Vendor Landscape: Customer Service Knowledge Management Suites

Ensure integration of contextual knowledge with your support channels.
Introduction

Select a Customer Service Knowledge Management (CSKM) solution that will get the right information to the right person at the right time. Ensure social features are sufficient in your product of choice or risk failure.

This Research Is Designed For:

✓ Enterprises seeking to select a solution for Customer Service Knowledge Management (CSKM).

✓ Executive-level stakeholders in the following roles:
  • Customer Service and Knowledge Managers.
  • IT Managers and Directors involved in selecting a CSKM solution.

This Research Will Help You:

✓ Understand what’s new in the CSKM market.

✓ Evaluate CSKM vendors and products for your enterprise needs.

✓ Determine which products are most appropriate for particular use cases and scenarios, such as:
  • Knowledge-centered support (KCS) methodology compliance.
  • Best role-specific user interface.
  • Availability of virtual assistants.
The Info-Tech Customer Service Research Agenda

**Design a Service Strategy that Keeps Pace with Customers**
- Providing world-class customer service is a critical differentiator in a competitive marketplace. Organizations are taking advantage of traditional and social interaction channels to serve customers.

**Vendor Landscape: Customer Service Management Suites**
- Customer Service Management (CSM) suites provide a range of functionality for effectively resolving service inquiries.
- This set will help you choose the right CSM platform.

**Design a Field Service Automation Strategy**
- Field service agents require unique mobile solutions that allow them to get the job done.

**Vendor Landscape: Field Service Automation**
- A variety of vendors offer end-to-end solutions for field service that meet complicated use cases.

**Design a Customer Service Knowledge Management Strategy**
- Supporting knowledge management in the customer service organization is critical for successful resolutions.

**Vendor Landscape: Customer Service Knowledge Management Suites**
- Choosing a standalone CSKM platform can help achieve knowledge management (KM) goals.
Executive Summary

Info-Tech evaluated nine competitors in the CSKM market, including the following notable performers:

**Champions:**
- **Salesforce.com**, the first CSKM vendor to get KCS5-verified; always staying on top of collaboration, social, and mobile trends.
- **eGain**, a vendor with the best-of-breed knowledgebase and search, excellent workflow resolution tools, and an innovative approach to social and collaboration.
- **KANA**, a vendor that continues to define the CSKM market with its exceptional knowledge in context tools.
- **IntelliResponse**, a multi-channel self-service solution with an innovative approach to pricing.

**Value Award:**
- **eGain**, the product that offers most bang-for-the-buck with its comprehensive set of features and solid vendor credentials.

**Trend Setter Award:**
- **KANA**, a vendor that provides agile channeling to the customer: the ability to select the desired way to receive support right from the customer portal. Customers can choose from channel options such as email, online help, contacting a store, or posting in the online community. This approach eliminates the costs and effort of channel switching later in the resolution process.

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**Info-Tech Insight**

1. **Mobile support is improving.**
   This year, Info-Tech saw an improvement in mobile capabilities among vendors reviewed. The majority of CSKM solutions are now optimized for touch devices.

2. **Integration with social media still lags.**
   Although most vendors offer share-to-social, social listening is not yet a market staple. Service organizations need to quickly amend their knowledge gaps based on the customer experience in the social cloud. Until CSKM social listening features mature, consider integration with a third-party point solution for social listening.

3. **Contextual integration with support channels is a market differentiator.**
   Not all CSKM solutions today can provide applicable support articles through integration with channels such as IVR, Twitter, and Facebook Pages.
Market Overview

How it got here

- Customer service organizations started adding searchable “notes” to maintain customer information system (CIS) platforms, in addition to providing agents with service call scripts. Eventually, dedicated collections of notes were maintained by product specialists for agent use.

- Best-of-breed vendors began to recognize the need for a specific product that addressed companies’ organizational pain. They began to offer knowledgebases, search, and structural (taxonomy, category) capabilities. Later, vendors began to merge external sources into the query layer, along with more complex service and support.

- The market has recently seen a significant improvement in mobile capabilities, with vendors offering either browser-agnostic access or native applications. Although the majority of solutions are now optimized for touch devices, one should still pay close attention to this functionality when selecting the appropriate solution.

Where it’s going

- CSKM market players are continuing to recognize the importance of basic social features, such as share-to-social. Although the state of the market for social listening is weak today, Info-Tech expects social listening to become an invaluable requirement for organizations to garner insights about their knowledge gaps. Vendors will begin to capitalize on this trend by introducing integration of social listening and knowledge gap reports.

- Contextual integration with various support channels will continue to be a battlefield for CSKM vendors. Some innovators today are integrating knowledge with IVR and are allowing automatic tweets of suggested knowledge solutions by monitoring customer tweets around the world.

- Although a few vendors already offer solutions for industry-specific verticals (e.g. healthcare, manufacturing, government), verticalization will become more important as the market matures.

Info-Tech Insight

As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. Taxonomic navigation and personalization have become a Table Stakes capability and should no longer be used to differentiate solutions. Instead focus on social and collaboration to get the best fit for your requirements. And remember, social listening for detection of knowledge gaps will likely require third-party listening and response tools for one or two more years.
CSKM Vendor selection / knock-out criteria: market share, mind share, and platform coverage

- The CSKM marketplace is mature and organizations have various options to meet their needs. A number of vendors offer solutions that span the full gamut of features: knowledgebases, advanced search, and resolution workflow tools, as well as social, mobile, and collaboration features.
- For this Vendor Landscape, Info-Tech focused on those vendors that offer broad capabilities across multiple platforms and that have a strong market presence or reputational presence among mid-sized and large enterprises.

### Included in this Vendor Landscape:

- **Aptean Consona.** Consona Knowledge is a veteran CSKM product that is now part of the Aptean product family.
- **eGain.** An established vendor with best-of-breed knowledgebase and resolution workflow tools.
- **IntelliResponse.** A provider of sophisticated virtual assistant technologies with a global client base.
- **KANA.** An established market leader that provides a comprehensive CSKM feature set.
- **Moxie.** A vendor that excels in the social CSKM space.
- **Novo Solutions.** A smaller vendor with a core set of basic CSKM capabilities.
- **Oracle Knowledge.** Formerly known as InQuira, this product offers robust application integration features.
- **Parature.** A vendor with a long-standing commitment to the social space.
- **Salesforce.com.** A forward-looking cloud-based vendor with a competitive CSKM offering.
## CSKM criteria & weighting factors

### Product Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Features</td>
<td>The solution provides basic and advanced feature/functionality.</td>
</tr>
<tr>
<td>Usability</td>
<td>The solution is easy and intuitive to use on traditional and mobile devices.</td>
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<tr>
<td>Affordability</td>
<td>The three year TCO of the solution is economical.</td>
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<tr>
<td>Architecture</td>
<td>The delivery method of the solution aligns with what is expected within the space.</td>
</tr>
</tbody>
</table>

### Vendor Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viability</td>
<td>Vendor is profitable, knowledgeable, and will be around for the long-term.</td>
</tr>
<tr>
<td>Strategy</td>
<td>Vendor is committed to the space and has a future product and portfolio roadmap.</td>
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<tr>
<td>Reach</td>
<td>Vendor offers global coverage and is able to sell and provide post-sales support.</td>
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<tr>
<td>Channel</td>
<td>Vendor channel strategy is appropriate and the channels themselves are strong.</td>
</tr>
</tbody>
</table>

### Criteria Weighting:

- **Features**: 50% (20% Usability, 15% Architecture, 15% Affordability)
- **Viability**: 30%
- **Vendor Strategy**: 40%
- **Vendor Channel**: 15%
- **Vendor Reach**: 15%
The Info-Tech CSKM Vendor Landscape

The Zones of the Landscape

**Champions** receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

**Market Pillars** are established players with very strong vendor credentials, but with more average product scores.

**Innovators** have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

**Emerging Players** are newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

For an explanation of how the Info-Tech Vendor Landscape is created, see Information Presentation – Vendor Landscape in the Appendix.
Balance individual strengths to find the best fit for your enterprise

<table>
<thead>
<tr>
<th>Product</th>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
<th>Afford.</th>
<th>Arch.</th>
<th>Overall</th>
<th>Viability</th>
<th>Strategy</th>
<th>Reach</th>
<th>Channel</th>
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<tbody>
<tr>
<td>Aptean Consona*</td>
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<td>eGain</td>
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<td>IntelliResponse</td>
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<td>Novo Solutions</td>
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<td>Oracle Knowledge</td>
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<td>Parature</td>
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</tbody>
</table>

Legend:
- =Exemplary
- =Good
- =Adequate
- =Inadequate
- =Poor

*The vendor declined to provide pricing and publically available pricing could not be found.

