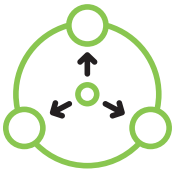


Key to Selecting the Right CX Platform

Find the right fit for your business to turn customer feedback into competitive advantage.





Whether you're a small shop or a large enterprise, you need a CX solution that can deliver tuned in, actionable insights and a CX platform that will grow and evolve with you. This guide is designed to help you make more informed decisions in the next steps of your CX evolution: know the questions to ask and what to look for in your search for a platform that best fits the needs and growth trajectory of your business.

IS YOUR CX INFRASTRUCTURE DESIGNED TO SCALE?

Without a CX platform infrastructure that can scale and mature with you, the competition will leave you behind. Most CX providers will assure you they can scale—explaining that they're a SaaS solution and leverage the elasticity of the cloud to scale up and down to meet your needs. It's true that investing in a true SaaS-based solution is fundamental to the success of your CX program. However, just because a CX offering is positioned as SaaS or cloud-based doesn't guarantee it will be able to grow and scale to the degree you need.

To assess actual scalability, you need to ask some probing questions. In addition to getting details about the how their technology and infrastructure can support the growth of your program, some of your first questions should revolve around what happens when you need to update or make changes to the CX program. How flexible is the provider in terms of accommodating program changes? What does it cost to make changes?

And perhaps the most revealing question: are there any program changes that the provider has to make for you? Make sure you know if you can adjust your survey designs, collection parameters, sample management, reporting, analytics, distribution and alerts at any time. Do you always have full access to your data? Do you have the option to choose between a self-service model, a full-service model, or anywhere in between? Because true scalability requires flexibility, an inflexible platform will cripple your ability to adapt to fast-moving changes in your business.

The next topic to cover with a potential provider centers on whether the platform allows you to build and invest in your program at your own pace. Do you have to commit to all the available services right up front or is it a pay as you evolve model? Can you add features to your program gradually? Along the same lines, will the vendor's offering provide a smooth and seamless transition from a modest CX program on the rise to a more complex world-class program?

If you aim to be a world-class business, you'll want to ask your CX vendor about their global presence. Will their platform allow you to expand beyond the borders of your country so you can build a global CX program? We'll discuss international capabilities in greater detail later, but be aware that there may be different requirements depending on where your data will reside. And if you'll want to analyze data from multiple geographic locations in tandem, you'll need a solution that will allow you to access that data—or data from all your CX programs, for that matter—with one convenient login. A robust CX platform will allow you to integrate and report on all programs in a single dashboard. Without this, you will be giving up a valuable holistic view into the effectiveness of your CX efforts as a whole.

IS THE INFRASTRUCTURE DESIGNED FOR COST-PERFORMANCE OR SECURITY?

Let's say you experience a sudden increase in user response to a survey and your provider must add servers to manage the increased load. How their infrastructure design handles this pooling of services can have serious consequences on the performance, cost, and security of your program. While searching for the right CX platform, you will need to understand how the provider will pool their services in order to grow your program or expand dynamically when needed.

To deliver flexible performance at an optimal cost, most CX vendors pool their services across multiple servers in what is called a multi-tenant architecture. This means they share the

Platform Architecture





resources of multiple servers to run their software and house the data of all their clients. This pooling lowers infrastructure costs for the vendor, and improves performance through load balancing, making it easier to scale up and down when any one customer needs more resources. In addition, when the vendor adds updates to the service, all customers can immediately take advantage of them.

The downside of this design is the possibility of co-mingling data between the vendor's customers, leading to security and data privacy concerns. To address these concerns, some vendors offer a single-tenancy architecture. Under this design, the customer still enjoys SaaS benefits, but the servers running their software and housing their data will not be shared with other customers. While this does offer a higher level of security, it is more costly and may cause lags in service enhancements or scalability.

How can you achieve the best of both worlds? A unique, but rare, hybrid approach exists that pools server resources (i.e., is multi-tenant) at the web and application layer where the service's software resides, but doesn't share resources (i.e., is single-tenant) where the customer data is stored. This hybrid approach lets you enjoy the cost, performance, scalability, and innovation sharing of resource pooling, but gives you security and data privacy by logically isolating your data.

