

Customer Experience & Commerce

# **SPARK Matrix™:** **Customer Journey Analytics** **(CJA), Q3, 2023**

Market Insights, Competitive Evaluation, and Vendor Rankings

**September, 2023**



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## Executive Overview

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This research report includes a detailed analysis of the global customer journey analytics (CJA) market dynamics, vendor landscape, and competitive positioning analysis. The study provides competition analysis and ranking of the leading CJA vendors in the form of the SPARK Matrix. This research provides strategic information for technology vendors to better understand the market supporting their growth strategies and for users to evaluate different vendor's capabilities, competitive differentiation, and their market positions.

## Market Dynamics and Overview

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Quadrant Knowledge Solutions defines Customer journey analytics (CJA) software as “A tool that allows organizations to understand how their customers interact with them across multiple channels and touchpoints throughout each stage of their customer lifecycle.” The software tracks & visualizes website visits, operational flow within the contact center, and online & offline customer interactions with an organization, to provide a unified view of the customers. Users can leverage Customer Journey Analytics software to capture steps customers take while achieving their purpose, measure the customer experience, predict customer behaviour, uncover & diagnose the root cause of customer experience issues, identification of solutions to resolve these issues, and enhance collaboration in organizations.

An increasingly competitive marketplace is emphasizing the need for organizations to put an increased focus on understanding customers and their behavioral aspects associated with organizational offerings, reducing churn, and aligning organizational offerings with customer demands to stay competitive. Customer Journey Analytics tools aid organizations in these initiatives by analyzing and optimizing the customer journey.

Modern customer journey analytics software utilizes advanced analytics techniques and technologies such as artificial intelligence & machine learning for deriving valuable insights & patterns from the vast amount of customer data collected. Additionally, the software leverages real-time data processing capabilities that allow organizations to enable proactive intervention during critical moments as they are happening and offers visualization & reporting tools to represent customer data in comprehensible & actionable format.

The future of customer journey analytics software includes efficient integration of offline & online data, augmented & predictive analytics, and real-time personalization to transform it into a unified customer data analysis tool. Vendors offering customer journey analytics software are planning to transform customer journey analytics tools into a CX management solution. Driving factors for the global customer journey analytics market include growing demand for consistent customer support, an increase in data silos with amorphous datasets due to the advent of digitalization & Industry 4.0, and organizations’ increasing reliance on customer data for strategizing organizational policies. However, factors such as the

complexity involved in the technology & tools, difficulty in gathering a workforce able to handle the technical aspect of the system, and lack of awareness regarding the ROI of CX tools are acting as a major restraining factor for the growth of the Customer Journey Analytics Market.

Following are the key capabilities of customer journey analytics (CJA):

- **Data Integration:** This capability allows organizations to aggregate & consolidate customer data from multiple sources to gain a comprehensive and holistic view of their customers' journey across various touchpoints & channels. The emergence of newer customer data sources has made the inclusion of features that analyze not only existing data but also extract data from these sources to provide a comprehensive understanding of their customers crucial for CJA vendors. Vendors are offering data fusion capabilities to eliminate the need for complex aggregations and data connectors to aggregate data from multiple & complex sources. Vendors are also offering data manipulation functions to improve data quality & standardize data across journey event sources. Additionally, vendors are focusing on enhancing integration with data technologies to achieve flexibility of multiple data types for measuring journey behaviour effects on CSAT, NPS, service cost & revenue.
- **Journey Discovery:** Journey Discovery enables organizations to understand their customers' needs and pain points by mapping every step of the customer journey. This capability accelerates the extraction of insights into customer behaviour & their cross-channel journeys to allow organizations to understand & optimize their CX performance. Vendors in the market are offering built-in integrations & no-code connectors to integrate Journey Discovery into the users' existing setups and connect siloed systems & channels across the tech stack to generate end-to-end visibility into cross-channel behaviour across the customer journey lifecycle.
- **Journey Design, Mapping, & Visualization:** This capability creates journey maps, records the customer activities on them, and monitors the output to understand the customer's perception of an organization. Vendors in the market are offering flexible & intuitive interfaces that assist users in linking all customer interactions across time & touchpoints. They are also offering designing & mapping of self-service journey applications and automatic visualization capabilities. Vendors are also offering Journey Visualization Tools embedded with AI-based journey discovery, Sankey-based journey

flow analysis, opportunity Matrix, and CX dashboards to identify key journeys for business, existing anomalies, and the length of the path a customer takes. Additionally, vendors are offering Dashboards with features to export visualization and data in batches to other reporting & management tools.

- **Journey Testing & Optimization:** Journey Testing quantifies, evaluates, & compares the impact of customer behaviour on customer experience, while Journey Optimization connects & maps customer interactions throughout end-to-end customer journeys and delivers connected & personalized experiences to the customers. Vendors are offering native-testing capabilities as well as A/B/N testing against business & customer goals which automatically promote the best experience based on test outcomes. Vendors are also offering journey scores to prioritize changes that will significantly impact customers. Additionally, vendors are utilizing AI to enable users to prioritize at scale with adaptable & optimizable algorithms that change with the change in journeys, web contents, or call scripts.
- **Journey Orchestration & Activation:** Journey Orchestration facilitates the creation of unique & personalized interactions with customers, while Journey Activation deals with guiding prospective customers through active engagement across their journey to convert them into loyal customers. Vendors in the market are offering detailed views of a customer's individual path across channels to allow organizations to diagnose and resolve customer problems more efficiently. Vendors are also offering orchestration APIs to integrate with existing CX-centric applications, such as web experience management, real-time interaction management, campaign management, and contact center & workflow platforms, to extract customer data and design customer-centric strategies accordingly. Additionally, vendors are offering journey playbooks that assist in the adoption of journey orchestration by covering use cases that enable organizations to implement & orchestrate Customer Journey Orchestration with ease.
- **Integration & Interoperability:** Integration & Interoperability enable organizations to achieve a holistic view of the customer journey, enhance data accuracy & reliability, streamline data flow & accuracy, and promote collaboration across departments. Vendors in the market are offering a range of integration-centered solutions comprising integration into the database, use of webhooks for triggering external systems, REST API integration, automatic file ingestion, and use of Google Tag Manager for tracking web &

