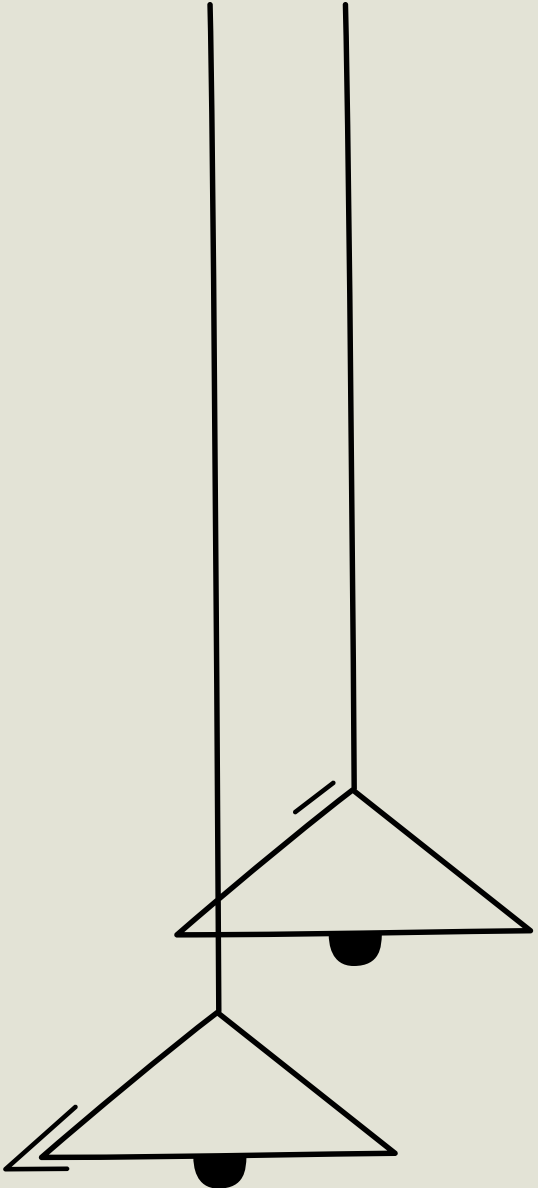




ZOOM: THE VALUE DISCOVERY EXPERIENCE DIAGNOSTIC

*A CX Architecture Case Study of zoom.com
using the Radz Diagnostic Framework*

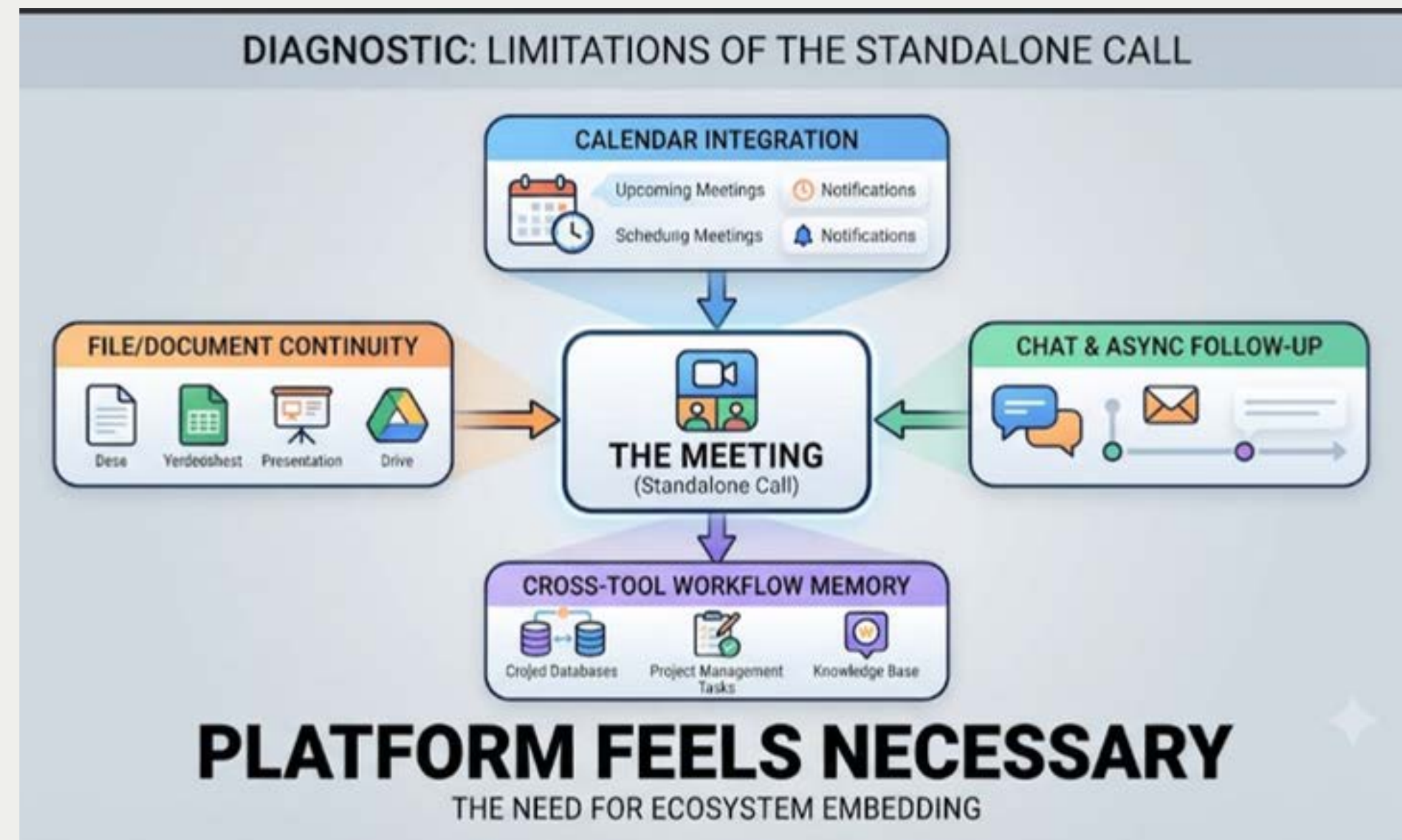
September 2026

Presented By: Sreeja Vijayan (SJ),
Founder & Customer Experience Strategist
Radz Designs

ECOSYSTEM CONTEXT

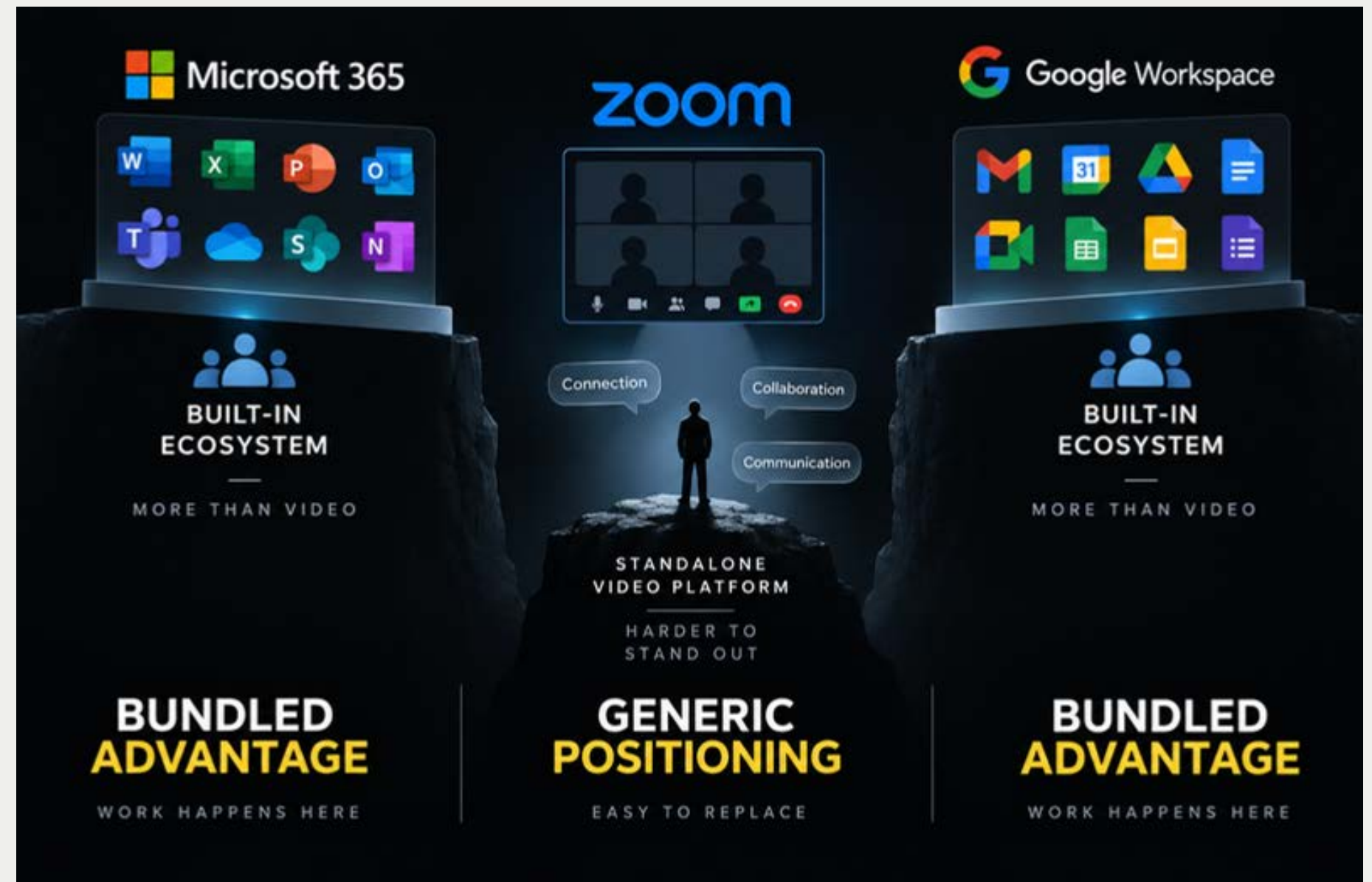
Why Standalone Value Erodes in a Bundled Category

- Most video tools were built on one promise: **a reliable call**, enough to win adoption during the category's growth phase
- Value now depends on **calendar integration, document continuity, async follow-up, and cross-tool memory**, not the call itself.
- A standalone tool competes on "does this disappear into my workflow," not "does the call work".
- **Result:** Call quality is now a Vanity Metric if the tool stays disconnected from the rest of the stack

