

FORRESTER®

CHALLENGE THINKING. LEAD CHANGE.

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Omnichannel Content In The Wilds Of The Enterprise

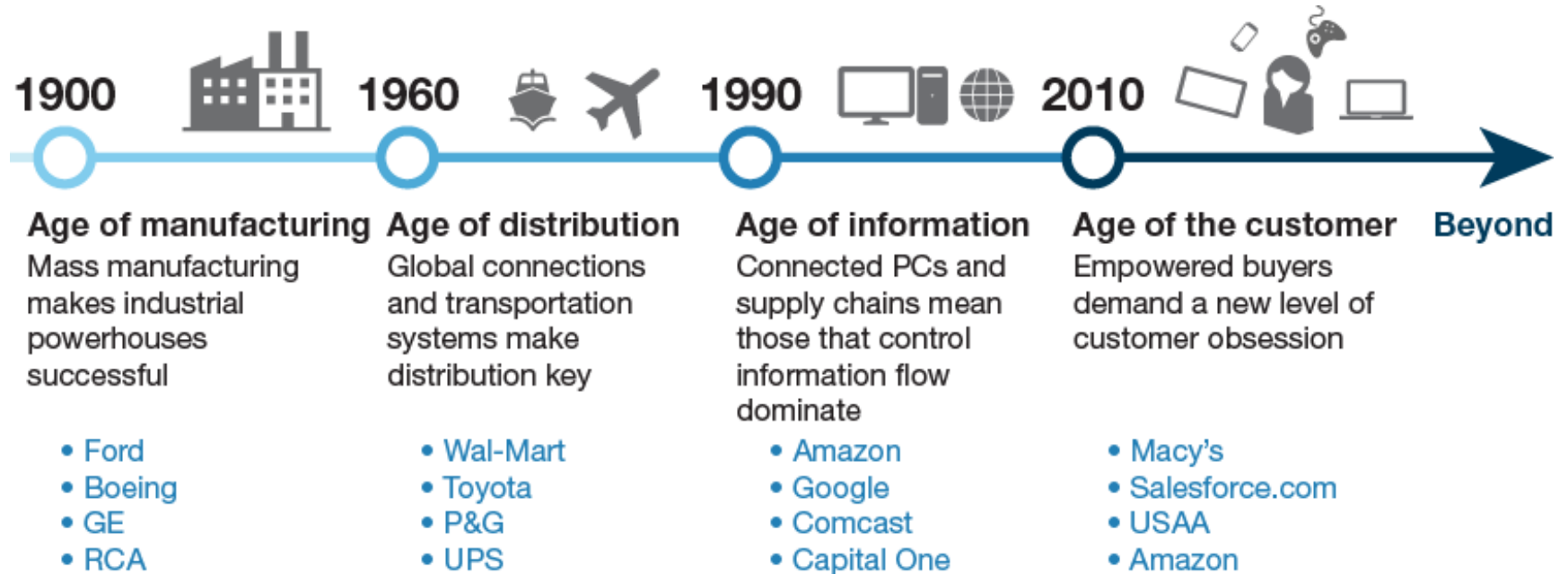
Ryan Skinner, Senior Analyst

31 January 2019

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.



We are 9 years into the age of the customer!



The End Of The (Digital) Beginning



Source: Benedict Evans, a16z, <https://a16z.com/2018/11/16/summit-2018-benedict-evans-annual-keynote/>