applications. Vendors are also offering data connectors and system integration via connection with APIs & web services that facilitate the addition of non-standard data sources. Additionally, Vendors are also offering data export features for analysis & visualization of customer data on other platforms such as visual analytics platforms, business intelligence platforms, data visualization platforms, and several others.

## Competitive Landscape and Analysis

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Quadrant Knowledge Solutions has conducted an in-depth analysis of the major Customer Journey Analytics (CJA) software vendors by evaluating their products, market presence, and value proposition. The evaluation is based on primary research with expert interviews, analysis of use cases, and Quadrant's internal analysis of the overall CJA market. This study includes an analysis of key vendors, including Adobe, Alterian, BryterCX by IgniteTech, CallMiner, CerebriAI, CSG, EngageHub, Factors AI, Genesys, Glassbox, inQuba, LiveRamp, Medallia, MoEngage, NICE, Qualtrics, Quantum Metric, Roojoom, SAS, Scuba Analytics, and Woopra by Appier.

NICE, Medallia, Genesys, CSG, Adobe, Qualtrics, Alterian, inQuba, and CallMiner are among the top performers and technology leaders, while MoEngage is positioned as an emerging leader in the 2023 SPARK Matrix™ analysis of the global CJA software market. These companies provide sophisticated and comprehensive technology solutions to address a variety of marketing and sales use cases to maximize sales conversion, accelerate the sales & marketing process and pipeline, and drive personalized customer engagements across multiple channels. These companies are also pioneers in offering comprehensive out-of-the-box capabilities, sophisticated technology platforms, and integration & interoperability with various data sources.

NICE offers a range of customer journey analytics capabilities comprising interaction analytics, feedback management, reporting & BI, performance analytics, visualization of customer journeys, & measuring & predicting journey success through its offerings NICE Customer Experience Analytics. NICE has empowered contact center organizations to optimize their cost & time and improve agent performance by enhancing its Enlighten AutoSummary capability, providing integration of Enlighten XO with SmartAssist via AutoFlow, and enhancing Enlighten AI intent & activity models.

Medallia has strengthened its capabilities to provide customer journey analytics and customer journey orchestration post the acquisition of Thunderhead. The company, through Medallia Experience Orchestration, enables its users to combine feedback with journey visuals, understand how customers navigate across engagement channels & lifecycle stages, gain insights into the perspective & sentiments of customers, and receive a comprehensive view of customer interactions, behavior, & journeys. By providing capabilities that enable Medallia's



users to understand the context behind every journey, extract actionable insights from every lifecycle stage & engagement channel, and align engagement strategies with customer insights, Medallia has been positioned as a leader in the SPARK Matrix™: Customer Journey Analytics, 2023.

Genesys provides solutions for contact center operations and customer journey management. Genesys enables aggregation of customer data from any source, orchestration of journeys from within & beyond the contact center, and provides collaboration tools to align employees with customer goals through Pointillist, its end-to-end customer journey management platform. Genesys has regained its position as a leader by providing an agile data fusion approach that minimizes data preparation by real-time resolution of customer identities and provides a transparent & auditable data integration process for ensuring data quality.

CSG provides customer journey analytics capabilities through its offering CSG Xponent. The presence of AI-powered journey analytics features, the presence of a partner ecosystem comprising leading ISV partners, and the facilitation of consultative assistance through digital engagement experts have strengthened CSG's position as a leader in the SPARK Matrix for customer journey analytics. Facilitation of features such as a Journey-as-a-Service library comprising pre-built journeys and flexible measurement functionality for defining success metrics, have differentiated CSG from its competitors in the CJA market.

Adobe provides a range of customer journey analytics capabilities through Adobe Customer Journey Analytics and Adobe Experience Cloud, including streaming data collection, data manipulation, workflow automation, journey visualization, data democratization, and project & report creation. By providing role-based modelling & algorithm attribution that provide a robust analysis of customer behaviour, drag-and-drop features for immediate customization, open APIs to provide scalability, and Adobe Experience Data Model for simplifying data preparation capabilities, Adobe has empowered its users to understand their customers efficiently.

Qualtrics provides a customer journey analytics offering through a wide product portfolio. The offering enables its users to identify friction points across journeys and resolve them to transform customer's user experience. Qualtrics has strengthened its position in the customer journey analytics space by providing agent effectiveness capability that facilitates automatic scoring of an agent's performance & recommendations to enhance it and other features that include identification of customer pain points, success metrics, and visualization of journey paths & customer insights.