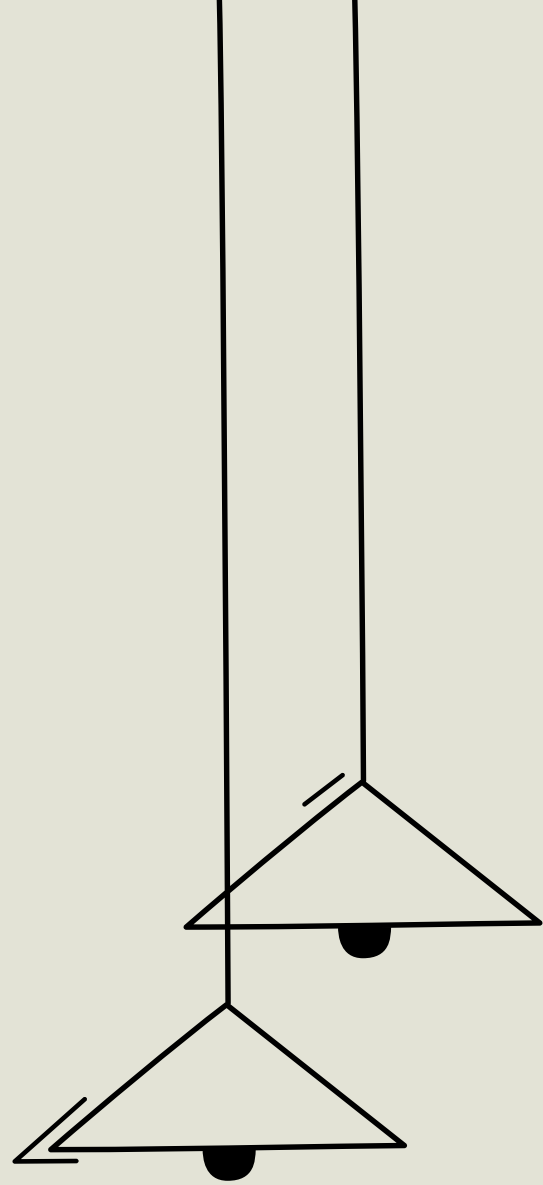


ZOOM'S POSITION WITHIN THIS ECOSYSTEM

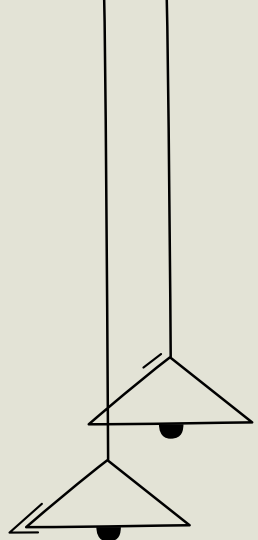
- Zoom's dominance was built on **pandemic-era default necessity**, not a resolved answer to "why this over the alternative"
- Teams and Meet now win through **bundling** (Microsoft 365, Google Workspace), not superior video.
- **Zoom's own messaging (connection, collaboration, communication) is generic enough** to describe either competitor.
- No owned productivity ecosystem means **Zoom can only compete on differentiation**, and hasn't provided one



