

Get Started on Creating Great Customer Experiences with Journey Strategies

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Highlights

2

Executive Summary

3

Focus Journey Strategies on Speed, High-Value Interactions, and Analytics

7

Be Prepared: CMOs Will Encounter Challenges With Journey Strategies

8

Journey Strategies Create Challenges by Attempting to Span Business Silos

10

Start by Following Best Practices

13

Learn from Successful Initiatives: Life Time Fitness' Customer Journey

14

Conclusion: Build Awareness, Use Data, and Focus on Results to Achieve Success

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Executive Summary

Developing a customer journey strategy is emerging as a critical component of customer experience management initiatives.¹ For this reason, chief marketing officers must understand customer journey strategies, their benefits, and how best to use them to transform or fundamentally improve customer experiences.

But first, what is a customer journey strategy? Digital Clarity Group (DCG) defines it as follows:

The enterprise's business technology plan to engage and delight customers by supporting all touchpoints that span discovery, sales, finance, support, and service, and by integrating the multiple devices, interaction channels, and application silos that support those customer touchpoints.

Customer journeys are highly strategic and – in a world where the customer truly is king – understanding them can literally make or break the future success of an organization. The purpose of a journey strategy is to understand and provide what customers truly want as opposed to guessing or assuming what the customer needs. This includes identifying the customer's first potential touch through engagement in customer-centric business processes, and then using these touchpoints or points of interaction (POIs) to plan and maintain a high-value, long-term customer relationship.

Firms develop customer journey strategies to understand what experiences the customer has with the organization, encompassing its products and services from the very beginning through the entire cycle of interactions. In a customer-driven world, it is critical to understand the moments of truth – the point(s) at which a customer decides to continue to engage or stops the interaction – not only for a single interaction but also through every interaction. Finding and understanding the moments of truth throughout the journey provides crucial intelligence for crafting great customer experiences.

Companies that embark on journey strategies and develop journey maps that graphically depict the pluses and minuses of current customer journeys are well-positioned to win the ongoing, never-ending race to delight customers. Enterprises that stand back and wait will only have themselves to blame when customers abandon them and turn to companies that delight them at all touchpoints throughout the full spectrum of their interactions. The message to the C-suite? Make sure your organization has a customer journey strategy in place and is proactively enabling journeys that satisfy the customer, support crucial moments of truth and, ultimately, span all touchpoints.

A journey strategy is the enterprise's business technology plan to engage and delight customers by supporting all touchpoints that span discovery, sales, finance, support, and service, and by integrating the multiple devices, interaction channels, and application silos that support those customer touchpoints.

Focus Journey Strategies on Speed, High-Value Interactions, and Analytics

Organizations that successfully adopt customer journeys as part of their overall business strategy often succeed in growing customer accounts, increasing revenues, and improving business results. For example, Sungevity, an energy company, used end-to-end customer journeys to transform its business, thus doubling its sales in one year “to more than \$65 million, exceeding growth targets and making Sungevity the fastest-growing player in the residential solar business.”² By focusing on the customer journey, companies can make simple adjustments that have big payoffs. For example, matching the customer’s response to an email campaign with the customer’s buying behavior and preferences lets the organization learn which channels the customer prefers and target those channels in future interactions.

Successes and tactics like these have catapulted the delivery of a great customer experience into the boardroom, where the C-suite routinely discusses topics such as customer journey strategies and incorporates them into the organization’s strategic focus. As a result, four critical customer journey trends have emerged in organizations over the last 12 months:

1. Using high-performance journey teams to quickly develop a holistic journey strategy that grows the business. Organizations with successful journey strategies also have high-performance marketing teams capable of adopting and integrating the journey strategy approach with the overall business strategy and doing so quickly (in light of the intense competition in this area). As *Harvard Business*

Review points out, companies are now creating journey product managers as “the journey’s economic and creative stewards. They have ultimate accountability for its business performance, managing it as they would any product.”³ Trying to create a holistic journey strategy without these resources in place is time-consuming and doesn’t leverage internal assets effectively.