Alterian provides customer journey analytics and customer journey orchestration solutions through its offering Alterian CX. The presence of multi-node mirrored design in different availability zones and the utilization of digital adoption technology for enabling users to acknowledge technological changes has enabled Alterian to differentiate its CX platform from other vendors. Alterian allows users to accelerate the process of converting insights into actions through its ability to combine analytics & orchestration and facilitates data integration capabilities that enable users to build real-time progressive identity profiles.

inQuba enables its users to efficiently collect & analyze real-time customer engagement data and orchestrate & engage customers to reach their goals. Built on Microsoft Azure with a fully service-oriented architecture its cloud hosting environment empowers inQuba's CJA capabilities to ingest more than a billion journey points per month. inQuba has enhanced its capability to analyze customers efficiently and simplify data extraction capabilities by enhancing its text analytics & reporting capabilities and by integrating with Google Tag Manager.

CallMiner enables users to automatically analyze data from all customer contacts, including voice & text-based interactions in the contact center, emails, chats, surveys, social media, and more, through its offerings CallMiner Eureka Platform and CallMiner Analyze. By updating its capability for a pre-built solutions catalog to support an expanded number of international languages, investing in language translations, and by facilitating omnichannel interaction acquisition embedded with metadata, CallMiner has acquired the position of leader in the customer journey analytics space.

MoEngage through MoEngage Customer Journey Orchestration facilitates an AI-powered journey orchestration & optimization solution that enables its users to create unique experiences dependent on customer interactions. Through its offerings that provide an intelligent path optimizer for optimizing customer journeys, utilizing geolocation & localization for creating multilingual versions of target users, and solutions to simplify triggered & periodic campaigns has resulted in MoEngage acquiring the position of a leader in SPARK Matrix™: Customer Journey Analytics, 2023.

LiveRamp, SAS, Quantum Metric, Glassbox, and BryterCX by IgniteTech have been positioned among the Strong Contenders in the 2023 SPARK Matrix for Customer Journey Analytics. These companies provide comprehensive technology capabilities and are rapidly gaining market traction across industries

and geographical regions. They are also aware of upcoming market trends and have laid out a detailed roadmap to capitalize on future growth opportunities.

LiveRamp's data & analytics offering enables its users to resolve their data management & measurement-related concerns. LiveRamp has regained its position as a strong contender in the customer journey analytics space by providing solutions to recognize, consolidate, & cleanse first-party data, measuring impact across marketing investments, measurement services, and measuring the impact of cross-screen video ads.

Through a wide product portfolio and by utilizing emerging technologies such as artificial intelligence & machine learning to provide embedded customer analytics SAS empowers its users to visualize end-to-end customer journeys. By empowering organizations to extract out-of-the-box insights and make business decisions quickly, SAS has regained the position of a strong contender in the SPARK Matrix for customer journey analytics.

Quantum Metric has secured a position as a strong contender by facilitating Atlas industry approach & tagless real-time data capture for automatically capturing micro-journeys and providing Sankey charts & heatmaps for visualizing journeys & quantifying impact as well as real-time behavioral signals & friction indicators for enriching audience data.

Glassbox provides CJA capabilities through its digital analytics platform that offers native integration & open API to offer two-click integration with non-native solutions, Glassbox Augmented Journey Map for providing AI-driven insights along with enhanced visualization of customer journeys, and the capability to leverage artificial intelligence & automatic capture for highlighting pain points & unusual patterns. These abilities have enabled Glassbox to strengthen its position in the global customer journey analytics space.

BryterCX by IgniteTech, through its products Corizon & Placeable, offers a customer experience management suite that enables users to measure, understand, target, & engage with customers in an efficient way. Owing to factors including providing end-to-end solutions & consultation & support services to provide a real-time holistic view for CS agents, BryterCX by IgniteTech has been positioned as a strong contender in the SPARK Matrix for Customer Journey Analytics.

Scuba Analytics, CerebriAI, EngageHub, and Woopra by Appier have been positioned as contenders in the 2023 SPARK Matrix for CJA owing to their ability to gain technological strength and increase their presence in various industry verticals across different regions in the CJA space.

Scuba Analytics has been positioned as a contender in the SPARK Matrix owing to its solutions that provide ML-powered hyper-personalization, real-time cross-channel measurement, predictive journey flow analysis, ML audience segmentation, and predictive retention modelling,

CerebriAI by facilitating AI models trained on past data & experiences, real-time data visualization, and its CVX data engineering platform for incorporating structured & unstructured data platforms has acquired the position of contenders in the SPARK Matrix.

Through Customer Journey Tracker, EngageHub enables its users to map, visualize, automate, & optimize customer interactions in real time. By providing a complete view of every customer interaction across every online & offline system, data collection from every online & offline touchpoint, automated delivery of personalized customer experience, and extraction & delivery of actionable customer insights, EngageHub has strengthened its position among customer journey analytics providers.

Post-acquisition of Woopra by Appier, the newly formed entity offers syncing with existing customer data, optimization of every customer touchpoint, real-time individual-level analysis, and integration, personalization, & collaboration solutions under its customer journey analytics offering. Through Woopra Customer Journey Analytics, the newly formed entity specializes in offering visualization & reporting capabilities, out-of-the-box real-time integration triggers for analyzing behaviour data, and an intuitive visual interface for robust segmentation capabilities which has resulted in positioning Woopra by Appier as a contender in the SPARK Matrix. Roojoom and Factors AI being positioned as an Aspirant in the SPARK Matrix, Customer Journey Analytics, 2023, owing to strong technological capability and limited market exposure.