DIAGNOSTIC SCOPE

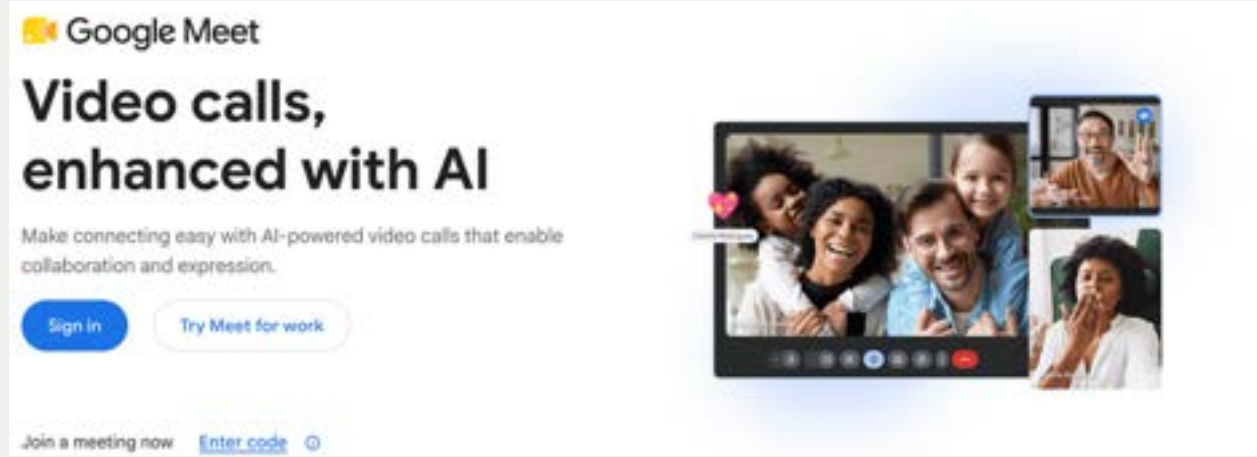
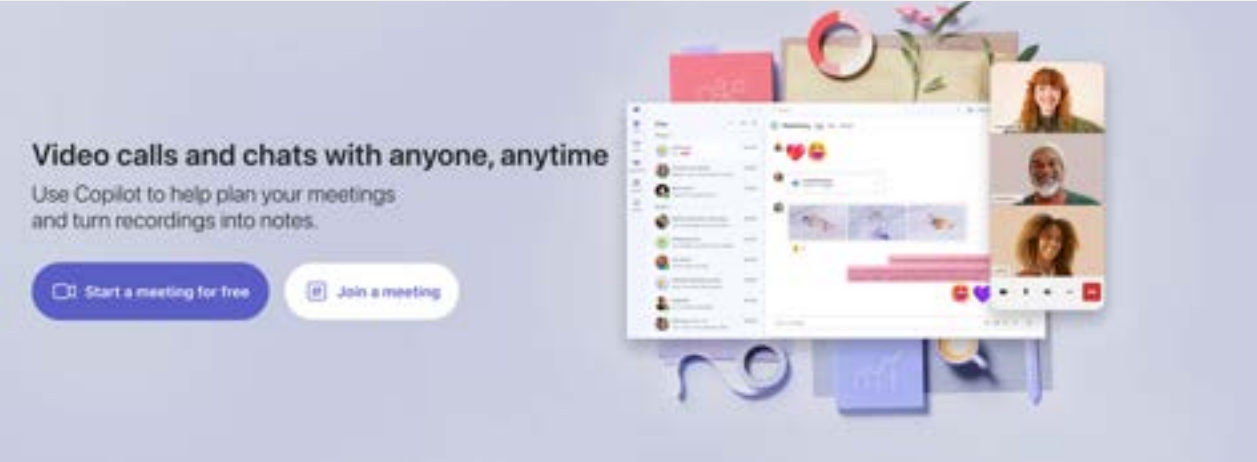
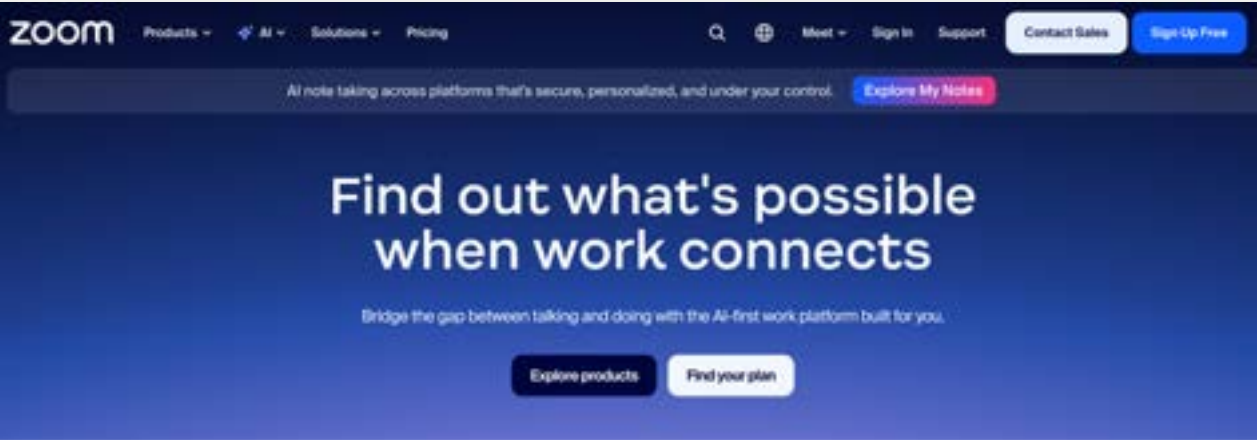


- **Identifying Critical Customer Touchpoints:**
 - Mapping where and how users evaluate Zoom's value against alternatives
- **Competitive Position: Where Zoom Wins, Where It Loses:**
 - Comparing Zoom against Microsoft Teams and Google Meet across use cases and regions
- **Diagnosing Positioning Ambiguity & Differentiation Friction:**
 - Examining why users can't articulate a distinct reason to choose Zoom
- **Mapping Structural Gaps in Category Messaging:**
 - Locating where Zoom's brand language fails to stake a defensible claim
- **Value Visibility & Discovery Lag Analysis:**
 - Assessing how clearly and quickly users find Zoom's differentiated value, if at all
- **Translating Findings into Business Impact:**
 - Converting positioning diagnosis into measurable outcomes



DIAGNOSTIC 1:

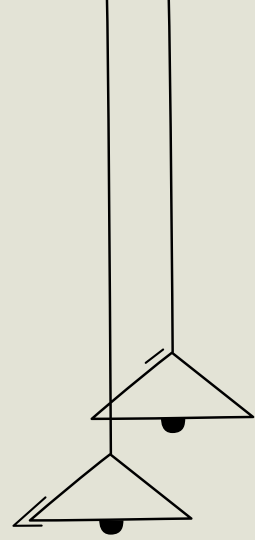
TOUCHPOINT 1



Landing Page:

- Zoom's headline persuades;
- Teams/Meet's landing pages barely need to, users are already inside those ecosystems

	Zoom	Microsoft Teams	Google Meet
Headline	Find out what's possible when work connects	Video calls and chats with anyone, anytime	Video calls, enhanced with AI
Subheadline	Bridge the gap between talking and doing with the AI-first work platform built for you	Use Copilot to help plan your meetings and turn recordings into notes	Make connecting easy with AI-powered video calls that enable collaboration and expression.
Primary CTA	Sign Up Free / Explore Products / Find Your Plan	Start a Meeting for Free / Join a meeting	Sign in / Try Meet for Work / Join a meeting now



DIAGNOSTIC 1:

