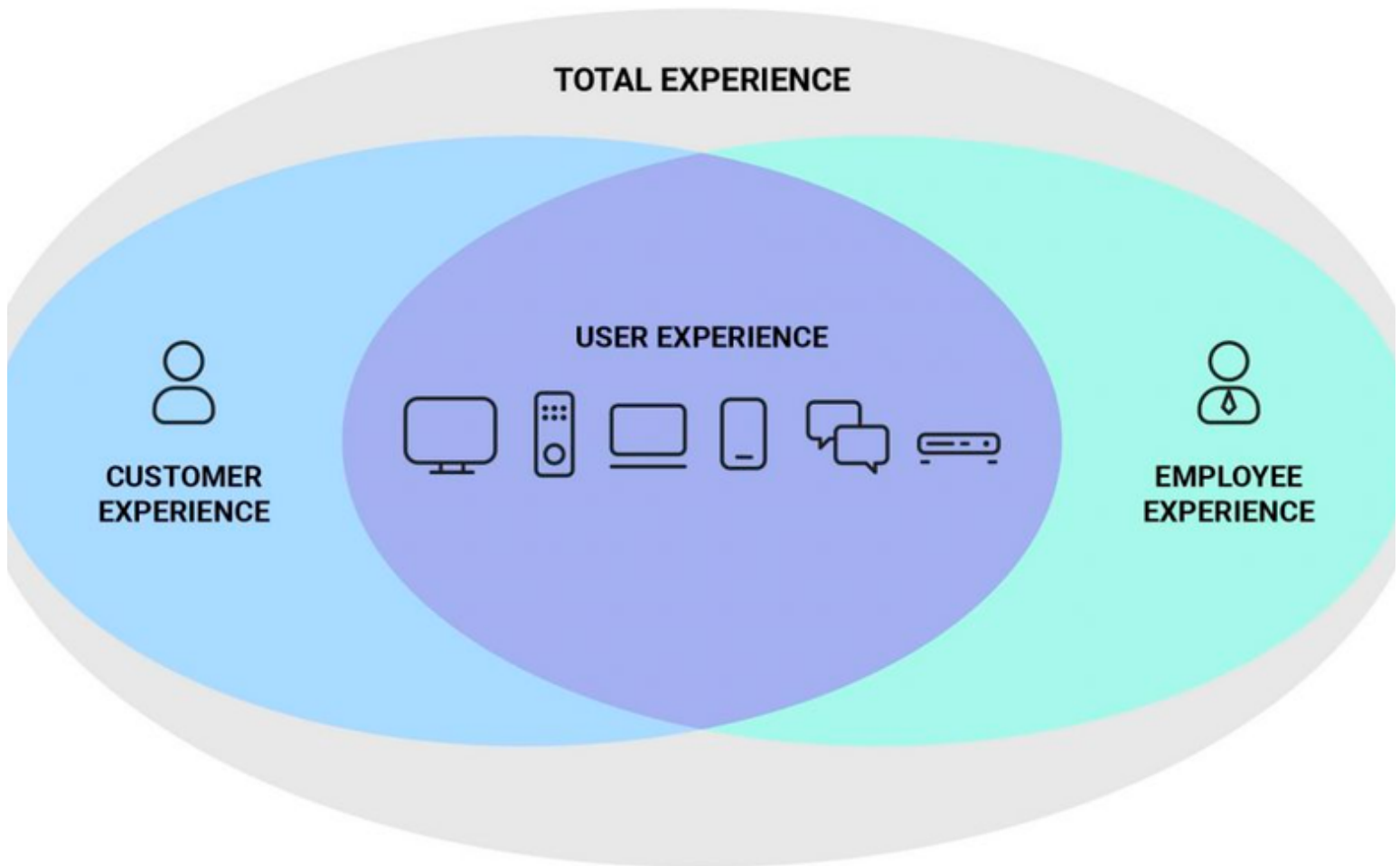


Total Experience



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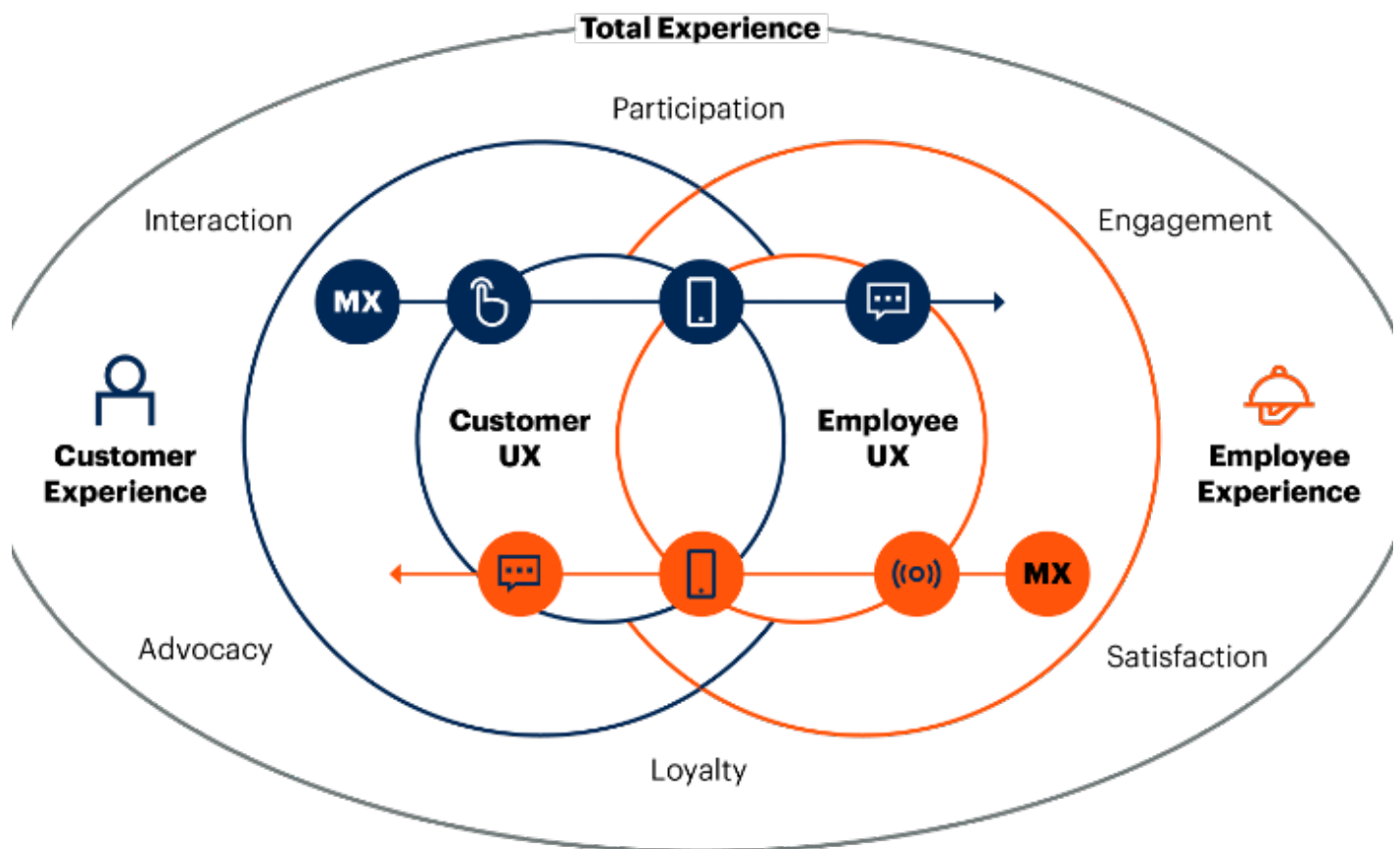
Vertex is on a journey that is embracing the SaaS business model and working through an overall digital transformation to stay competitive and drive growth. One of the areas that is important to focus on is a differentiated digital experience for customers, partners, alliances, and channels that can help drive growth. Although companies often start with Customer Experience as a way to improve the digital experience, the journey is really that of one to improve the Total Experience (TX), which includes Customer Experience (CX), Employee Experience (EX), User Experience (UX), and Multi-

Experience (MX). Gartner predicts that businesses that evolve these experiences together can achieve greater growth and advocacy (internally and externally).

