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Built to Last:

Designing Your Ideal Digital Experience Platform



By Matthew Kippen

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About The Author

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Introduction: The True Value of a DXP Is Not “Out-of-the-Box”

If someone were to tell you that the Digital Experience Platform (DXP) market is set to grow from \$7.9 billion in 2019 to \$13.9 billion by 2024*, you probably wouldn't care. However, if someone were to tell you that this means organizations all over the world are expected to invest 12% more per year, either via new DXPs acquisitions or by growing their currently installed platforms, it might set off a few alarm bells.

DXPs are loudly being pronounced as the next big marketing technology trend by analysts like Gartner and Forrester. Customer experience is no longer just a checkmark on a sheet; Companies are expected to deliver innovative, individual digital experiences to each customer. This isn't just to grow their businesses – they also have to maintain the market share they already have. The result is that DXPs, once considered a niche trend in the digital arena, are fast becoming the choice *du jour* of organizations looking to use customer data to bring better, more personalized digital experiences to their customers.

Historically speaking, this is pretty odd. The issues that slowed the adoption of DXPs haven't gone away. Complicated technology, high costs, and a market that still can't handle the bare minimum of customer engagement are still part and

parcel for the industry. The desire for a simple “out-of-the-box” solution - one which can plug into any organization's system and work without a problem - is louder than ever before.

And yet. Our customers have forced the collective market's hand. They have embraced omnichannel engagement. The need for customized technology that is up to the challenge – and can use the information from all these channels to deliver more one-to-one experiences – is irreplaceable. The rise of COVID-19 has only proven that point further.

And yet. Despite the changing market trends, despite the technological hurdles, and despite the need for a solution that fits their specific needs, organizations are still looking for that mythic white whale. The “out-of-the-box” DXP solution.

It's not hard to see why. The idea of a solution that you can simply slot into your current organization, flip a few switches, and then have it deliver instant content management, customer data management, and personalization is the fantasy of marketers everywhere. Truth be told, even though it doesn't work out quite as neatly as that, the out-of-the-box option does theoretically exist.

*MarketsandMarkets, Digital Experience Platform Market by Component

The rise of the marketing technology stack over martech suites means that many industry leading DXPs are now designed to integrate into your existing technologies, rather than having those technologies reconfigured to work with them. These stackable DXPs have standard builds of their product – *tabula rasa* – that you can bring into your organization, minimal customization required.

And yet. It never seems to quite work. When customers go for the “out-of-the-box” approach, the result is usually the same: Poor functionality. A DXP not optimized for their employees, their systems, or their specific needs. A quick fix that ends up creating more problems than it ever comes close to solving.

We find that the average lifespan of an “out-of-the-box” DXP falls somewhere within the realm of **three-to-five years**; at that point, an organization will either have to overhaul the platform they have in place or completely scrap it and start over with a new vendor. Given the time, money, and manpower required for either of these things, the out-of-the-box solution can hardly be considered a “quick fix.”

Meanwhile, a thoughtfully integrated DXP, built for your specific organization and based on parameters you set forth ahead of time, has the potential to last for decades. It will be the basis upon which you build a long and flourishing marketing technology stack, answer the changing needs of your customers, and integrate future technologies and

capabilities as they are developed. The short-term investment ends up paying huge long-term dividends. And the best part is – it’s not as hard as you think!

In this whitepaper we’ll go through the steps of achieving this thoughtfully integrated DXP, such as how to plan out your digital experience platform, aligning your organization, navigating through the buying process, ensuring a high-efficiency implementation, and building a culture of constant optimization.



1. Understanding Your Digital Experience Needs

The first step in building out your ideal digital experience platform is to understand what you need and what you don't. That means examining your organization's goals for the next few years, evaluating your current marketing technologies as well as future technologies you plan to add, and envisioning how they will all work together to bring you success. This isn't a matter of just solving for a specific need – a successful DXP is built to provide value for years to come, and to be flexible enough to change as you do.

Do You Need A DXP?

Before even examining DXPs, it's important to take a step back and just figure out whether you even need it. Although this seems like a pretty basic step – the equivalent of putting on pants before stepping into a snowstorm – it's almost shocking how few organizations actually take the time to think through why they want a DXP in the first place. Part of the reason is just how exciting new tech can be. The bright lights, the smell of fresh code; it's intoxicating to imagine bringing in something that will excite and revolutionize the way you do business.

It rarely works out like that, though. Technology is always a means to an end, not the end itself. As such, organization leaders should ask themselves a few key questions before even considering a DXP:

- What does our current digital experience look like?
- What do we want our digital experience to look like?
- Why do we need a DXP? How will it help us get to that ideal digital experience?
- Is my organization able to take full advantage of the technology? Do we have the people and infrastructure in place to ensure it is successful?
- What alternative options exist? Would they provide equal value given our needs?
- Is this a priority?

The reason for the questions is simple: avoiding the trappings of FOMO (Fear of Missing Out). It's hard to see clearly through the fog of new technology when you have a non-stop wave of analysts, vendors, and pay-to-play blog writers talking up its capabilities and waxing poetic on what it could mean for the future of the industry.





Once emotion is taken off the table and sheer need is evaluated, it's much easier for organizations to make a tactile decision whether or not a DXP is right for them. And, sometimes, it isn't. That's okay! DXP's are complex, comprehensive technologies that require organizations to be all-in on the idea of digital transformation. If they are instead just trying to ride a wave of hype and play catch-up, the end result won't be good for anyone.

Even if now isn't the right time to buy a DXP, that doesn't mean things won't change in the future. Sometimes organizations just need to do some housekeeping before the prospect of a DXP makes sense. Growing staff, building internal expertise, fixing broken systems that would be hugely impacted by any new technology. Just like every organization's DXP will look different, every organization's need for a DXP will look different too.

Set Goals

However; should you decide that it's the right time to look into a DXP, the next step is setting goals. You've obviously identified that a DXP will fulfill a specific need for your organization, but that's only a small piece of it. You also have to figure out what you want to do with the DXP once you bring it in. Because, like it or not, a DXP isn't there just to solve a single problem. Rather, it's there to literally transform the way you engage with your customers across every digital channel.