- 2. Recognizing that focusing on high-value customer interactions does not require exclusively focusing on high-net-worth clients in the supply chain.** Instead, firms are prioritizing the POIs that are of highest value to a client engaging with their products or services. These touchpoints could be providing a single right answer to a search query, a fast response to a problem already logged, or web chat support during a commerce transaction. Prioritizing these high-value touchpoints for all customers – not just high-net-worth clientele – ensures that organizational effort is spent in the right place.
- 3. Integrating customer journey platforms with extensive analytics and predictive intelligence.** Organizations use analytics extensively with these platforms for many reasons, including measuring attribution across channels, identifying costly bottlenecks that don’t provide value to customers, surfacing high-value orders that might otherwise have been missed, and determining media impact across channels. By using analytics data, organizations can identify the

best media for promoting products, streamline the customer journey while adding value for the customer, identify potential areas for fraud, and make real-time decisions throughout the customer's journey.

- 4. Using omnichannel and back-end integration to support a single view of the customer across channels.** Companies are increasingly integrating back-end business systems for internal uses, a possibility even with customer touchpoints, so as to provide a single view of the customer across all channels (including social media and email and other marketing campaigns), all working off an integrated source of information. These in turn support integrated marketing strategies, which are centrally coordinated across all channels, products, and services of the organization. Although it is still early and this type of integration is challenging (requiring an SOA architecture), organizations are increasingly focused on realignment and moving across organizational, application, and information silos. Also, advanced thinkers who focus on operational excellence for internal processes are beginning to work with journey teams to investigate integrating journey strategies with transformed business processes and how to marry journey mapping with process mapping.

Journey Mapping Is an Important Tool for Visualizing and Communicating the Customer Journey Strategy

Organizations use journey mapping methods and tools to visually depict customer touchpoints, providing a useful tool in developing the customer journey strategy. A customer journey map is a diagram showing the stages of customer engagement with an organization across the respective channels associated with every service or product. The only way to develop an accurate picture is to base it on accurate data. Many visualization tools can display customer experience dimensions including sentiment, touchpoints, goals, experiences, successes, and many others.

Importantly, companies must consider two perspectives while developing the journey map: the customer's perspective on the organization, and the organization's perspective on the customer. Using both perspectives, project teams should work toward the following goals:

- **Identify obstacles as well as great experiences.** When identifying the experiences across all touchpoints from the customer's perspective, it's important not only to replicate great interactions but also to understand obstacles customers encounter that result in poor interactions. A seemingly small obstacle such as not easily finding the "Checkout" link on a website could result in significant revenue losses.

- **Understand how customer experiences align with the organizational structures, channels, and metrics.** If an internal 48-hour turnaround departmental service metric has been agreed but the customer expects same-business-day service, then the journey map should show the misalignment.
- **Go beyond customer interactions to include all of the systems, processes, and individuals that support them (i.e., effect the interactions and make them possible).** Realistically, organizations will need several journey maps to encompass the different scenarios and paths that customers may take to engage with the organization. A single map will seldom convey the whole picture.

Organizations must also realize that customer journey maps can depict scenarios ranging from a simple series of customer interactions to buy a product or service, to more complex, comprehensive diagrams of the entire customer journey across the customer's lifetime – spanning all parts of the organization that serve the customer. Project teams must take two important precautions:

- **Don't try to fix every single customer interaction.** Organizations need to differentiate between the complete customer lifecycle and a relatively small number of high-value customer journeys. Developing the

journey strategy is paramount for identifying a limited number of journeys that highly influence both customer satisfaction and value (revenue) for the organization.