- By 2025, organizations in the top 10% of the Global Empathy Index score for their industry will see a 10% increase in customer loyalty.
- Through 2025, 50% of large organizations will have failed to unify engagement channels, resulting in a disjointed and siloed CX that lacks context.
- By 2026, 60% of large enterprises will use total experience to transform their business models to achieve world-class customer and employee advocacy levels.

The combination, synergy, and interconnectedness of these various experience models is the key to success as seen in the illustration below.

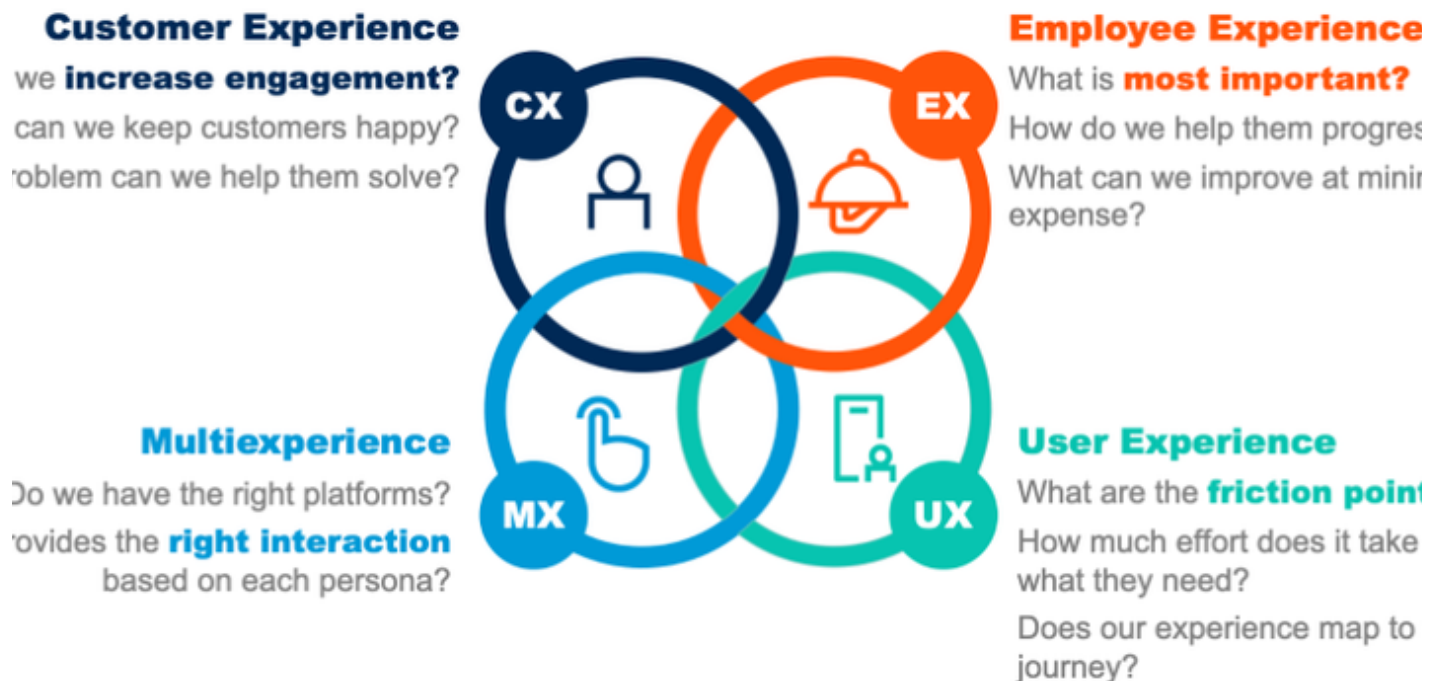
Total Experience Interlinks the CX, EX, UX and MX Disciplines



Source: Gartner
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Gartner

Each experience discipline helps provide focus on a different perspective to drive engagement, interaction, priority, and reduce friction. Gartner illustrates both the focus and interconnectedness in the following diagram.