For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.
What is a Value Score?

The Value Score indexes each vendor’s product offering and business strength relative to their price point. It does not indicate vendor ranking.

Vendors that score high offer more bang-for-the-buck (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

On a relative basis, eGain maintained the highest Info-Tech Value Score™ of the vendor group. Vendors were indexed against eGain’s performance to provide a complete, relative view of their product offerings.

For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.
Info-Tech evaluated a range of features: basic points were awarded for table stakes, more for advanced functionality.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Basic/Adv.</th>
<th>What we looked for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Search</td>
<td>Basic</td>
<td>Knowledgebase search.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Content indexing and search of external content repositories. Proactive search and article auto-suggestions. Natural language processing. Diagnostics tools.</td>
</tr>
<tr>
<td>Authorship and Editorial Controls</td>
<td>Basic</td>
<td>Authorship and editing permissions are defined at the user level.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Support for advanced editorial and approval workflows.</td>
</tr>
<tr>
<td>Content Repository</td>
<td>Basic</td>
<td>Native knowledgebase that supports rich media (e.g. video).</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Basic</td>
<td>Customers can rate and comment on individual articles and pieces of content.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Forums and communities where customers can help each other. Agent-agent collaboration tools, including collaboration on article creation.</td>
</tr>
<tr>
<td>Globalization</td>
<td>Basic</td>
<td>Application is offered in multiple languages.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Search engines and knowledgebase support multiple languages. The application accounts for different locations and time zones. Translation workflows for knowledgebase articles.</td>
</tr>
<tr>
<td>Personalization</td>
<td>Basic</td>
<td>Ability to save searches, favorite content, subscriptions, history.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Integration with asset management.</td>
</tr>
</tbody>
</table>

**Scoring Methodology**

Info-Tech scored each vendor’s features on a granular scale. Vendors were given partial marks for basic and advanced features, summing up to full marks if all the advanced criteria were satisfied. See [appendix](#) for scoring methodology.
Info-Tech evaluated a range of features: basic points were awarded for table stakes, more for advanced functionality.

<table>
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<tr>
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<th>What we looked for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting and Analytics</td>
<td>Basic</td>
<td>Reports can demonstrate knowledge gaps and content utilization.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Real time analytics and an interactive dashboards for different audiences (author, manager, agent, customer).</td>
</tr>
<tr>
<td>Resolution Workflow Tools</td>
<td>Basic</td>
<td>Guided search results.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Decision trees and service wizards for agent-facing service.</td>
</tr>
<tr>
<td>Social Media</td>
<td>Basic</td>
<td>Social sharing to Facebook, Twitter, etc. The option of embedding the knowledgebase into social media pages (e.g. Facebook Pages).</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Social listening capabilities for proactive service and identification of knowledge gaps.</td>
</tr>
<tr>
<td>Taxonomic Navigation</td>
<td>Basic</td>
<td>Content organized by taxonomies.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Ability to refine search results through a taxonomy. Content entitlements and access control.</td>
</tr>
<tr>
<td>Web Portals</td>
<td>Basic</td>
<td>The platform supports customer-facing and agent-facing portals.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Portals can be tailored based on search histories and content relevance. Knowledge in context. Virtual assistants and retail portals.</td>
</tr>
</tbody>
</table>

**Scoring Methodology**

Info-Tech scored each vendor’s features on a granular scale. Vendors were given partial marks for basic and advanced features, summing up to full marks if all the advanced criteria were satisfied. See [appendix](#) for scoring methodology.
Each vendor offers a different feature set; concentrate on what your organization needs

<table>
<thead>
<tr>
<th>Vendor Landscape: Customer Service Knowledge Management Suites</th>
<th>Evaluated Features</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Content Repository</td>
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<tr>
<td>Aptean Consona</td>
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<tr>
<td>Salesforce.com</td>
<td></td>
</tr>
</tbody>
</table>

Legend: 
- =Feature fully present 
=Feature partially present/pending 
=Feature Unsatisfactory

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stop Lights) in the Appendix.
Scenario 1: KCS Methodology Compliance

If you are looking for a product with a proven adherence to knowledge-centered support methodologies, consider the following vendors.

1. KCS Methodology Compliance

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use-cases come to the forefront. Whether those use-cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use-cases as Scenarios, and calls attention to them where they exist.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.
Scenario 2: Role-Specific User Interface

Choose these vendors for the best experience provided to users in the following roles: agent, customer, and knowledge editor.

Best Agent User Interface:
KANA Enterprise offers best-of-breed knowledge in context, including contextualized social threads that are displayed on the agent’s UI to assist with customer support.

Best Customer User Interface:
eGain provides the best web self-service interface with the special set of technologies called Click2Collaborate. Users can choose their preferred method of support through one-click access on any mobile device.

Best Knowledge Editor User Interface:
In 2012, Salesforce.com has enriched the editor’s experience on mobile and traditional devices. Improvements include a richer article HTML editor, article validation status, and the ability to create and edit the article wherever you are.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.
Scenario 3: Virtual Assistants

If your organization is looking to lower call center volume, consider these solutions that provide the best virtual assistant technologies.

**Exemplary Performers**

IntelliResponse’s Virtual Agents can be deployed on organizations’ websites, social media sites, or in the call center. These virtual assistants can provide quick answers in a chatbot style or in the form of customizable animated characters. Optimized for mobile devices and equipped with voice recognition technology, these Virtual Agents have been deployed by some of the world’s largest brands.

eGain Chatbot is an integral part of eGain’s self-service product line and its multichannel customer engagement cloud suite. The Chatbot is a virtual assistant that can give customers a tour of the website, push relevant web pages, answer service questions, and assist them in shopping decisions. The Chatbot can also facilitate context-aware escalation to agent-assisted support channels.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.
Salesforce Knowledge is a strong contender with a comprehensive feature set

**Champion**

- **Product:** Salesforce Knowledge
- **Employees:** 9,300+
- **Headquarters:** San Francisco, CA
- **Website:** Salesforce.com
- **Founded:** 1999
- **Presence:** NYSE: CRM, FY12: $2.27B

**Overview**

- Salesforce was one of the first companies to embrace the cloud for delivering CRM solutions. The company has over 100,000 clients today and offers a wide range of geographical spread for sales and support. The vendor’s Knowledge product is available as a standalone tool or with any other Salesforce.com product.

**Strengths**

- The KCS5-certified knowledgebase with content entitlements and knowledge in context sets the benchmark standard for the Service Knowledge market today.
- Excellent collaboration tools include Chatter for employee-to-employee collaboration, as well as tools for collaborative article creation and Chatter Communities for customer-to-customer collaboration (add-on product).
- Exemplary social features include a Facebook knowledge portal, share to social, and proactive listening and monitoring of the social cloud.

**Challenges**

- Although advanced search features are rather comprehensive, there is no capability for indexing external content yet.
- The lack of on-premise deployment option diminishes the otherwise strong architecture (which is particularly robust on integrations). Compliance-regulated markets are still concerned about storing data in the cloud.

3 year TCO for this solution falls into pricing tier 8, between $250,000 and $500,000

Pricing provided by vendor
SFDC holds a solid focus on multi-channel Customer Service Knowledge Management.

**Vendor Landscape**

**SFDC**

SFDC holds a solid focus on multi-channel Customer Service Knowledge Management.

