

The Forrester Wave™: Journey Visioning Platforms, Q4 2018

The 12 Providers That Matter Most And How They Stack Up

by Joana van den Brink-Quintanilha and Alex Causey
November 14, 2018

Why Read This Report

Forrester evaluated two overlapping but different categories within journey analytics: journey visioning and journey orchestration. In this 26-criteria evaluation of journey visioning platform providers, we identified the 12 most significant ones — ClickFox, IBM, inQuba, Kitewheel, NICE, Pointillist, SuiteCX, TandemSeven, Teradata, Thunderhead, Touchpoint Dashboard, and Usermind — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer experience (CX) professionals make the right choice.

Key Takeaways

Kitewheel, Thunderhead, NICE, And Pointillist Lead The Journey Visioning Pack

Based on our research and analysis, Kitewheel, Thunderhead, NICE, and Pointillist are Leaders; Teradata, Touchpoint Dashboard, Usermind, and ClickFox are Strong Performers; TandemSeven, SuiteCX, and IBM are Contenders; and inQuba is a Challenger.

CX Pros Are Looking For Ways To Approach Customer Problems More Holistically

Both of the customer journey analytics categories are growing because CX pros want to shift from a channel-centric approach to a holistic approach to customer problems as they occur across touchpoints, channels, policies, and procedures. This is largely because companies are increasingly competing at shaping their customers' journeys.

Cocreation And Business Impact Analysis Matter Most, For Visioning

Vendors that enable firms to use journey insights to drive cross-functional alignment by linking them across the CX ecosystem stand out. Measuring business impact is also a differentiator because it helps companies drive business results and CX differentiation.

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The 12 Providers That Matter Most And How They Stack Up

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November 14, 2018

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[Brief: Learning From Three Early Adopters Of Customer Journey Analytics](#)

[The Customer Journey Atlas In Six Steps](#)

[Drive Customer Obsession With Journey Analytics](#)

[The Forrester Wave™: Journey Orchestration Platforms, Q4 2018](#)

[The Journey Analytics Road Map: From Start To Scale](#)

[Now Tech: Journey Management, Q4 2018](#)

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Journey Analytics Is Driven By Customer Obsession

Companies transforming to become customer-obsessed are using journey analytics to help them become customer-led, insights-driven, fast, and connected. Forrester defines journey analytics as:¹

An analytics practice that combines quantitative and qualitative data to analyze customer behaviors and motivations across touchpoints and over time to optimize customer interactions and predict future behavior.

By using data to look at high-level journeys and to zoom in on microjourneys and the defining moments within them, journey analytics helps companies isolate, quantify, model, and track opportunities to improve CX, operational efficiency, and business results. Journey analytics stitches together data horizontally, across silos, to provide an integrated view of the customer and enable companies to test a wide variety of journey hypotheses in near real time to determine which combinations of interactions will yield the desired business results.

Journey analytics involves four core capabilities, and we have segmented the space into two categories (see Figure 1):

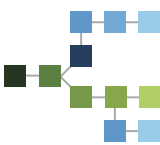


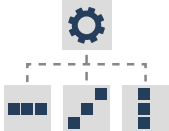
- › Journey visioning, which focuses on data fusion, journey design and planning, and journey testing and optimization.
- › Journey orchestration, which includes the journey visioning capabilities but also delivers — and places a greater emphasis on — journey automation and orchestration.

Journey analytics stitches together data to provide an integrated view of the customer and enable companies to test a wide variety of journey hypotheses.

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FIGURE 1 The Four Core Journey Analytics Capabilities

				Journey visioning evaluation	Journey orchestration evaluation
	Data fusion	Connect data sources across steps in a journey and entire journeys to create a unified view of a customer	• Connecting the data	✓	✓
			• Quality of visualization	✓	✓
			• Journey zoom level	✓	✓
			• Journey behavior analysis	✓	✓
			• Business impact analysis	✓	✓
	Journey design and planning	Create a repository of data-driven journey maps for analysis to model future behaviors and measure interactions	• Sharing maps and insights	✓	✓
			• Creating current- and future-state maps	✓	✓
			• Cocreation and ideation	✓	✓
			• Discovery of segments and personas	✓	✓
			• Acting on journey insights throughout the ecosystem	✓	✗
	Journey testing and optimization	Test journey hypotheses, measure results, and optimize future interactions across journeys	• Design opportunities	✓	✓
			• Prioritization	✓	✓
			• Continuous testing	✓	✓
	Journey automation and orchestration	Predictive and prescriptive analytics capabilities for automating interactions in near real time	• Workflow automation	✗	✓
			• Journey orchestration	✗	✓
			• Integration	✗	✓