Digital-first purchase journeys are now a fact



DISCOVER



RESEARCH



BUY



CLOTHING



CONSUMER ELECTRONICS



FURNITURE



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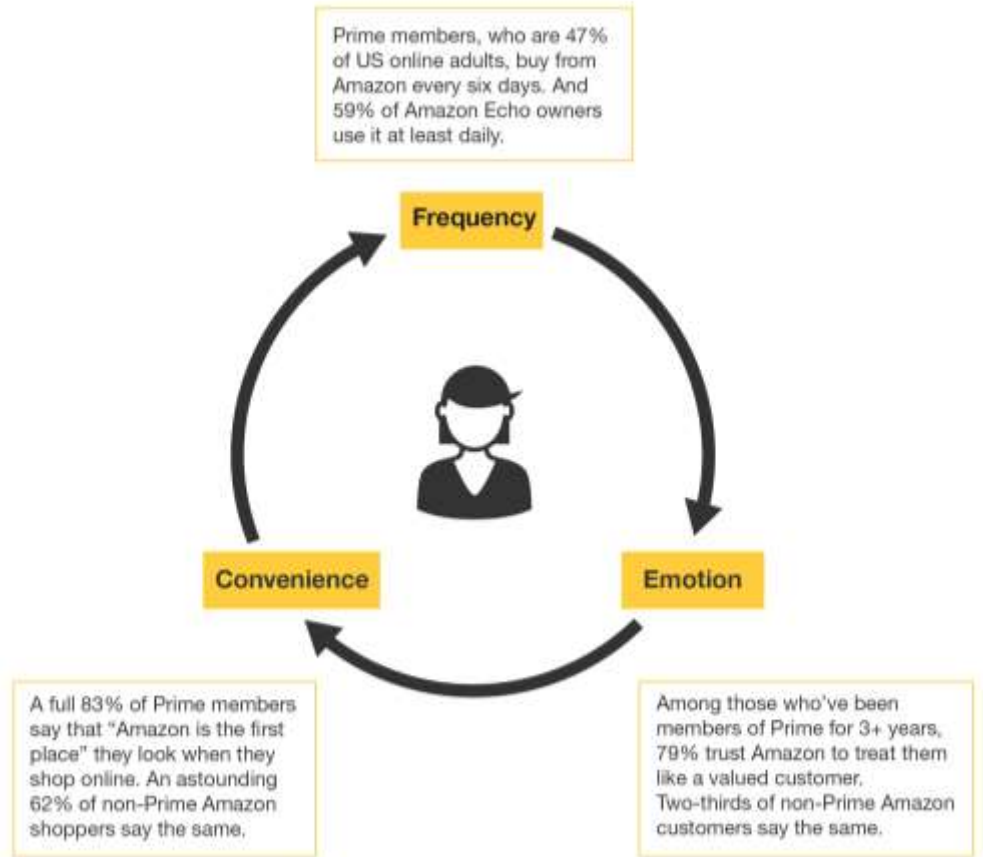