**Value Index**

**92**
2nd out of 9

**Salesforce Knowledge integrates with the following support channels:**

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

- **Web Portal:** Customer-facing portal provides support articles to customers.
- **Email:** Ability to find applicable support articles based on email ticket submission.
- **Chat:** Ability to find applicable support articles based on live chat content.
- **Telephony:** Ability to enable agents to find applicable support articles during a client call.
- **IVR:** Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.
- **Facebook Page Integration:** Ability to integrate self-service find directly into company’s Facebook Page.
- **Automated Twitter Response:** Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.*
- **Out-of-the-box native application or mobile optimized API:** Support can be provided via a dedicated mobile app or by building a customized mobile application based on provided API.

*Automated Twitter response is only available with the Service Cloud product via the Twitter API.

**Features**

- **Content Repository**
- **Search**
- **Taxonomy**
- **Web Portals**
- **Analytics**
- **Collab.**
- **Social**
- **Authorship**
- **Workflow**
- **Global.**
- **Person.**

**Info-Tech Recommends:**

The product is a great fit for organizations that are already invested in the Salesforce.com ecosystem, but this market leader should be considered by any mid-to-large organization in search for a strong standalone CSKM product.
eGain shines in both traditional features and newer market trends alike

**Champion**

- **Product:** eGain Knowledge Agent
- **Employees:** 518
- **Headquarters:** Sunnyvale, CA
- **Website:** [eGain.com](http://eGain.com)
- **Founded:** 1997
- **Presence:** NASDAQ: EGAN
  
  FY12 Revenue: $43.4M

The vendor entered the knowledge management domain in 1997 and boosted its knowledge capabilities in 2000 through the acquisition of Inference, a leader in case-based reasoning technology. With over 500 knowledge management clients, eGain is a well-established market leader today.

**Overview**

- The product’s core strengths remain its knowledgebase and search capabilities. The vendor excels at providing federated search across multiple information sources.
- Advanced guided workflow tools (e.g. service wizards) make eGain a good pick for agent-facing service.
- eGain delivers community and social products as part of its unified customer engagement suite rather than treating it as a silo. There is a community-like feature for agent-to-agent collaboration, as well as social listening adaptors and social sentiment analysis.

**Strengths**

- The vendor is a very strong player, but enterprise and midmarket focus may prove a challenge to smaller organizations.
- eGain offers primarily the cloud deployment option, although on-premise deployment is provided on an exceptional basis.
- The company has experienced some swings during the recent recession, but has been on a growth path recently posting significant year-over-year quarterly revenue growth.

**Challenges**

- The 3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

Pricing provided by vendor
eGAIN is a good fit for mid-to-large organizations looking for an established vendor with experience in cloud deployment.

**Vendor Landscape**: eGAIN is a good fit for mid-to-large organizations looking for an established vendor with experience in cloud deployment.

**Value Index**: 100

1st out of 9

**eGAIN integrates with the following support channels**: This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

<table>
<thead>
<tr>
<th>Support Channel</th>
<th>Integration Available</th>
<th>Integration Unavailable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Web Portal</strong>: Customer-facing portal provides support articles to customers.</td>
<td>Email: Ability to find applicable support articles based on email ticket submission.</td>
<td></td>
</tr>
</tbody>
</table>

**Features**

- Content Repository
- Search
- Taxonomy
- Web Portals
- Analytics
- Collab.
- Social
- Authorship
- Workflow
- Global
- Person.

**Info-Tech Recommends**: The solution is targeted towards larger organizations, with mid-sized clients accounting for about 30% of eGAIN’s business and an extensive technology partner network supporting the client base. Even though most of deployments are cloud-based, small businesses should look elsewhere for a CSKM solution.
KANA Enterprise is an overall strong performer that excels at social and knowledge in context

**Champion**

- **Product:** KANA Enterprise
- **Employees:** 700+
- **Headquarters:** Sunnyvale, CA
- **Website:** [KANA.com](http://KANA.com)
- **Founded:** 1996
- **Presence:** Private

**Overview**

- KANA was one of the first vendors to enter and define the CSKM market. Its knowledge management module has stayed strong over the years and is the best-of-breed solution with open architecture and strong integration capabilities.

**Strengths**

- Although the product’s knowledgebase and advanced search are both very comprehensive, knowledge in context is where KANA really shines. Context from customer records and external sources is presented to the service agents to help them achieve faster resolution.
- Multi-channel integration is particularly strong, with an important focus on the social media channel. The platform allows for full monitoring and response capabilities on social channels.
- The product’s workflows and analytics are very advanced.

**Challenges**

- Although native mobile apps are available today, device-agnostic HTML5 application is not available until late 2013.
- The product’s pricing makes it an inappropriate choice for smaller organizations. That said, KANA has a separate offering for midmarket, KANA Express, which requires little to no customization, that may be a better fit for some SMBs.

3 year TCO for this solution falls into pricing tier 9, between $500,000 and $1,000,000

Pricing provided by vendor
KANA Enterprise is an industry leader with an enterprise-class offering.

**Vendor Landscape**

<table>
<thead>
<tr>
<th>Innovator</th>
<th>Leader</th>
<th>Challenger</th>
<th>Niche</th>
</tr>
</thead>
</table>

**Value Index**

| 59 | 6th out of 9 |

**Info-Tech Research Group**

**Vendor Landscape: Customer Service Knowledge Management Suites**

**Info-Tech Recommends:**

The product is an enterprise-class offering, with a suitable price tag. If your organization is a smaller company, remember to consider Kana’s midmarket offering, KANA Express, as an alternative.

**KANA integrates with the following support channels:**

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Integration available</th>
<th>Integration unavailable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Portal: Customer-facing portal provides support articles to customers.</td>
<td>Email: Ability to find applicable support articles based on email ticket submission.</td>
<td>Chat: Ability to find applicable support articles based on live chat content.</td>
</tr>
<tr>
<td>Chat: Ability to find applicable support articles based on live chat content.</td>
<td>Telephony: Ability to enable agents to find applicable support articles during a client call.</td>
<td>IVR: Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.</td>
</tr>
<tr>
<td>IVR: Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.</td>
<td>Facebook Page Integration: Ability to integrate self-service find directly into company's Facebook Page.</td>
<td>Automated Twitter Response: Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.</td>
</tr>
<tr>
<td>Out-of-the-box native application or mobile optimized API: Support can be provided via a dedicated mobile app or by building a customized mobile application based on provided API.</td>
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</tr>
</tbody>
</table>

**Features**

<table>
<thead>
<tr>
<th>Content Repository</th>
<th>Search</th>
<th>Taxonomy</th>
<th>Web Portals</th>
<th>Analytics</th>
<th>Collaborate</th>
<th>Social</th>
<th>Authorship</th>
<th>Workflow</th>
<th>Global</th>
<th>Person.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration available</td>
<td>Integration available</td>
<td>Integration available</td>
<td>Integration available</td>
<td>Integration available</td>
<td>Integration available</td>
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<td>Integration available</td>
<td>Integration available</td>
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</tbody>
</table>
IntelliResponse provides best-of-breed virtual agents that can be deployed to a website or an agent’s desktop.

**Champion**

<table>
<thead>
<tr>
<th>Product:</th>
<th>IntelliResponse Virtual Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees:</td>
<td>100</td>
</tr>
<tr>
<td>Headquarters:</td>
<td>Toronto, Ontario</td>
</tr>
<tr>
<td>Website:</td>
<td>IntelliResponse.com</td>
</tr>
<tr>
<td>Founded:</td>
<td>2000</td>
</tr>
<tr>
<td>Presence:</td>
<td>Private</td>
</tr>
</tbody>
</table>

**Overview**

- IntelliResponse Virtual Agent is a privately hosted, SaaS product that can be embedded into any website, mobile, or social channel to facilitate customer self-service. It can also be deployed on the agent’s desktop to assist with agent-facing service.

**Strengths**

- The product is a good fit for organizations looking for usability and extreme customizability of their multi-channel self-service solution.
- It has an excellent analytics feature, Introspect: a newly introduced algorithm that derives actionable themes and trends about customer inquiries to help drive business decisions.
- In addition to full internationalization at the core architecture level, virtual agents can support a wide array of languages including Japanese, Korean, Chinese, English, French, and Spanish.

