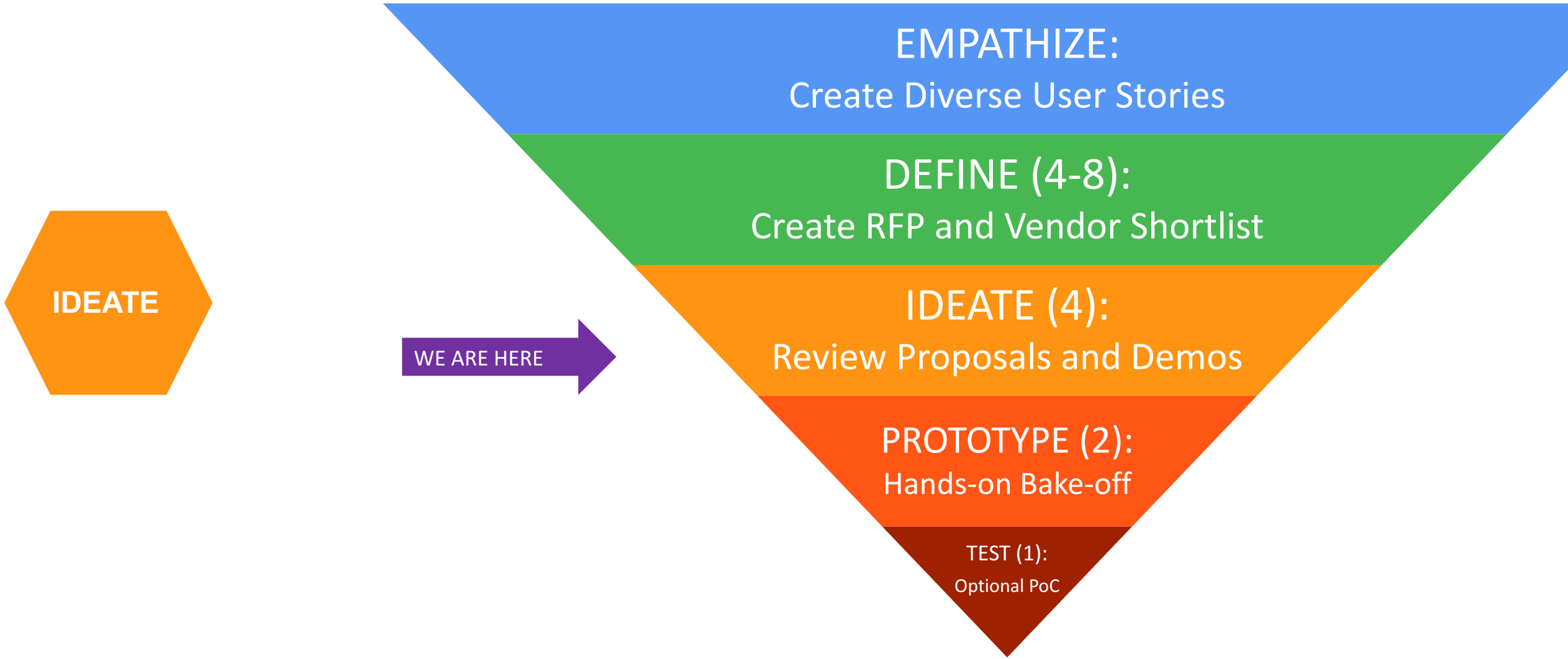


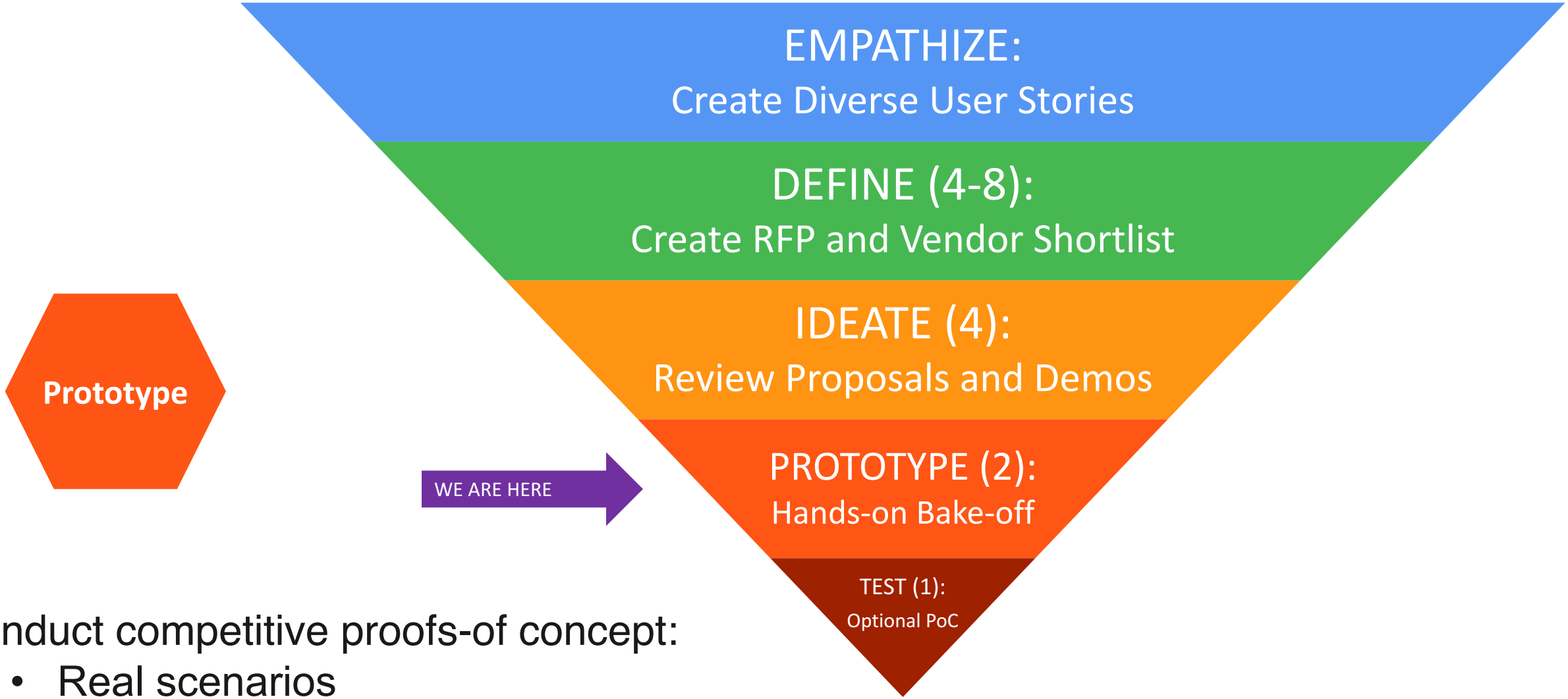
Review proposals to learn the art of the possible and reshape your user stories

