

# TIPS & INSIGHTS

## Starter Guide for Implementing Customer Journey Management



# **CUSTOMER JOURNEY MANAGEMENT: A GUIDE TO OVERCOMING ROADBLOCKS AND IMPROVING CUSTOMER EXPERIENCE FOR HIGHER GAINS**

Customer Journey Management (CJM) has varying descriptions, intents, and goals depending on who you ask. It is the new frontier for advanced customer engagement made possible by a technology stack optimized for the modern consumer. Like anything new, it holds both promise and pitfalls for those exploring the unfamiliar, in search of the higher rewards business-as-usual is incapable of delivering.

To aid those just getting started, we sat down with our own Senior Director for Strategic Marketing Services, Toby Hawkes, to compile a guide with tips and insights to facilitate a successful move into CJM, including:

- The Key to Success
- Going Beyond Customer Journey Mapping
- Roadblocks
- Getting Started
- Retention vs. Acquisition
- Role of CJM Champion

## THE KEY TO SUCCESS

### WHAT'S YOUR TAKE ON A SUCCESSFUL CUSTOMER JOURNEY MANAGEMENT INITIATIVE?

That's an enormous question so to simplify, let me start with a couple of grounding principles.

First, the focus of all successful customer journey initiatives is invariably on improving the quality of the customer's overall experience with the organization, brand, or service. That improvement may be focused on making those experiences easier/less painful, more valuable/relevant, emotionally engaging, or ideally all three.

Second, the initiative should be designed with a clearly defined experience in mind. This may run the spectrum from the customer's entire lifecycle experience (over several years) with a brand – down to specified individual journeys (e.g. loyalty program enrollment, building a wish list or gift registry) – or even specific moments of truth within a journey. Ultimately, it is the latter – specific interactions – that need to be addressed to improve the overall experience. By keeping these strategic principles front and center when you are defining and scoping out your customer journey initiative, you give yourself a better chance of success.



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Of course, whatever improvement initiative is planned needs to be founded on a comprehensive understanding of the customers' experience on the journey – and their interactions both physical and digital. Gathering data on what a customer is doing, thinking, and feeling will provide the insight you need to develop the ideal journey and a roadmap of enhancements to get there. Voice of customer data along with tribal or

anecdotal information can help prioritize your efforts; however, really understanding the “as is” experience – *as well as developing the “to be”* – requires real customer data.

Unfortunately, having a clear idea of how you can manage, or perhaps enable, the customer’s journey is just part of the puzzle. Making a journey easy, valued, or engaging by providing the right message or offer, requires the orchestration and management of copious quantities of data, rules, and content, increasingly in real time. Making this happen is the ultimate team sport – requiring data scientists, analysts, communication specialists, customer strategists, product evangelists, and sales advocates – and an ecosystem of service providers, to come together with aligned goals.

Of course (and whisper this quietly), we understand that the customer can’t be the only consideration. We all have budgets, targets and fiscal years. Getting any sustained and enhanced program off the ground will be dependent on demonstrating clear business benefit. The right partners can help manage the costs of developing and implementing journey management, along with the selection and monitoring of the right program success metrics to track benefits.

## **GOING BEYOND CUSTOMER JOURNEY MAPPING**

### **WHAT DOES GOING BEYOND CUSTOMER JOURNEY MAPPING MEAN TO YOU?**

Many people get hung up on the concept of customer journey mapping as a solution. While undeniably a foundation of successful journey management, CJ mapping is just the means to an end. Mapping serves as a persuasive visual to articulate insights about a customer’s experience through a journey. It can serve to align team stakeholders and clearly demonstrate the sequence of interactions through which a customer moves. Moreover, when designing an enhanced or “to be” journey, a map can highlight the range of touchpoints that need to be refined to reach an ideal state.

When this is all done, and stakeholders are aligned on the future direction, the challenging work begins in defining the data inputs, decision rules, messaging strategy and content that will enable the customer to move through the journey. Furthermore, a platform is required to manage the sequence of events and actions that comprise the journey for an individual, requiring integration with multiple customer data sources, content management and messaging systems.



## ROADBLOCKS

ECONSULTANCY RECENTLY PUBLISHED A SURVEY OF 1000 MARKETING PROFESSIONALS CATEGORIZING THEIR ORGANIZATION'S UNDERSTANDING OF CUSTOMER JOURNEYS ON A SCALE OF NON-EXISTENT TO ADVANCED. NEARLY HALF WERE "STUCK" AT AN INTERMEDIATE LEVEL AND CITED THE CHALLENGES OF ACQUIRING, ACCESSING, AND ANALYZING DATA AS "ROADBLOCKS" FOR IMPROVEMENT.