CONSUMER ELECTRONICS



FURNITURE

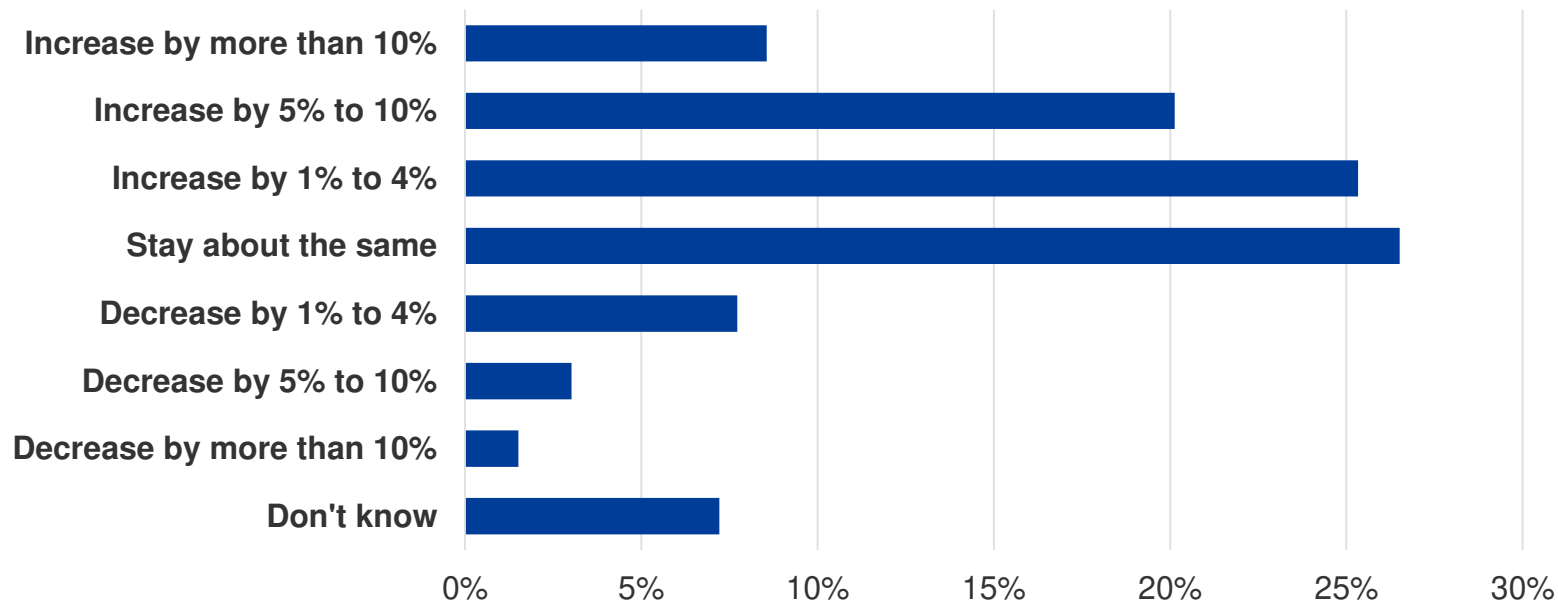




Source: Forrester report - "Amazon Will Own Your Customer In The Future", 8 February 2018

Digital experiences have the attention of IT

How do you expect your business unit's/IT department's spending on digital experience software to change over the next 12 months?



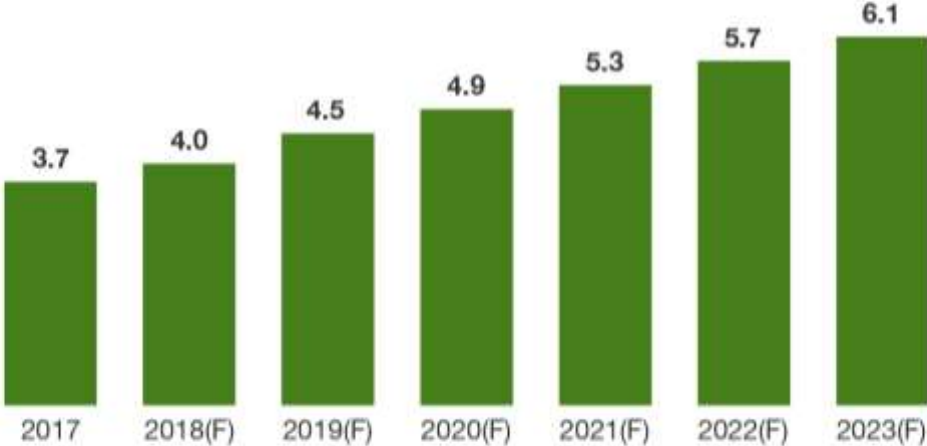
Base: 596 software decision makers in UK, FR, DE enterprises (>1,000 employees)
Source: Forrester Analytics Global Business Technographics Software Survey, 2018

Content has the attention of those working in digital experience

Global web CMS forecast, 2017 to 2023

(US\$ billions)

CAGR (2017 to 2023): 8.7%



F = Forecast

Source: Forrester Analytics: Web Content Management Systems Forecast, 2017 To 2023 (Global)

In-House Resources Step Up

"To the best of your knowledge, where are each of the following marketing functions performed?"