Some of these goals can be simple – better engagement with customers, a stronger handle over your customer data – but together they should guide you to the same result: **a clear and concise roadmap to excellence through your DXP.**

When setting these goals, examine the capabilities of a DXP. Content Management, Data Management, Personalization, and Integrations. Think about how your organization currently manages each of these pieces, if they do at all. Identify opportunities for improvement. Examine how improvement could positively impact other parts of your organization. Then tie it back to the people at your organization and how it will enhance their day-to-day lives.

This is just an example of how to approach it. Every organization has their own process. Ensuring that these goals are properly identified – a SMART (Specific, Measurable, Achievable, Relevant, Time-Bound) goal structure ensures coherency – is huge when it comes time to evaluating various DXP vendors.

“Just like every organization's DXP will look different, every organization's need for a DXP will look different too.”



Evaluate Your Technology

Unless you're starting from the ground up, chances are your organization has other technologies in place. This is a good thing. DXP's are designed to work hand-in-hand with other technologies to deliver a fuller and more nuanced customer experience. However, before starting your hunt for a DXP, it's important to know where the pieces you currently have will fit into the dynamic.

Think of your martech stack, as an assortment of random LEGO bricks. The pieces all have their own unique look and feel, but by themselves they are a bit formless. A DXP, meanwhile, is a brand-new model kit. It looks nice and stands on its own. But a model kit, even when complete, has room to grow. That's where those assorted bricks from your stack come in. With each one you add to the DXP, you create something bigger. Better. And suddenly the model kit isn't just what was on the box - it's a wholly unique creation

to you alone, built to meet whatever crazy design you have in your head.

Before even buying your DXP, you should know how your various technologies will connect to it, or if they even can. How they add functionality on top of the DXP or, conversely, how the DXP's capabilities further enhance what they are able to do. It's also possible some of your technologies overlap with the DXP. If the technologies are incompatible, you'll need to know if they can be made compatible or if you will have to choose between them and the DXP for the resulting martech stack.

Each answer will ultimately impact the potential ROI you will get from the DXP, both immediately and down the line.

So you know you need a DXP, you've set your goals for it, and you've evaluated your current technology. Great! Now here comes the final part: planning for the technologies that you don't even have yet.

Plan Ahead For The Future

It may seem like a redundant exercise – adopting the role of a futurist to do little more than guess where your organization will be in three-to-five years – but technology is like a never-ending staircase. You have to continue to climb upwards, building on the groundwork that was already complete, or you run the risk of your handiwork crumbling underneath you before you take the next step.

A DXP is an investment not just in the current iteration of your organization, but in its future. It will be there to help grow your organization as it builds a cohesive, personalized customer experience, and it will be there as you continue to enhance that same customer experience to keep up with the changing needs of the marketplace. While you may not be able to say exactly what technologies you'll be getting, your organization should know where you're headed.

Emerging technologies such as IoT, voice, AI and Machine Learning are all growing at a rapid pace. Each one has the potential to add new dimensions to the customer experience in ways that many of us haven't fully grasped yet. Even if you might not need them today, there's no way to know you won't need them tomorrow. The best thing you can do is ensure that your plan for a DXP includes finding one that has the flexibility to work with those and other emergent technologies and seamlessly bring them into your future digital experiences.



2. Aligning Your Organization

Fun fact: There is no such thing as a “DXP Store.” There are no retail locations, no online shops; No simple drag-and-drop checkout where the end result is you leaving with a brand-new DXP. The DXP buying process is, well, a process.

For this reason, you need to **align your entire organization** before your first conversation with a DXP Sales Rep. There are going to be a lot of chefs in the kitchen – from Marketing to IT, developers to C-suite executives – that will need to have their say before pen hits paper. It’s important to make sure everyone is on the same page on what you want (and what you don’t) to save yourself time and grief later on.

There’s a lot to align on, after all. Budget, timelines, assigning the project lead, and much more. If you don’t want a 6-12 month buying process to turn into a 18-24 month one, you’re going to need plan ahead.

Craft A Cohesive Vision

Remember when you set your goals for your new DXP system? It’s time to get buy-in from the rest of your organization and turn those goals into a clear missive that will help guide your organization through the buying process and beyond.

There are numerous ways to do this, though a particularly effective one is to start at the very top. You’ll have to get the buy-in of your executives anyway in order to begin the vendor selection process, as they are the ones who oversee the vision and roadmap for your entire organization. Bringing your value statement as to why you need a DXP, the goals you have for it, and how you envision it fitting into your organization now and into the future will help jumpstart the discussion and ensure the feedback you get is valuable and applicable.

Buy-in might not come on the first meeting, but rather after numerous back-and-forths where you take their feedback and use it to further flesh out or improve

on the initial vision. But, eventually, if your need is compelling and the executive team believes in your pitch, they will grant their blessing to the project.

Now you need to sell your vision into the various departments. The key stakeholders here are IT and Marketing, as they will have the most people involved in the actual buying process. In many companies, Marketing holds the purse strings for martech purchases such as a DXP, so they will want a say in how the DXP is being used, how they will be using it in their day-to-day work, and who else will be touching it internally. IT, meanwhile, will be focused around the technical requirements and how the DXP will slot into the technologies currently in place, as well as how the maintenance and upkeep of the system will impact their work.

In both cases, they’re engaging with you as a partner rather than an obstacle. This is important to remember, as often their

requests and requirements may diverge from what you just agreed with the executives about. This is where you'll have to work closely alongside them to parse through their needs and fit them into your vision. At the same time, you'll be able to show them the plan that won the approval of your executive team, and hopefully get them to buy-in in a similar way. Consensus won't necessarily come quick, but it'll pay off in spades once the buying process starts, as both teams will be invaluable in providing input and helping cover your knowledge gaps as you talk to vendors.

The end result, hopefully, is that you have all major internal stakeholders on-board with the idea of purchasing a DXP. Because the next thing you'll have to talk about is money.

Set A Budget

The most basic decision around a DXP is how much money you're going to spend on the thing. And though the answer can very well be "depends on the vendor," there are a few considerations you can plan for, and approve, ahead of time.

First is just the **general cost** of the DXP itself. Depending on how extensive a DXP you are looking for, and how much customization you will want to add to it, you will likely need to budget for at least a six-figure investment. How far deep into the six-figures, however, can vary widely. If you go for a stack vendor, who sells the DXP as a centerpiece for the marketing stack that you have already or will continue to build, you'll probably be on the lower side of the spectrum. However, if you instead go for a suite, which requires you to buy into an entire ecosystem in which the DXP is just a piece of it, you should probably expect to go a bit deeper into that six-figure estimation.

