ZION & ZION

Aligning Organizations for **ABX & CX Superiority**

Our 8-Forces Framework

Superiority in Account Based Experience (ABX) and Customer Experience (CX) requires more than just technical skill—it demands a collaborative organization. And, while the need for more collaboration is often discussed within organizations, the degree of necessary collaboration has still failed to materialize in most organizations. This paper outlines a path forward, introducing our comprehensive 8-Forces Framework.

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Organizations Fail at ABX and CX Far Too Often

As ABM and CDP platforms continue to pave the way for ever-more-sophisticated ABX and CX (such as 6sense and Demandbase in the ABX realm; and Tealium, Segment, and RudderStack and others in the CX realm), the imperative for organizational realignment becomes critical.

Organizations that do not evolve toward collaborative structures simply cannot expect to fully leverage the promise of these technologies. These organizations risk falling behind in an increasingly competitive marketplace where adaptability is not just valued, but vital.

Lack of Collaboration
a Key Driver of CDP / ABM Project Failure

81%

72%
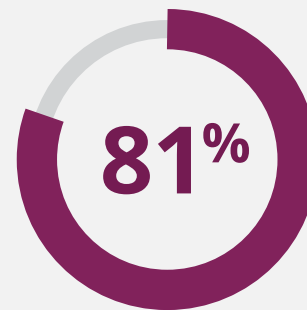
81% of marketing professionals who classified their **CDP projects** as having 'failed' believe that a key reason was a lack of cross-functional collaboration*
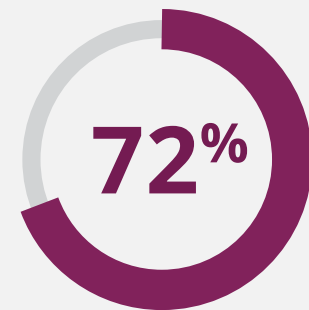
72% of marketing professionals who classified their **ABM projects** as having 'failed' believe that a key reason was a lack of cross-functional collaboration*

For CMOs and business leaders, the integration of ABX and CX tools is more than a technological upgrade—it's a pivot towards a more collaborative, agile, and adaptable business model. This shift is critical in leveraging the full potential of these platforms, ensuring that sales, marketing, and customer service are not just aligned but are resonating on the same frequency, driven by the principles of our 8-Forces Framework.

The 8-Forces Framework for ABX & CX Organizational Alignment

The key to collaboration and organizational alignment is having common frameworks to drive the new operating model.

The Zion & Zion 8-Forces Framework, as depicted in the visual on the next page, has been instrumental in helping our clients foster collaboration across departments by providing a unified focus and a structured set of questions and topics for consideration.

This framework serves not only to enhance collaborative efforts but also to streamline the efficiency of such interactions, ensuring that all departments work cohesively towards common objectives.

Recognizing the multifaceted nature of Account Based Experience (ABX) and Customer Experience (CX), our framework encourages a comprehensive viewpoint that crosses departmental lines and embraces a global perspective, essential for thorough evaluations.

The 8-Forces Framework is a meticulous and comprehensive approach, guiding organizations through the complexities of ABX and CX with a clear and methodical strategy for alignment and success.

No Unifying Framework
a Key Reason for Lack of Collaboration

83%

69%
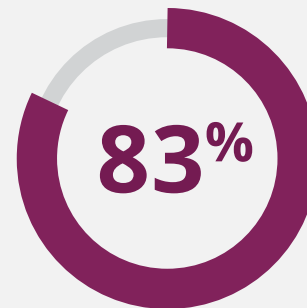
83% of the 81% referenced on the previous page believe that having no unifying framework to drive cross-functional collaboration was a key reason for the **CDP project** failure*
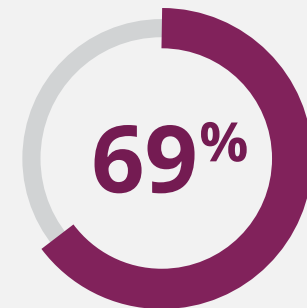
69% of the 72% referenced on the previous page believe that having no unifying framework to drive cross-functional collaboration was a key reason for the **ABM project** failure*

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Our 8-Forces Framework

Industry Forces

The constant evolution in industry dynamics reshapes traditional boundaries, urging businesses to rethink value creation.

Customer Forces

Shifting customer expectations in an ever-changing market demand swift and adaptive responses from businesses.

Investor Forces

Balancing short-term financial goals with long-term strategic visions is crucial, especially in the face of growing margin pressures.

Regulatory Forces

Keeping pace with evolving regulations and compliance requirements is vital for operational consistency and accountability.

Economic Forces

Fluctuating economic conditions necessitate strategic adaptations to sustain profitability.

