The Right Way to Select Technology For Your New Omnichannel Stack

Jarrod Gingras
Managing Director/Analyst

Real Story Group
Make Better Technology Decisions
1. Context / Disclaimers
2. The Goal
3. The Right Way
Three Subscription Offerings

#1 Vendor Selection Advisory
Inform and empower tech selection teams with critical research and candid advice

#2 Omnichannel Stack Advisory
Advise stack owners on strategic decisions and technology choices

#3 Council-Level Membership
Host executive leadership council for peer support to omnichannel stack owners
<table>
<thead>
<tr>
<th>INDEPENDENCE FACTORS</th>
<th>REAL STORY GROUP</th>
<th>OTHER FIRMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONSULT TO VENDORS?</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>SPEAK AT VENDOR EVENTS?</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>ACCEPT EXPENSES &amp; HOSPITALITY FROM VENDORS?</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>WRITE PAPERS FOR VENDORS?</td>
<td>NO</td>
<td>YES</td>
</tr>
</tbody>
</table>
Digital Workplace and Digital Marketing Technology

- Author of book about applying design thinking to the tech selection process
- http://rosenfeldmedia.com/books/right-way-to-select-technology/
- Lead DAM analyst
- Evaluating 30+ DAM vendors
- https://www.realstorygroup.com/Reports/DAM/
THE GOAL
Ideal Customer Engagement

Get the right content and message...
To the right person...
In the right context...
At the right time...
...And measure the effectiveness
Silo Problem: Isolated, Disjointed, Inconsistent Customer Experiences

Engagement Silo:
- Ads
- Web
- Email
- Mobile
- Social
- Print
- Alexa
- Chat
- Call
- PoS/F2F

Content:
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Data:
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Rules:
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Planning:
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Analytics:
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Enterprise Target Reference Model for an Integrated Customer Experience

**Foundations 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

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Contextual Engagement:
- Ads
- Web
- Email
- Mobile
- Social
- Print
- Alexa
- Chat
- Call
- PoS/F2F

Contextual Engagement:
- Social Engagement
- Email Engagement
- Mobile Engagement
- Print Engagement
- Alexa Engagement
- Chat Engagement
- Call Engagement
- PoS/F2F Engagement

Contextual Engagement:
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### Reference Architecture Model for the 2020s: Omnichannel CX Stack

#### ENGAGEMENT CHANNELS

<table>
<thead>
<tr>
<th>Channel</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ads</td>
<td>Generate demand</td>
</tr>
<tr>
<td>Web</td>
<td>Applications</td>
</tr>
<tr>
<td>Email</td>
<td>E-commerce</td>
</tr>
<tr>
<td>Mobile</td>
<td>Distribution</td>
</tr>
<tr>
<td>Social</td>
<td>Contact Center</td>
</tr>
<tr>
<td>Print</td>
<td></td>
</tr>
<tr>
<td>Alexa</td>
<td></td>
</tr>
<tr>
<td>Chat</td>
<td></td>
</tr>
<tr>
<td>Call</td>
<td></td>
</tr>
<tr>
<td>PoS/F2F</td>
<td></td>
</tr>
</tbody>
</table>

#### INTERACTION & DELIVERY ENVIRONMENTS

<table>
<thead>
<tr>
<th>Environment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising</td>
<td>Generate demand</td>
</tr>
<tr>
<td>Applications</td>
<td>Deliver services</td>
</tr>
<tr>
<td>E-commerce</td>
<td>Sell things</td>
</tr>
<tr>
<td>Distribution</td>
<td>Deliver via channel</td>
</tr>
<tr>
<td>Contact Center</td>
<td>Answer questions</td>
</tr>
</tbody>
</table>

#### CONTENT & ENGAGEMENT MANAGEMENT PLATFORMS

<table>
<thead>
<tr>
<th>Platform</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service &amp; Support</td>
<td>Address customer inquiries and problems</td>
</tr>
<tr>
<td>CRM &amp; SFA</td>
<td>Salesforce Automation &amp; Relationship Mgmt</td>
</tr>
<tr>
<td>Social Engagement</td>
<td>Engage in social media &amp; communities</td>
</tr>
<tr>
<td>Email &amp; Marketing Automation</td>
<td>Manage outbound messaging</td>
</tr>
<tr>
<td>WCM</td>
<td>Manage web content &amp; inbound experience</td>
</tr>
<tr>
<td>DAM / MAM</td>
<td>Manage image, video, &amp; audio assets</td>
</tr>
<tr>
<td>Operations Hubs</td>
<td>Creative &amp; Content Development, Campaign Scheduling, Resource Mgmt</td>
</tr>
<tr>
<td>Journey Orchestration Engine</td>
<td>Omnichannel engagement and personalization: rules and decisions</td>
</tr>
<tr>
<td>Omnichannel Content Platform</td>
<td>Content object store for base components</td>
</tr>
<tr>
<td>Customer Data Platform (CDP)</td>
<td>Definitive consumer data &amp; segments</td>
</tr>
<tr>
<td>Intelligence Hubs</td>
<td>Analytics, Reporting &amp; Visualization, Predictive Modeling, Dashboards</td>
</tr>
<tr>
<td>CIAM</td>
<td>Customer Identity &amp; Access Management, and SSO</td>
</tr>
</tbody>
</table>

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THE RIGHT WAY
“Design thinking” is a process and a way of thinking about tough-to-solve problems.

