Evaluating Your Digital Experience: Eight Critical Questions

Bolt Innovative Transformations
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**Eight Critical Questions**

The digital journeys of customers, partners, and employees are central to defining the experience for the brand. In today’s digital world, interactions between various digital touchpoints and applications are critical to the top and bottom lines for business. Forrester Research evaluated leading vendors that provide digital experience platforms (SFDC, Adobe, and others). The digital experience platform and its associated architecture diagram, shown below courtesy of Forrester, highlights six key building blocks: Content, Commerce, Marketing, Service, Analytics and Customer Data. Forrester analysis concluded that while these platforms provide a wealth of capability, no platform offers a fully matured capability that can address all critical needs for an enterprise. The typical gaps are:

1. Lack of rationalized data strategy.
2. Mobile app support is still in a very nascent stage.
3. Customer experience scenarios are heavily underserved.

In addition to the lack of completeness of the platform itself, the report also lists critical enterprise challenges in implementing these platforms.

The three key challenges are:

1. Integration to backend is more difficult than perceived.
2. Service partners that understand the business are more vital than a vendor’s professional services.
3. Aggressive vendor sales teams are selling features rather than capabilities and integrated solutions.

Ultimately, selection and implementation of a digital experience platform casts a substantial shadow on the organization in terms of architectural implications, governance, compliance needs and business processes. With the gaps of the platform and the implications of the “shadow,” all too often the platform becomes yet another silo. The true value and the ROI associated with these platforms lie in how well the platform is integrated into the fabric of the organization not just technically, but also from user adoption and business process perspectives. The full integration and adoption of these capable platforms enables the organization to take a huge stride toward becoming a true digital enterprise.

Therefore, the intent of this whitepaper is to highlight the 8 key questions every organization MUST ask of its digital partner. Recognition and positive validation of these critical questions are central to a successful deployment of a game changing platform.
1. Which business metrics will the digital experience platform impact and how?

It is exceedingly important for the digital transformation program, as well the successful implementation of digital experience platform, that the vendor capture and document all critical business metrics. These success metrics determine the tangible benefits the new platform will deliver to the business, as well as answers to the “what’s in for me?” question for all stakeholders. In a typical digital experience platform that includes CRM capability, there are between 8 and 12 business functional areas with associated stakeholders. Each of these functional areas needs to engage to document the business metrics that will be positively impacted via the adoption of the digital experience platform.

The business success metrics capture the key pain areas and the agreed-upon solution that the new platform is expected to deliver. These also become critical, MUST-HAVE requirements over and above the minimum viable product (MVP) release. Shown below is an example of business success metrics for product management:

<table>
<thead>
<tr>
<th>Objective</th>
<th>Success Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification and Description: Identify a single, and logically consistent list of</td>
<td>1. All products and its components searchable, and uniquely identifiable across</td>
</tr>
<tr>
<td>Product classification</td>
<td>commodities, functions, areas, applications, Channel Partners, forecast and actual</td>
</tr>
<tr>
<td></td>
<td>reports.</td>
</tr>
<tr>
<td></td>
<td>2. Support X number of identification schemes mapped to one global identification</td>
</tr>
<tr>
<td></td>
<td>scheme.</td>
</tr>
<tr>
<td>Prices, Discounts, Taxes: Rationalize and</td>
<td>1. All packages, products &amp; its components have one or more price, discount and</td>
</tr>
<tr>
<td>codify the different ways products are priced</td>
<td>tax scheme.</td>
</tr>
<tr>
<td></td>
<td>2. Various price, discount, and tax schemes can be used to compute quote figures,</td>
</tr>
<tr>
<td></td>
<td>revenues, commissions and profits.</td>
</tr>
<tr>
<td>Product Success Metrics: Establish ways of</td>
<td>1. Product level revenue forecasts</td>
</tr>
<tr>
<td>quantifying product</td>
<td>2. Product level discounts</td>
</tr>
<tr>
<td>success</td>
<td>3. Identification of new products across commodities, customer segments or regions</td>
</tr>
</tbody>
</table>

2. Can I afford a “Lift & Shift” approach? What approach is best to drive business value and ROI to the CFO?

When facing adoption of a new technology, our experience indicates that is critical to understand how an organization accomplishes its core objectives, and how individuals get things done. Documenting these “as is” business processes provides not just the insight into day-to-day work, but also highlights the reasons why and how work gets done. Furthermore, it is critical to understand the next level of “why” – why do they do something in a particular manner? Is this a cultural “we have always done things this way,” or are they facing any kind of limitations?

The vendor’s proposed strategy for addressing business processes must be carefully understood. Every organization has limitations around time and budget to deploy the digital experience platform, and at the same time, tremendous pressure toward change. Hence, the typical recommendation is to understand the current way of working and shift it to the new platform, and then optimize it future phases. This “Lift & Shift” mistake is common and leads to the following problems:
1. The same inefficient processes on the new platform do not provide the business any improvements in the way things are done.
2. Since users only see new technology but no new capability, adoption becomes difficult (usage actually dips). Business sees no value in the platform – only cost.
3. IT is unable to justify an ROI on the new system to VPs of Sales and Operations or the CFO in any tangible way. Lack of a demonstrable ROI limits future phases, and the optimization never happens.