CAN YOU GET MEANINGFUL INSIGHTS FROM YOUR BIG DATA?

Big data has been used so often as a buzzword that sometimes the term may seem meaningless, especially for companies that are starting out smaller. But it isn't meaningless: if you have the right tools to gain actionable insights for growth from your data—big or small—the significance becomes clear. How do you know if a CX provider really has the kind of big data implementation your business needs? The truth is, most providers don't have shortcomings when it comes to the data itself. Where they

often fall short is in their ability—or lack thereof—to help you get true insights from your data.

When you dig into how most CX providers handle big data, very few actually have the infrastructure needed to consume, process, and analyze data in a way that can produce meaningful insights. Some CX providers use data cubes: this gives them the ability to scale, but cripples their flexibility. Every time you need to update reporting in your program, the provider will require every filter and chart you use, and will then use that information to redesign and rebuild the database. Unfortunately, building or updating a cube can be a slow and cumbersome process. To address the need for flexibility, other CX providers might use a relational database, but these systems lack scalability.

You need a big data platform that incorporates big data technologies such as Hadoop and Elasticsearch to drive reporting in a way that remains scalable and flexible, while providing you with advanced analytics. These technologies give you the advantage of distributed computing and horizontal scalability while enabling a level of advanced analytics that is not possible with other systems.

For example, imagine a scenario where you'd like to distribute three surveys: an annual survey to your customers about how they rate you and your products, a transactional survey seeking feedback from a customer about a specific purchase, and an employee satisfaction survey. Unfortunately, cube and relational databases store the data from each type of survey in disparate data sets, and are therefore unable to compare and correlate drivers that ultimately impact your brand.

In addition, these systems may not have a function that introduces essential unstructured data, such as social media comments or online reviews, into the analysis. You need a big data platform to combine data from separate programs and sources and reveal specific correlations. Other unique advanced analytics that Hadoop can provide include data

mining, highly complex queries and the ability to perform a nearly infinite number of breakdowns with your data. The bottom line: a successful CX program requires a big data infrastructure that can perform advanced analytics and reveal actionable insights.

HOW SERIOUS IS YOUR CX PROVIDER ABOUT SECURITY?

Though a whole paper could be dedicated to what levels of security a CX vendor should provide, one of the first things you need to pay attention to is what security capabilities the vendor has built into the platform that you are able to control. To what degree can you manage account access to the program? Can you set password credential strengths and expiration lengths? Can you provide role-based access and create your own roles with granular control access and rights? Do you have audit capabilities to see who did what and when? Does it give you single sign-on capabilities that tie into your existing authentication methods?

It is also important to examine the operational controls the platform provider takes care of. Does it have an information security program with established policies, standards, controls, and technology to secure and monitor the platform? What levels of encryption does it offer for data in transit and at rest? In addition to its own internal security policies and controls, does the vendor have a third party perform regular assessments that include continuous vulnerability scanning and regular penetration testing? How thorough are they and what have been the results of their testing? Is the vendor pursuing industry-recognized security certifications, such as FedRAMP, High Trust, and ISO 27001?

Another key factor that will give you insight into how seriously a CX vendor takes security is if it has a certified and trained staff dedicated to executing its security program. When you sit down with the vendor to discuss security under NDA, will you be meeting with the head of engineering or will they have a chief information security officer on staff to address your questions too?

Lastly, ask about the CX provider's current clients. How many clients do they service with high information security concerns? Organizations of particular interest might include Fortune 500 companies, financial institutions and government agencies. The type of clients a provider serves can give you a feel for the level of trust that it has already established.