**Challenges**

- Although the product can be used for agent-facing service, its core strengths lie with customer self-service. For example, search of external content repositories or content indexing is not possible. That said, internal search features are strong and include a predictive matching engine used by Virtual Agents.
- Collaboration and social features are fairly limited. They include the possibility of deploying Virtual Agents to social web pages and customer ratings of knowledge articles.

3 year TCO for this solution falls into pricing tier 8, between $250,000 and $500,000.
IntelliResponse is popular with universities and colleges, as well as organizations looking for customer-centric service.

**Vendor Landscape**

IntelliResponse integrates with the following support channels:

- **Web Portal:** Customer-facing portal provides support articles to customers.
- **Chat:** Ability to find applicable support articles based on live chat content.
- **Telephony:** Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.
- **IVR:** Ability to enable agents to find applicable support articles during a client call.
- **Facebook Page Integration:** Ability to integrate self-service find directly into company’s Facebook Page.
- **Automated Twitter Response:** Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.
- **Email:** Ability to find applicable support articles based on email ticket submission.*

*Provided through integration with Email Response Management systems. Integration available.

**Features**

- **Content Repository:**
- **Search:**
- **Taxonomy:**
- **Web Portals:**
- **Analytics:**
- **Collab.:**
- **Social:**
- **Authorship:**
- **Workflow:**
- **Global:**
- **Person:**

**Info-Tech Recommends:**

IntelliResponse Virtual Agent is an easy choice if your organization is looking for customer knowledge-driven self-service. It is also worth noting that the product is very popular with the financial higher education industry and is deployed in many universities and colleges across North America.
Parature is a solid choice for organizations that have strong social needs

**Market Pillar**

<table>
<thead>
<tr>
<th>Product:</th>
<th>Parature</th>
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<tbody>
<tr>
<td>Employees:</td>
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<td>Headquarters:</td>
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<td>Website:</td>
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<tr>
<td>Founded:</td>
<td>2000</td>
</tr>
<tr>
<td>Presence:</td>
<td>Private</td>
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</table>

**Overview**

- Parature, meaning Paradigm of the Future, was founded in 2000. The company provides multi-tenant SaaS CRM solutions with a strong commitment to social. In 2013, Parature announced an extended partnership with Microsoft to enhance customer service in Dynamics CRM.

**Strengths**

- Parature is one of the few vendors in the customer service space to offer monitoring capabilities for Facebook and Twitter out-of-the-box. Social features in general are very strong and include a Facebook portal and customer support via social channels.
- Parature offers some great modules for customer feedback, including Parature Survey that can be distributed to customers after support is received.
- Strong globalization features include support of multiple time zones and languages.

**Challenges**

- Although Parature offers chat to support agent-to-agent collaboration, collaboration features in general are not as extensive as those of competitors.
- Diagnostics tools, as well as search of external sources and file attachments, is currently lacking. That said, search of attachments is on the roadmap for 2013.

3 year TCO for this solution falls into pricing tier 9, between $500,000 and $1,000,000

Pricing provided by vendor
Parature is a good choice for social-centric organizations, but the product may be a little expensive for some SMBs

Parature integrates with the following support channels:

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

- **Web Portal**: Customer-facing portal provides support articles to customers.
- **Email**: Ability to find applicable support articles based on email ticket submission.
- **Chat**: Ability to find applicable support articles based on live chat content.
- **Telephony**: Ability to find applicable support articles during a client call.
- **IVR**: Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.
- **Facebook Page**: Integration available
  - **Integration available**: Ability to find applicable support articles directly into company’s Facebook Page.
- **Automated Twitter Response**: Integration available
  - **Integration available**: Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.
- **Out-of-the-box native application or mobile optimized API**: Support can be provided via a dedicated mobile app or by building a customized mobile application based on provided API.

**Features**

- **Content Repository**: Integration available
- **Search**: Integration available
- **Taxonomy**: Integration available
- **Web Portals**: Integration available
- **Analytics**: Integration available
- **Collab.**: Integration available
- **Social**: Integration available
- **Authorship**: Integration available
- **Workflow**: Integration available
- **Global**: Integration available
- **Person**: Integration available

**Info-Tech Recommends:**

Parature is making strong plays in the social market space, making it a natural fit for mid-to-large organizations wishing to augment customer service with social channels. Organizations that are currently using Microsoft Dynamics for their CRM needs are also likely to benefit from integration with Parature’s knowledge management solution.
Oracle Knowledge is a pricey product with superior analytics, internationalization, and verticalization capabilities

**Market Pillar**

- **Product:** Oracle Knowledge 8.5
- **Employees:** 108,000
- **Headquarters:** Redwood City, CA
- **Website:** Oracle.com
- **Founded:** 1977
- **Presence:** NASDAQ: ORCL
  - FY2012 Revenue: $37.12B

3 year TCO for this solution falls into pricing tier 10, greater than $1,000,000

**Overview**

- Formerly known as InQuira, the product was acquired in July 2011 and re-branded as Oracle Knowledge. It has since then certified on Oracle technologies, including Oracle WebLogic Server and Oracle Business Intelligence.

**Strengths**

- Exceptional out-of-the-box analytics include scorecards that identify search, content, and team performance gaps. Root cause analysis can be performed on trends and insights.
- The new AnswerFlow feature allows for excellent guided troubleshooting and answer delivery.
- Enhanced multilingual capabilities include natural language search, support in 16 languages, and keyword search for most other authoring languages.
- Pre-packaged ontologies are available for High-Tech, Communications, Financial Services, and Insurance industries.

**Challenges**

- Although social sharing is included, social monitoring and listening capabilities are not yet available. Organizations looking for more social-centric customer service should consider Oracle RightNow as an alternative choice.
- Mobile features are not as impressive as those of some competitors.
- The product remains very expensive for smaller and medium-sized organizations.

Pricing solicited from public sources
Organizations looking for out-of-the-box ontologies and Oracle shops should consider Oracle Knowledge

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**Value Index**

9

8th out of 9

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**Vendor Landscape**

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**Product**

<table>
<thead>
<tr>
<th>Overall</th>
<th>Features</th>
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<th>Afford.</th>
<th>Arch.</th>
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**Vendor**

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<th>Overall</th>
<th>Viability</th>
<th>Strategy</th>
<th>Reach</th>
<th>Channel</th>
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**Oracle Knowledge integrates with the following support channels:**

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

<table>
<thead>
<tr>
<th>Support Channel</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Web Portal:</strong></td>
<td>Customer-facing portal provides support articles to customers.</td>
</tr>
<tr>
<td><strong>Email:</strong></td>
<td>Ability to find applicable support articles based on email ticket submission.</td>
</tr>
<tr>
<td><strong>Chat:</strong></td>
<td>Ability to find applicable support articles based on live chat content.</td>
</tr>
<tr>
<td><strong>Telephony:</strong></td>
<td>Ability to find applicable support articles during a client call.</td>
</tr>
<tr>
<td><strong>IVR:</strong></td>
<td>Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.</td>
</tr>
<tr>
<td><strong>Facebook Page Integration:</strong></td>
<td>Ability to integrate self-service find directly into company’s Facebook Page.</td>
</tr>
<tr>
<td><strong>Automated Twitter Response:</strong></td>
<td>Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.</td>
</tr>
</tbody>
</table>

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**Features**

<table>
<thead>
<tr>
<th>Content Repository</th>
<th>Search</th>
<th>Taxonomy</th>
<th>Web Portals</th>
<th>Analytics</th>
<th>Collab.</th>
<th>Social</th>
<th>Authorship</th>
<th>Workflow</th>
<th>Global</th>
<th>Person</th>
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**Info-Tech Recommends:**

Organizations that are Oracle shops should definitely consider the product to create licensing and integration synergies. If your organization is looking for pre-packaged vertical-specific ontologies (High-Tech, Communications, Financial Services, and Insurance industries), shortlisting Oracle Knowledge may be a good idea as well.
Moxie is a solid choice for larger enterprises looking for exemplary social and collaboration

**Innovator**

<table>
<thead>
<tr>
<th>Product:</th>
<th>Moxie Knowledge Spaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees:</td>
<td>220</td>
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<tr>
<td>Headquarters:</td>
<td>Mountain View, CA</td>
</tr>
<tr>
<td>Website:</td>
<td>Moxiesoft.com</td>
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<tr>
<td>Founded:</td>
<td>2006</td>
</tr>
<tr>
<td>Presence:</td>
<td>Private</td>
</tr>
</tbody>
</table>

**Overview**

- Since foundation, Moxie Software has been a strong player in the customer collaboration and employee collaboration arenas with the vendor’s Spaces by Moxie™ suite, which includes multi-channel customer interactions and an integrated internal collaboration platform. The company targets global enterprises.