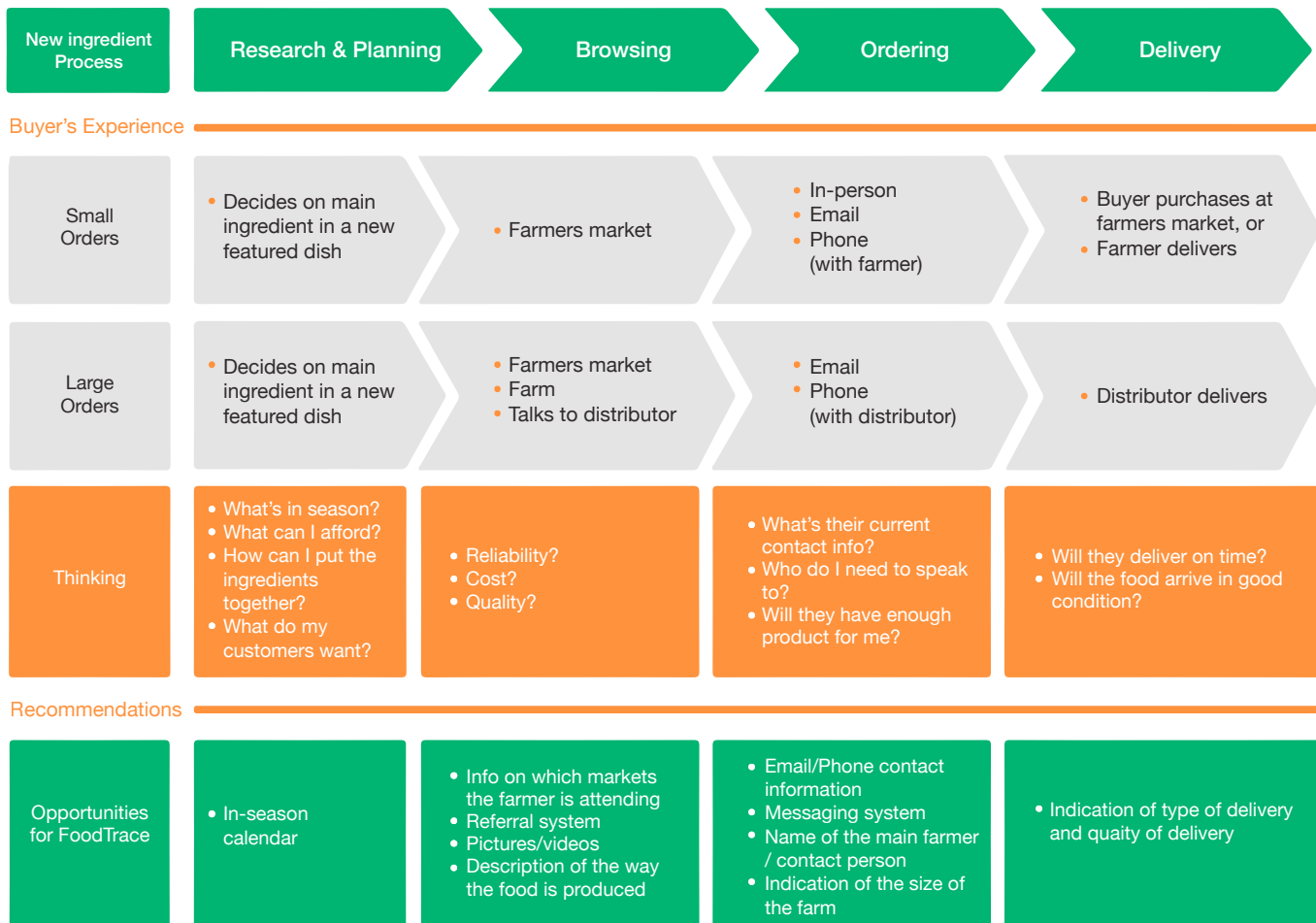
- **Align customer experience project teams' efforts with the customer journey strategy, to avoid becoming overwhelmed or going off-course.** If the customer journey strategy has a wide scope, then journey maps can be broken down into specific products/services, specific channels, and specific parts of the organization or implementation phases.⁴

Figure 1 provides a simple example of a customer journey map that identifies the stages in the journey, the channels, customer interactions, and customer thoughts, and makes recommendations to the seller for improving the journey. This example is from FoodTrace, a B2B website that connects food sellers (farmers) with buyers (e.g., restaurants and grocers). Customer journey maps for complex processes that span multiple channels – both digital and analog – are more detailed than this map, which is shown for illustration purposes.

Developing a journey strategy will allow organizations to map out all of the interactions in the customer journey lifecycle and identify a limited number of journeys that highly influence both customer satisfaction and value (revenue) for the organization.

Figure 1
Sample Journey Map Depicting Customer Interactions and Thoughts, Plus Recommendations About Touchpoints

Food Buyer Journey Map



Source: <http://uxcatherine.com/foodtrace.html>⁵

Mapping all of the customer interactions from cradle to grave might be possible and useful but it is a mistake to then try to fix (or even pay attention to) every one of them.