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There Are Two Valid Approaches To Journey Visioning: Bottom-Up And Top-Down

Companies take one of two approaches to journey visioning (see Figure 2):

- › **The bottom-up approach derives journey patterns from analyzing data.** This means starting from large volumes of existing data (CX metrics, voice of the customer [VoC], digital, web and mobile analytics, CRM, call center, etc.) to discover and visualize frequent, costly, problematic, or promising customer journeys. Stitching together the data across channels helps companies find patterns and narrow the range under consideration to isolate the highest-impact journey hypothesis.

With the right tools, companies can get a feel for the number of customers on a specific journey or affected by an issue. The journey data helps to visualize specific behaviors like drop-offs, skipped steps, repeat steps, duration, pain points, and channel switches. This approach — also known as inductive — helps companies home in on the most promising hypothesis, to drive CX metrics improvement, cost savings, and revenue uplift. Doing this typically requires a journey visioning platform or service provider with experience connecting data and isolating core journeys for specific industries to get insights fast.

- › **The top-down approach pulls in data to test current- and future-state journey models.** This means defining current-state and future-state journeys first based on a segment or persona and then layering qualitative data captured in employee notes, interview transcripts, and call center logs as well as quantitative data from surveys and other databases and systems onto the journey to capture important insights and drive a road map for change.

Companies using this approach — also known as deductive — frequently invest in a journey mapping tool or journey visioning platform that focuses on journey design and planning. These tend to come from vendors with a journey mapping software background and typically have a considerably lower price point that can scale to accommodate more complex journey management programs. They capture metadata — clickstream data, emotional end state, A/B testing data, Net Promoter Score (NPS) — at the touchpoint level and construct a journey narrative supported by relevant data to help align stakeholders in the organization around a top-down, strategic vision.²

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FIGURE 2 The Vendors We Selected Each Take One Of Two Different Approaches

Bottom-up	Top-down
ClickFox	SuiteCX
IBM	TandemSeven
inQuba	Touchpoint Dashboard
Kitewheel	
NICE	
Pointillist	
Teradata	
Thunderhead	
Usermind	

Journey Visioning Is Not Just A Tech Category — It's A Practice With Specific Goals

Journey visioning is a practice — part science and part art. Having the right data and insights — and the right tools — is important, but it's not enough. Tools help fuse data across channels, touchpoints, and systems along the customer journey to design and plan current- and future-state journeys and test and optimize journey hypotheses. But to execute at scale, you also need the right skills, the right governance, and the right operational model.

Journey visioning as a practice is still in its infancy, so companies are looking for help to develop the right strategy, find the right tools, build the right competencies, and align the right stakeholders to make journey visioning an enterprise capability. There is no one-size-fits-all vendor. That said, some vendors stand out because of their ability to:

- › **Drive cocreation and ideation.** Some vendors enable firms to use journey insights to drive cross-functional alignment through functionality that supports ideation, brainstorming, prioritization, and validation for an individual journey visualization or a group of them. So much of the success of a journey analytics strategy is dependent on aligning stakeholders, processes, and technology systems across the wider CX ecosystem. Some vendors excel at driving a common vision and consensus around prioritization that leads to clear accountability for an agreed upon journey transformation road map.
- › **Measure business impact.** Some vendors offer robust dashboarding capabilities that help companies monitor the impact of journey design improvements on a variety of key performance indicators (KPIs). By enabling companies to make a clear link between journey improvements and

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repeat purchases, attrition, renewals, complaints, and NPS, these vendors help companies quickly prove the value of journey analytics investments. In addition, some vendors have added custom algorithms to measure the success of key journeys to aid prioritization.