**Strengths**

- Strong device-agnostic mobile is provided through an HTML5 application that is tablet-optimized and allows for social sharing.
- Exemplary social features include social listening, share-to-social, social knowledge portals, and even a chat app integrated with Facebook’s graph API.
- Moxie excels at collaboration with its Social Knowledge module, an internal collaboration tool with social media capabilities (e.g. like, share) and community forum integration.

**Challenges**

- The software provides standard reporting rather than advanced analytics. Many of Moxie’s enterprise customers use the product as a source of data that feeds into their enterprise analytics.
- Although Moxie offers cloud deployment along with traditional on-premise deployment, it may still be inappropriate for smaller enterprises.

3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

Pricing provided by vendor
Moxie Knowledge Spaces is a comprehensive solution at a modest price

**Vendor Landscape**

<table>
<thead>
<tr>
<th>Vendor Landscape</th>
<th>Product</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overall</td>
<td>Features</td>
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<tr>
<td></td>
<td>[ ][ ][ ][ ]</td>
<td>[ ][ ][ ]</td>
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</tbody>
</table>

**Value Index**

85

3rd out of 9

**Moxie Knowledge Spaces integrates with the following support channels:**

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

<table>
<thead>
<tr>
<th>Web Portal: Customer-facing portal provides support articles to customers.</th>
<th>Email: Ability to find applicable support articles based on email ticket submission.</th>
<th>Chat: Ability to find applicable support articles based on live chat content.</th>
<th>Telephony: Ability to enable agents to find applicable support articles during a client call.</th>
<th>IVR: Ability to integrate with IVRs to enable high-level knowledge base find based on IVR menu selections.</th>
<th>Facebook Page Integration: Ability to integrate self-service find directly into company's Facebook Page.</th>
<th>Automated Twitter Response: Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.</th>
<th>Out-of-the-box native application or mobile optimized API: Support can be provided via a dedicated mobile app or by building a customized mobile application based on provided API.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration available</td>
<td>Integration available</td>
<td>Integration available</td>
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<td>Integration available</td>
<td>Integration available</td>
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</table>

**Features**

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</table>

**Info-Tech Recommends:**

Organizations that use Salesforce.com or Microsoft Dynamics for CRM should consider Moxie as a point solution for CSKM due to its strong channel partnerships and integrations with those industry leaders.
Novo Solutions has the core basics in place, but some advanced functionality is currently lacking

**Emerging Player**

<table>
<thead>
<tr>
<th>Product:</th>
<th>Novo Solutions Knowledge Base Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees:</td>
<td>N/A</td>
</tr>
<tr>
<td>Headquarters:</td>
<td>Virginia Beach, VA</td>
</tr>
<tr>
<td>Website:</td>
<td>NovoSolutions.com</td>
</tr>
<tr>
<td>Founded:</td>
<td>1999</td>
</tr>
<tr>
<td>Presence:</td>
<td>Private</td>
</tr>
</tbody>
</table>

- **Overview**
  - Since its foundation in 1999, Novo Solutions has focused on providing web-based customer support and knowledge management solutions. Their knowledgebase product is deployed by over 250 customers in North America and Europe. Although it is currently deployed on-premise and in the cloud, the upcoming ShareNet Platform will be a SaaS-only solution.

- **Strengths**
  - The licensing model equates agents to end users (only editors are charged) and allows for a very low entry price. Small and most mid-market firms will find that end-user query features are sufficient, but larger firms may need a full seat license, raising the vendor’s price to be comparable to market average.
  - The knowledgebase is relatively robust for the SMB market and includes multimedia capabilities, built-in spell checker, article versioning, and public RSS feeds.

- **Challenges**
  - The current solution is not mobile optimized. Set to release in late 2013, the ShareNet Platform will provide a mobile-optimized web interface.
  - Search functionality is fairly limited and cannot be extended to external knowledge sources or used for knowledge in context.
  - Although articles allow customer ratings and comments, collaboration and social features are fairly basic. That said, an interesting feature allows users to embed social feeds into knowledgebase articles.

3 year TCO for this solution falls into pricing tier 3, between $10,000 and $25,000

Pricing solicited from public sources
Novo Solutions is a good fit for smaller organizations that are looking for affordability rather than bells and whistles.

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

Web Portal: Customer-facing portal provides support articles to customers.
Email: Ability to find applicable support articles based on email ticket submission.
Chat: Ability to find applicable support articles based on live chat content.
Telephony: Ability to enable agents to find applicable support articles during a client call.
IVR: Ability to integrate with IVRs to enable high-level knowledgebase find based on IVR menu selections.
Facebook Page Integration: Ability to integrate self-service find directly into company’s Facebook Page.
Automated Twitter Response: Ability to monitor designated customer service Twitter stream and auto-respond (tweet back) suggested solutions.
Out-of-the-box native application or mobile optimized API: Support can be provided via a dedicated mobile app or by building a customized mobile application based on provided API.

Lack of mobile support offered by Novo Solutions today may prove to be a hindrance to some organizations. Although smaller organizations may find the available functionality sufficient, Info-Tech recommends to wait until late 2013, when re-branding to ShareNet is complete and mobile is brought up to par.
Aptean Consona lags behind in social and mobile, but can offer solid search and personalization features

**Emerging Player**

- **Product:** Consona Knowledge Management
- **Employees:** 1,500
- **Headquarters:** Atlanta, GA
- **Website:** Aptean.com
- **Founded:** 2012
- **Presence:** Private

The vendor declined to provide pricing, and publicly available pricing could not be found.

**Overview**

- Aptean was formed by the merger of CDC Software and Consona Corporation in August 2012, creating a global organization with a broad range of product offerings. Consona is an industry veteran with a product developed around the knowledge-centered support (KCS) methodology.

**Strengths**

- Consona patented "Knova Adaptive Search and Navigation" for guided searches, a tool that is meant to provide the most relevant search content. Search features also include the ability to crawl external content, categorization, and natural language capabilities.
- Personalization features are very strong. For example, the self-service portal offers personalized feeds of knowledge and asset management capabilities.

**Challenges**

- Out-of-the-box analytics are not as advanced as those of competitors. Consona partners with QlikView analytics to provide faster in-memory analytics (Knova Analytics).
- Social and mobile features lag behind most competitors. That said, the product does provide community forum integration for social collaboration that relies on a reputation model (identifying experts with highest value) and customer peer support.
Consona should be considered by organizations looking for advanced search and good channel partnerships

### Info-Tech Recommends:

If social and mobile are not your organization’s primary selection criteria, Consona is worth consideration for larger organizations that are looking for excellent search and adherence to KCS methodology.

### Consona integrates with the following support channels:

This solution can contextually integrate with the support channels highlighted in green. Such integration allows the CSKM solution to facilitate quicker resolution and provide applicable support articles to the customer or the customer service agent.

<table>
<thead>
<tr>
<th>Support Channel</th>
<th>Integration Available</th>
<th>Integration Unavailable</th>
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<tbody>
<tr>
<td>Web Portal</td>
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<td>Chat</td>
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<td>Automated Twitter Response</td>
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<td>Out-of-the-box native application or mobile optimized API</td>
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</table>

### Value Index

N/A

The vendor declined to provide pricing, and publicly available pricing could not be found

### Vendor Landscape

![Vendor Landscape Diagram]

### Product

<table>
<thead>
<tr>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
<th>Afford.</th>
<th>Arch.</th>
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### Vendor

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<th>Reach</th>
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### Features

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Identify leading candidates with the Customer Service Knowledge Management (CSKM) Vendor Shortlist Tool

The Info-Tech Customer Service Knowledge Management (CSKM) Vendor Shortlist Tool is designed to generate a customized shortlist of vendors based on your key priorities.