The second thing you have to consider is **implementation costs**. In Digital Clarity Group's 2018 DXP Report, they reported organizations typically spend three-to-five times the cost of the DXP just on implementing it, with particularly involved implementations running even higher. Assuming you're spending \$250,000 or more just on the platform, that means you can probably expect to cross the \$1 million threshold on total expenditures. That's not chump change.

Luckily, doing research and having those numbers in mind can make it very easy to set expectations internally. You'll also need to run the numbers by Marketing to ensure that there is room in the budget for this kind of expenditure. Typically there isn't, but that's when you turn to the executive team. While you might not necessarily have many happy executives when you present them your proposed budget – and will likely need to haggle over the final, ear-marked number – it's a lot easier than coming back a year later trying to squeeze more money into the project because you underestimated what you needed.



Establish A Timeline

We've already talked about how the buying process for a DXP can take close to a year, if not longer. But it's not like you can just then take the DXP and immediately plug it in and start using it right away. You have to take the time to implement the solution inside your own system, linking up the various technologies you use and working out any bugs or glitches that might crop up along the way.

This can take a bit of time. Implementations, on average, can last anywhere from a couple months to half a year or longer. A lot of this depends on what you need and when you need it – if you're just getting a basic, ground-level DXP that you plan to build onto over the coming months and years, a few months is hardly unreasonable to get something functional up-and-running. Larger implementations, unsurprisingly, take more time. This can be shortened somewhat by bringing in additional help on top of your implementation partner, but of course that comes with additional costs that you would need to budget in.

Another consideration is just how complex your DXP will be. This again boils down to the suite vs. stack argument. With a suite, you will be looking at a much

more in-depth implementation, as they will be basically replacing your entire martech infrastructure with their own solutions. Meanwhile, stacks are more variable. If you purchase one designed to be flexible and easily integrated, your implementation has a good chance of going smoothly and relatively quick. However, this isn't a hard and fast rule – there's no such thing as a hiccup-free DXP implementation, no matter if it's an integrated or standalone stack. You'll just have to put your trust into the team you have implementing it and support them in every way possible. hope luck is on your side.

Regardless, when setting your timeline internally, ensure there are allowances for an extended buying and implementation process. In this case, it's all about managing expectations – if you plan for the higher-end of the normal process, but get it done in less time, everyone is happy. This is also the opportunity for your executives to tell you if they have a hard deadline when they need the DXP project completed. Both so you can discuss if that timeline is feasible...and to figure out how you'll accomplish it regardless.



Assign The Project Lead

Every great project needs a good frontman (or woman). The person(s) who will take lead on the vendor selection process, act as liaison between vendor and organization, and otherwise manage the entire DXP purchase from beginning to fully implemented end. It's not an easy job – or even one that gets a lot of thanks – but it is arguably the last big decision you need to make before you start engaging vendors.

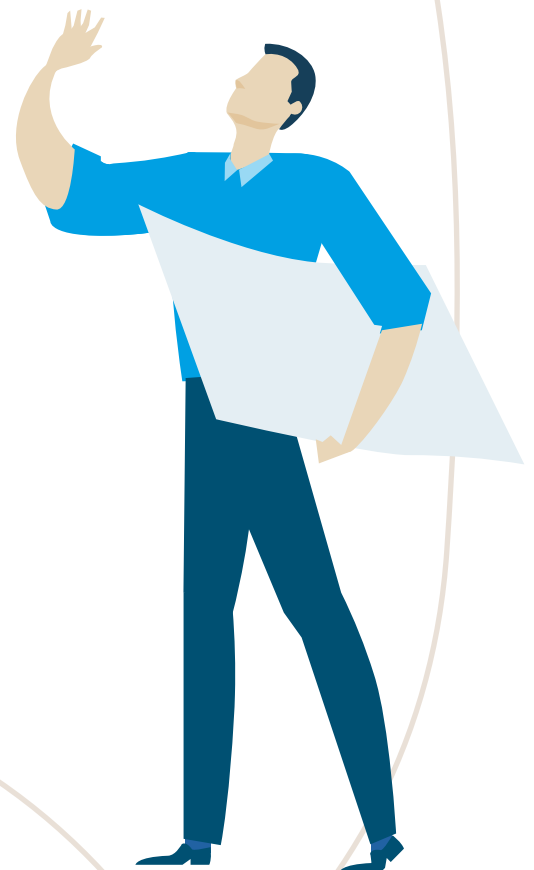
The good thing is, if you're reading this, you're probably a great candidate for the role! Or you know someone who would be.

A project lead's job is, in essence, to ensure a DXP is successfully purchased and implemented into the organization. That means their responsibilities break down as such:

- Identifying DXP vendors
- Developing an RFP (Request For Proposal)
- Acting as the “point-of-contact”
- Managing the internal review process
- Building consensus on a solution (aka. Getting to “Yes”)
- Overseeing the implementation
- Reporting the project status to stakeholders

There are more tasks inherent to the role as well, such as the contract, but this can vary by company size and the seniority of the project lead.

One final thing: Although we say “project lead,” this doesn't have to be a one-person job. There can often be whole teams acting as the leads on a DXP project, each person taking on responsibilities based on their expertise level. This is especially valuable for smaller organizations where one person just might not have the bandwidth to run the entire project from end-to-end.



Plan Out Your Internal Evaluation Process

Your internal stakeholders are important. More than that, their opinions are important (and often vital) to ensuring that you get consensus on a vendor once the buying process begins. For that reason, it's important to map out exactly how and where you'll be bringing in your internal stakeholders. This can be towards the beginning or the later stages of the buying process; there's no "one" way that is more effective. However, you should have three key questions answered ahead of time:

- What departments need to be included?
- Who will act as the department representative(s)?
- How invested are they in the project?

These three questions will help you map out exactly who you'll be included in the process and why. Obvious inclusions are Marketing and IT, whom you should have already spoken with and thus know exactly how they will be slotting into the process. Both will likely want to be involved early and often once the RFP is sent out, either for the first or second demo presentation by the vendor. Both groups should have their requirements well in hand, with IT in particular knowing the technical requirements ahead of time.