TOUCHPOINTS 2-4

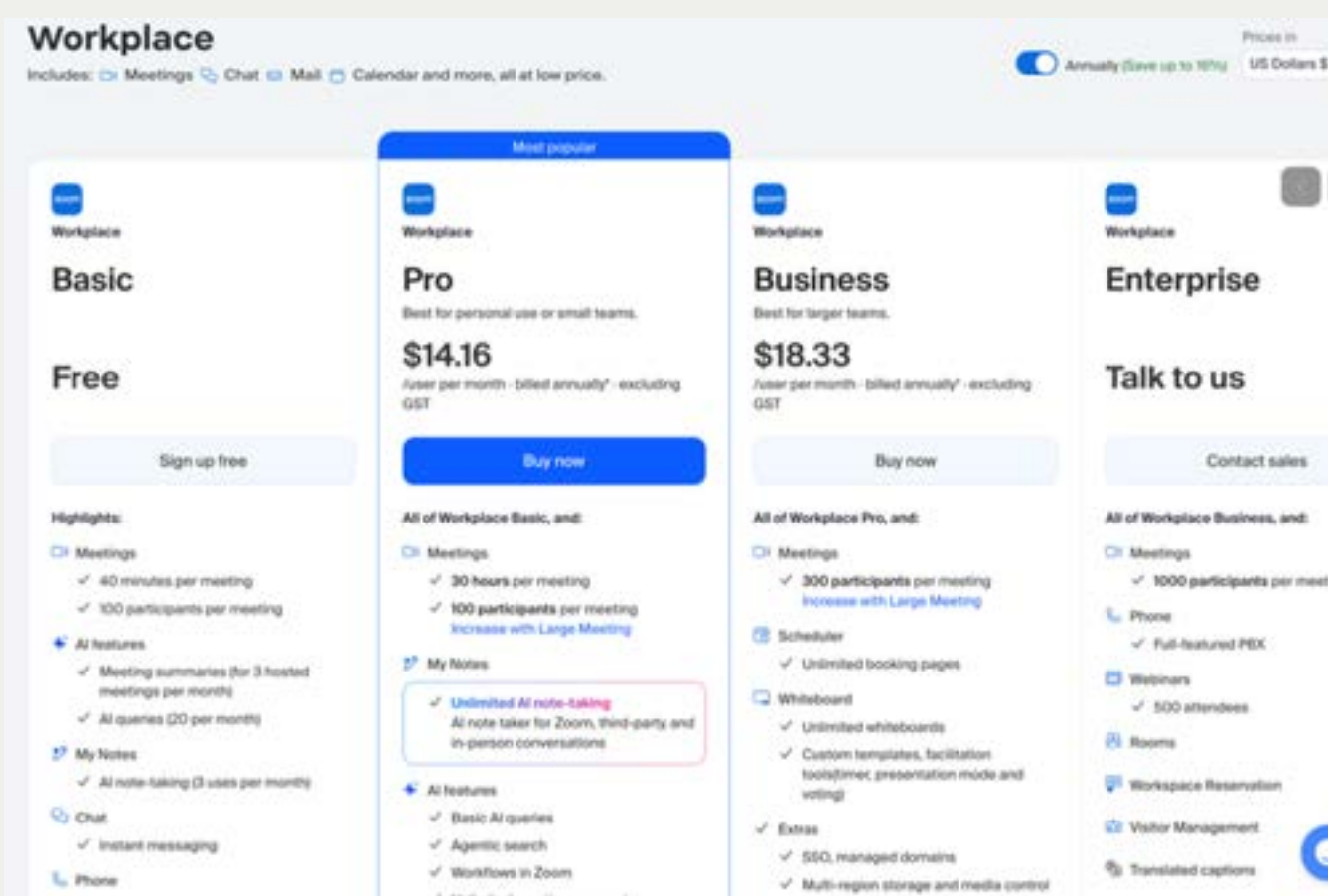
Comparison Moment:

- Cost, signup friction, and ecosystem fit all favor the already-installed incumbent

	Zoom	Microsoft Teams	Google Meet
Cost if already bundled	\$14 to \$18 per user/month, an additional line item	Included in existing Microsoft 365 subscription	Included in existing Google Workspace subscription
Signup requirement	A deliberate signup decision (email or Google/Apple sign-in)	None, already authenticated inside Microsoft 365	None, already authenticated inside Google account
Primary strength	Call quality, cross-platform simplicity, guest-join ease	Deep integration with Outlook, Office, and existing enterprise IT	Instant access from Gmail and Calendar, zero setup
Primary gap	No owned productivity suite to bundle into	Weaker as a pure video-first, external-facing tool	Weaker as a pure video-first, external-facing tool

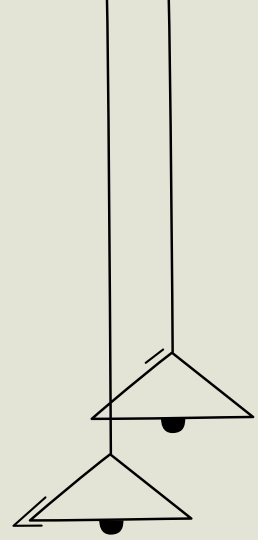
Pricing Page:

- Real cost vs. zero marginal cost
- Even the AI Companion advantage is paywalled



First Meeting:

- Zoom's strongest ground, arrives last, after 3 touchpoints, where positioning could already lose the user



DIAGNOSTIC 2:

COMPETITIVE POSITION

Zoom wins the decision. Zoom loses the default.