Be Prepared: CMOs Will Encounter Challenges With Journey Strategies

Journey strategies provide significant value to organizations that are focused on delivering exceptional customer experiences, bringing journey mapping to the forefront as an important tool in the customer experience management program. However, CMOs will encounter several challenges as their organizations move to develop their journey strategies and build out their maps:

- **Customers want to control how an organization engages with them.** As a result, marketers need to shift their approach from campaigns that typically run over fixed time periods and fixed channels to more flexible solutions that can operate in customer time in the channel where the customer finds him- or herself. The cross-channel benefits that can be achieved – by combining mobile location-based campaigns with e-mail campaigns, for example – far outweigh the benefits of single-channel, fixed-time campaigns.⁶ Applying a journey mapping approach will help to identify the cross-channel touchpoints.
- **Marketing campaign effectiveness can be very poor if it is *ad hoc* and not based on customer-provided data.** In the rush to do something quickly, and given the heavy emphasis on big data, CMOs may lose sight of the relevant customer intelligence already at their disposal. Sometimes, collecting more data is not necessarily better; sometimes, using what you've already got is

expeditious, cost-effective, and very helpful.

Unfortunately, companies often ignore small data opportunities in an attempt to focus on big bang, big data implementations. Successful CMOs start with the right data, which in many cases they already own, before trying to focus on collecting big data. They do this by focusing on accurate marketing analytics supported by predictive intelligence in order to get answers to the problems they seek to solve.

- **With the C-suite focus on customer experience management, it's easy to become overly fixated on digital.** Implicitly, the term “digital” refers to the sweeping changes brought about by digital computing and communication technology during (and after) the latter half of the 20th century – specifically, megatrends like the rampant growth of the web, cloud, mobile computing, social networks, and e-commerce, and now cognitive computing. But today, digital has become business as usual for marketing. To significantly impact the customer experience, digital must be viewed as an integrated, holistic strategy and not as a completely different thing from the rest of marketing. CMOs must reduce the number of digital silos and build a shared journey strategy where digital is an integral part of the overall customer experience.

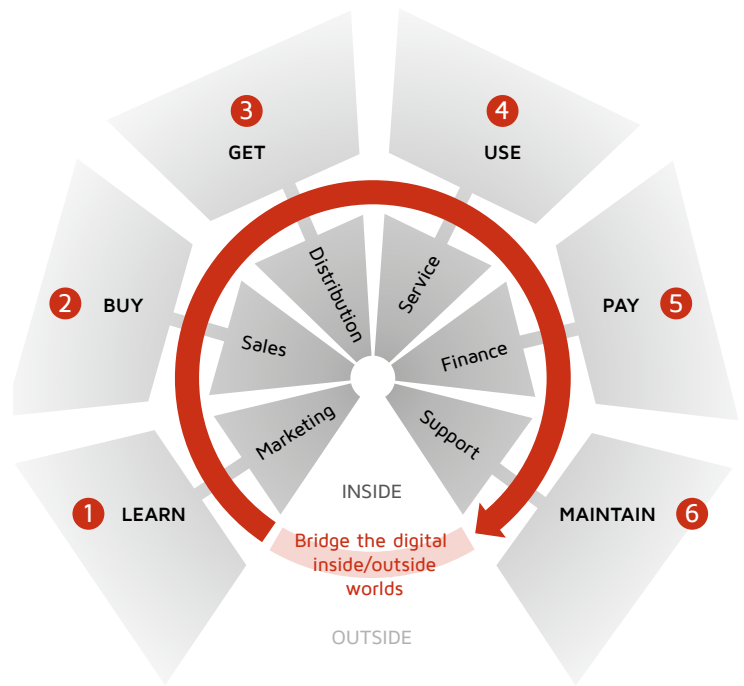
Journey Strategies Create Challenges by Attempting to Span Business Silos

Organizations must be able to serve customers and prospects across all channels and virtually any device, creating personalized omnichannel customer experiences across all business units. This approach requires a mature journey strategy, a high degree of knowledge and experience, and a serious amount of fortitude. Due to the many available customer POIs, customer journeys are no longer linear. A customer can perform a web search on a product, visit a store for a demonstration, watch a YouTube video about the solution, and buy the product online almost in parallel – or with the time required significantly collapsed. No matter how much organizations want customers to behave and follow the journey laid out for them, customer interactions are no longer black and white, sequential, or as tidy as the traditional funnels. Realistically, organizations must embrace the complicated, cyclical, and often quirky nature of a customer’s interactions with their products and services.