Outside of those two, the involvement of other departments should be considered based on need and desire. Depending on the size of your organization, it could just be Marketing and IT. In others, Operations might want to get a closer look during the demo process or to give input directly into the initial RFP. Finance will need to be brought in for the contract and Development, if organized separately from IT, will have to be involved early and often for the solution's architecture.

When in doubt, keep the inner circle as small as possible. Each stakeholder should be acting as the representative for their larger teams, delivering streamlined and decisive feedback that represents the voices of their entire department without, well, including the voices of their entire department. That's what team calls are for.



3. Picking Your DXP Vendor

You've established that your organization needs a DXP. You've built a clear vision for that DXP that is aligned across your entire organization. Now it's time to finally take your first steps towards actually buying it!

This is both the easiest and the most nerve-wracking part of the entire process. On the one hand, you've already set up all the difficult groundwork that will go into your RFP (Request for Proposal) and thus can sit back, listen to proposals, and guide the various pitches and demos through your organization like the conductor of a philharmonic orchestra. On the other hand, you will eventually have to pick someone.

The choice you make of DXP vendor will make or break your entire project. You need to find a company whose platform meets your specific needs and is at a price point that meets your budgetary requirements. And even if they check all those boxes, that still doesn't guarantee that the vendor is a good match. There are a lot of other factors to consider. No pressure though, right?

(Optional) Find a Tech Partner

The DXP world is a tough nut to crack. Especially for an organization where this may be your first time experiencing it, you can very easily be overwhelmed with information and technical details. For this reason, many organizations choose to bring in a technical partner prior to the buying process. These technical partners are often experts in digital technologies such as DXPs, and act as paid consultants to help walk your organization through the entire process from end-to-end. You can really bring them in at any point of the process – from when you're first evaluating whether you need a DXP right up until you're actually installing it .

help you with the actual implementation. With that said, a tech partner is absolutely not required for a successful vendor selection. They are most valuable for organizations that are uncertain or uneasy about engaging with vendors who feel like they need someone in their corner to help provide expert guidance. If that doesn't apply to you, feel free to charge on ahead.

However, in our experience, tech partners are most valuable right as vendor selection begins. They often know most of the vendors in the industry, can give you specific details about each one, and will act as a guiding hand when you start the process. And, bonus, once you do select a vendor, many tech partners will have the capabilities to

Create An RFP

An RFP is your mission statement when you go out to vendors. It tells them who you are, what you're looking for, and your strategy to get there. Essentially, you're taking the reins of the buying conversation from Day 1 and ensuring vendors will be speaking to your specific needs, rather than sending you some generic pitch they pulled from a dusty Google Drive folder.

The RFP also makes the buying process much more formalized. As you're the one setting the agenda, vendors will have the ability to either opt-in or opt-out of the process right at the beginning depending on if they believe the project is worth pursuing. And if they choose to opt-in, their first requirement is to, well, respond to the RFP. This is usually done in a point-by-point document, either templated ahead of time or customized based on what you provide. Each one is usually dense, full of industry jargon, and incredibly dry. Brew a jug of coffee ahead of time.

Like DXPs themselves, an RFP should be unique to your organization and your needs. However, if you're having trouble starting, you can start by outlining the following:

Project Overview

- Let them know what you need from a DXP. Try to keep it general and focus on the most salient information – the point here is really just to let them know if this is something they can actually help you with.

Company Information

- Talk about yourself. What does your company do, how does it do it, and where does it all happen? Revenue, industry, recent acquisitions and/or organizational changes – anything that would be important for a vendor to know in order to have their response speak better to you.

Project Goals

- Now you can go into what you are envisioning for the DXP. Talk big picture. What will a vendor need to be able to promise – and deliver – to win your business?

Scope

- This is where you start digging into specifics. Dive into the kind of features you need, the supplementary customizations you'll require, and what technologies the DXP will need to work alongside. Don't worry about trying to make yourself look good or bad – the point is to just share as many details as possible with potential vendors.

Challenges

- Time to put your cards on the table. Establish where your organization currently stands from a digital experience standpoint and what roadblocks might pop up that could impact the success of a DXP. Be sure to highlight any technical issues they need to know ahead of time. Like if you've already had a failed DXP implementation or if you are coming in with a blank slate. This will help the vendors really evaluate whether they're up for the task or not.



Budget

- Very simply – what are you looking to spend. Some buyers may choose to forego this information, preferring instead that vendors come to them with prices first. This isn't recommended. Vendors have a set list price already in-hand, and will often make concessions while competing for your business that will bring that number down anyway. Your budget is, if nothing else, an opt-out point for a vendor if they believe you can't afford their product.

Timeline

- You have a set date for when this DXP needs to be up and running. Mark it. Set expectations appropriately. Don't worry about feeling too ambitious either – if a vendor wants your business, they will do whatever they can to meet your deadline.

That's pretty much it. Now, if you're going through that list and thinking "Well, a lot of this sounds awfully familiar," that's because we already addressed most of it earlier. In fact, we did that *because* you would need it for your RFP. So you won't be spending as much time as you think building this out.

One other point – if you did decide to bring a technical partner along ahead of time, note that they will often have sample RFPs that you can use to build your own, and will help guide you in how to write it and what to include based on their experiences. First-touch vendors, especially ones that have been introduced to you by your technical partners, will also be more than happy to guide you through the RFP build process. Don't be afraid to accept the help. Just make sure you are aware of the inherent biases that come along with it.

Cast A Wide Net

Once your RFP is ready, it's time to cast it out and see what fish come biting. There's a number of ways you can do this. The easiest, of course, is just to post it publicly – via your website, social media, a third-party resource, or whatever. However, that's not so much casting a wide net as dropping a crumb of bread into the ocean and hoping a Coelacanth snaps it up.

Instead, it's recommended you think strategically about who and where you're going to be sending it. Below are just a few recommendations:

Go Through An Analyst

- From Gartner to Forrester, Real Story Group to Ars Logica and many more, there are tons of organizations out there filled with experts ready and willing to help guide you through your vendor selection process. The positives here are tremendous – a wide understanding of all the big and small DXP vendors in the market, detailed analyses of each one, and tips and tricks from people who have arguably seen it all. They will help put your RFP in front of the vendors they think are right for you and will help facilitate end-to-end conversations.