Roojoom through its AI-based journey Orchestration Platform facilitates solutions for user success journeys, customer engagement journeys, and customer service journeys. By providing unique capabilities comprising AI-based journey logic, continuous personal customer journeys, omnichannel multi-session journeys,

and auto-generated & no-code-based UX, Roojoom has achieved the position of Aspirants in the SPARK Matrix.

By facilitating accurate & event-based data models that enable users to track, filter, & break down customer touchpoints, account-level timelines that empower users to achieve complete visibility of account journeys across known & anonymous users, and AI-fueled insights that decode & refine account-level journeys, Factors AI has been positioned as Aspirant in the SPARK Matrix for customer journey analytics, 2023.

CJA vendors are strengthening their technology value proposition by enhancing key functionalities, including real-time customer data ingestion, customer data management, integration with journey mapping & journey orchestration technologies, and optimization capabilities. While a majority of the vendors provide all core functionalities, the capability to offer it with breadth & depth varies from vendor to vendor. Vendors should focus on enhancing their comprehensive capabilities to provide seamless integration with organizations' legacy tools and platforms, open architecture-based platforms, various native capabilities, and scalability & extensibility. Vendors are also focusing on increasing R&D expenditure and mergers & acquisitions to continuously enhance their CJA offerings and provide robust technology and unique value propositions to meet customer needs. Moreover, vendors' capability to utilize emerging technologies such as AI, ML, NLP, generative AI, and a unified and integrated communication platform, is the key differentiator in the global CJA space.

## Key Competitive Factors and Technology Differentiators

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To evaluate customer journey analytics vendors, it's important to consider the key competitive factors and differentiators. While most customer journey analytics offer core functionalities, the scope and depth of these functionalities can vary between vendors. Due to rising competition, vendors are focused on enhancing their technical capabilities and overall value proposition to maintain their competitiveness. Here are some of the key factors that differentiate them:

- **Sophistication in the Analysis of Structured and Unstructured Data:** The combination of structured and unstructured data analysis enables organizations to gain a comprehensive understanding of customer behaviour & preferences across their journeys. This understanding helps them make data-driven decisions. The customer journey analytics software is becoming increasingly dependent on data analysis processes owing to the presence of large amounts of data in unstructured format and an increase in the number of customer data sources. Therefore, users are advised to analyze vendors based on their capability to utilize phonetic speech & index for analyzing unstructured data present in audio, text, image, & other formats. Users should also evaluate vendors based on their capability to provide auto-categorization that utilizes semantic relationships among words & phrases across conversations to identify & present the relationship amongst various topics.
- **Interactive analytics capabilities:** An extension of real-time analytics, Interactive analytics provides features such as instantaneous cross-filtering, geospatial exploration, in-memory analytics, multilayer geo charts, and multisource dashboards that enable organizations to maximize the analytical capabilities of business intelligence technologies. Users are thus advised to analyze vendors based on their capability to provide rich interactive analytics capabilities that enable users to enhance their data extraction capabilities. Users should also evaluate vendors based on their capability to provide immersive & interactive visual analytics experiences that reduce time to insights and enhance the capability to extract hidden insights.
- **Comprehensive Data Manipulation Capabilities:** Data Manipulation focuses on processing, organizing, & cleansing data to make it more understandable. Data manipulation is used to identify complex patterns in data, simplify reading

& organizing of data, and enable users to manipulate data analysis as per the customer goals. Users are thus advised to evaluate vendors based on their capability to provide advanced calculated metrics to match with audience segments, data repair APIs to manage & cleanse sensitive data, and derived fields to make sophisticated updates to the data to make it more usable. Users should also evaluate vendors based on their capability to provide data governance labels for managing & adhering to data restrictions & regulations, privacy controls to meet GDPR & CCPA regulations, and data governance framework features such as data source labelling, policy creation to ensure compliance, & automated enforcement for keeping customer data secure.

- **Identity Stitching:** Identity Stitching deals with the consolidation of matching identifier data to create a unified view of the customer. Identity Stitching tracks a customer's online activities to provide attributes to build a complete & anonymized picture of the customer and enables organizations to achieve audience relevance. Users are advised to evaluate vendors based on their capability to provide field-based stitching that combines IDs from multiple channels & devices and assigns them a single-person ID. Users should also evaluate vendors based on their capability to provide additional features, including demographic information, preferences, purchase history, browsing behaviour, and static & computed data points, to enrich customer profiles.
- **Data Democratization:** Data Democratization ensures the right data is available to the right team members through data-sharing tools while adhering to data governance protocols. Users are advised to evaluate vendors based on their capability to provide the creation and sharing of reports in various formats and set one-time or recurring report distribution. Users should also evaluate vendors based on their capability to provide dashboards embedded with an alerting system for monitoring call consumption and tracking resource usage.
- **The sophistication of AI/ML technologies:** The presence of workflow automation enables non-IT professionals to perform sophisticated analysis. Users are advised to evaluate vendors based on their capability to provide algorithmic attribution comprising best-fit algorithmic models for discovering & solving unique attribution use cases, anomaly detection for finding trends in data, and intelligent caption for simplifying analysis & analyzing key trends in the data. Users should also analyze vendors based on their capability to provide AI/ML models enhanced with customer & attribution AI models for

performing deeper analysis & insight discovery. Additionally, vendors should analyze vendors based on their capability to provide AI Assistant embedded with natural language Generative AI for analyzing key trends and highlighting data events.