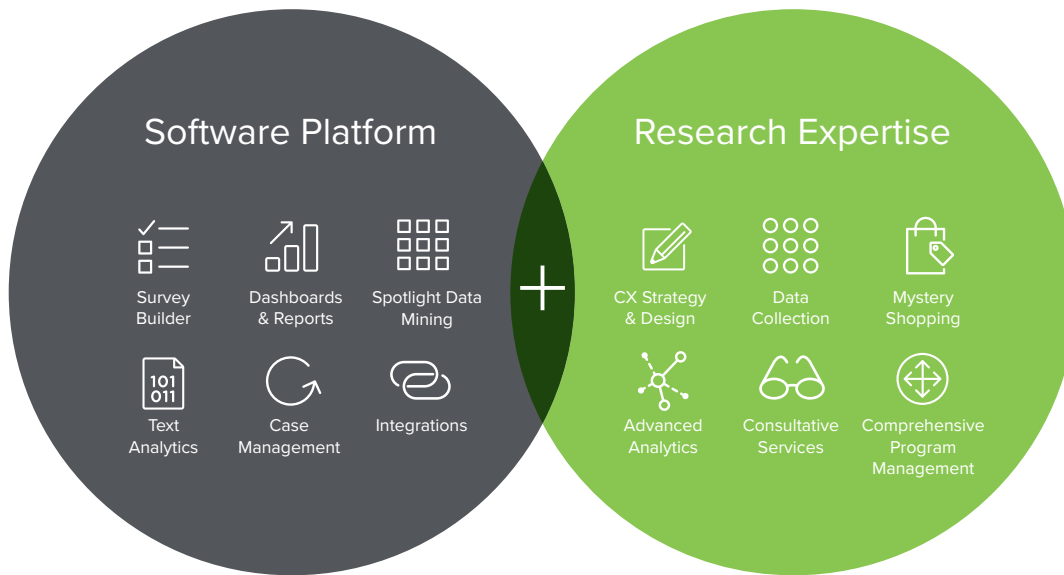


Data security continues to be of critical importance to consumers everywhere--CX software must provide comprehensive protection to safeguard you and your clients.

IS IT A FLEXIBLE SERVICE MODEL WITH TECHNOLOGY AND SERVICES UNDER ONE ROOF?

You want a CX provider with a robust technology platform. You also want a CX provider with strong market research and services expertise. The key is that you want both unified under a single roof. Many CX vendors grow their technology and services by a series of partnerships or acquisitions, and they might end up with a conglomerate of disjointed products and services as a result.

For example, perhaps a vendor develops its own CX technology product, but partners with a market research firm for services expertise and a separate business consultancy for program management and industry expertise. A number of different scenarios can play out from such an example, but too often each group will have their own agenda and may even compete with each other if they are separate profit centers. The technologies and services might not work well



A strong CX provider will offer a flexible software platform and services/ research expertise under one roof.

together, may have overlapping functionality, and may be developed with very different roadmap objectives in mind. In most cases, the different providers might share clients and engagements, but they rarely share a holistic CX vision.

Whether a CX vendor’s technology and services are home-grown or built through industry partnerships, what really matters is that everyone in the organization is on the same CX page. Do the development teams work together and share the same goal? Do the efforts of the market research team impact and inform development and consulting and vice versa? Does the platform evolve based on results from both market research and customer engagements? If leading-edge research or custom consulting is done for one customer, does it make its way into the development of the platform so everyone can benefit from it?

You might also invest in a great technology platform that the vendor helps you set up, and then you never hear from them again. The CX technology at your fingertips is only optimized if you are given guidance about taking maximum advantage of it. But if you’ve chosen a provider that has cobbled together a disparate mix of offerings sourced from different places, getting that consulting expertise, insight from market research, or even the implementation of a change to your program might saddle you with a hefty bill.

A CX provider with a flexible service model is the solution. Whether you need no help, a modest amount of guidance, or in-depth access to services and research, you should be able to get it to the degree you want, when you want it,

and at a reasonable price. You should seek a provider that offers personalized services and has a unified organizational structure. This will enable you to take a holistic approach to CX through their technology platform and the services that support you in your CX efforts.

CAN THEY GUIDE CX MATURITY AND ASSOCIATED BUSINESS BENEFITS?

A capable CX vendor will give you guidance about growing the maturity of your CX program in the short and long term. Maturity models developed by CX vendors or analysts are essential to helping firms understand exactly where they are and where they want to go. These models provide action plans to take your CX program from fledgling to ever-increasing levels of capability and sophistication. Make sure your potential CX vendors have the desire, expertise, and technological capability to guide that evolutionary process.