This tool offers the ability to modify:

- Overall Vendor vs. Product Weightings
- Individual product criteria weightings:
  - Features
  - Usability
  - Affordability
  - Architecture
- Individual vendor criteria weightings:
  - Viability
  - Strategy
  - Reach
  - Channel

Custom Vendor Landscape™ and Vendor Shortlist

Your customized Vendor Shortlist is sorted based on the priorities identified on the Data Entry tab. Scores are calculated using the Client Weightings and the assigned Info-Tech Vendor Landscape scores. Vendors are ranked based on the computed Average Score. The Average Score is the average of the weighted average Vendor Score and the weighted Average Product Score. A custom Vendor Landscape™ has been generated as well, plotting the weighted average Vendor Score against the weighted average Product Score.
Appendix

1. Vendor Landscape Methodology: Overview
2. Vendor Landscape Methodology: Product Selection & Information Gathering
3. Vendor Landscape Methodology: Scoring
4. Vendor Landscape Methodology: Information Presentation
5. Vendor Landscape Methodology: Fact Check & Publication
6. Product Pricing Scenario
Vendor Landscape Methodology: Overview

Info-Tech’s Vendor Landscapes are research materials that review a particular IT market space, evaluating the strengths and abilities of both the products available in that space, as well as the vendors of those products. These materials are created by a team of dedicated analysts operating under the direction of a senior subject matter expert over a period of six weeks.

Evaluations weigh selected vendors and their products (collectively “solutions”) on the following eight criteria to determine overall standing:

- **Features**: The presence of advanced and market-differentiating capabilities.
- **Usability**: The intuitiveness, power, and integrated nature of administrative consoles and client software components.
- **Affordability**: The three-year total cost of ownership of the solution.
- **Architecture**: The degree of integration with the vendor’s other tools, flexibility of deployment, and breadth of platform applicability.
- **Viability**: The stability of the company as measured by its history in the market, the size of its client base, and its financial performance.
- **Strategy**: The commitment to both the market-space, as well as to the various sized clients (small, mid-sized, and enterprise clients).
- **Reach**: The ability of the vendor to support its products on a global scale.
- **Channel**: The measure of the size of the vendor’s channel partner program, as well as any channel strengthening strategies.

Evaluated solutions are plotted on a standard two by two matrix:

- **Champions**: Both the product and the vendor receive scores that are above the average score for the evaluated group.
- **Innovators**: The product receives a score that is above the average score for the evaluated group, but the vendor receives a score that is below the average score for the evaluated group.
- **Market Pillars**: The product receives a score that is below the average score for the evaluated group, but the vendor receives a score that is above the average score for the evaluated group.
- **Emerging Players**: Both the product and the vendor receive scores that are below the average score for the evaluated group.

Info-Tech’s Vendor Landscapes are researched and produced according to a strictly adhered to process that includes the following steps:

- **Vendor/product selection**
- **Information gathering**
- **Vendor/product scoring**
- **Information presentation**
- **Fact checking**
- **Publication**

This document outlines how each of these steps is conducted.
Vendor Landscape Methodology:
Vendor/Product Selection & Information Gathering

Info-Tech works closely with its client base to solicit guidance in terms of understanding the vendors with whom clients wish to work and the products that they wish evaluated; this demand pool forms the basis of the vendor selection process for Vendor Landscapes. Balancing this demand, Info-Tech also relies upon the deep subject matter expertise and market awareness of its Senior and Lead Research Analysts to ensure that appropriate solutions are included in the evaluation. As an aspect of that expertise and awareness, Info-Tech’s analysts may, at their discretion, determine the specific capabilities that are required of the products under evaluation, and include in the Vendor Landscape only those solutions that meet all specified requirements.

Information on vendors and products is gathered in a number of ways via a number of channels.

Initially, a request package is submitted to vendors to solicit information on a broad range of topics. The request package includes:
- A detailed survey.
- A pricing scenario (see Vendor Landscape Methodology: Price Evaluation and Pricing Scenario, below).
- A request for reference clients.
- A request for a briefing and, where applicable, guided product demonstration.

These request packages are distributed approximately twelve weeks prior to the initiation of the actual research project to allow vendors ample time to consolidate the required information and schedule appropriate resources.

During the course of the research project, briefings and demonstrations are scheduled (generally for one hour each session, though more time is scheduled as required) to allow the analyst team to discuss the information provided in the survey, validate vendor claims, and gain direct exposure to the evaluated products. Additionally, an end-user survey is circulated to Info-Tech’s client base and vendor-supplied reference accounts are interviewed to solicit their feedback on their experiences with the evaluated solutions and with the vendors of those solutions.

These materials are supplemented by a thorough review of all product briefs, technical manuals, and publicly available marketing materials about the product, as well as about the vendor itself.

Refusal by a vendor to supply completed surveys or submit to participation in briefings and demonstrations does not eliminate a vendor from inclusion in the evaluation. Where analyst and client input has determined that a vendor belongs in a particular evaluation, it will be evaluated as best as possible based on publicly available materials only. As these materials are not as comprehensive as a survey, briefing, and demonstration, the possibility exists that the evaluation may not be as thorough or accurate. Since Info-Tech includes vendors regardless of vendor participation, it is always in the vendor’s best interest to participate fully.

All information is recorded and catalogued, as required, to facilitate scoring and for future reference.
Vendor Landscape Methodology: Scoring

Once all information has been gathered and evaluated for all vendors and products, the analyst team moves to scoring. All scoring is performed at the same time so as to ensure as much consistency as possible. Each criterion is scored on a ten point scale, though the manner of scoring for criteria differs slightly:

- Features is scored via Cumulative Scoring
- Affordability is scored via Scalar Scoring
- All other criteria are scored via Base5 Scoring

In Cumulative Scoring, a single point is assigned to each evaluated feature that is regarded as being fully present, a half point to each feature that is partially present or pending in an upcoming release, and zero points to features that are deemed to be absent. The assigned points are summed and normalized to a value out of ten. For example, if a particular Vendor Landscape evaluates eight specific features in the Feature Criteria, the summed score out of eight for each evaluated product would be multiplied by 1.25 to yield a value out of ten.

In Scalar Scoring, a score of ten is assigned to the lowest cost solution, and a score of one is assigned to the highest cost solution. All other solutions are assigned a mathematically determined score based on their proximity to / distance from these two endpoints. For example, in an evaluation of three solutions, where the middle cost solution is closer to the low end of the pricing scale it will receive a higher score, and where it is closer to the high end of the pricing scale it will receive a lower score; depending on proximity to the high or low price it is entirely possible that it could receive either ten points (if it is very close to the lowest price) or one point (if it is very close to the highest price). Where pricing cannot be determined (vendor does not supply price and public sources do not exist), a score of 0 is automatically assigned.

In Base5 scoring a number of sub-criteria are specified for each criterion (for example, Longevity, Market Presence, and Financials are sub-criteria of the Viability criterion), and each one is scored on the following scale:

- 5 - The product/vendor is exemplary in this area (nothing could be done to improve the status).
- 4 - The product/vendor is good in this area (small changes could be made that would move things to the next level).
- 3 - The product/vendor is adequate in this area (small changes would make it good, more significant changes required to be exemplary).
- 2 - The product/vendor is poor in this area (this is a notable weakness and significant work is required).
- 1 - The product/vendor is terrible/fails in this area (this is a glaring oversight and a serious impediment to adoption).

The assigned points are summed and normalized to a value out of ten as explained in Cumulative Scoring above.