- › **Deliver insights at speed.** Journey analytics can quickly become overwhelming due to the number of data sources combined, the volumes of data involved, the number of systems affected, the need to balance quantitative and qualitative insights, and the challenge of aligning stakeholders across the organization. Some vendors excel at finding insights quickly across many permutations of the journey and help to prioritize the most promising journey hypotheses.
- › **Be pragmatic and adopt a partnership mindset.** For many companies, journey analytics starts pragmatically, using current analytics approaches and existing analytics technologies. While some companies jump straight into journey analytics, others start with traditional journey mapping and then advance to a more data-driven approach to mapping journeys. Some vendors stand out in their willingness to build on prior art and insights and to add new data sources, capabilities, and analytical models, too. They also stand out in their willingness — and ability — to go the extra mile to stitch together imperfect data sets and legacy systems to jump-start journey analytics.

A Diverse And Growing Set Of Visioning Platforms Vie To Match Customer Demand

Although there is no one-size-fits-all solution, vendors from different technology segments — including big data analytics, CRM, VoC, journey mapping software, and testing and optimization — are rushing to develop journey analytics capabilities within their offering to help companies capture the end-to-end customer journey and make insights available to the enterprise for analysis, testing, and action. Over the next few years, as more companies use customer journeys as an organizing principle and focus more on the return on investment (ROI) of journey-related investments:

- › Some established players will add journey analytics capabilities to their current offerings.
- › More startups from areas like CRM, VoC, and journey mapping will develop clearer propositions focusing on all or a subset of the four journey analytics capabilities.
- › Service providers focusing on CX or digital transformation will develop proprietary journey analytics technologies.
- › Greater competition between existing vendors will result in consolidation within the market as vendors join forces.
- › Companies with strong machine learning and AI capabilities may become contenders in this segment.

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Journey Visioning Platforms Evaluation Overview

To assess the state of the customer journey analytics platform market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top customer journey analytics platform vendors, divided into two categories and therefore two Forrester Wave™ evaluations. The criteria for the two evaluations are similar, but: 1) the weightings are different to reflect whether the end user's priority is journey visioning or journey orchestration, and 2) the journey automation and orchestration criteria appear only in the journey orchestration Forrester Wave (see Figure 3). This Forrester Wave focuses on visioning. You can find its companion evaluation, focused on orchestration, here: [The Forrester Wave™: Journey Orchestration Platforms, Q4 2018](#).

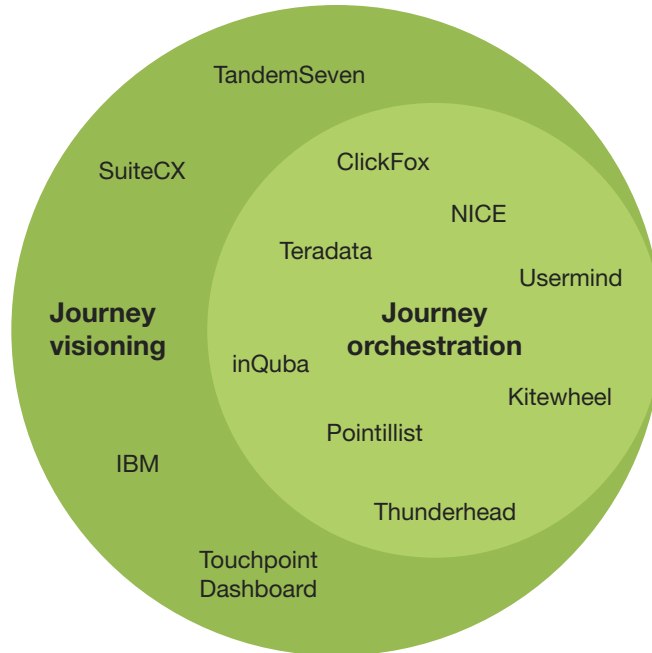
After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of 26 evaluation criteria. We evaluated vendors against these criteria, which we grouped into three high-level buckets:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Our evaluation of current visioning capabilities focused on three of the four core journey analytics capabilities — excluding the one that applies only to orchestration: data fusion, journey design and planning, and journey testing and optimization. We evaluated each vendor's technology, services, client experience, and usability through this lens.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each vendor's strategy based on its user research, planned enhancements, partner ecosystem, pricing model, and track record.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of employees dedicated to its journey analytics product and the number of its journey-analytics-specific customers.