Worker Forces

The rise of hybrid and remote work models calls for new approaches to maximize productivity and maintain organizational culture.

Technology Forces

Rapid technological advancements challenge existing infrastructures, pushing companies towards innovative solutions.

Environmental Forces

The growing emphasis on sustainability demands the integration of eco-friendly practices in line with both regulatory and consumer expectations.

Industry Forces

Adapting to the Market's Evolution

As industry forces reshape traditional boundaries, it's imperative for organizations to pivot, ensuring that their structure is conducive to innovation and capable of rethinking value creation. This calls for a proactive, rather than reactive, approach to market changes, anticipating shifts and sculpting offerings that meet the new demands.

INDUSTRY FORCES ➤➤➤ RESPONSE SCENARIOS

ABX *Example*	CX *Example*
As a result of a collaborative interdepartmental discussion of prevailing industry forces, an organization's sales team brings up that they are noticing new topics crop up in client conversations. This results in the cross-functional team in attendance recognizing the need for an agile mechanism to quickly identify and adapt to industry shifts and to incorporate responses into ABM campaigns. A pilot project is undertaken to deploy an AI-driven analytics platform where we develop an interface to allow questions to easily be asked by marketing, where the answers will come from the custom AI drawing upon the organization's entire email and audio recording database.	By acknowledging and gaining cross-department agreement that Industry Forces, are shifting the ecommerce landscape beneath our feet in every department, we suggest that leveraging predictive analytics to anticipate market trends and customer needs based on not just purchase data but zero-party data that serves as a leading, rather than lagging indicator. Acting on this, using our ZPD-6 Framework*, we see an increase in customer retention as we introduce not only products that align with emerging customer interests ahead of our competitors, but our customers deeply feel our brand's interest in what they think.

Submit a contact form at zionandzion.com to request a copy of this framework and the accompanying whitepaper

Customer Forces

Responding to Dynamic Market Demands

In parallel, shifting customer expectations command a swift and adaptive organizational response. Whether in the B2B realm, where deep insights into account dynamics lead to tailored strategies, or in B2C markets, tapping into consumer preferences and data is essential for crafting personalized experiences that resonate deeply.

CUSTOMER FORCES　　➤➤➤　　RESPONSE SCENARIOS

ABX *Example*	CX *Example*
A client's marketing department highlights the gap in personalized content, which is crucial for ABX. An initiative is designed to utilize deep learning algorithms that predict customer preferences, enabling us to craft hyper-personalized content. The outcome is an increase in content engagement, leading to an uptick in qualified leads from top-tier accounts.	Marketing unveils a data-driven personalization engine that crafts individual customer journeys. Integrating this with our CX strategy results in a boost in customer engagement, as evidenced by increased time on site and a growth in repeat purchases.

Investor Forces

Managing Expectations with Strategic Foresight

Balancing the immediate financial pressures with a long-term strategic outlook is crucial, particularly when investor expectations can dictate the pace and direction of change. Stewarding resources with an eye towards sustainable growth is a delicate act but one that is essential for maintaining a competitive edge.

INVESTOR FORCES ➤➤➤ RESPONSE SCENARIOS

ABX *Example*	CX *Example*
A client recognizes the need to align ABX initiatives with financial goals in order to drive ABX investment. The client agrees to implement a cost-benefit analysis model that links ABX activities directly to revenue outcomes. As a result, we see an improvement in ROI on ABX campaigns due to more strategic allocation of resources.	An organization resolves to tie CX enhancements directly to financial outcomes. By introducing a 'Customer Lifetime Value Predictor,' we optimize our marketing spend, which leads to improvement in customer acquisition cost (CAC) and a rise in overall profit margins.

Regulatory Forces

Ensuring Compliance
within Dynamic Frameworks

Keeping apace with evolving regulations and compliance requirements is not merely a legal necessity but a foundational aspect of operational consistency and accountability. This vigilance ensures that an organization's ABX and CX strategies are both robust and responsible.

REGULATORY FORCES ➤➤➤ RESPONSE SCENARIOS

ABX *Example*	CX *Example*
Regulatory forces prompt an organization to establish a compliance-centric culture. We integrate a real-time compliance checker into our ABX workflows, ensuring that every customer touchpoint is compliant. The approach reduces compliance-related incidents, safeguarding brand reputation.	Upon reviewing the trajectory of regulatory forces, we encourage the organization to embed compliance into every customer interaction. By automating GDPR and CCPA and other emerging compliance legislation within our CX platform, we reduce legal queries and eliminate compliance breaches, reinforcing customer trust.