- However, there are downsides to going this route. All that knowledge doesn't come cheap, and despite their claims to be unbiased, analysts definitely play favorites. Make sure to do your research beforehand.

Go Through A Tech Partner

- If you already found a tech partner ahead of time, great! You can use their connections and knowledge to put together a list of vendors that they think will fit your exact requirements. If you haven't, however, that doesn't necessarily count you out of the game. It's a great time to bring one in now as well. You can also work with a tech consultancy firm to build your list of viable vendors, many of whom they will have direct connections to and will be happy to forward your RFP along.
- On the negative side, do note that many tech firms focus on only a specific subset of technology (like coding language, such as .NET or Java) which can limit the scope of recommendations they will give you. Also, unlike analysts, they won't necessarily have as wide a breadth of the industry, so there are many smaller vendors that you might never talk to if you go this route.

Send To Vendors Directly

- Feel like doing some research? It is absolutely possible for you to take a deep dive through the industry, learn all the different vendors out there, and take the initiative to send RFPs directly to them. It's a great way to save money that would otherwise go towards consultants, it allows you to control exactly who and how many vendors are being brought into the process, and the only biases you'll be bringing with you are those that you already harbored beforehand. Like how you might think coconut is gross. Because, well, it just is.
- The downsides are pretty apparent. Unless you have any expertise about the industry going in, all you'll have backing your choices is a degree from Google U. The bigger DXP vendors also tend to dominate the narrative online, meaning that chances are high that you could miss a smaller vendor that better fits your requirements. Plus, how much spare time do you really have to dedicate to research?

Many companies choose to mix-and-match pieces from each of these processes – they talk to an analyst to get an initial feel of the industry, for example, before diving headlong into finding and sending to vendors on their own. That's completely okay too. Find a process that works best for your organization and commit to it. The goal here is just to ensure you bring as many viable vendors as you deem necessary so you can have a full and rich comparison of technologies. Which dovetails nicely into our next step.



Decide On A Top Three

So your RFP is out in the marketplace and vendors are starting to respond. That's great. You'll need to dedicate quite a lot of time to reading their responses in the coming weeks (or months, depending on how many vendors are responding and how long it takes them to respond). Your goal at this stage is to evaluate how, or even if, they meet your needs as outlined in the RFP. Some will come in with completely custom presentations that speak directly to your organization. Some will be so generic you can see the marks from the copier. It will ultimately be up to you, your team, and any consultants you may have hired to judge each one on its own merits and decide which you want to look into further.

Once you've made your determinations based on the RFP responses, it's time to reach out to the vendors you liked and schedule an introductory meeting. Don't worry if your list of vendors is still really long at this point – we'll get to whittling them down shortly. This first meeting is for the vendor to get to know the Project Lead and discuss your DXP needs in more detail. After an RFP, this meeting will almost always be with a Senior or Director-level Sales representative. That means you can expect this to be an exchange of ideas; it's just as much an opportunity for the vendor to quiz you on specifics as it is for you to dive deeper into the product they presented.

If all goes well and you want to pursue some of these vendors further, the next step is for them to provide you a demo. This means they will create a personalized presentation of their DXP's capabilities, showing you the inner workings of the product and what it's like to use it. Unlike the meeting, this doesn't have to only include the Project Lead. Rather, you should try to include multiple members of the evaluation committee's inner circle.

As far as the demo itself, some vendors may go "above-and-beyond." We're talking a fully customized demo built from the ground up to address your entire RFP and details from the introductory meeting. And, again, others might give you a token demo that's so overdone that the Sales Engineer sounds bored presenting it. There's no necessarily "right" way to judge a demo except in how much it actually speaks to your needs.

Once you sit through the demos, though, it's time to start whittling down your choices. Together with the rest of your inner circle, discuss what you saw. What you liked and what you didn't. Use the RFP as a reference point, even if just to create a list of checkboxes for each vendor to tick.

A good rule of thumb at this point is to try to get the list of vendors down to three. This number is fairly arbitrary – if you have four vendors you liked, keep four – but everything after the initial demo will get very involved for both your selection committee and your organization at large. In order not to make the process more exhausting than it needs to be, it's best to try to only move forward with vendors that you truly believe are worth the time.



Make A Decision (and DON'T Settle)

Yeah, that header is a bit scary. Don't fret. While this is being condensed into one step, this will likely be one of the longest parts of the entire process.

So from sending out RFPs to now, you will have likely spent a few months talking to vendors, getting demos, evaluating, and then finally narrowing down your list. Expect to spend at least two to three times that time cutting down your list of vendors to one. The process for deciding who to cut and when will ultimately depend on further discovery and evaluation, likely diving into deep details that will only come out once you become intimately familiar with the product and bring in more of your organization to examine it. Some common "deep-dive" meeting types include:

Proof of Concepts

- With a Proof of Concept (or POC), you are essentially asking a vendor to show you exactly what your new platform will look like when everything is complete and integrated. That means showing off connectivity, look-and-feel, functionality, and more – all tied to the specific requirements you came in with from the outset. POCs are much more involved than demos, typically taking multiple weeks to over a month to prepare depending on how detailed they need to be. Nevertheless, they are essential to really set expectations for the product before you purchase it.

"Stump The Chump"

- So you've gotten your stakeholders deeply involved with the project. That's great. As you have more meetings, it's imperative that they collect feedback and questions from other members of their teams and continue to press the vendors for answers. If this proves insufficient for whatever reason, another option is to have a 'Stump The Chump' session, where an entire team is put on with a vendor representative to just batter them with questions (examples include "If I want to do X, how can I do it?" or "Y lets me do this. Does your product support Y?"). Most vendors are happy to do these kinds of calls, as it shows that you are invested in buying from them.

Integration Roundtables

- You are going to have a lot of discussions around integrations with a vendor. If there are a few that you are very passionate about, and which might not be natively available with the DXP vendor, it is worth connecting the two so they can figure out how they can make a happy marriage work. Often the third-party technology will also be able to ask additional illuminating questions that you hadn't thought about ahead of time.

Along with all these meetings, you will also continue to do a lot of internal evaluation with your teams based on each new piece of information you receive. Make sure you take copious notes and consider each member's thoughts.