Marketing leads most customer experience initiatives (although customer experience executives and other newly titled individuals are also making headway), yet many of the interactions a customer has with an organization’s products and services are beyond the control of the [CMO](#).⁷ Typically, marketing must convince various functional silos (e.g., sales, support, finance) within the organization to work together and buy into the journey strategy, particularly given that the journey mapping process could reduce duplication in multiple customer experience projects.

Figure 2 punctuates the importance of aligning external, customer touchpoints ([outside-in](#)) with

Figure 2
How the Customer Journey and Internal Functions Work Together⁸



Source: adapted from Earley Information Science.

internal processes that support those customer interactions (inside-out.) Without gaining the support of business function leaders, such as the VP of sales or VP of support, it will be hard for the CMO or other customer experience leader to truly implement the customer journey strategy. By leading or collaborating in the effort to create cross-functional silos that support customer POIs, marketing can also identify opportunities to integrate customer data throughout the organization (i.e., information that is outside marketing's purview) to get a better view of what drives customer behavior during the buying or servicing journey.

Whenever possible, the CMO should collaborate with other functional executives to identify internal processes that align directly with customer interactions and seek to implement cross-functional, customer-centric processes that integrate the organization's silos into a holistic customer journey. This is a tall order and well beyond the reach of any CMO without extensive collaboration and leadership across the C-suite. One way the CMO can create change within the organization is to work with operational excellence and process experts, who are usually in the COO's office. Additionally, the CMO can surface the need for cross-functional processes when the organization is creating either a new strategic plan or its annual business plan. The key action for the CMO is to reach out to other business leaders to envision and brainstorm how transformed processes could work.

Unfortunately, companies often ignore small data opportunities in an attempt to focus on big data implementations.

Start by Following Best Practices

Attempting to focus on every single customer touchpoint is an impossible and fruitless task; instead, journey teams should concentrate their efforts on identifying the highest-value touchpoints (or POIs) and making sure these interactions provide great customer experiences across the journey. Below are a number of key best practices to observe when starting to build a customer journey strategy and a supporting journey mapping practice:

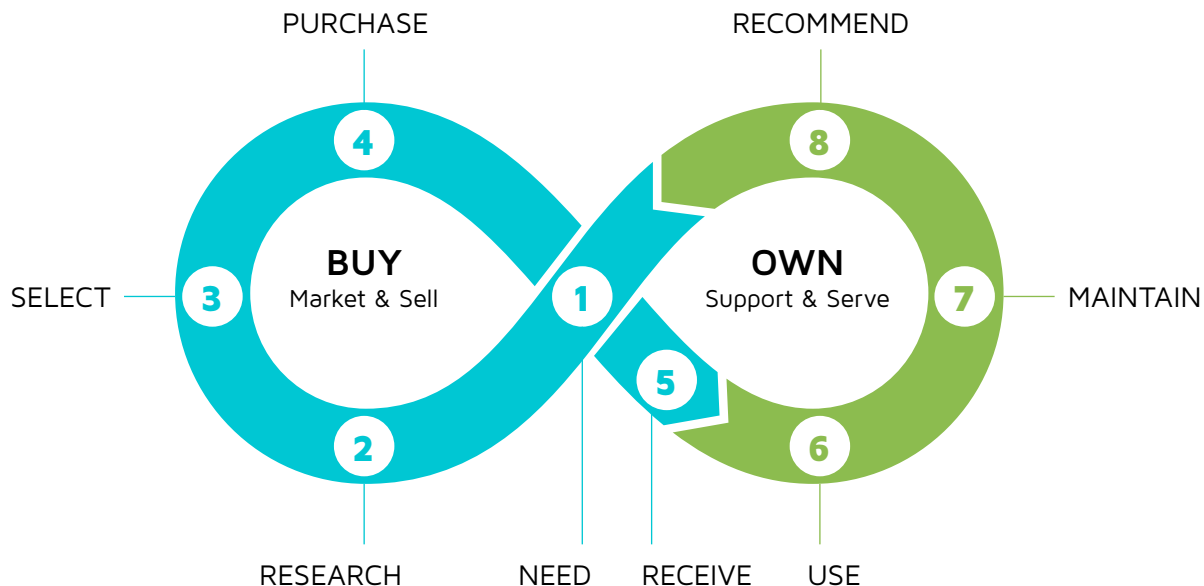
- **Know Where the Customer Is in the Journey.**

With the customer in control, it's vital that the organization listen to what he or she is saying about wants, needs, expectations, and preferences. Listen for those cues, and understand where every customer is in her journey with your organization. Focus on the moments of truth (the points where customers decide whether to continue or stop

interacting with your company) that matter for the customer during his journey of engaging with your organization. Make it easy for each customer to move to the most relevant journey.