- **Real-Time Data Processing:** Real-time data processing in customer journey analytics enables users to accelerate the process of generating immediate insights, offering proactive customer support, agility & responsiveness, personalization, and enhanced fraud detection & prevention. Users are thus advised to evaluate vendors based on their capability to provide APIs, event streaming platforms, and data ingestion tools for ensuring seamless and continuous data ingestion. Users should also evaluate vendors based on their capability to provide real-time data streaming technologies to handle high-volume incoming data streams, stream processing engines or frameworks for performing real-time data processing, and efficient data storage & management solutions to provide quick access & querying of customer journey insights. Additionally, users should evaluate vendors based on their capability to provide querying capabilities for retrieving real-time insights from the processed data and visualization tools to present real-time visualization & monitor key metrics related to customer journeys.
- **Automated Action Triggers:** Also known as event triggers, these are predefined rules or condition sets that enable the customer journey analytics software to automatically initiate specific actions or interventions based on detected events or customer behaviour. These triggers play a vital role in enhancing the customer experience by enabling timely & personalized interactions, proactively addressing customer needs, identifying revenue-generating opportunities, and streamlining internal processes. Users should evaluate vendors based on their capability to detect & analyze customer behaviour, as it will help in taking timely actions. Users are also advised to evaluate vendors based on their capability to leverage real-time customer data insights to facilitate personalization at scale through content tailored to an individual's specific interest. Additionally, users should evaluate vendors based on their capability to streamline internal processes & workflow by automating routine actions or tasks to improve operational efficiency, reduce manual efforts, and ensure timely customer issue resolution.
- **Customer's Data Privacy & Protection Capabilities:** With the industry moving towards decreasing its dependence on third-party data, organizations



storing or managing customer data should focus on strengthening their data privacy & data protection capabilities to build trust with customers, protect sensitive information, and comply with increasingly stringent regulations. Users are thus advised to evaluate vendors based on their capability to employ data anonymization & aggregation techniques to ensure customer identities are not exposed. They should also look for vendors providing consent management capabilities such as opt-in mechanisms & preference centers to ensure proper consent from customers to collect & analyze their data. Users should evaluate vendors based on their capability to store customer data in a secured infrastructure that complies with industry standards & best practices; and their capability to implement robust security measures, comprising firewalls, intrusion detection systems, & regular security audits, to safeguard customer data during storage & transmission. Additionally, users should also evaluate vendors based on their capability to adhere to relevant data protection regulations such as the General Data Protection Regulation (GDPR) or California Consumer Privacy Act (CCPA) to ensure transparent data handling practices & provide customers with control over their data.

## SPARK Matrix™: Strategic Performance Assessment and Ranking

Quadrant Knowledge Solutions' SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix provides a visual representation of market participants and provides strategic insights on how each supplier ranks related to their competitors, concerning various performance parameters based on the category of technology excellence and customer impact. Quadrant's Competitive Landscape Analysis is a useful planning guide for strategic decision makings, such as finding M&A prospects, partnerships, geographical expansion, portfolio expansion, and similar others.

Each market participant is analyzed against several parameters of Technology Excellence and Customer Impact. In each of the parameters (see charts), an index is assigned to each supplier from 1 (lowest) to 10 (highest). These ratings are designated to each market participant based on the research findings. Based on the individual participant ratings, X and Y coordinate values are calculated. These coordinates are finally used to make SPARK Matrix.

Technology Excellence	Weightage	Customer Impact	Weightage
Sophistication of Technology	20%	Product Strategy & Performance	20%
Competitive Differentiation Strategy	20%	Market Presence	20%
Application Diversity	15%	Proven Record	15%
Scalability	15%	Ease of Deployment & Use	15%
Integration and Interoperability	15%	Customer Service Excellence	15%
Vision and Roadmap	15%	Unique Value Proposition	15%

## Evaluation Criteria: Technology Excellence

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- **The sophistication of Technology:** The ability to provide comprehensive functional capabilities and product features, technology innovations, product/platform architecture, and such others.
- **Competitive Differentiation Strategy:** The ability to differentiate from competitors through functional capabilities and/or innovations and/or GTM strategy, customer value proposition, and such others.
- **Application Diversity:** The ability to demonstrate product deployment for a range of industry verticals and/or multiple use cases.
- **Scalability:** The ability to demonstrate that the solution supports enterprise-grade scalability along with customer case examples.
- **Integration & Interoperability:** The ability to offer product and technology platform that supports integration with multiple best-of-breed technologies, provides prebuilt out-of-the-box integrations, and open API support and services.
- **Vision & Roadmap:** Evaluation of the vendor's product strategy and roadmap with the analysis of key planned enhancements to offer superior products/technology and improve the customer ownership experience.