Assuming you eventually make it through all your meetings, you'll run into one of three scenarios:

Scenario 1: You Decide on a DXP Vendor

This is ideal – we'll cover next steps there shortly.

Scenario 2: You Can't Decide Between Vendors

When this happens, it means, that two or more vendors have either identical technology or comparable benefits (ie. one has a lower price while the other has more capabilities). If this occurs, it's best to condense evaluations down to your inner circle again and focus on the differences between the vendors and rank them in terms of importance. You can also use this opportunity to play each vendor off of the other, to see if one is willing to offer a more enticing package to win your business. No matter what you do, unless you have a strict deadline to make a decision, try to take your time.

Scenario 3: You Don't Decide On A Vendor

This is, let's be honest here, the worst-case scenario. However, no search is ever perfect, and it's important your team recognizes that the options you have in front of you are just not up to par. In a perfect world, you could start your search over again with your RFP – sending it out to vendors you may have ignored the first time around – and see if the second batch of DXPs look better than the first.

However, we don't live in a perfect world. There are deadlines to everything. If you aren't satisfied with the vendors you took this far, try to talk with the vendors first. Lay out exactly what is unsatisfactory about their product and/or their offer. See if you can find some sort of middle ground or concession that will satisfy you and your team. If that still doesn't work, talk to your inner circle. Come up with a consensus next step. Even if that means going to your executive board and begging for more time.

At the end of the day, you do not want to pick a DXP technology you aren't happy with. This is a long-term commitment with huge ramifications on how you do business. If you aren't happy, don't settle.

If you are happy, though, now we get to the "fun" part.

Get To “Yes”

It's the best-case scenario. You found a great technology that you're happy with and you're charging ahead. Well, now you have to get the lawyers involved because it's time for everyone's favorite game: Contracts!

In all seriousness, contracts, while unique to each customer, usually contain similarities across all iterations. As most DXP vendors sell their platforms as a SaaS product (Software as a Service), your contract will likely be on a yearly basis, with a commitment of multiple years up front. This figure usually will not include the integration costs unless that comes directly from the vendor as well.

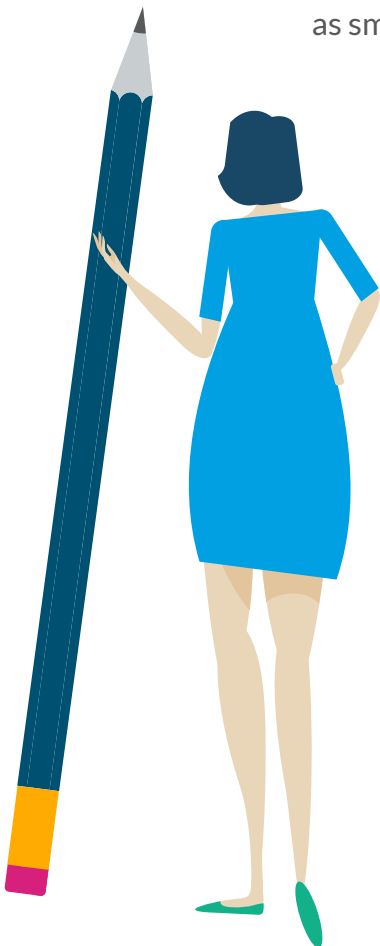
Remember the phrase “Everything is Negotiable?” Well, that holds true for DXP negotiations as well. Let the vendors know what you want and negotiate additional requests onto the package as need be (like Cloud support, for example). At this point, you will ultimately just be a middleman for your executive team to make a decision on signing the contract. Do your best to support them and liaise with the vendor.

Outside of the contract, you will also need to select an implementation partner. If you already have a tech partner, congrats, you're already done. If you don't, you will be diving deep into your chosen vendor's “Partner” program. This is the list of implementers that the vendor has formally approved to implement their software, usually through a series of classes and tests. While it's not mandatory to use someone from their list (ie. if you bring in a tech partner ahead of time, they can still implement it), you are guaranteed that anyone you do pick from the list knows the intricacies of the vendor software and should make the whole process as smooth as possible.

Some vendors also grade implementers based on the amount of implementations they have done – this is where you get “Platinum” and “Gold”-level Partners – and will often point you to the higher-graded implementers. Some vendors may even bring them in earlier on in the process if they think they'll be a good match for your project. However, no matter what, it will still be your decision who you pick at the end of the day.

The entire “Getting to ‘Yes’” process can take a long time, so don't be discouraged. When pen is finally put to paper and you're popping champagne to celebrate your new DXP, it will make the whole endeavor worth it.

Then, tomorrow, implementation starts.



4. Ramping Up Through Implementation

Success! You have found the ideal DXP for your organization, negotiated for terms and with features that you are happy with, and are now ready to start getting it implemented into your organization.

A few things to keep in mind before diving in here. As said before, implementation comes with a price tag that is three-to-five times higher than the DXP solution itself. This price tag often rises and falls based on complications that come up during the process. Such as when technology you already have doesn't pair well with the DXP, or you have customized systems that need customized integrations. It's very much on a case-by-case basis and is something your IT and Developer teams will be involved with throughout, providing periodical updates all the while. And while the vendor will still be in the background, ensuring implementation is going smoothly, your main point of contact will be the implementer themselves.

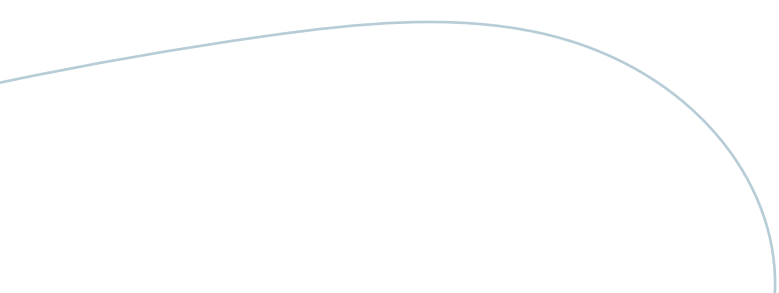
So instead of diving deeper into the implementation, let's talk about what you can do while all this is going on. DXP implementation is often thought of as an out of sight/out of mind obstacle – essentially dead time for you to wait until everything is ready to be used. But this just isn't true. You have a lot that you can do to prepare your team ahead of launch day.