Scores out of ten, known as Raw scores, are transposed as-is into Info-Tech’s Vendor Landscape Shortlist Tool, which automatically determines Vendor Landscape positioning (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, below), Criteria Score (see Vendor Landscape Methodology: Information Presentation - Criteria Score, below), and Value Index (see Vendor Landscape Methodology: Information Presentation - Value Index, below).
Vendor Landscape Methodology:
Information Presentation – Vendor Landscape

Info-Tech’s Vendor Landscape is a two-by-two matrix that plots solutions based on the combination of Product score and Vendor score. Placement is not determined by absolute score, but instead by relative score. Relative scores are used to ensure a consistent view of information and to minimize dispersion in nascent markets, while enhancing dispersion in commodity markets to allow for quick visual analysis by clients.

Relative scores are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).
2. Each individual criterion Raw score is multiplied by the pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process to eliminate any possibility of bias. Weighting factors are expressed as a percentage such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100% and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.
3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.
4. Overall Vendor scores are then normalized to a 20 point scale by calculating the arithmetic mean and standard deviation of the pool of Vendor scores. Vendors for whom their overall Vendor score is higher than the arithmetic mean will receive a normalized Vendor score of 11-20 (exact value determined by how much higher than the arithmetic mean their overall Vendor score is), while vendors for whom their overall Vendor score is lower than the arithmetic mean will receive a normalized Vendor score of between one and ten (exact value determined by how much lower than the arithmetic mean their overall Vendor score is).
5. Overall Product score is normalized to a 20 point scale according to the same process.
6. Normalized scores are plotted on the matrix, with Vendor score being used as the x-axis, and Product score being used as the y-axis.

Vendor Landscape

| Innovators: solutions with below average Vendor scores and above average Product scores. |
| Champions: solutions with above average Vendor scores and above average Product scores. |
| Emerging Players: solutions with below average Vendor scores and below average Product scores. |
| Market Pillars: solutions with above average Vendor scores and below average Product scores. |
Vendor Landscape Methodology: Information Presentation – Criteria Scores (Harvey Balls)

Info-Tech’s Criteria Scores are visual representations of the absolute score assigned to each individual criterion, as well as of the calculated overall Vendor and Product scores. The visual representation used is Harvey Balls.

Harvey Balls are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

2. Each individual criterion Raw score is multiplied by a pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process, based on the expertise of the Senior or Lead Research Analyst, to eliminate any possibility of bias. Weighting factors are expressed as a percentage, such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100%, and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.

3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.

4. Both overall Vendor score / overall Product score, as well as individual criterion Raw scores are converted from a scale of one to ten to Harvey Ball scores on a scale of zero to four, where exceptional performance results in a score of four and poor performance results in a score of zero.

5. Harvey Ball scores are converted to Harvey Balls as follows:
   - A score of four becomes a full Harvey Ball.
   - A score of three becomes a three-quarter full Harvey Ball.
   - A score of two becomes a half full Harvey Ball.
   - A score of one becomes a one-quarter full Harvey Ball.
   - A score of zero (zero) becomes an empty Harvey Ball.

6. Harvey Balls are plotted by solution in a chart where rows represent individual solutions and columns represent overall Vendor / overall Product, as well as individual criteria. Solutions are ordered in the chart alphabetically by vendor name.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor</td>
<td>Via.</td>
</tr>
</tbody>
</table>

Overall Harvey Balls represent weighted aggregates.

Criteria Harvey Balls represent individual Raw scores.
Vendor Landscape Methodology: 
Information Presentation – Feature Ranks (Stop Lights)

Info-Tech’s Feature Ranks are visual representations of the presence/availability of individual features that collectively comprise the Features’ criterion. The visual representation used is Stop Lights.

Stop Lights are determined as follows:

1. A single point is assigned to each evaluated feature category that contains an impressive array of advanced characteristics and does not lack any important basics. Partial points are assigned to each feature bucket that is missing important characteristics (either basic or advanced) or they are pending in an upcoming release. Zero points is assigned if all features, basic and advanced, are missing.
   - Fully present means all aspects and capabilities of the feature as described are in evidence.
   - Unsatisfactory means that some basics, as well as most of the advanced characteristics are missing.
   - Partially present means some, but not all, aspects and capabilities of the feature as described are in evidence, OR all aspects and capabilities of the feature as described are in evidence, but only for some models in a line.
   - Pending means all aspects and capabilities of the feature, as described, are anticipated to be in evidence in a future revision of the product and that revision is to be released within the next 12 months.

2. Feature scores are converted to Stop Lights as follows:
   - >0.7 becomes a Green light.
   - 0.4 - 0.6 becomes a Yellow light.
   - <0.3 becomes a Red light.

3. Stop Lights are plotted by solution in a chart where rows represent individual solutions and columns represent individual features. Solutions are ordered in the chart alphabetically by vendor name.

For example, a set of applications is being reviewed and a feature of “Integration with Mobile Devices” that is defined as “availability of dedicated mobile device applications for iOS, Android, and BlackBerry devices” is specified. Solution A provides such apps for all listed platforms and scores “Green”, solution B provides apps for iOS and Android only and scores “Yellow”, while solution C provides mobile device functionality through browser extensions, has no dedicated apps, and so scores “Red”.

<table>
<thead>
<tr>
<th>Features</th>
<th>Stop Lights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feature 1</td>
<td>Green</td>
</tr>
<tr>
<td>Feature 2</td>
<td>Green</td>
</tr>
<tr>
<td>Feature 3</td>
<td>Green</td>
</tr>
<tr>
<td>Feature 4</td>
<td>Red</td>
</tr>
<tr>
<td>Feature 5</td>
<td>Red</td>
</tr>
<tr>
<td>Feature 6</td>
<td>Yellow</td>
</tr>
<tr>
<td>Feature 7</td>
<td>Red</td>
</tr>
<tr>
<td>Feature 8</td>
<td>Yellow</td>
</tr>
</tbody>
</table>

Green means a feature is fully present; red means it’s unsatisfactory. Yellow shows partial availability (such as in some models in a line).
Vendor Landscape Methodology: Information Presentation – Value Index

Info-Tech’s Value Index is an indexed ranking of solution value per dollar as determined by the Raw scores assigned to each criteria (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

Value scores are calculated as follows:

1. The Affordability criterion is removed from the overall Product score and the remaining Product score criteria (Features, Usability, Architecture) are reweighted so as to retain the same weightings relative to one another, while still summing to 100%. For example, if all four Product criteria were assigned base weightings of 25%, for the determination of the Value score, Features, Usability, and Architecture would be reweighted to 33.3% each to retain the same relative weightings while still summing to 100%.

2. A sum-product of the weighted Vendor criteria scores and of the reweighted Product criteria scores is calculated to yield an overall Vendor score and a reweighted overall Product score.

3. The overall Vendor score and the reweighted overall Product score are then summed, and this sum is multiplied by the Affordability Raw score to yield an interim Value score for each solution.

4. All interim Value scores are then indexed to the highest performing solution by dividing each interim Value score by the highest interim Value score. This results in a Value score of 100 for the top solution and an indexed Value score relative to the 100 for each alternate solution.

5. Solutions are plotted according to Value score, with the highest score plotted first, and all remaining scores plotted in descending numerical order.

Where pricing is not provided by the vendor and public sources of information cannot be found, an Affordability Raw score of zero is assigned. Since multiplication by zero results in a product of zero, those solutions for which pricing cannot be determined receive a Value score of zero. Since Info-Tech assigns a score of zero where pricing is not available, it is always in the vendor’s best interest to provide accurate and up to date pricing.

Value Index

Vendors are arranged in order of Value Score. The Value Score each solution achieved is displayed, and so is the average score.
Vendor Landscape Methodology: Information Presentation – Price Evaluation

Info-Tech's Price Evaluation is a tiered representation of the three year Total Cost of Ownership (TCO) of a proposed solution. Info-Tech uses this method of communicating pricing information to provide high-level budgetary guidance to its end-user clients while respecting the privacy of the vendors with whom it works. The solution TCO is calculated and then represented as belonging to one of ten pricing tiers.