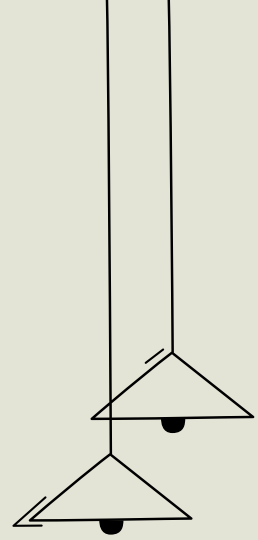
WHERE ZOOM WINS / LOSES

Wins:

- External, guest-facing meetings
- Standalone Call Quality,
- AI Companion, feature-for-feature bundled free
- Solopreneurs/Small Teams

Loses:

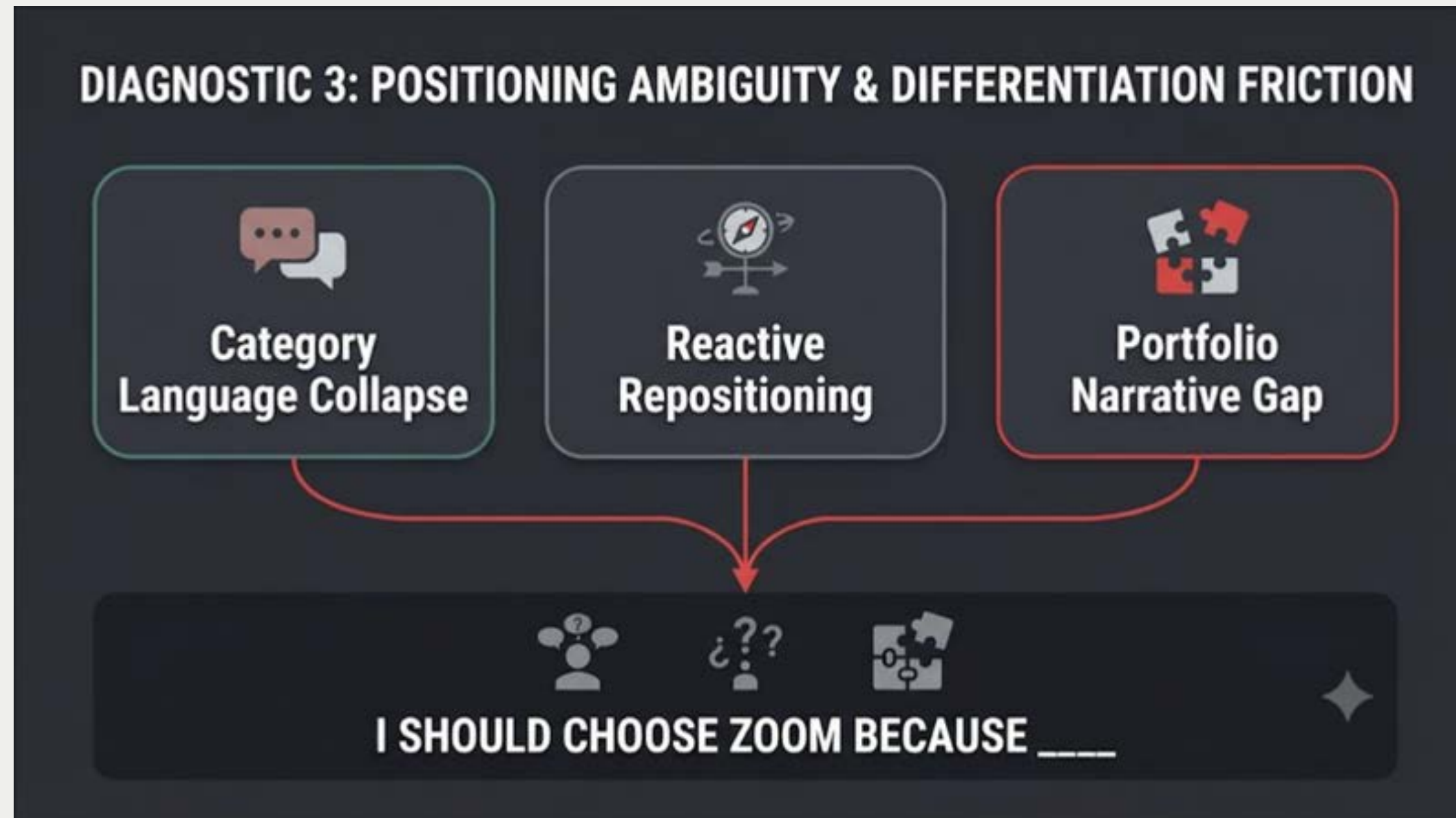
- Markets with high enterprise Microsoft penetration
- Markets with high Google Workspace penetration
- Internal Team Collaboration,
- Buying decision is made by IT-led Procurement

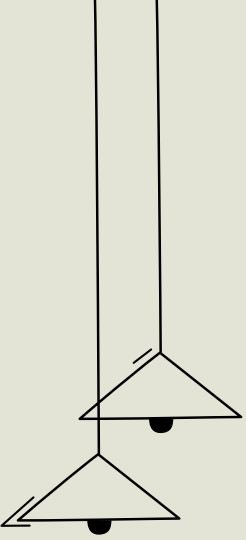


DIAGNOSTIC 3:

POSITIONING AMBIGUITY

"I should choose Zoom because ____"





CATEGORY LANGUAGE COLLAPSE + REACTIVE REPOSITIONING

Radz

Category Language Collapse

Zoom's own **messaging, connection, collaboration, communication, productivity**, describes the category of tools it belongs to, **not a distinct position** within it.