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FIGURE 3 How Forrester’s Two Customer Journey Analytics Platform Waves Principally Differ



**The journey visioning platforms
Forrester Wave™:**

- + Is weighted heavier on journey design and planning (sharing maps and insights, creating current- and future-state maps, cocreation and ideation, discovery of segments and personas, and acting on journey insights throughout the ecosystem [this criterion is only included in the journey visioning Forrester Wave]).
- Is weighted lighter on journey testing and optimization and technology.

**The journey orchestration platforms
Forrester Wave:**

- + Includes criteria on journey automation and orchestration (workflow automation, journey orchestration, and integration).
- + Is weighted slightly heavier on journey testing and optimization (design improvement, prioritization, and continuous testing) and technology (security and scalability).
- Is weighted lighter on journey design planning.

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Evaluated Vendors And Inclusion Criteria

Forrester included 12 vendors in this assessment: ClickFox, IBM, inQuba, Kitewheel, NICE, Pointillist, SuiteCX, TandemSeven, Teradata, Thunderhead, Touchpoint Dashboard, and Usermind (see Figure 4). Each of these vendors:

- › **Offers a comprehensive journey visioning platform.** We included only vendors that support all three of the core capabilities required for journey visioning (data fusion, journey design and planning, and journey testing and optimization) with a proprietary, productized software platform. We excluded vendors whose offering consists of one-off, custom-coded journey analytics systems based on loosely integrated disparate technologies, varying from client to client. We also excluded vendors that offer services on top of another vendor's software only. Each vendor in this evaluation offers a platform that delivers journey visioning capabilities as a standalone offering.
- › **Provided evidence of its journey visioning customers' success.** To be included in this Forrester Wave, a vendor must have provided Forrester with concrete evidence of its journey visioning customers' success with the platform.
- › **Supports access to a wide range of data sources.** To be included, a vendor's platform must be able to access a wide range of data sources (CX, marketing, operational, etc.) to perform journey visioning on multiple journeys across the customer life cycle.
- › **Generates strong customer interest.** To be included, a vendor's platform must have earned a strong enough reputation that Forrester clients have demonstrated interest in it through inquiries to analysts, consulting engagements, media requests, and impact on other players in the market.

We Excluded Vendors In Adjacent Categories

The vendors we did not include in this Forrester Wave because their journey visioning offerings do not meet the above criteria fall into four categories:

- › **Services-based.** Forrester identified many vendors serving this space that offer journey analytics services but no standalone product — such as Andrew Reise, Convergys, and SapientRazorfish, among others. Several of the service providers have partnerships with the technology providers. For example, as of this writing, SapientRazorfish has a partnership to implement Kitewheel's journey analytics platform.
- › **Specialists.** Some vendors, like Indeemo, have a strong journey mapping software offering with some testing and optimization capabilities but do not support all of the journey visioning capabilities. We have written a separate report about the broader journey management space that includes vendors that specifically focus on journey mapping software.³ We also excluded firms like Optimizely that specialize on a single capability (journey testing and optimization) and are frequently used in combination with a full-fledged journey analytics platform.

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- › **Marketing-only.** Firms like Manthan focus on connecting advertising, customer segmentation, promotion, pricing, and social data to build profiles of each customer for marketing programs. These vendors apply marketing mix, customer look-alike, propensity, and attribution models to leverage actual behavior data and enhance and personalize the experience for each customer.
- › **Digital-only.** These providers focus solely on ingesting data from digital channels and don't cover a wide enough range of data sources along the customer journey — such as CX metrics, VoC data, operational data, and geolocation data — to yield a holistic picture.

FIGURE 4 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version
ClickFox	Fox	FOX 1.5, Trace 2018.02
IBM	Watson Customer Experience Analytics	18.3.7
inQuba	inQuba platform	7.6
Kitewheel	Kitewheel Customer Journey Hub	Release 14
NICE	NICE Nexidia Customer Engagement Analytics (CEA)	7.4
Pointillist	Pointillist	N/A
Strativity Group	Touchpoint Dashboard	v1.9.2
SuiteCX	SuiteCX	2
TandemSeven	Cora Journey360	N/A
Teradata	Teradata Customer Journey	N/A
Thunderhead	ONE Engagement Hub	N/A
Usermind	Usermind Customer Engagement Hub	1

Vendor Profiles

We intend this evaluation of the journey visioning platform market to be a starting point. We encourage you to examine our detailed product evaluations and adapt criteria weightings to fit your individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 5 and see Figure 6). Click the link at the beginning of this report on Forrester.com to download the tool.