- **Consolidate your customer data to better understand *who* and *what* customers are seeking.** Specifically, use your data about where the customer is in her engagement with your organization to map her actions to your internal processes and services. (See Figure 3.) If the customer is at the research stage (#2 in Figure 3), offer products that move her to the select and purchase stages (#3 and #4), where she will make a decision and then buy. These lifecycle stages can be further broken down through journey mapping to document the enterprise's processes for engaging with customers.

Figure 3
B2C Customer Lifecycle Management



- **Deliver consistent experiences irrespective of the channel.** Building the complete customer journey while using organizational, application, and information silos is fraught with risk. That's because each functional group supporting the POIs in the journey may have developed very different ways of supporting customers. The user interfaces may vary widely, making the customer's journey between touchpoints a jarring experience. Or, customer-provided data may not be persistent across touchpoints, meaning the customer repeatedly has to provide the same information to a customer service representative or on the website. Tools based on technologies such as artificial intelligence show promise as possible means for stitching together customer information, enabling personalized experiences across channels and devices.
- **Include all channels and every area of the business with the highest value for customers.** This means utilizing everything at your disposal, including emails, SMS messages, push notifications, digital and traditional ads, web experience, in-store, sales reps, traditional and mobile apps – as well

as emerging channels like the internet of things (IoT) – to reach customers on all digital channels. Then build interactions that extend beyond marketing to every area of the business that aligns with the customer experience.

- **Don't overanalyze when implementing the journey.** Once all the planning has been done and it's time to implement, don't overanalyze. For example, don't waste time creating beautiful diagrams or spend endless hours trying to create the perfect journey. Developing a journey strategy requires an evolutionary, phased approach, best done by automating processes and interactions to move at the customer's speed. Do this by using an automation tool to engage customers at scale, as handcrafted one-on-one relationships are cost-prohibitive and not really possible today. Develop logical decision trees that allow the customer to move through different paths based on his or her behavior and preferences. As customers interact with the organization during the journey, they should be automatically routed down paths that best fit their behaviors, requirements, and expectations.

Develop journey maps that allow functional executives and key customer experience management leaders to visualize all customer touchpoints and channels that have the highest value for the customer.

■ **Re-evaluate the highest-value POIs frequently and focus on updating them.**

Build logic into interactions that automatically move customers down different paths based on how they engage with a message or based on attributes in their customer profile, like title or geography. Test different types of channels and different messages to see which perform the best. Develop a “crawl, walk, run” strategy. Your first customer journey may be as simple as a series of three emails. Then, once engaged with the customer, the project team can add additional communications across an increasing number of channels depending on customer behavior and products and services consumed.

■ **Measure and adapt the journey using analytics and metrics.**

Analyze every interaction to offer the best experience possible by examining metrics for what is and isn't working. Continually assess where bad experiences are creating problems, and design a more positive experience. Use journey analytics to help evaluate customer engagements across all channels. Set goals for every interaction and continually monitor how customers perform against these goals. Modify interactions where necessary to better meet customer needs. Companies with customers who are more satisfied deliver measurable results; these customers spend more money, are more willing to recommend the brand, and are less likely to churn.

The customer experience is the sum of every interaction a customer has with your brand. Businesses that embrace the journey philosophy across channels and across departments, throughout the entire lifecycle, are seeing strong, tangible business results.