- Interchangeable claims,
- No Named Enemy,
- No Strong Differentiating USP
- Comprehension Without Conviction

Reactive Repositioning

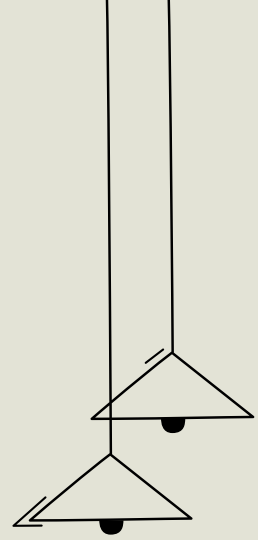
Zoom's **AI-first repositioning** uses language already common in enterprise software. Instead of owning new territory, Zoom is **entering territory competitors already claim.**

- Trend-Following, Not Trend-Setting
- Each reposition (task tool → AI platform → "work connects")
answers nothing, just shifts the question
- Credibility Cost of Repeated Pivots

PORTFOLIO NARRATIVE GAP

- Zoom's *portfolio breadth (meetings, phone, contact center, events)* now rivals Microsoft's stack, but with no single unifying story a user can hold in their head.
- Analyst coverage confirms this tension was never resolved, even internally
- User is left to guess whether they're buying a video tool, a phone system, or a full enterprise platform.





DIAGNOSTIC 4:

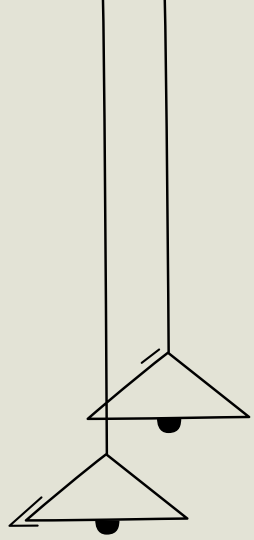
STRUCTURAL GAPS

Not a wording problem. A structure that was never built.

DIAGNOSTIC 4: STRUCTURAL GAPS IN CATEGORY MESSAGING

 No Owned Comparison Content Zoom vs Teams. Zoom vs Meet. Only third-party results.	 No Consistent Positioning A different identity at every touchpoint.
 No Segment-Specific Messaging Same pitch for solopreneur and enterprise buyer.	 AI Advantage Buried, Not Structural A real edge, hidden several clicks deep.

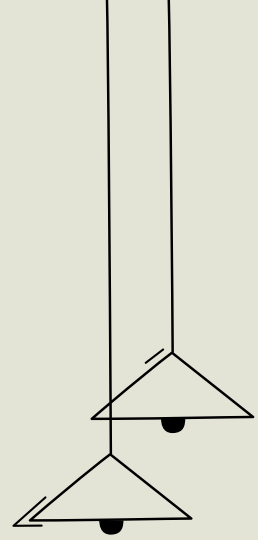
NOT A WORDING PROBLEM. A STRUCTURE THAT WAS NEVER BUILT.



THE FOUR GAPS

- No owned comparison content (only third-party sites answer "Zoom vs. Teams vs. Meet")
- No consistent positioning across touchpoints
- No segment-specific messaging
- AI cost advantage buried, not structural

None of these are wording problems that a better headline could fix. They are structural absences, that leave the user to do the differentiation work Zoom's own architecture should be doing for them.



DIAGNOSTIC 5:

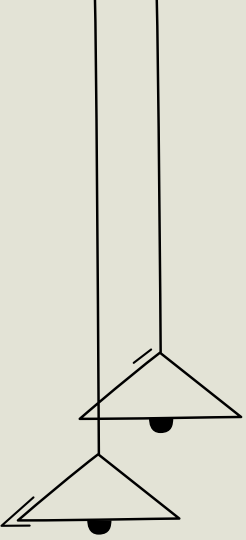
VALUE VISIBILITY

The value that would win the decision arrives after the decision is made.

DIAGNOSTIC 5: VALUE VISIBILITY & DISCOVERY LAG



THE VALUE THAT WOULD WIN THE DECISION ARRIVES
AFTER THE DECISION IS ALREADY MADE.



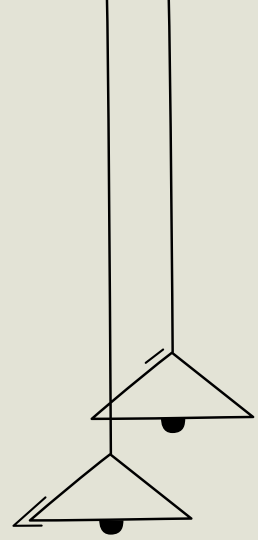
SURFACE VS. DIFFERENTIATED VALUE

Surface Value Discovery:

- Happens fast and needs no effort.
- The user opens the product and immediately experiences
 - Clean Call Quality,
 - An Intuitive Interface, and
 - Easy Guest Access.
- This is discovered within the first meeting, exactly as Touchpoint 4 showed.