Marketing function	In-house	External	Both
Content marketing (B2B marketers only)	52%	23%	24%
Customer experience	35%	34%	31%
Digital experience marketing (e.g., web, mobile, social, virtual events)	45%	20%	35%
Customer relationship management (B2C marketers only)	38%	25%	38%
Brand management	35%	30%	35%
Customer intelligence/insights	31%	32%	37%
Direct marketing	24%	23%	52%
eCommerce	33%	30%	37%
Marketing/demand planning performance measurement – analytics and measurement	27%	15%	58%
Marketing technology and operations	22%	37%	40%

Base: 53 to 124 B2B and B2C global marketing decision makers at firms that are Differentiators in Forrester's Digital Maturity Model

Note: Percentages may not total 100 due to rounding.

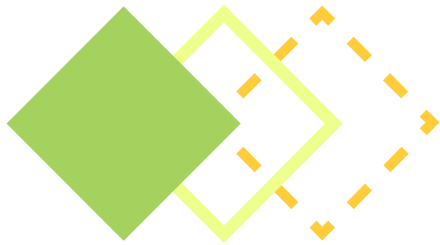
Source: Forrester Data Global Business Technographics® Marketing Survey, 2017



ING-DiBa competes with robots by...being human



Plain words
make us
happy



Intangible assets such as IP, goodwill, CX, brand, and reputation now account for more than 87% of the US S&P 500's net worth.

Source: Vipal Monga, "Accounting's 21st Century Challenge: How to Value Intangible Assets," The Wall Street Journal, March 21, 2016 (<http://www.wsj.com/articles/accountings-21st-century-challenge-how-to-value-intangible-assets-1458605126>); Kristi L. Stathis, "Ocean Tomo Releases 2015 Annual Study of Intangible Asset Market Value," Insights Blog, March 5, 2015 (<http://www.oceantomo.com/blog/2015/03-05-ocean-tomo-2015-intangible-asset-market-value/>).