Pricing tiers are as follows:
1. Between $1 and $2,500
2. Between $2,500 and $5,000
3. Between $5,000 and $10,000
4. Between $10,000 and $25,000
5. Between $25,000 and $50,000
6. Between $50,000 and $100,000
7. Between $100,000 and $250,000
8. Between $250,000 and $500,000
9. Between $500,000 and $1,000,000
10. Greater than $1,000,000

Where pricing is not provided, Info-Tech makes use of publicly available sources of information to determine a price. As these sources are not official price lists, the possibility exists that they may be inaccurate or outdated, and so the source of the pricing information is provided. Since Info-Tech publishes pricing information regardless of vendor participation, it is always in the vendor's best interest to supply accurate and up-to-date information.

Info-Tech’s Price Evaluations are based on pre-defined pricing scenarios (see Product Pricing Scenario, below) to ensure a comparison that is as close as possible between evaluated solutions. Pricing scenarios describe a sample business and solicit guidance as to the appropriate product/service mix required to deliver the specified functionality, the list price for those tools/services, as well as three full years of maintenance and support.

Price Evaluation

Call-out bubble indicates within which price tier the three year TCO for the solution falls, provides the brackets of that price tier, and links to the graphical representation.

3 year TCO for this solution falls into pricing tier 6, between $50,000 and $100,000.

$1 $1M+

$1 $1M+

Pricing solicited from public sources.

Scale along the bottom indicates that the graphic as a whole represents a price scale with a range of $1 to $1M+, while the notation indicates whether the pricing was supplied by the vendor or derived from public sources.
Vendor Landscape Methodology: Information Presentation – Scenarios

Info-Tech’s Scenarios highlight specific use cases for the evaluated solution to provide as complete (when taken in conjunction with the individual written review, Vendor Landscape, Criteria Scores, Feature Ranks, and Value Index) a basis for comparison by end-user clients as possible.

Scenarios are designed to reflect tiered capability in a particular set of circumstances. Determination of the Scenarios in question is at the discretion of the analyst team assigned to the research project. Where possible, Scenarios are designed to be mutually exclusive and collectively exhaustive, or at the very least, hierarchical such that the tiers within the Scenario represent a progressively greater or broader capability.

Scenario ranking is determined as follows:

1. The analyst team determines an appropriate use case.
   *For example:*  
   • Clients that have multinational presence and require vendors to provide four hour onsite support.

2. The analyst team establishes the various tiers of capability.
   *For example:*  
   • Presence in Americas  
   • Presence in EMEA  
   • Presence in APAC

3. The analyst team reviews all evaluated solutions and determines which ones meet which tiers of capability.
   *For example:*  
   • Presence in Americas – Vendor A, Vendor C, Vendor E  
   • Presence in EMEA – Vendor A, Vendor B, Vendor C  
   • Presence in APAC – Vendor B, Vendor D, Vendor E

4. Solutions are plotted on a grid alphabetically by vendor by tier. Where one vendor is deemed to be stronger in a tier than other vendors in the same tier, they may be plotted non-alphabetically.
   *For example:*  
   • Vendor C is able to provide four hour onsite support to 12 countries in EMEA while Vendors A and B are only able to provide four hour onsite support to eight countries in EMEA; Vendor C would be plotted first, followed by Vendor A, then Vendor B.
Vendor Landscape Methodology: Information Presentation – Vendor Awards

At the conclusion of all analyses, Info-Tech presents awards to exceptional solutions in three distinct categories. Award presentation is discretionary; not all awards are extended subsequent to each Vendor landscape and it is entirely possible, though unlikely, that no awards may be presented.

Awards categories are as follows:

• **Champion Awards** are presented to those solutions, and only those solutions, that land in the Champion zone of the Info-Tech Vendor Landscape (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, above). If no solutions land in the Champion zone, no Champion Awards are presented. Similarly, if multiple solutions land in the Champion zone, multiple Champion Awards are presented.

• **Trend Setter Awards** are presented to those solutions, and only those solutions, that are deemed to include the most original/inventive product/service, or the most original/inventive feature/capability of a product/service. If no solution is deemed to be markedly or sufficiently original/inventive, either as a product/service on the whole or by feature/capability specifically, no Trend Setter Award is presented. Only one Trend Setter Award is available for each Vendor Landscape.

• **Best Overall Value Awards** are presented to those solutions, and only those solutions, that are ranked highest on the Info-Tech Value Index (see Vendor Landscape Methodology: Information Presentation – Value Index, above). If insufficient pricing information is made available for the evaluated solutions, such that a Value Index cannot be calculated, no Best Overall Value Award will be presented. Only one Best Overall Value Award is available for each Vendor Landscape.
Vendor Landscape Methodology: Fact Check & Publication

Info-Tech takes the factual accuracy of its Vendor Landscapes, and indeed of all of its published content, very seriously. To ensure the utmost accuracy in its Vendor Landscapes, we invite all vendors of evaluated solutions (whether the vendor elected to provide a survey and/or participate in a briefing or not) to participate in a process of Fact Check.

Once the research project is complete and the materials are deemed to be in a publication ready state, excerpts of the material specific to each vendor’s solution are provided to the vendor. Info-Tech only provides material specific to the individual vendor’s solution for review encompassing the following:

• All written review materials of the vendor and the vendor’s product that comprise the evaluated solution.
• Info-Tech’s Criteria Scores / Harvey Balls detailing the individual and overall Vendor / Product scores assigned.
• Info-Tech’s Feature Rank / Stop Lights detailing the individual feature scores of the evaluated product.
• Info-Tech’s Value Index ranking for the evaluated solution.
• Info-Tech’s Scenario ranking for all considered scenarios for the evaluated solution.

Info-Tech does not provide the following:

• Info-Tech’s Vendor Landscape placement of the evaluated solution.
• Info-Tech’s Value Score for the evaluated solution.
• End-user feedback gathered during the research project.
• Info-Tech’s overall recommendation in regard to the evaluated solution.

Info-Tech provides a one-week window for each vendor to provide written feedback. Feedback must be corroborated (be provided with supporting evidence), and where it does, feedback that addresses factual errors or omissions is adopted fully, while feedback that addresses opinions is taken under consideration. The assigned analyst team makes all appropriate edits and supplies an edited copy of the materials to the vendor within one week for final review.

Should a vendor still have concerns or objections at that time, they are invited to a conversation, initially via email, but as required and deemed appropriate by Info-Tech, subsequently via telephone, to ensure common understanding of the concerns. Where concerns relate to ongoing factual errors or omissions they are corrected under the supervision of Info-Tech’s Vendor Relations personnel. Where concerns relate to ongoing differences of opinion they are again taken under consideration with neither explicit not implicit indication of adoption.

Publication of materials is scheduled to occur within the six weeks immediately following the completion of the research project, but does not occur until the Fact Check process has come to conclusion, and under no circumstances are “pre-publication” copies of any materials made available to any client.
CSKM Product Pricing Scenario

**Enterprise Name:** Mushu Dynamics  
**Enterprise Size:** Mid-Sized  
**Enterprise Vertical:** Consumer Electronics  
**Total Number of Sites:** One Customer Service Call Center  
**Total Number of End Users:** 150 call center agents, split into three shifts (50/shift – please specify per-user or per-device licensing). 15 customer service managers (5 per shift).  
**Operating System Environment:** Windows 7  
**Office Productivity Suite Environment:** Office 2010 Enterprise Edition  
**Functional Requirements and Additional Information:**

Mushu Dynamics is a global provider of specialized consumer electronics with a high degree of product complexity and customer service complexity. The firm provides **24/7 customer support via self-service portals and assisted-service channels** (telephony, email, and chat). It has a single call center, with 50 agents working per shift (150 over three shifts). The organization has a CRM solution in place, but is specifically looking for a best-of-breed option for customer service knowledge management. In particular, the organization needs a solution that provides the following functionality:

- Content repositories.
- Advanced search and indexing.
- Resolution workflow tools.
- Reporting and analytics (i.e. data on first-contact resolution, average time to resolution). Please specify if an external reporting vendor is necessary.
- Social functionality (ability to offer solutions through social channels; basic monitoring and response capabilities).
- Integration with other relevant technologies: CRM, call center telephony/IVR, etc.
- Mobile support is highly desirable (either through a dedicated app or mobile browser).