The collective result is a combination of further reduced funding and more limited patch work on the platform to “get things corrected.” And, certainly, the organization is no closer to a Digital Enterprise – it could actually be even farther away.

The best expected response from the vendor is a detailed understanding of the “as is” processes that are reviewed and developed into an updated a set of “to be” optimized business processes. These future state processes reduce manual steps, optimize the process flows, digitally connect functional areas and deliver an overall reduction in efforts. Getting more done with less is critical to driving adoption, and this can only be accomplished if we optimize business processes and avoid the “lift and shift” paradigm.

3. **The path to successful digital experience starts with User Journeys for all users. Are we on that path?**

In a Fortune 2000-sized enterprise, we often see from 8 to 12 areas of the organization leverage the CRM platform that maintains sales, service, and marketing data. In a well-run organization, the CRM platform is the system of record (not a record keeping system) for all customer-centric data and is therefore incredibly valuable to the organization. When deploying a new digital experience platform, the implementation team (vendor) is often only considering use cases as they pertain to sales. Or they consider use cases for sales, service and marketing, but never for the full suite of 8 to 12 critical functional areas of the organization. Typically, vendors will not even recognize that business process journeys, as they relate to different market segments (small, mid-size, large, and strategic), are very different.

This misunderstanding creates huge gaps in requirements, as many vendors are looking for shortcuts to get the new digital experience platform rolled out. The user requirement study that follows is also based on this initial understanding and typically toward MVP release. The right way to analyze the vendor study is to examine the user journeys across business functions they have interviewed, the kind of questions and responses they have documented, and finally, whether they have covered all the different user types and functions of the organization.

Ideally, the vendor has interviewed and documented user journeys for all key stakeholders, typically including sales, marketing, service, product management, finance, legal, sales operations, engineering, etc. Has the vendor captured the full suite of user journeys? Is our approach and proposed solution making each of their journeys better in some meaningful way? That is the critical holistic question that must be addressed.
4. A digital platform mandates new optimized processes. How will the current business processes be upgraded, enhanced and optimized?

If the vendor has recommended “to-be” business processes and digital user journeys, then it is important to understand the level and depth of optimizations:

1. What level of process standardization is being recommended, and which process bottlenecks are identified and addressed?
2. How do the optimized processes reduce manual swivel chair operations?
3. Do they present a better way of working, and what specific pain areas do they address?
4. How do they improve the user/customer experience?
5. Has the vendor detailed “to be” processes with high level and low level process flows or maps?

Furthermore, the ideal “to be” business processes should be documented in BPMN 2.0 notations. Having these documented in BPMN notation has further value in that they become living, breathing documents. They can be edited and updated as the business needs and requirements change over time. Having a firm handle on the process allows for business optimization and a technical underpinning to follow suit as market dynamics dictate.

5. Digital experience platforms must be well integrated into the entire business. Is the chosen digital experience platform taking us toward a wholly integrated digital enterprise?

It is important to understand if the vendor’s evaluation of the digital experience platform fits into your digital strategy. Key questions any organization must ask themselves are: Why is the digital customer experience important? What does the digital experience mean to my customers, partners, employees and users? What business metric we need to impact the most? What is my organizational readiness for change? Does my enterprise architecture support deep integration into public, hybrid, or private clouds?

The first step toward realize the true benefits of any digital experience platform is to build the business architecture. The business architecture captures the organizational information flow between various functional areas, which effectively delivers the required business results. Furthermore, the business architecture, which is technology agnostic, defines the way optimized digital journeys will be implemented. It also articulates the necessary IT governance that features:
1. Context-driven dashboards
2. Rules-driven unified processes
3. Standard business objects
4. Separation of business and technical concerns
5. Business and technology transformation team

The diagram at right depicts a typical business architecture that implements the above-mentioned features. This architecture allows the organization to develop required business capabilities for customer management, product management, renewal processing, configure, price & quote, case management, fulfillment, entitlements, contract management and channel management.

6. **How does the digital experience platform integrate into my enterprise architecture?**

The major success of any digital experience platform comes with deep integration into the organization’s backend systems. The meaningful customer insights, the 360-degree view of the customer, and end-to-end digital journeys without manual/swivel chair operations are only possible by integrating the platform into enterprise business systems. Every organization has some sort of cloud deployment – if not SaaS applications, then at least on the infrastructure side. Also, every Global 2000 organization has heavily invested in on-premise systems and wants to reuse these and, at the same time, have a well-planned data strategy.

Hence, it is important to understand what the vendor has proposed in terms of integrating into the enterprise architectures, what the available options are, what capabilities are re-used, and what additional capabilities will need to be built. These are some of the evaluation questions on which to focus.