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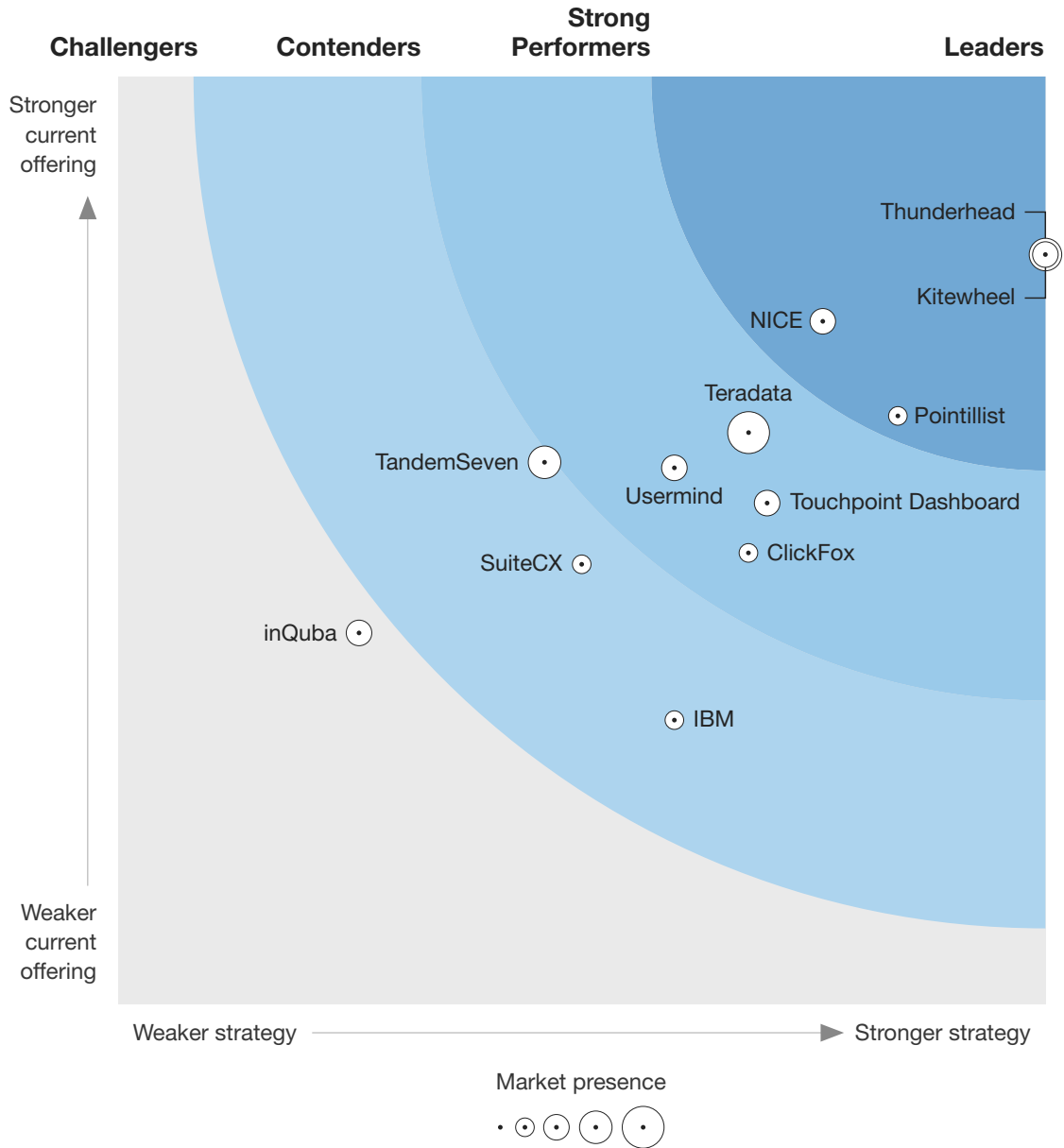
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FIGURE 5 Forrester Wave™: Journey Visioning Platforms, Q4 2018