- Stanford’s dSchool
“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
Applying Design Thinking Principles to Tech Selection

EMPATHIZE

DEFINE

IDEATE

PROTOTYPE

TEST

Image source: Stanford’s dSchool
Applying Design Thinking Principles to Tech Selection

- EMPATHIZE: Create Stories
- DEFINE: Create RFP and Shortlist
- IDEATE: Review Proposals and Downselect
- PROTOTYPE: Demos and Downselect
- TEST: PoC

Right Market

Long to Shortlist (6-8)

Shortlist to Demo (3-5)

Demo to Finalists (1-2)

Finalists to Winner (1)
Design Thinking: Empathize

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

Describe, not prescribe
### Content Authoring

<table>
<thead>
<tr>
<th>1.1</th>
<th>Content Editor and Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1</td>
<td>Authoring is fully web browser-based</td>
</tr>
<tr>
<td>1.1.2</td>
<td>Content editor supports Microsoft Internet Explorer</td>
</tr>
<tr>
<td>1.1.3</td>
<td>Content editor supports Mozilla Firefox</td>
</tr>
<tr>
<td>1.1.4</td>
<td>Content editor supports Opera</td>
</tr>
<tr>
<td>1.1.5</td>
<td>Content editor supports Konqueror</td>
</tr>
<tr>
<td>1.1.6</td>
<td>Content editor supports Safari</td>
</tr>
<tr>
<td>1.1.7</td>
<td>Content editor supports Opera</td>
</tr>
<tr>
<td>1.1.8</td>
<td>Own proprietary browser environment</td>
</tr>
<tr>
<td>1.1.9</td>
<td>Thin client application for content editor</td>
</tr>
<tr>
<td>1.1.10</td>
<td>Embedded HTML editor for content editor</td>
</tr>
<tr>
<td>1.1.11</td>
<td>Template or for editing</td>
</tr>
<tr>
<td>1.1.12</td>
<td>Java applet content editor</td>
</tr>
<tr>
<td>1.1.13</td>
<td>OCX object content editor</td>
</tr>
<tr>
<td>1.1.14</td>
<td>The content editor supports DHTML/JavaScript</td>
</tr>
<tr>
<td>1.1.15</td>
<td>The content editor has been developed by the vendor for use with ECM</td>
</tr>
<tr>
<td>1.1.16</td>
<td>The content editor is a third-party product</td>
</tr>
<tr>
<td>1.1.17</td>
<td>The content editor provides its own browser development</td>
</tr>
</tbody>
</table>

### Content Editor Presentation

This category contains 9 criteria below it.
Dan the creative director needs to distribute a set of assets to a 3rd-party or a client. He logs into the DAM using Firefox on a Mac. He uploads 50 images via his browser, simply dragging-and-dropping a folder of assets on his desktop into the browser. In addition to the images he uploaded to the system, there’s a few already in the system he needs as well.

He searches for the images he needs, and is able to refine and focus the search via facets, leveraging the pre-defined taxonomy structure. Images and other asset types were tagged upon ingest, and standard metadata was pre-populated on ingest.

He narrows down the list and finds the ones he needs, and as he finds each one, he can drag and drop them into a lightbox or “collection” that he gives a custom name to. After he puts the full collection together, he generates a link.

He is then able to have the link automatically sent to the registered users from the agency via the DAM, or he can copy and paste the URL from the DAM and send it via email.

Local art directors can open assets and ad kits to make changes specific for a local market. This, for example, can be localizing the wording by opening the source files (InDesign, for example), making changes, and saving a local version of the asset.

Marta, on the 3rd party agency side receives a notification that the collection is ready, she clicks on the link, which directs her to a page that’s branded with her company look-and-feel, and is dedicated to the collection Dan created for them.

...
Shortlist options whose fundamental strengths align with your unique needs
What Are You Trying To Do?

Get the right vendor shortlist based on your unique requirements.
Digital & Marketing Asset Management

Scenarios

Brand Management:
Select All | Select None
- Basic Brand Management
- Multilingual Brand Management

Enterprise Asset Management:
Select All | Select None
- Highly-regulated Environment
- Media-based Knowledge Management
- Photo / Asset Library
- Work-in-Progress Creative Management

Marketing Asset Management:
Select All | Select None
- Advertising & Marketing Asset Management
- Integrated Marketing Content Hub
- Product Asset Management

Publishing:
Select All | Select None
- Digital+Print Publishing
- Periodical & Catalog Production

Video & Audio Management:
Select All | Select None
- Media Editing & Assembly
- Media Library Review & Approval

THE RIGHT SHORTLIST
Conduct *realistic* vendor demos where vendors *show* how their solution meets your needs
Make Them Real
Make Them Real

- Make sure your team is represented
- Beware of the “canned” demos
- Demo your scenarios
- Each vendor should demo same scenarios
- Ask the tough questions

- Especially around pricing
Conduct competitive proofs-of-concept with:

- Real scenarios
- Real content
- Real people
- Real environment
Your cooks, your ingredients, your kitchen.

Can be resource-intensive, but what’s the cost of a failed implementation?
Adopt an iterative approach where you sketch light (imperfect) requirements and refine over time through testing at every step in the process.
Not Just Technology

Scenario Fit

Technology Fit

Partner Fit

Value Fit
Design thinking develops 3 significant components of common ground in teams:

- Shared vocabulary
- Tangible artifacts
- A trust-based team culture

- NNGroup
More Value, More Lessons, Delivered Earlier

**Traditional**

- **Requirements**: RFP, Proposals, Demos
- **Project Initiation, Specifications**
- **(Big-Bang) Implementation**

**Iterative, test-based**

- **Requirements**: RFP, Proposals, Demos
- **Bake-Off (POC)**
- **Live Pilot**
- **(Phased) Implementation**
Jakob Nielsen: “a wonderful interface solving the wrong problem will fail.”

RSG: “wonderful technology solving the wrong problem will fail.”
Final Thoughts

- Download a free research excerpt: www.realstorygroup.com/Sample

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  - @jarrodgingras

- Email: jgingras@realstorygroup.com

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