These areas help chart journey maps, value streams, and solutions (systems and processes) that can be leveraged to achieve Vertex's strategic outcomes.

Connecting the above backdrop of industry trends and analysis with Vertex's Corporate and Technology strategies leads to the Customer Experience / Total Experience vision and further refines the strategy. The Vertex corporate strategy looks to expand its commercial portfolio, expand the markets it serves, and develop new channels of growth. The strategy calls out key growth vectors including the North America Enterprise market, North America Middle market, European market, Marketplaces market, and eCommerce market. Each of these market segments may have overlapping or different personas that interact with Vertex and its customers, partners, alliances, and channels throughout the solution lifecycle. Tailoring interactions and digital experiences for each of these personas will enable differentiation and help customers realize value more quickly.

The technology landscape continues to evolve to support these digital experiences. Companies are relying on core systems like CRM, ERP, LMS, as well as emerging and evolving technologies like AI, analytics, and different interaction technologies (mobile, chat, api, web, etc.) to all come together to help create a superior experience. The technology landscape enables broad and deep connectedness, while also supporting an incremental, composable, and extensible approach to realize the value. Many of these capabilities existing in off-the-shelf software and frameworks that can become an integrated ecosystem to serve the various internal and external users.

The Customer Experience / Total Experience vision is to drive for superior experiences that create differentiation and are engaging for customers and employees to help them achieve greater value. The following are key strategic outcomes.

- Alliances, Partners, and Channels will be leveraged for indirect and direct selling of products and services. This includes "sell-with", "sell-by", and "sell-through". This will usher in digital experiences and operating models to support this way of selling Vertex's SaaS portfolio. This will also drive a new level of connectedness across technologies (commercial portfolio and back-office), new ways of working, and greater efficiencies and economies of scale.
- Customers are going through digital transformations themselves and are expecting their experiences with Vertex to evolve. They are expecting a more digital experience that is personalized, standard, robust, and intuitive, which is driven by understanding their needs. New personas and customer journeys will evolve as Vertex expands into new markets, which will require new digital experiences that will act as differentiators.
- Vertex will educate customers, alliances, partners, and channels to help them achieve greater value realization. This includes new types of information that is specific for the audience and targeted outcome, new ways of finding the information/education, and new ways to experience it such as chatbots, mobile, video, etc.
- B2B commerce interactions and operations are evolving to become closer to B2C interaction models with more self-service, self-discovery, always available, and accessible anywhere interactions, which requires Vertex's systems and process to evolve to include these capabilities.
- Vertex, like many other SaaS companies, are looking to grow NRR, grow loyalty, and reduce churn. This is achieved through deep understanding of the customer through the data and interactions with the systems and users.
- Vertex operations are expected to evolve to become more streamlined for

efficiency, align more closely with customer experiences, and connect across the enterprise (commercial portfolio and back-office) to unlock information and insights. This also leads to up skilling the people, processes, and systems used to understand our customers, our data, as well as to drive insights and decisions.

- Vertex will embrace automation, data exchange and enrichment, as well as composable architectures to connect commercial systems with back-office systems to realize operational efficiencies, deeper insights, and improved communication.
- Vertex will evolve its external collaboration capabilities to create a space for co-creation with and/or by partners and customers to enhance the ecosystem and generate new value. This may include software or services.

These strategic outcomes will be realized through commercial and enterprise projects over the next 2 years to provide incremental evolution and result in:

- Higher NPS scores
- Increase in NRR
- Increase in automation (less manual intervention)
- Increase in data integrity
- Increase in channels
- Increase in markets, segments, and geographies
- Increase in understanding of customers, business, systems, and employees
- Increase in digital transformation maturity
 - Business process maturity
 - Data centric maturity base on modern culture of data driven organizations
 - Process based performance management
- Target operating models to support selling and go-to-market strategies

Source articles for this page:

- <https://www.gartner.com/document/code/755118?ref=authbody&refval=4007537>
- <https://www.gartner.com/document/code/755679?ref=authbody&refval=4007537>

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