A vendor with true CX chops will have the ability to determine your CX maturity and tie that to a prescriptive roadmap that will guide incremental investments in new technologies and services, advancing your CX program to ever-increasing levels of maturity. A vendor that can only baseline your maturity is a red flag. If they can’t tell you what’s holding you back and what steps you should take today, tomorrow, and all along your CX maturity path, they’re not going to deliver all the value you should expect.

You should also ask if their prescriptive action plans include technology and services beyond their own portfolio. In other words, are they interested in your optimal results, or just their own? And do they have the breadth of partnerships needed to meet your needs in every CX competency that impacts your bottom line, or are there significant gaps in their offering? And finally, can they demonstrate how their maturity model is empirically linked to business results? Can they help you make the business case for new CX investments—with concrete benefits you can expect as a return?

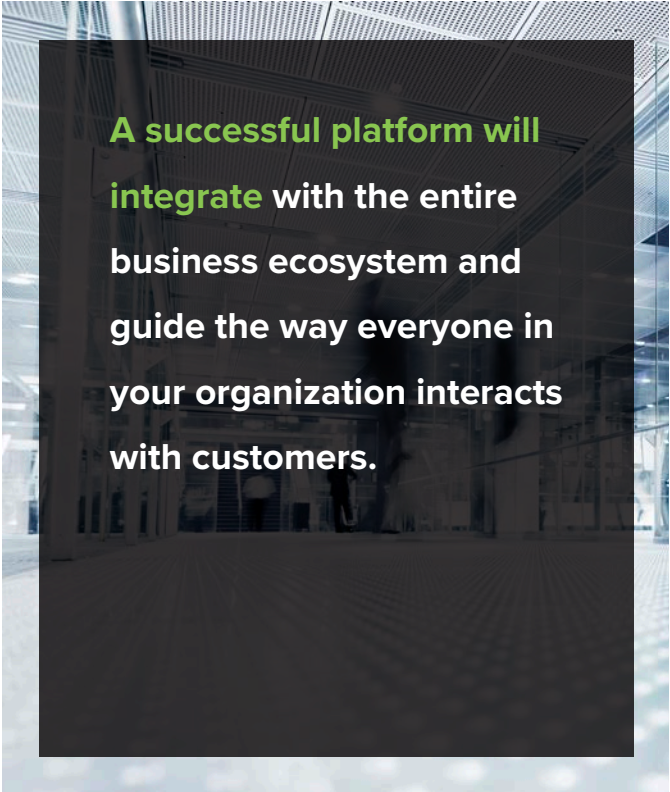
True CX maturity is aided by a vendor that has a step-by-step, precise, and tailored CX maturity path that can deliver business results with measurable return on investment. A vendor that combines this prescriptive guidance—combined with personalized service—will help you set clear objectives, gain executive buy-in, and align the organization around the achievement of CX goals.

IS THE CX SOLUTION AN ISLAND OR A BRIDGE?

Your CX efforts shouldn't be confined to a single department within the organization. A successful platform will integrate with the entire business ecosystem and guide the way everyone in your organization interacts with customers. Your CX effort should impact every customer touchpoint: customer support, direct sales, marketing, and more. Too often organizations will have key touchpoints that aren't informed by CX data, resulting in misguided action—or missed opportunities to address customer sentiment in the moment.

To make sure you don't have customer experience blind spots, you need a CX platform that can proactively share information across all touchpoints and strengthen your ability to act on customer sentiment at each one. The right CX solution can make the business tools you're already using work even better for you—by not only capturing how the customer feels about your organization, but feeding those insights into the right systems to guide frontline action.