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FIGURE 6 Forrester Wave™: Journey Visioning Platforms Scorecard, Q4 2018

	Forrester's weighting	ClickFox	IBM	inQuba	Kitewheel	NICE	Pointillist	SuiteCX	TandemSeven	Teradata	Thunderhead	Touchpoint Dashboard	Usermind
Current offering	50%	2.43	1.53	2.00	4.04	3.68	3.17	2.37	2.92	3.08	4.04	2.70	2.89
Data fusion	20%	2.60	1.80	1.00	4.20	3.80	2.60	1.40	1.80	3.80	5.00	1.80	3.80
Journey design and planning	40%	2.40	1.00	1.80	3.80	3.80	3.00	2.60	3.80	3.40	3.40	2.60	3.00
Journey testing and optimization	10%	1.70	0.70	1.60	3.00	3.00	4.30	1.70	2.40	3.00	3.00	2.40	2.30
Services, client experience, and usability	20%	2.40	2.00	3.60	4.40	3.00	3.60	3.40	3.00	1.80	4.40	3.80	2.00
Technology	10%	3.00	3.00	2.00	5.00	5.00	3.00	2.00	2.00	3.00	5.00	3.00	3.00
Strategy	50%	3.40	3.00	1.30	5.00	3.80	4.20	2.50	2.30	3.40	5.00	3.50	3.00
User research	25%	3.00	3.00	1.00	5.00	3.00	5.00	3.00	3.00	3.00	5.00	5.00	3.00
Planned enhancements	20%	5.00	3.00	1.00	5.00	5.00	3.00	0.00	3.00	3.00	5.00	3.00	3.00
Partner ecosystem	20%	3.00	5.00	1.00	5.00	5.00	3.00	3.00	1.00	5.00	5.00	1.00	1.00
Pricing model	20%	3.00	1.00	1.00	5.00	3.00	5.00	5.00	3.00	3.00	5.00	5.00	5.00
Track record	15%	3.00	3.00	3.00	5.00	3.00	5.00	1.00	1.00	3.00	5.00	3.00	3.00
Market presence	0%	2.00	2.00	3.00	3.00	3.00	2.00	2.00	4.00	5.00	4.00	3.00	3.00
Number of employees	50%	3.00	3.00	3.00	3.00	5.00	3.00	1.00	5.00	5.00	5.00	1.00	5.00
Number of customers	50%	1.00	1.00	3.00	3.00	1.00	1.00	3.00	3.00	5.00	3.00	5.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders

- › **Kitewheel weaves data together to design and deliver future journeys in real time.** The platform lets users analyze what customers do, identify key trends and behaviors, and decide on the best path forward. It has a “test mode” to analyze the activity of real or simulated customers and monitor the ROI of marketing campaigns and broader CX improvements. One reference customer we interviewed calls it the “glue” because it bridges existing data, aggregating it and helping companies understand how a customer moves between journeys, where processes break down, and how to optimize interactions to drive business results. The platform helps with visioning, but its primary focus is on strategizing and learning by testing journey hypotheses, designs, and

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rules, with the help of multivariate testing, machine learning, and other AI techniques. It's a good fit for end user companies and agencies ready to use real-time journey data to identify areas for journey improvement and learn by doing, as they can test journeys that prove the value of scaling a journey-centric approach.