## Evaluation Criteria: Customer Impact

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- **Product Strategy & Performance:** Evaluation of multiple aspects of product strategy and performance in terms of product availability, price-to-performance ratio, excellence in GTM strategy, and other product-specific parameters.
- **Market Presence:** The ability to demonstrate revenue, client base, and market growth along with a presence in various geographical regions and industry verticals.
- **Proven Record:** Evaluation of the existing client base from SMB, mid-

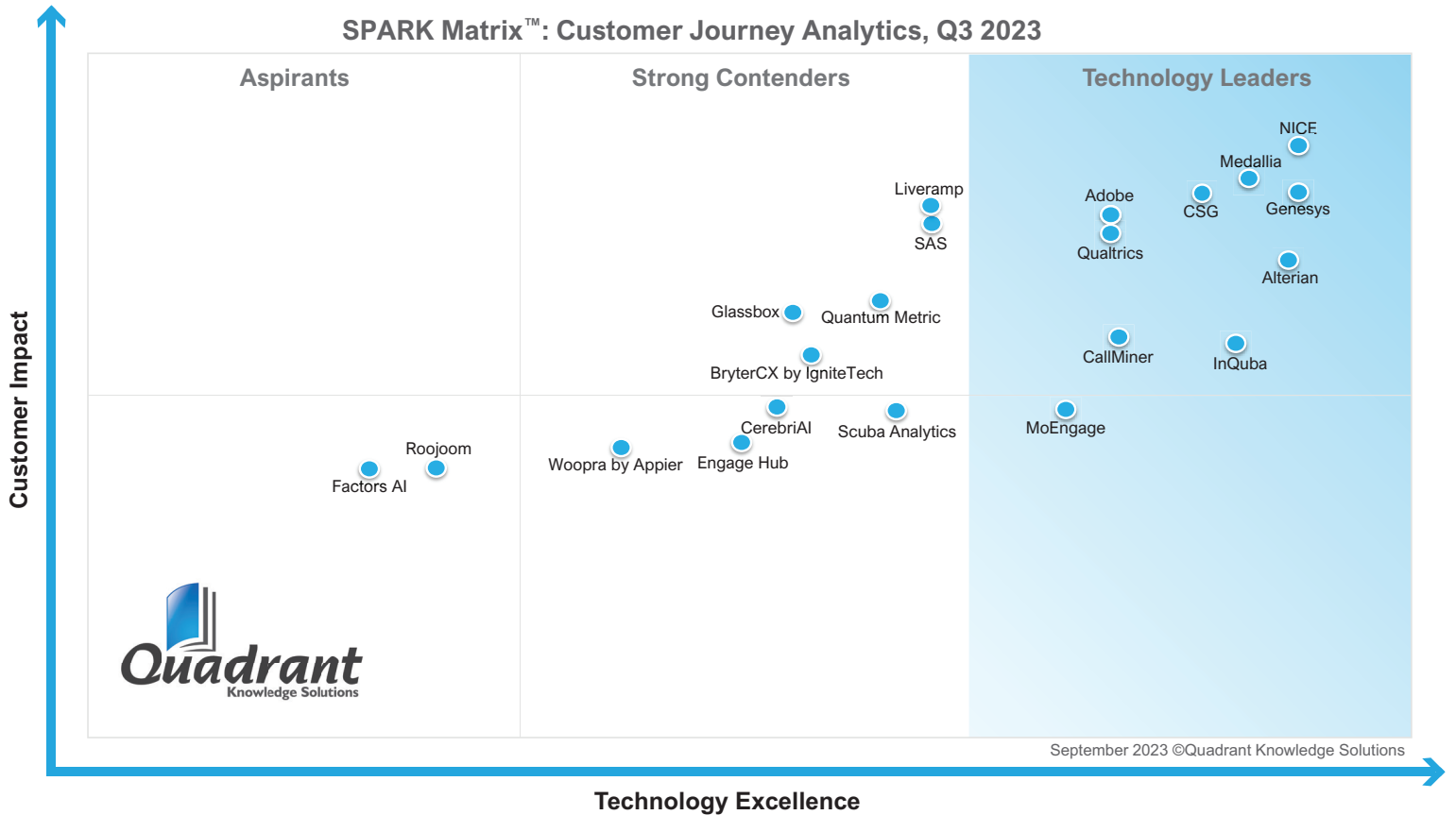
market, and large enterprise segments, growth rate, and analysis of the customer case studies.

- **Ease of Deployment & Use:** The ability to provide superior deployment experience to clients supporting flexible deployment or demonstrate superior purchase, implementation, and usage experience. Additionally, vendors' products are analyzed to offer a user-friendly UI and ownership experience.
- **Customer Service Excellence:** The ability to demonstrate vendors' capability to provide a range of professional services from consulting, training, and support. Additionally, the company's service partner strategy or system integration capability across geographical regions is also considered.
- **Unique Value Proposition:** The ability to demonstrate unique differentiators driven by ongoing industry trends, industry convergence, technology innovation, and others.

# SPARK Matrix™: Customer Journey Analytics (CJA)

Strategic Performance Assessment and Ranking

**Figure: 2023 SPARK Matrix™**  
(Strategic Performance Assessment and Ranking)  
Customer Journey Analytics (CJA)



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## Vendors Profile

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Following is the profile of the leading CJA vendors with a global impact. The following vendors profile is written based on the information provided by the vendor's executives as part of the research process. The Quadrant research team has also referred to the company's website, whitepapers, blogs, and other sources for writing the profile. A detailed vendor profile and analysis of all the vendors, along with various competitive scenarios, are available as a custom research deliverable to our clients. Users are advised to directly speak to respective vendors for a more comprehensive understanding of their technology capabilities. Users are advised to consult Quadrant Knowledge Solutions before making any purchase decisions regarding customer journey analytics and vendor selection based on research findings included in this research service.