Effectiveness

You get value from the experience



Ease

You get value from the experience without difficulty



Emotion

You feel engaged by the experience

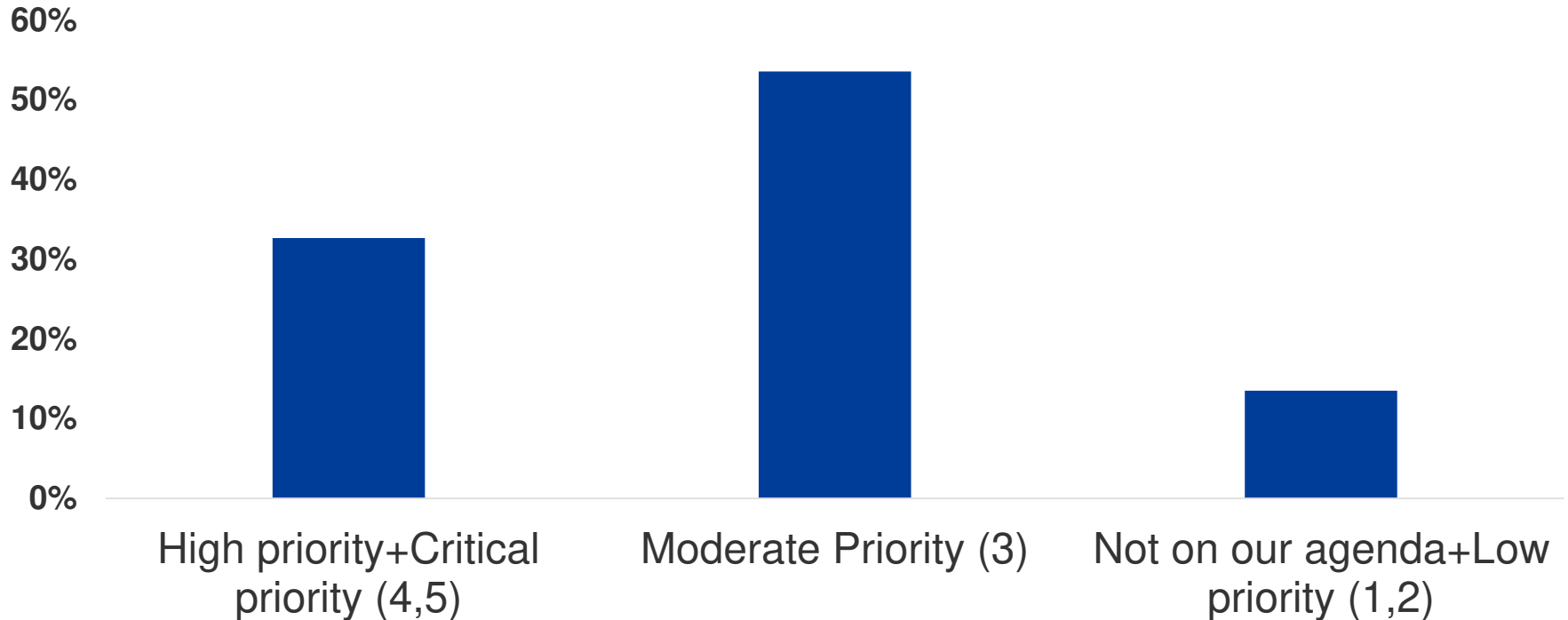


Forrester views experiences as formed along 3 dimensions (the 3Es)

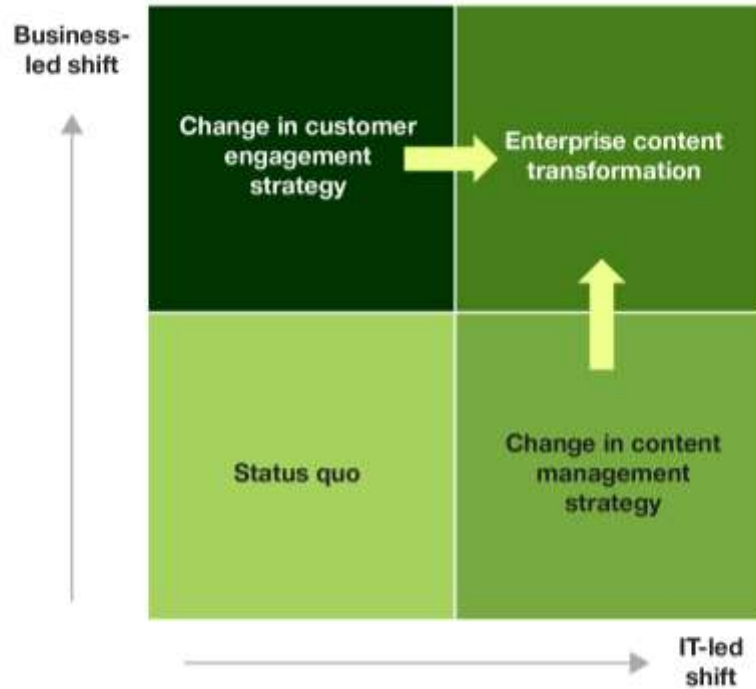


Which of the following is likely to be your top software initiative in the next 12 months?

“Personalize our customer-facing web and mobile experiences”



Two Routes Towards Content Transformation



Primary Gaps To Omnichannel Content

- › *Management of content at a strategic, enterprise level*
- › *Technical and logical connections between teams*
- › *Rate of business change, transformation and renewal*
- › *Technology and integrations to support consistent delivery*

TRUE OMNICHANNEL
VIRTUAL OMNICHANNEL

Perspectives

- *Start omnichannel content as a discrete component within customer experience*
- *Address plays where customers see most value, first*
- *Address human-to-human connections before and over technical connections*

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Thank you