- › **Thunderhead uses analytics, decisioning rules, and AI to drive real-time engagement.** The platform ingests data across touchpoints and systems via APIs and native listening to yield insight about journeys (e.g., looking up stock prices), goals (e.g., investing), and overall intent (e.g., saving for college education) in real time that informs an orchestration engine. Sleek visualizations capture where journeys start, their progress across channels, and where customers are regressing, dropping off, or skipping steps. The platform uses AI, through its recently launched Intent Analyzer, to uncover deeper insights — for instance, the cost and effort of a journey based on time spent and number of regressions, re-entries, and transitions. The platform helps spot anonymous customers and progressively builds customer profiles to drive engagement. It supports a range of engagement-related use cases such as connecting online and offline, routing customers to the right agent, improving campaigns, and applying journey-based segmentation.
- › **NICE lets firms start with a single channel like IVR and grow from there.** The platform lets users drill into journeys (micro and macro) and slice and dice data to visualize moments of truth, pain points, and KPI changes. Its new Journey Excellence Score (JES) is a single metric that considers all journeys in the customer life cycle, combining interaction data with sentiment data to measure effectiveness and help prioritize improvement efforts. The platform continues to grow through acquisitions (e.g., Nexidia and Mattersight) to strengthen its ability to connect journeys to agent performance (using behavioral, speech, and text analytics) and employee metrics. The vendor has separate offerings for interactive voice response (IVR) optimization, digital containment, customer journey optimization, and real-time personalization. It lets firms jump-start journey analytics in a single channel to test the value before committing to more. The platform's features cater to business stakeholders and, as such, can support enterprisewide journey analytics programs.
- › **Pointillist uses AI to discover and optimize journeys and drive personalization.** Pointillist has seen a significant shift in its customer base from small and medium-size businesses (SMBs) to predominantly enterprise clients. It is a good fit for companies that have done a fair amount of journey mapping, have a robust VoC program, are looking for flexible integration of their data, take a metrics-based approach, and need strong journey visualization and analytics to drive their CX program to the next level. Pointillist works closely and quickly with clients to integrate an initial set of data sources, create the right journey nomenclature, and pick a specific business case to start proving the value of a journey-based approach to personalization. The platform has a robust dashboard that can be used to monitor KPIs across stages of the customer life cycle and uses a flexible canvas to organize, plan, and share journey projects.⁴ It helps business analysts, marketers, and CX pros analyze, test, and optimize journey hypotheses by observing customer behavior in real time using an intuitive interface and bolstered by AI.

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Strong Performers

- › **Teradata helps analyze large volumes of data and find root causes.** The platform is best suited to Global 500 companies that want a single data and decisioning hub that provides a complete view of the customer together with advanced analytic capabilities. It is best suited to firms that have complex data and systems, require a lot of data quality management, and have large numbers of frontline employees who need real-time journey insights to factor into their planning. It helps companies define audiences to target customers precisely and drive real-time personalization, optimize marketing spend, drive next best offers, predict churn, and promote better journey flow. Business analysts, data scientists, and marketers can use the platform to run pathing analysis, predictive models, behavior analytics, pattern detection, and trend analysis. It significantly speeds up analysis and can generate detailed sales funnel reports and find the root causes of pain points. The vendor has a long-standing partnership with Celebrus, which provides real-time data ingestion and analysis from digital channels.
- › **Touchpoint Dashboard validates and manages journeys enterprisewide.** The platform lets users create a persona library, manage current- and future-state journey maps, and layer them with data at the touchpoint level. It's best suited to CX pros seeking a data-driven approach for managing journeys, to drive actions and road maps that sustain journey-centric ideation, collaboration, and cocreation over time. The platform helps users field surveys to validate journey hypotheses with colleagues and customers. Users can enter data into the platform manually or import it via CSV files, though not in real time. They can also share journey maps effectively across the organization (for example, using the platform's "story panel" feature), prioritize journey initiatives, and link journey maps together to create a journey atlas. It is a good fit for firms needing to build a more strategic and cross-functional approach to managing journeys before they can consider orchestrating them in real time.
- › **Usermind specializes in complex journeys and KPI monitoring.** The platform analyzes customer acquisition, onboarding, order fulfillment, and problem resolution journeys to drive specific strategic and tactical business outcomes. It helps companies investigate journeys across longer time frames that connect physical, digital, supply chain, and loyalty programs. It does this based on manual, threshold, model-driven, and correlation-driven rules. It tracks actions across journeys in near real time and automates triggers, signals, inputs, and actions based on customer activity, inactivity, and progress. Users can input their own or third-party predictive models and run simulations to generate a journey baseline from historical data and analyze the impact on KPIs before publishing a model derived from machine learning directly into a running journey. Usermind offers Tableau within the platform, thanks to an OEM agreement with that vendor. It can also make data available in other similar tools.⁵ Usermind focuses on the financial services, manufacturing, logistics, and utilities sectors.
- › **ClickFox delivers purist journey science at scale.** As a pioneer and thought leader in this category, the vendor excels at ingesting lots of data quickly to visualize journeys across the customer life cycle and quantify the impact that a single customer's multiple, parallel journeys

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have one on the other. It also offers exceptionally good help with bringing in the right data and creating the right taxonomy to uncover customers' actual experiences. It measures and monitors journeys to understand the customer journey effort and cost; understand the impact on revenue, satisfaction, and complaints; and segment customers by their journeys. The platform requires some technical expertise to get to strategic and tactical insights but offers flexibility to query the data and ask ad hoc questions. It generates alerts to help stakeholders in various roles detect and prevent journey problems. It's particularly strong in digital channels, monitoring drop-offs in the journey and switches to higher-cost channels like the call center.