## Medallia

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**Establishment Year:** 2001

**Headquarters:** Pleasanton, California, USA

Medallia is a developer and provider of a SaaS-based customer experience platform. Medallia offers experience orchestration solutions which serve as a unifying technological layer that acquires knowledge, comprehends data, and manages customer journeys and dialogues. Medallia aids in comprehending the genuine intentions of each customer across various journeys, touchpoints, and timeframes, with the aim of meeting individual needs throughout their entire interaction on online and offline media channels. Additionally, Medallia offers services in various domains, including Customer Experience Management, Business Intelligence, Enterprise Feedback Management, Employee Experience, Social Listening and Contact Center. Medallia acquired Thunderhead, a leader in real-time interaction management & journey orchestration, in 2022 to strengthen its ability to scale individualized journeys & conversations. Medallia enables its users to orchestrate individualized experiences & real-time best experiences across all channels. Medallia is vertically agnostic yet has deep experience in various industry verticals including Automotive and Transportation, Communications and Media, Financial Services, Healthcare and Life Sciences, Insurance, Manufacturing, Restaurants, Retail and Consumer Goods, Technology and Services, Travel and Hospitality and more. Medallia has a strong presence in North America and Europe followed by APAC, Middle east, and Latin America.

## Product Overview

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**Product Name:** Medallia Experience Cloud, Medallia Experience Orchestration (MXO)

Medallia through its Medallia Experience Cloud and Medallia Experience Orchestration unifies & visualizes customer data present across customer journeys & life cycles. The presence of bottom-up journey analytics enables Medallia's users to get a complete view of individual customer journeys across the web, contact center, & physical location to make data-driven decisions. Medallia offers personalized reports, intuitive workflows, and AI-driven topic & theme-based alerts, at the granular level of the customers that enables its users to make de-

cisions on pain points present in customer journeys. Medallia through its Action Intelligence offering helps organizations identify customers in needs of action and presents actionable feedback & uncover real-time trends across segments & data sources.

The key capabilities for Medallia's customer journey analytics offering include journey intelligence & analytics and delivery of relevant action at sale.

## **Analyst Perspective**

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The acquisition of Thunderhead by Medallia was aimed to combine Medallia Experience Cloud & Thunderhead's journey orchestration capabilities to deliver feedback-driven personalization solutions for real-time interactions. Medallia also strives to gain from Thunderhead's closed-loop proprietary customer engagement platform, Customer Operating System, powered by journey orchestration & real-time interaction management to strengthen its customer experience management capabilities.

Medallia offers a centralized experience personalized strategy that enables organizations to create individualized experiences that help them unify customer centricity, prioritize the next-best experience derived from intent-based customer data, and promote cross-functional collaboration. Medallia by combining commonly transversed paths with feedback signals has empowered organizations to attain unified brand intelligence and design & implement automated actions to visualize real-time personalized experience.

MXO's features that capture & link customer data across devices & touchpoints and provide customer profile linking capabilities enable its users to achieve a unified view of the customers and get a comprehensive understanding of customer intent. MXO facilitates customer intelligence by maintaining a record of customer interaction & experiences and helps its users deliver real-time personalized interactions.

Some use cases offered by Medallia under its customer journey analytics offering include enablement of customer-led development, prioritization of customer feedback, utilization of conversation intelligence, capturing B2B customer perspective, integration of experience management data, and transforming feedback into loyalty & revenue.



## Technology Differentiators

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Technology differentiators for Medallia include its Athena Studio empowers its users to create no-code-based custom AI models & analytics for unstructured data, machine-learning empowered pre-made templates & tagging interface, and rapid creation & training of models that empower users to build AI models rapidly.

Medallia offers solutions for alignment of engagement strategies with customer insights to generate automated real-time actions, identify touchpoints where personalized experiences are delivered, and understand customer expectations across customer journeys.

Additionally, the facilitation of out-of-the-box adaptive machine learning models and AI predictive models empowers its users to reduce operational work and accurately predict customer behaviour which is crucial for making business-related decisions.

## Market Differentiators

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The facilitation of Medallia Go provides customer experience solutions designed specifically for mid-sized organizations offers text analytics & machine learning, turnkey solutions developed by industry experts, capturing of solicited & unsolicited feedback across channels, and real-time responses & feedback which acts as a market differentiator for Medallia.