Conduct *realistic* vendor demos where vendors *show* how their solution meets your needs

Running a demo

- Make sure your team is represented
- Beware of the "canned" demos
- Demo ***your*** scenarios
- Each vendor demos same scenarios
- Ask the tough questions
  - Especially around pricing

Time	Agenda Item	Length
9:00–9:10	Introductions	10 minutes
9:10–9:30	Brief bidder company overview and media experience	20 minutes
9:30–10:15	Introduction: architecture and overall user experience	45 minutes
10:15-10:30	Break	15 minutes
10:30–12:30	Demonstration of Scenarios 1-4	120 minutes
12:30-1:30	Joint lunch break and informal chat (meal provided)	45 minutes
1:30-2:30	Demonstrate bidder answers to "Advanced Q&A"	60 minutes
2:30-3:00	Break and private team caucus	30 minutes
3:00-4:00	Final questions, discussion	1 hour



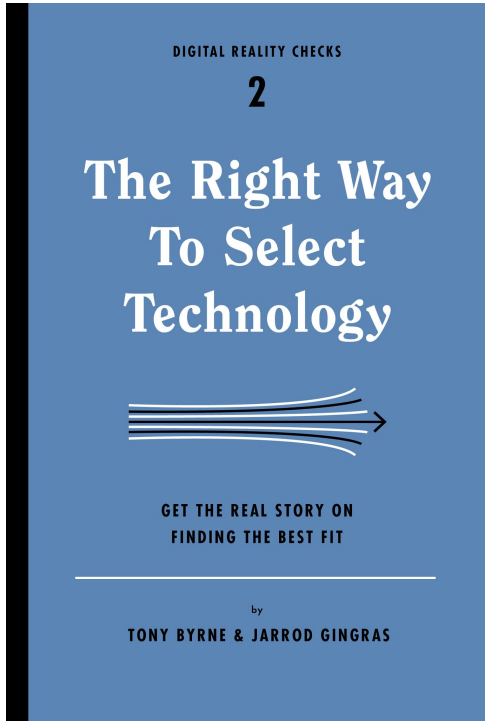
Conduct competitive proofs-of concept:

- Real scenarios
- Real information
- Real people
- Real environment

Final Take-Aways

1. Understand role in **your broader MarTech/C stack**
2. **Research marketplaces** and understand that all vendors have competitors
3. Focus more on "**fit**" than putative vendor reputation
4. Build **integrated team**, to drive selection and then activation
5. Create **real, testable stories** when assessing or selecting any technology
6. **Test adaptively** throughout your selection process
7. **Implement joyfully!**

Get the Book



1. https://rosenfeldmedia.com/books/right-way-to-select-technology

2. Be sure to choose “Ebooks only” and “Add to Cart”

3. Use the code

   rmcomp-srt-forsg

4. Check out (should be $0.00)

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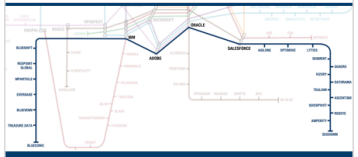
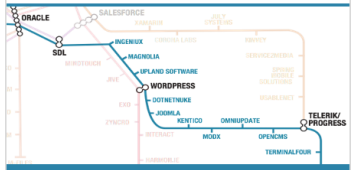
Journey Orchestration Engine

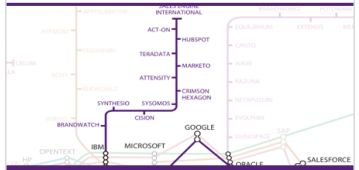


Customer Data Platforms

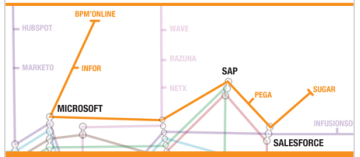


Web Content & Experience Management

Digital & Marketing Asset Management



Campaign & Lead Management Technology



Customer Relationship Management

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