Economic Forces

Strategizing for Stability and Profitability

Economic fluctuations demand agile strategies that can pivot for profitability without sacrificing stability. The alignment of ABX and CX initiatives to economic resilience is a testament to an organization's capacity to endure and thrive amidst market volatility.

ECONOMIC FORCES ➤➤➤ RESPONSE SCENARIOS

ABX *Example*	CX *Example*
A client needs to adopt a flexible ABX strategy that can withstand economic uncertainty. We create an 'Economic Response ABX Toolkit' which allows us to pivot quickly in volatile markets. As a benefit, we maintain a steady lead conversion rate despite an economic downturn, unlike our competitors who saw a drop.	An organization crafts a 'Resilience CX Buffer' that adjusts customer service resources dynamically in response to economic shifts. This buffer helps us maintain service levels during high demand, leading to cutting wait times by nearly a third and increasing customer satisfaction during peak times.

Worker Forces

Fostering a Culture of Adaptability and Progress

The rise of hybrid roles and remote work necessitates new approaches to productivity and organizational culture. Embracing these changes is essential for teams to remain effective in delivering ABX and CX that meet the high standards of today's market.

WORKER FORCES ⟫⟫⟫ **RESPONSE SCENARIOS**

ABX *Example*	CX *Example*
Worker forces reveal a need for extensive ABX training. We launch a comprehensive internal ABX certification program for our client, which, in and of itself, unites previously disparate sales, marketing, customer service and product teams. Post-training, we observe a near-40% increase in cross-departmental ABX initiatives, leading to a more cohesive customer journey and a reduction in customer churn.	A careful review of prevailing worker forces uncovers the need for CX-centric upskilling within the client's organization. We roll out an immersive training program focusing on combining empathy and technical skills. This leads to further driving the collaboration between various departments, including UX, CX, digital media, analytics, and lifecycle marketing, now that they have a shared understanding of the frameworks learned during the training.

Technology Forces

Driving Innovation in Infrastructure

Technological advancements continually challenge and elevate the infrastructure required for effective ABX and CX. Investing in the latest technologies and ensuring organizational structures support these innovations is crucial for staying ahead of the curve.

TECHNOLOGY FORCES ➤➤➤ RESPONSE SCENARIOS

ABX *Example*	CX *Example*
By considering the technology forces surrounding the client's industry, we observe that in the time that has elapsed since most of their tech stack was deployed, the various constituent platforms had evolved their features to overlap, providing substantial opportunities to rationalize and consolidate the stack.	A client's digital media, IT, MarTech, and UX departments were all concerned with third-party cookie deprecation, until they sat in a room together and stepped through the 8-Forces. Until they do, it did not become apparent that even though each of their departments had done what was asked of it to address the issue, the lack of a coordinated approach and coordinated follow up had resulted in Client-Side Event Flaws and PII Deficiencies.

Environmental Forces

Integrating Sustainability into Business Practices

Lastly, the increasing emphasis on environmental concerns requires the integration of sustainable practices into every aspect of business, from ABX to CX. Aligning organizational strategies with eco-friendly practices is not only ethically sound but also aligns with the expectations of an increasingly conscientious customer base.

ENVIRONMENTAL FORCES ➤➤➤ RESPONSE SCENARIOS

ABX *Example*	CX *Example*
Environmental forces drive us to integrate ABX with our corporate social responsibility (CSR) goals. We launch a 'Green ABX Initiative' that not only resonates with the client's environmentally conscious customers but also results in an increase in brand advocacy and a partnership with a leading sustainable enterprise.	Environmental forces inspire us to align CX with eco-conscious practices. We introduce sustainable packaging with a tracking feature that customers can follow, which not only reduces our carbon footprint but also increases customer satisfaction due to shared values on sustainability.

Building a Future-Ready Organization

Embracing the intricacies of ABX and CX is more than just a facet of marketing strategy; it represents the transformation into an organization that is effective, resilient, and prepared for the future. Rooted in a structure that fully appreciates the context of its industry, such an organization is primed for continuous adaptation and innovation.

Our 8-Forces can help to ensure that the air is no longer charged simply with anticipation but with the certainty of action. The 8-Forces Framework has provided a common language and purpose, aligning departments with a reinvigorated ABX strategy.

It's imperative that organizations step out of the mode of having their sales, marketing, and customer service departments operate not as disparate units but as a unified force ready to deliver unmatched ABX and CX.

Through the 8-Forces lens, results become tangible and varied: from faster market response to robust compliance, from increased engagement to economic resilience, and from empowered staff to a reputation for responsibility.

Each force within the framework does not stand alone but interweaves to create a comprehensive strategy that propels us toward a future where ABX and CX are not just concepts but the core of organizational excellence.

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