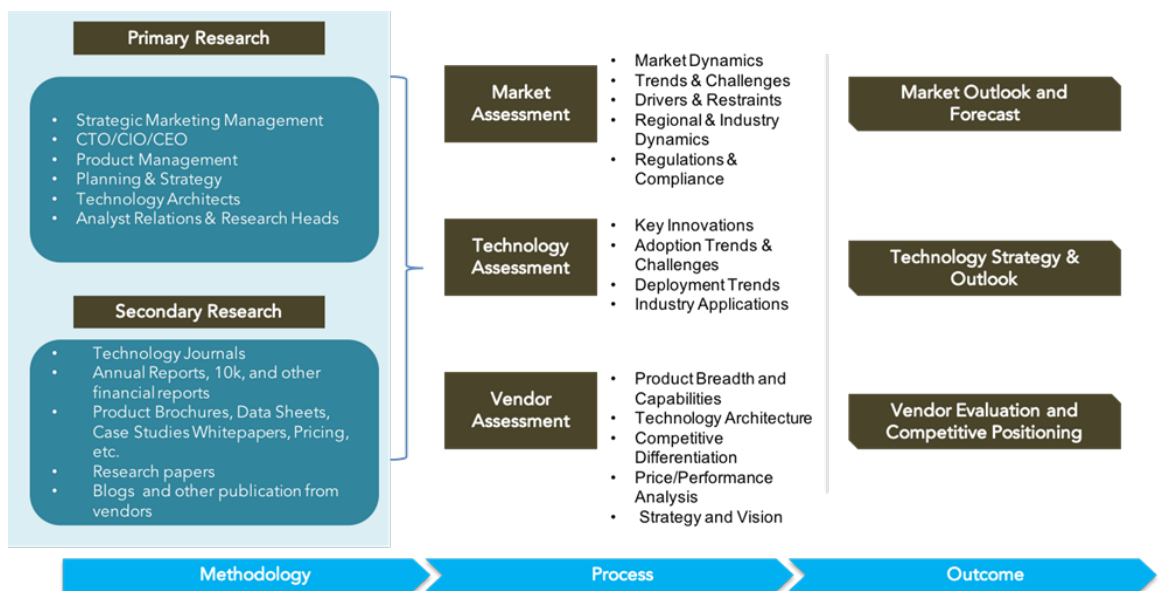
## Roadmap

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Post-acquisition of Thunderhead, Medallia is focusing on enhancing its integration with Thunderhead's offerings, empowering its existing offerings along with exploring new industry verticals and geographic regions to enhance its existing market share.

# Research Methodologies

[Quadrant Knowledge Solutions](#) uses a comprehensive approach to conduct global market outlook research for various technologies. Quadrant’s research approach provides our analysts with the most effective framework to identify market and technology trends and helps in formulating meaningful growth strategies for our clients. All the sections of our research report are prepared with a considerable amount of time and thought process before moving on to the next step. Following is a brief description of the major sections of our research methodologies.



## Secondary Research

Following are the major sources of information for conducting secondary research:

### Quadrant’s Internal Database

Quadrant Knowledge Solutions maintains a proprietary database in several technology marketplaces. This database provides our analyst with an adequate foundation to kick-start the research project. This database includes information from the following sources:

- Annual reports and other financial reports
- Industry participant lists
- Published secondary data on companies and their products

- Database of market sizes and forecast data for different market segments
- Major market and technology trends

## Literature Research

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Quadrant Knowledge Solutions leverages on several magazine subscriptions and other publications that cover a wide range of subjects related to technology research. We also use the extensive library of directories and Journals on various technology domains. Our analysts use blog posts, whitepapers, case studies, and other literature published by major technology vendors, online experts, and industry news publications.

## Inputs from Industry Participants

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Quadrant analysts collect relevant documents such as whitepaper, brochures, case studies, price lists, datasheet, and other reports from all major industry participants.

## Primary Research

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Quadrant analysts use a two-step process for conducting primary research that helps us in capturing meaningful and most accurate market information. Below is the two-step process of our primary research:

**Market Estimation:** Based on the top-down and bottom-up approach, our analyst analyses all industry participants to estimate their business in the technology market for various market segments. We also seek information and verification of client business performance as part of our primary research interviews or through a detailed market questionnaire. The Quadrant research team conducts a detailed analysis of the comments and inputs provided by the industry participants.

**Client Interview:** Quadrant analyst team conducts a detailed telephonic interview of all major industry participants to get their perspectives of the current and future market dynamics. Our analyst also gets their first-hand experience with the vendor's product demo to understand their technology capabilities, user experience, product features, and other aspects. Based on the requirements, Quadrant analysts interview with more than one person from each of the market participants to verify the accuracy of the information provided.

We typically engage with client personnel in one of the following functions:

- Strategic Marketing Management
- Product Management
- Product Planning
- Planning & Strategy

## **Feedback from Channel Partners and End Users**

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Quadrant research team researches with various sales channel partners, including distributors, system integrators, and consultants to understand the detailed perspective of the market. Our analysts also get feedback from end-users from multiple industries and geographical regions to understand key issues, technology trends, and supplier capabilities in the technology market.

## **Data Analysis: Market Forecast & Competition Analysis**

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Quadrant's analysts team gathers all the necessary information from secondary research and primary research to a computer database. These databases are then analyzed, verified, and cross-tabulated in numerous ways to get the right picture of the overall market and its segments. After analyzing all the market data, industry trends, market trends, technology trends, and key issues, we prepare preliminary market forecasts. This preliminary market forecast is tested against several market scenarios, economic most accurate forecast scenario for the overall market and its segments.

In addition to market forecasts, our team conducts a detailed review of industry participants to prepare competitive landscape and market positioning analysis for the overall market as well as for various market segments.

## **SPARK Matrix: Strategic Performance Assessment and Ranking**

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Quadrant Knowledge Solutions' SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix representation provides a visual representation of market participants and provides strategic insights on how each supplier ranks in comparison to their competitors, concerning various performance parameters based on the category of technology excellence and customer impact.

## Final Report Preparation

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After finalization of market analysis and forecasts, our analyst prepares necessary graphs, charts, and table to get further insights and preparation of the final research report. Our final research report includes information including market forecast; competitive analysis; major market & technology trends; market drivers; vendor profiles, and such others.

## **Client Support**

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For information on hard-copy or electronic reprints, please contact Client Support at [ajinkya@quadrant-solutions.com](mailto:ajinkya@quadrant-solutions.com) | [www.quadrant-solutions.com](http://www.quadrant-solutions.com)