Learn from Successful Initiatives: Life Time Fitness' Customer Journey

Life Time Fitness, a large lifestyle and fitness company, focuses its customer journey on each individual. The company provides lifestyle destinations in twenty-six states and thirty-five major markets; its mission is to help members achieve their total health objectives, athletic aspirations, and fitness goals. Members are individuals who want healthier lifestyles. The company actively focuses on hearing each member's story and documenting and mapping their goals. With less emphasis on marketing and more on relationship-building, Life Time has built a strong reputation as member-centric, member-driven, member-obsessed, and member-trusted. The company's customer journey strategy provides significant insights for organizations that have not yet embarked on journey strategies:

- **Initially, the company's marketers viewed email as the main channel for member communication.** Over the past two years, however, they watched their members' preference for smartphones as their primary channel grow from 40% to 70%. Recognizing this customer trend, the company revamped its email marketing efforts to become more personalized, supporting individual members through their fitness journey from the day they join until they reach their personal goal. And then, Life Time works with each member on what's next.
- **Marketing believes customer experience is less about what products and services to propose and more about enriching each member's experience and relationship**

with the company. Marketing focuses on developing a unique, individualized e-mail message that crosses channels and follows each customer wherever they choose to engage. By using a journey management tool, the company is working to access the right data, at the right touchpoint and during the right experience, to engage in the customer's personal journey.⁹ The company follows each member from the time they engage with the organization through each point in their journey – no matter who they are or why they are there. Life Time achieves this with the help of a journey management tool. The company also builds on this customer relationship to expand memberships to other individuals in the member's family. For example, a mom or dad may be offered an opportunity to enroll children in a children's fitness program.

- **The right member data, such as personal training preferences, is organized in the right way using the journey management tool so it supports personalized e-mail conversations via multiple channels.**

The company's journey management strategy and approach allows Life Time to 1) manage and scale many client communications across multiple customer interaction channels while 2) delivering a consistent engagement and understanding of where each customer is in attaining their personal goal. This approach provides the organization with insight into how they can add more value to the member relationship and connect to their members in a whole new way.

Conclusion: Build Awareness, Use Data, and Focus on Results to Achieve Success

Customer journey strategies and journey mapping are essential aspects of customer experience management and digital transformation initiatives. Gaining mastery of journey strategy is essential for marketing and customer experience teams. When initiating a journey strategy, follow these steps to obtain the greatest benefit from using journey maps:

- 1. Consolidate customer information.** Instead of looking at just part of a transaction or experience, use the customer journey tool to document the full end-to-end customer experience, while also collecting comprehensive customer data and information for customer journey decision-making.
- 2. Educate senior executives.** Many C-suite executives are unaware of or do not understand how to develop a journey strategy. Develop a plan for educating senior executives, and even board members, in customer experience management and the need for a journey strategy before selecting any tools or technologies. Proactively collect customer feedback through a formalized voice of the customer program that provides alerts from customer services and sentiment in social channels.

- 3. Use journey mapping as a communication and collaboration tool.** Journey maps are more than attractive diagrams; they provide valuable data and also offer an effective way to communicate throughout the organization about how customer journeys currently work and how they should work. Don't get sidetracked by visualization aesthetics but instead focus on gaining insights and reaching consensus while communicating across the organization. This includes focusing on the customer data gathered through the journey and making sure it is accurate, actionable, and high-impact.

The art of a successful journey strategy is understanding how to put the customer at the center of everything. The customer journeys for an organization's brands are in the customers' control, and not the company's. Remember at all times that customers have the power to decide 1) how they want to interact with your organization, 2) what they want to engage you for, 3) which channel they want to engage in, and 4) what time they want to engage.

Organizations that are successful in the use of journey strategies have high-performance marketing teams that have adopted a customer journey strategy as part of their overall business strategy.

Endnotes

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- 6 "Consumers Give Location Marketing A Resounding – Maybe," Digital Clarity Group, <http://www.digitalclaritygroup.com/consumers-location-marketing/>
- 7 "Who Drives Customer Experience: The CIO, The CMO, or Fill-In-The-Blank?" Digital Clarity Group, <http://www.digitalclaritygroup.com/customer-experience-cio-cmo/>
- 8 "Transform Customer Experience and Operational Excellence by Going Digital Outside and Inside," Digital Clarity Group, <http://www.digitalclaritygroup.com/transform-customer-experience-and-operational-excellence-by-going-digital-outside-and-inside/>
- 9 Journey management tools and platforms not only support the creation of journey maps, but also allow organizations to monitor and update customer journeys based on data from usage analytics. These tools provide insights to the journey team on future changes by monitoring touchpoints to determine the ROI, cost, and impact of changes on the customer.

About Digital Clarity Group



Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies.

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