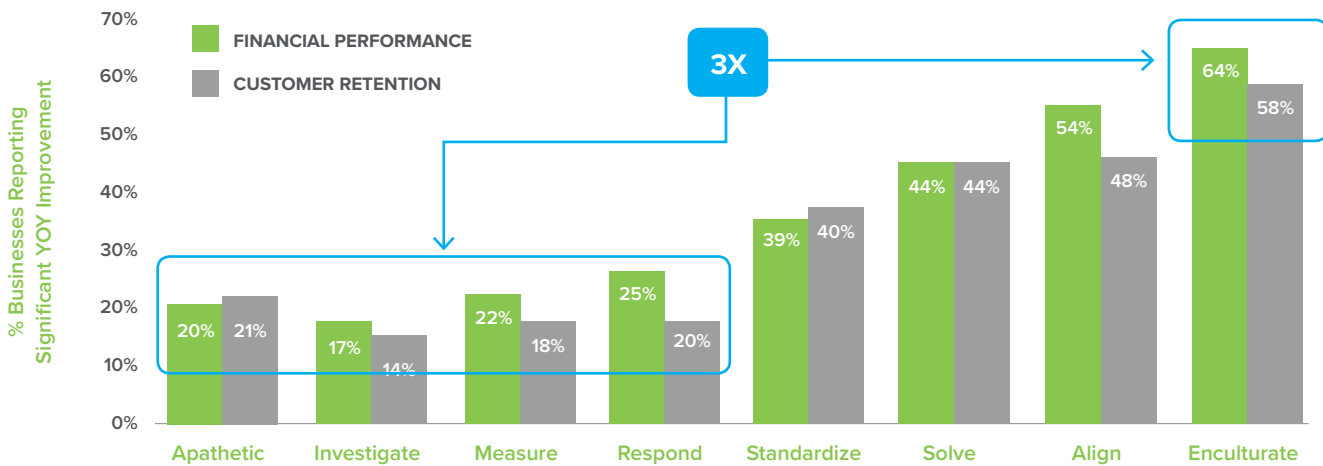
For example, an inside sales rep who spends most of her day in Salesforce might use an integrated CX platform to see customer survey responses and NPS® scores right in the account record. She may see that a particular customer has noted dissatisfaction with the response to the six support calls made in the last week—and now has the insight to shift the upsell call she had planned into a service recovery effort.



A successful platform will integrate with the entire business ecosystem and guide the way everyone in your organization interacts with customers.

Or perhaps your marketing team is using Adobe Analytics to monitor what your customers do and how they act when they visit your web site. But you could be taking it a giant step further, by creating site intercept surveys that help you understand not only web site behavior, but the motions, motivations, and attitudes that govern it. This allows your marketing team to create more meaningful insights, generate a wealth of actionable information, and ultimately build stronger, more productive relationships with your online customers.

To be able provide this type of cross-organizational emotional insight, your CX platform needs to have connectors with business-critical systems like CRM, salesforce and marketing automation, reporting tools, and more. It should also feature open APIs that let you create your own custom connectors to the tools your customer-facing teams use.



Companies at the highest level of CX maturity are 3x as successful in driving business results as companies in the first four stages.

HOW WELL CAN YOU EXPAND INTERNATIONALLY?

Even if you don't have current global aspirations, you still should take note of potential CX vendors' international capabilities. Don't let your CX vendor limit your potential for growth in countries that may become fertile markets. Do they understand how laws in each country—such as data residency and privacy laws—impact aspects of your CX program? Does their international competence give you the peace of mind that your program adheres to international treaties and a country's local laws? And beyond data privacy, can they host their data and services in close proximity to the customers who will use them so that speed of service is maximized?