Differentiated Value Discovery:

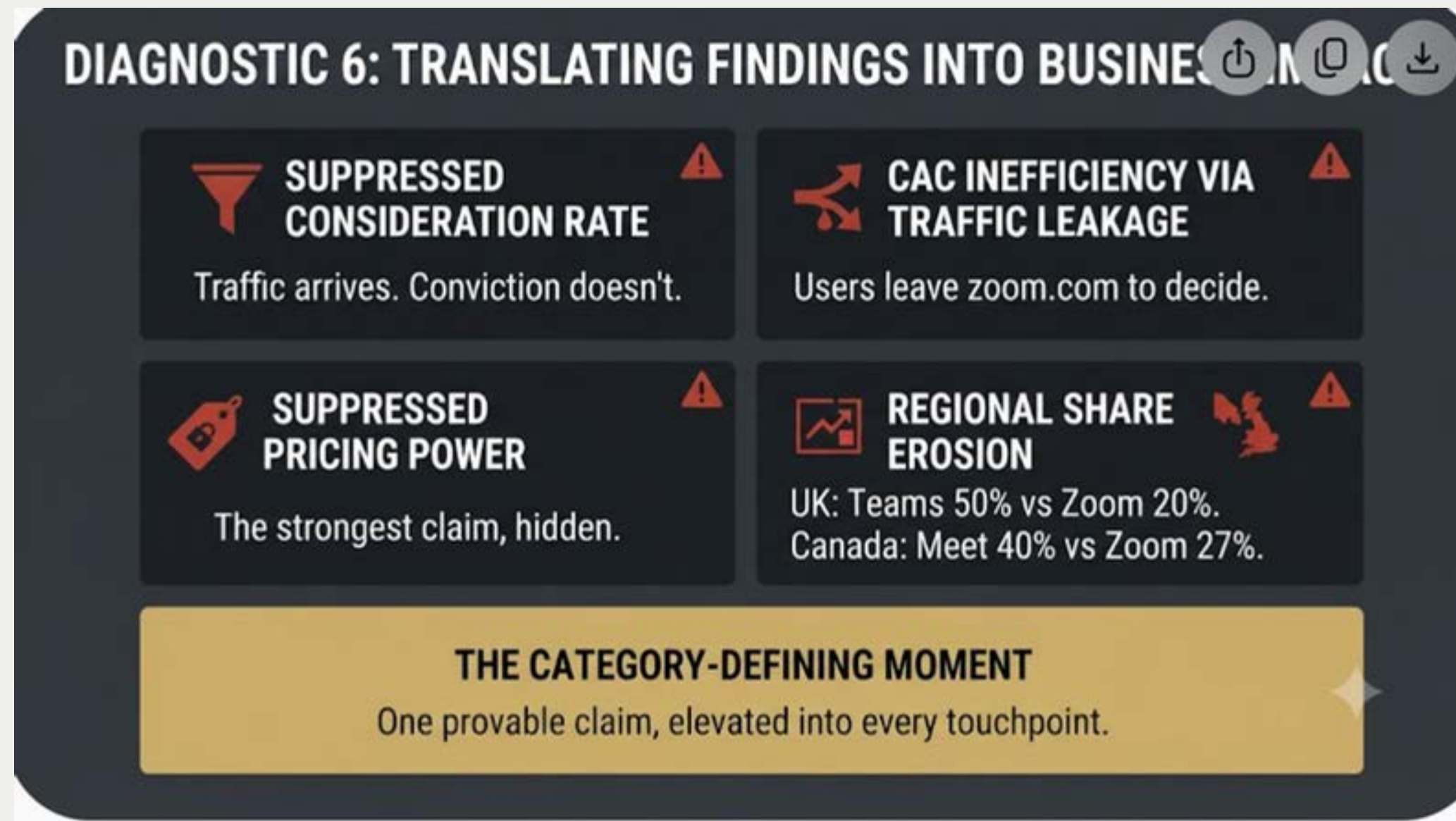
- The value that actually justifies choosing Zoom over a free, bundled alternative, ***AI Companion included at no extra charge*** versus Microsoft's separately priced Copilot,
- Superior Reliability on Inconsistent Networks,
- Best-in-class Webinar and Event tooling.
- This value exists, but nothing in Zoom's own architecture surfaces it early or clearly.
- A user only encounters it by digging into the pricing page themselves, or by reading a third-party comparison article that happens to mention it.

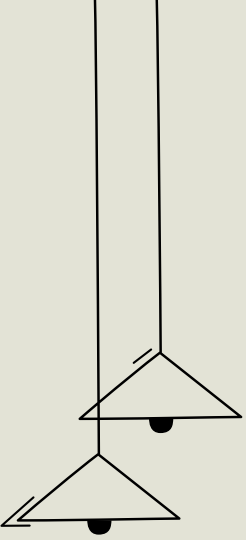


DIAGNOSTIC 6:

BUSINESS IMPACT

Four metric panels, suppressed consideration, CAC leakage, suppressed pricing power, regional share erosion.





THE CATEGORY-DEFINING MOMENT

Recommendation:

- One provable, ownable claim (AI cost differential is the clearest candidate), elevated into every touchpoint
- Ask: not "what should Zoom say it is," but "what can Zoom prove competitors structurally cannot"

THE CLOSE

This diagnostic reflects zoom.com's messaging, pricing structure, and positioning as observed on September 4, 2026. Zoom's homepage headline and value proposition changed twice during the course of this analysis alone, moving from task-oriented language to AI-agent framing, then to its current "work connects" positioning. This volatility is itself diagnostic evidence, it reflects the unresolved category positioning named throughout this report, rather than a settled brand identity. Findings on structural gaps, pricing tiers, and comparative positioning should be read as a snapshot in time and re-verified against the live site before any client-facing presentation of this material.

- **Scope:** Diagnostic runs entirely on **what's publicly observable** — no internal access, no engineering time, no disruption to your team
- **Differentiation:** Growth teams read metrics after damage is visible;
Radz identifies behavioral and structural gaps before they surface as a metric
- **Next Step: Request a Free Baseline Diagnostic**

REQUEST A FREE BASELINE DIAGNOSTIC