The diagram at right shows a sample of enterprise architecture integration options. The first is with Informatica, and the second is using AWS VPC setup. Also note that the top blue part is the digital experience platform (Salesforce in this example), and below is the on-premise enterprise architecture.

7. **Understanding change as a process, what is the proposed plan for change management?**

Change is notoriously difficult to implement in mature organizations. Even the best-laid plans can break down if your stakeholders and users are unprepared for change. Does your digital vendor have a strategy for change management?

The easiest, most basic approach to understanding change as a process is to break change down into distinct, understandable elements. The three states of change provide a powerful framework: the current state, the
transition state and the future state. A well-constructed plan for all three stages is essential for smooth implementation.

In evaluation of your digital experience platform, it is important to understand how the vendor suggests change management. There are five building blocks for successful change management:

1. Awareness of the need for change.
2. Desire to participate and support change.
3. Knowledge on how to change.
4. Ability to implement the required skills and behavior.
5. Reinforcement to sustain the change.

8. What is the proposed plan for training and ensuring adoption?

Success or failure of any initiative depends on how well it is adopted by the organization and its users. Hence, an adoption plan needs to be examined well in advance, along with stakeholder training. Every organization has a culture, and introducing a new system faces resistance. The best strategy toward successful adoption is:

1. Develop a comprehensive communication plan for all stakeholders. A successful communication plan will:
   - Identify key stakeholders.
   - List what types of information are of most value to our stakeholders. Also, identify optimum means of communication and agree on the format for information that is provided.
   - Establish the purpose, timing, location and attendees for regular meetings.
   - State which communication vehicles will be used and whether any steps are required to put them in place.
   - Include specific steps that the project team and Stakeholders Council can take to keep everyone who will be impacted by the project well informed.

2. Provide process change training to all key stakeholders and explain how they can work using the optimized process, which pain areas are addressed and how this improves their output.

3. Identify and establish adoption agents within every functional group. These are the early adopters and provide support to late adopters and laggers.

About Bolt

Bolt evolved from our team’s collective frustration with the digital experience status quo. We come from a diverse industry background – Fortune 500, Telecom, Government services – but we share a common vision for a user-friendly, customer-focused digital enterprise. We’ve seen that when digital integrates seamlessly with business, it provides much better analytics and visibility into revenue streams. Bolt is our opportunity to share our vision and make a positive difference.

We believe that today’s customer experience is always constrained by limitations of time, IT systems, money, skills, etc. Bolt challenges the widely accepted notion that we cannot make everyone happy. With our approach, it is possible to design, implement, and monitor an optimized digital customer experience without breaking the bank.
Our Method

At Bolt, we begin with the end in mind. Our experts start by examining current business processes in terms of “as-is” user stories and “to-be” optimization. We identify clear, objective success metrics that enable us to measure and share progress, and we keep stakeholders informed at every step. Our “Find the Gap—Close the Gap—Mind the Gap” methodology is as follows:

Find the Gap

The first step in becoming a true digital experience organization is to understand the current state – mapping the various digital journeys not just for customers and partners, but also for employees. We identify gaps that lead to redundant steps and digitally disconnected process elements. Key deliverables include:

1. “As-is” and “to-be” digital journeys for users, customers, partners and employees.
2. Automation and efficiency opportunities that reduce operational costs.
3. A path to the optimized digital enterprise, including a business architecture that achieves the “to-be” state.
4. Specific, measureable success metrics to track progress.

Close the Gap

Bolt provides extensive services to help customers “Close the Gap,” while ensuring that IT provides the required agility for ever-changing business needs. Key services include:

1. Technology selection and alignment according to the existing enterprise architecture.
2. Framework-led implementation, either with Bolt or the customer’s vendor of choice.
3. Agile development with engineering discipline.
4. Training services, including train-the-trainer programs.
5. Change management – open communication with users to explain and realize the benefits.

Mind the Gap

Bolt ensures that the digital journeys and business architecture are living, breathing, and evolving artifacts that rapidly adapt to new challenges. Key “Mind the Gap” services are:

1. Technology experts that bring “outside-in” perspectives to adopt and maintain change – tech innovations disruptive to the current state need to be addressed immediately.
2. Agile-led maintenance & enhancement services leveraging onsite, offsite and offshore models, as well as emerging crowd sourcing capabilities.

Why Bolt?

Bolt delivers seamless platform integration and connects multiple customer touchpoints with your delivery team. Bolt’s “Find the Gap – Close the Gap – Mind the Gap” methodology ensures your Digital Journey is a living, breathing enterprise that connects your digital platforms and evolves quickly to meet customer needs.

A customer-first mindset is the engine of digital transformation. With our approach, we can help your business harness the true potential of multi-platform transformation to deliver an unparalleled digital experience. Driving business and IT transformations that put the customer front and center – that’s the goal and value of “customer first” digital transformations.