Contenders**› TandemSeven captures qualitative journey data and links to business processes.**

TandemSeven's Cora Journey360 platform (acquired by Genpact in 2017) offers a central repository for personas and journey maps to visualize key moments, channels, pain points, and opportunities for improvement. It offers excellent visualization and the ability to add swim lanes — linking journeys to stakeholders, process flows, capability maps, and metrics. It also helps create future-state maps and families of maps (a journey atlas) to align business units around a shared vision.⁶ Users can import qualitative customer research, tag and code the notes, and align them to journey stages and steps. The platform can also import journey data (through CSV files or APIs) to construct narratives for key customer journeys linked to data-driven personas. It supports two-way integration with several Agile tools and workflow campaign engines. Once integrated with Genpact's AI-powered Cora, it should be able to better interconnect CX and operational capabilities and metrics.

› SuiteCX helps firms build a business case for CX transformation. The platform is a good fit for companies that have done some customer journey mapping manually that they want to digitize with a simple-to-use platform. It helps create a vision for key customer journeys and capture data for interaction points, such as customer effort, NPS, cost, and ROI. With this data, users can assess the effectiveness of an interaction from the customer's or the brand's point of view, whether an interaction point is a moment of truth or a pain point, and which stakeholders or partners influence it. By associating metadata with each interaction point in a journey, users can construct a narrative to help foster organizational alignment, prioritize initiatives, and drive a CX road map as well as individual flows for marketing campaigns and content management. The platform provides various visualizations — from functional-oriented to process-oriented to rich experience maps. It is a good fit for firms needing persona-driven journey mapping rather than deep analytics.**› IBM centralizes customer data to visualize customer paths and track conversion.** The platform uses IBM's exchange layer and identity correlation engine (UBX) to fuse data across email, mobile, web, location, social, CRM, and contact center. Users can select a start point and an end point to visualize top paths across key channels and zoom into individual customer journeys to get a granular view of paths across digital and offline channels. With behavioral analytics capabilities (Tealeaf, now included in the platform), firms can drill down to individual web session replays to understand channel hops and areas of struggle. The platform can create dashboards for KPIs and alerts that help

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to understand anomalies and the impact on business. It uses IBM Watson Marketing AI to segment customers by engagement, attrition risk, and lifetime value and to predict future customer behavior. The platform is a good fit for firms already using IBM products but is at present very channel-focused and requires professional services for analysis of complex journey flows.

Challenger

- › **inQuba builds on VoC data to manage personalized, contextual journeys.** The platform blends structured and unstructured data from multiple sources to analyze and model journeys in real time and integrates real-time feedback and sentiment analysis. inQuba focuses primarily on the financial services, telecom, and hospitality sectors in English-speaking markets (e.g., Australia, South Africa, the US, and the UK). The vendor helps clients set up a measurement model for key journeys (linking high-level metrics like NPS to experiences, sub-experiences, and touchpoint metrics) to track journey performance over time in dashboards. The platform integrates real-time text analytics and can visualize new feedback received for specific points in the journey. Users can drill down to individual customer records and verbatims. With its origins in VoC, the platform fuses traditional survey mechanisms with journey analytics.

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Supplemental Material

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by October 19, 2018.

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- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria.
- › **Executive briefings.** An executive backed by a product team from each vendor presented and answered questions on the vendor's product strategy and market sizing.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

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Endnotes

- ¹ See the Forrester report [“The Seven Top Questions About Journey Analytics.”](#)
- ² Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
- ³ See the Forrester report [“Now Tech: Journey Management, Q4 2018.”](#)
- ⁴ The canvas is similar to a journey atlas. See the Forrester report [“The Customer Journey Atlas In Six Steps.”](#)
- ⁵ For data visualization and business intelligence.
- ⁶ See the Forrester report [“The Customer Journey Atlas In Six Steps.”](#)

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