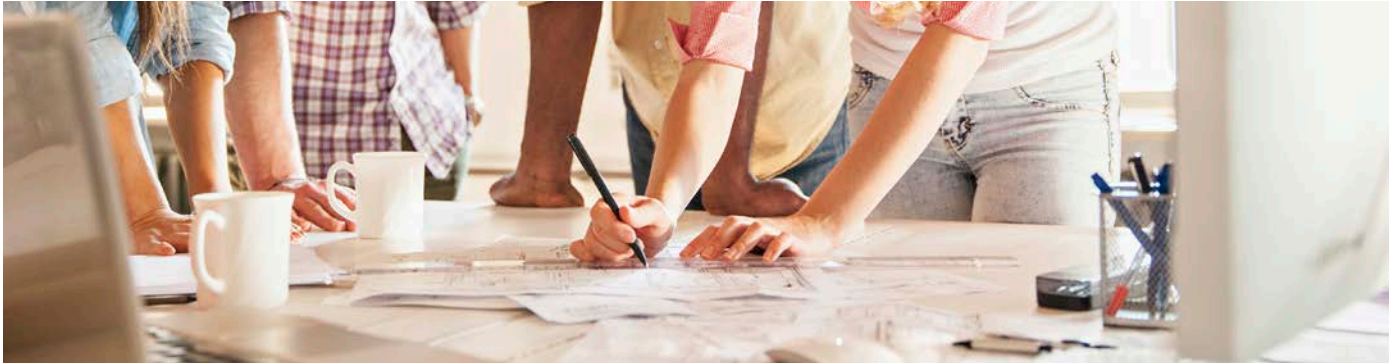
You can get a good gauge of their international capabilities by finding out what international programs they already support and how many. There are also a few specifics that you should ask about, such as their localization capabilities. Can they localize your surveys and responses in more than just a few languages? And, as mentioned earlier, it is important for your CX vendor to give you a single login for all programs no matter their geographic targets. Without a single login, you can't get a single unified view of your CX efforts.

A CX vendor with solid global capabilities will also have an international infrastructure with data centers in multiple countries, and even on multiple continents. Do they use global content distribution networks (CDNs) to move static data closer to your customers? Ideally, you want a vendor that also has the ability to easily spin up services in different regions or countries as needed.

WHAT IS THE VENDOR'S HISTORY OF CX INNOVATION?

To create a world-class CX program, you need a vendor that goes beyond data collection. Every program continues to improve its data collection capabilities, but what has your vendor done to innovate better ways to use or act on that data? Have they progressed to give you more focused insights with lower costs and fewer staff hours? Is the vendor simply offering variations on what every other CX vendor is doing, or is it venturing into new areas that can elevate your program?

One focus in the CX field that is extremely important is time to value. With the immediacy of today's world, you need to be able get results faster than ever before. What is your CX vendor doing to speed up your ability to get focused insights? How quickly can they help you identify patterns? What are they doing to shorten the time between customer feedback and action? How do they help you move from reactive to proactive? What are they doing in the area of predictive analysis, so you can proactively address customer feelings and perceptions even before they provide feedback?



What does the vendor’s history and customer base tell you about their ability to continually deliver new innovative ways to get more out of your CX program? A vendor that has a long history in CX and long-term relationships with major clients demonstrates their ability to excel in an ever-changing market—showing constant innovation and adaptation. It proves they’ve created a level of trust with their clients—and a solid track record for developing new and better ways for clients to succeed in their CX efforts.

DIFFERENTIATE WITH WORLD-CLASS CX

Customer experience has become the primary battlefield where today’s businesses compete and differentiate themselves. To excel in customer experience, you need a CX partner that does more than push out surveys and collect data. You need a partner with a holistic CX platform and the expert services and research expertise to deliver on all the essential aspects that we’ve discussed in this guide.

As the largest and most seasoned CX provider in the market, MaritzCX can deliver on each of these needs. From an infrastructure that delivers the benefits of true SaaS along with a single-tenant data layer and big data support to industry-leading security and full international capabilities, MaritzCX can service even the largest CX programs.

And our flexible service model, trademark CXEvolution maturity framework, and ability to share data to and from a wealth of business-critical systems means you’ll get a solution tailored to your needs, maturity level, and existing infrastructure. Finally, our history of innovation—including pioneering technology like Spotlight, which correlates success drivers that used to require a thousand analyst hours with a single click—means you can count on MaritzCX to keep you ahead of the pack today and far into the future.

In fact, MaritzCX believes organizations should be able to see, sense and act on the experiences and desires of every customer, at every touchpoint, as it happens. We help organizations increase customer retention, conversion, and lifetime value by ingraining customer experience intelligence and action systems into the DNA of business operations.

To learn more about how we can help you create a world-class CX program, as well as how our platform and services stack up against the competition in all the essential areas of CX success, contact us at www.maritzcx.com/contact-us/.

To demo a product or to contact MaritzCX call

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