Align With Your Implementation Partner

Although your IT and Developer teams will be headlining the implementation process, it's important that everyone starts on the same page. For this reason, scheduling an implementation strategy meeting with both the implementation partner and these teams is vital. The goal of this meeting should be two-fold: let the teams get to know each other, while the implementation partner presents their strategy and timeline for how they will be getting the DXP set up on your system.

It's a great opportunity for your teams to quiz the implementation partner on the various parts of their plan, give insight into the unique systems that they might run into along the way, and also set themselves up as stakeholders (and literal partners) for the entire process. Your implementation partner has likely had numerous experiences handling all types of systems – nothing you or your team says should shock them. Make sure to lay it all on the table right away so you enter implementation with a full head of steam.

Your job through this process, assuming you're the project lead, is really “monkey-wrangling.” Set up meetings when they need them, act as a mediator between your teams and the implementer, and step in if anything seems like it might derail the process. You are there to ensure things go smoothly.



Start Team Trainings

Your DXP may not be up and running as of yet, but that doesn't mean you won't still have a good idea what it looks like and how it will be used. It's time to get your teams trained on how to use the DXP's systems, utilizing materials provided by the vendor either specifically for your organization or as part of a larger onboarding package.

The process here is simple – most DXP vendors have a free demo or public version that allows you to see the essentials of what the platform looks like and how it plays. You should be scheduling periodic meetings with your teams, as applicable, to go over the various functionalities and how they can be used in your organization. The demo version of the product should allow you to cover these in enough detail to keep your team engaged. If the vendor does not have any of this available, it is worth considering asking the vendor to provide training materials or even host training sessions to get your teams prepped to use the product. This is especially important for the less tech-inclined teams, such as Marketing, as their use will often be focused around expertly using the UI instead of the backend.

Your tech teams, meanwhile, should be taking full advantage of the vendor's extensive product documentation to learn all they can about the DXP. This will be expedited by their working closely with the implementation partner, but don't overlook the value of a formal training to actually dive deep into the technology. As mentioned before, vendors typically have these kinds of formal trainings for a reason. Most vendors even have Developer trainings specifically so team members can be approved to use the backend of the product. Make sure your team is taking advantage!

Build A DXP Launch Plan

As your tech teams work alongside your implementation partner, and you continue to oversee the process, you will start to get a sense for when everything might be completed. Obviously, things can and will change in the process, but one of the benefits of an overhead view is that you can take a step back and build a launch plan designed around this timetable.

A successful DXP launch plan, much like a DXP itself, is built around the idea of scale and growth. Namely, you shouldn't be expecting to deliver an enterprise-level digital experience right out of the gate. You should plan for early pilot projects that will allow your teams to put to use some of the training that they've undertaken during implementation, in the hopes that they become more comfortable with the software and can deliver a few quick wins.

These pilots should be small in scope and focus around functionality. An example would be running personalization on a few content blocks on your website and testing the results. The goal here should be to show success and improvement using the software, or otherwise actionable next steps you can take if it proves less-than-ideal. As your team becomes more comfortable with the software, you'll be able to scale up to larger and more enterprise-wide projects.

The launch plan should reflect this. In general, your launch plan should cover the first three months, or to the end of the nearest fiscal quarter, after your DXP launches. This will give your teams more than enough time to use the software, make their mistakes, and learn. The hope isn't necessarily that you will be firing on all cylinders come the end of the three months; Rather, you will have just transitioned from taking baby steps with your platform to moving at a nice, brisk walk.

5. Launch And “Constant Innovation”

It's launch day. Implementation has been a bit of a mixed bag – some things went according to plan, some didn't – but you've pushed it over the finish line and gotten your DXP ready for organization-wide use.

You already have a plan for your first few months. You'll test the DXP on small projects, letting your teams get quick wins in the process and iron out any kinks they might have in the system. But what's next? How do you ensure that your DXP continues to grow and develop over the coming months and years with the software? How do you ensure that you are always getting as much value out of the platform as possible while still innovating for the latest and greatest pieces of technology?

The answer lies in a concept called **Constant Innovation**. This idea derives from the belief that organizations should always look for ways to improve or otherwise better themselves. Your DXP, as a piece of technology that will act as the very lifeblood of your marketing stack, is no different. You should always look for ways to update, improve, and otherwise “innovate” on top of what you have in place. Just because it is meeting every need now doesn't mean it will in the future. If you don't look for ways to improve it when it falls behind it will, just like a goldfish you forget to feed, eventually die.

Plan Your Next Steps Right Away

As discussed, you already have your launch plan well-in-hand thanks to proactiveness during implementation. However, that plan is only focused on ramping up your organization on using the DXP and getting it to a place where your team will feel comfortable using it. It doesn't cover what your plans are beyond pure functionality, or how you'll be gearing your organization up to take full advantage of a DXP's capabilities.

It's best to think of a DXP as the center of a vast spiderweb. It is made up of an amalgamation of various technologies that help give it form, structure, and capabilities. And like a spiderweb, a DXP can continue to add connections and grow outward to become bigger, better, and stronger. The only limit, essentially, is money and time.

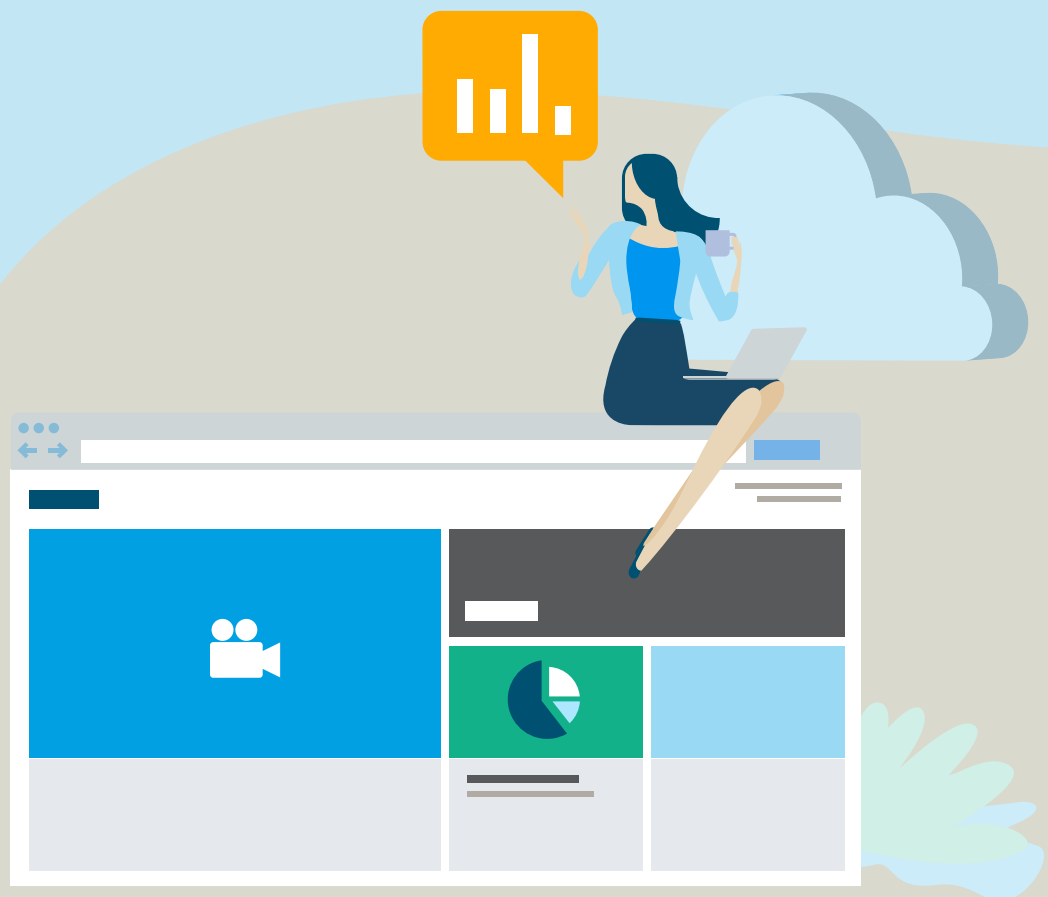
That's why it's important you start laying the groundwork now for what will come next. You've set up your DXP, but does it connect to your Customer Relationship Management (CRM) tool? Do you even have a CRM? Even if it's just a wish-list, the best thing you can do for your organization is start organizing your thoughts about where you want to take the DXP into the future and write them down. Get feedback from the technical teams who just helped with implementation, as well as your inner circle from the DXP project.

Once you have a list that excites you, go to the vendor and start talking about it. Let them know this isn't something that will be done tomorrow, but what you're considering in the future. They can help show feasibility on their DXP platform, the cost associated with such a project, and what resources they'll need to make it happen. Then it's just a matter of building a business case for each line item and going to your executive board for funding based on priority – either immediately or, since you just started signing checks for a DXP and its implementation, maybe a little bit down the line.

Embrace Change

Let's get one thing out of the way – even though your DXP is implemented, it's very unlikely that it is your ideal DXP. As the months go by and your team starts getting comfortable with the platform, cracks will start to form. Nagging issues that can't be easily fixed, or functionality that needs to be there but isn't. The best part about a DXP, though, is that while it may not be your ideal DXP on the day it launches, it can eventually become that with enough attention and care. DXPs are built to change. Not only that, but they kind of need to. A DXP, by definition, allows you to deliver personalized experiences to your customers. But where your customers are, what technologies they are using to talk to you, and how their data is being captured and stored is changing on a near-constant basis. Mobile engagement even five years ago was seen as a pipe dream for most companies. Now it's possibly the top way they interact with customers. Imagine where technology will be in another five years. Or ten.

Keep an eye out for each of these trends as they come and think about how your DXP can adapt to meet them. Keep an open dialogue with your developers – who maintain your DXP internally – as well as the vendor. Chances are, your vendor is likely thinking about these emergent technologies all the time and is building their platform to meet them. Make sure they know this will be a need for you. Hold them accountable to delivering it if you can't do it yourself. Lastly, never forget to keep an eye ahead on the market. As with the earlier spiderweb example, you never know what solutions may come along that just enhance or improve upon what you're already doing. If you have a truly flexible DXP, you can integrate it into your platform. And with each new addition, you get one step closer to that ideal platform.



Conclusion

At the very beginning, we talked about why an out-of-the-box DXP solution just doesn't make sense. The various moving parts that go into picking a DXP, then growing and developing it into your ideal platform, are far too complex for any basic, one-size-fits-all platform to be able to deliver on effectively.

Whether you're taking the first step into your DXP journey or you're halfway through the process, it's important to keep that in mind. You may have numerous stops along the way – from uniting your organization around one vision to vendors that may not be delivering exactly what you want – but the end result is like no other customer engagement tool on the market. Heck, it's unlike any other technology on the planet. DXPs are living systems upon which you build the entirety of your organization's marketing activities. It's how you talk to customers. It's how you remember them. It's how you show them your unique identity and values. And in times of uncertainty, such as a global pandemic, it's how you show them that you will always be there for them. There is nothing else out there that can deliver on that type of promise, nor flexible enough to deliver on that promise no matter what new digital channels, innovations, or changes may come its way.

Building the ideal DXP is ultimately an endeavor that has no end. The need to constantly innovate and grow your DXP to keep up with the changing tides of the market means that you will always be chasing another carrot. But part of the joy of a DXP is knowing that there is another goal to meet, another way to improve, and another digital experience achievement to push toward. It's in this process that a DXP is able to meet its full potential and truly stand tall in a market with a lot of big promises, but few technologies that can actually deliver them. So embrace the future and keep pushing forward in your digital experience journey. Just don't forget to bring your DXP along for the ride!

About Jahia

Jahia Solutions Group makes digital experiences simpler. Built on a cloud-based platform, Jahia helps organizations all across the world leverage their content and customer data to fully engage with their customers. With an unparalleled level of flexibility and connectivity, Jahia integrates into existing technology stacks and can be customized to meet each organization's specific business needs and challenges.

Founded in 2002 and headquartered in Switzerland, Jahia has offices in Boston, Toronto and Paris. Jahia's customer community includes hundreds of global brands and organizations, including Ben & Jerry's, AllianceRx Walgreens Prime, NASA and General Motors. For more information, visit www.jahia.com, read our [blog](#) and follow us on [LinkedIn](#)