IS THAT CONSISTENT WITH THE TYPES OF CLIENT ENGAGEMENTS YOU'VE LEAD AND IF SO, WHAT IS KEY TO OVERCOMING THOSE ROADBLOCKS?

Yes, absolutely. The biggest challenge can be connecting the data so it can move us from optimizing campaigns to optimizing relationships. This means better understanding of customers, responding in real time with relevant information, and seamless execution across all channels.

The data will make it possible for brands to be relevant and timely, providing the critical details of what is important and relevant to each person. With first and third-party data

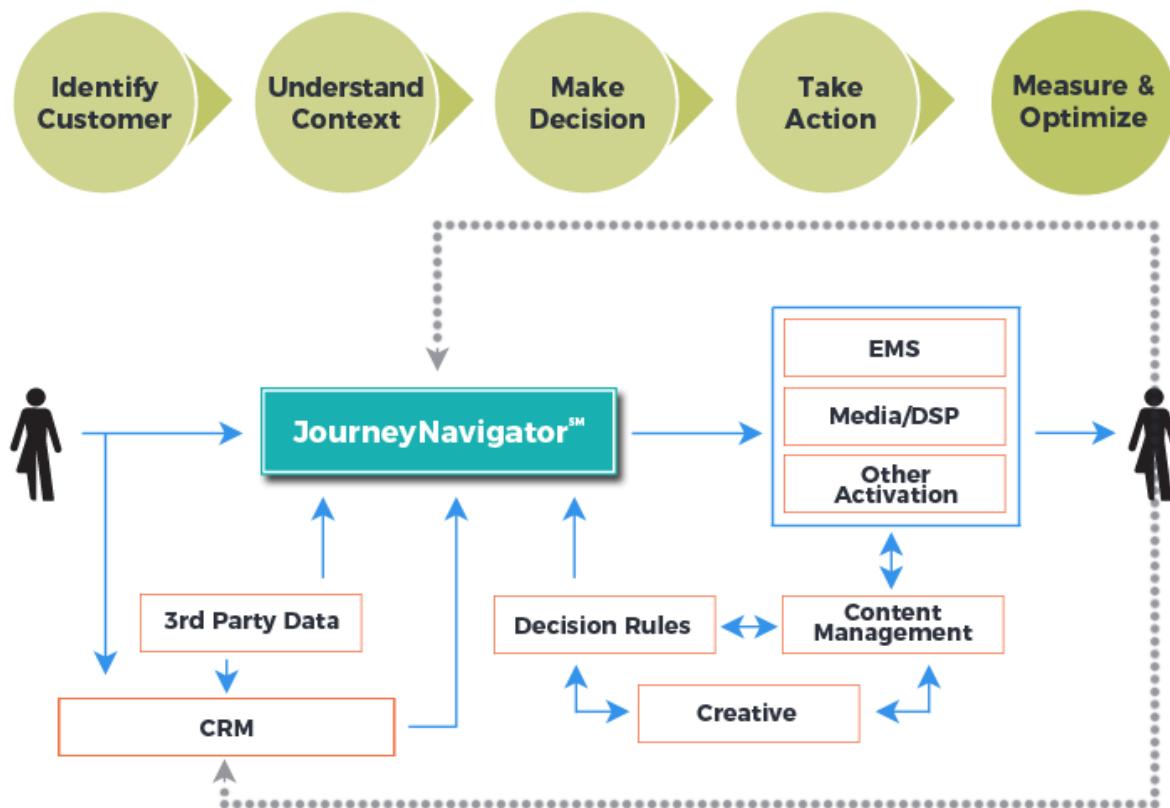
becoming increasingly available, the challenge becomes focused on collecting, assessing, and using data in real time.

Frequent operational/technical issues include:

- Legacy data silos
- Difficulties matching data across channels (e.g. online and in store customer purchase data)
- Insufficient data management or analytics capability to create effective decision rules

## **Putting data to work.**

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*JourneyNavigator,<sup>SM</sup> is 89 Degrees' proprietary customer journey management solution. Powered by Kitewheel, a recognized Visionary in Gartner's 2017 Digital Engagement Hub Magic Quadrant, JourneyNavigator comes with dozens of pre-built connectors, allowing marketers to fully integrate existing marketing technologies, including CRM, content management systems, ad tech, and social media.*

Overcoming these barriers (and many other related issues) isn't easy but can invariably be achieved by committing to developing a personalized "customer-first" approach.

One notable feature of the companies prioritizing customer experience transformation is the presence of a senior leader to help develop and sustain cross business collaboration while increasing quality and improved outcomes as the primary goals.

## **GETTING STARTED**

**IN THE SAME SURVEY, NEARLY A THIRD OF RESPONDERS INDICATED THAT THEY HAVE A BUSINESS CASE JUSTIFYING INVESTMENT IN "TECHNOLOGY AND RESOURCES" TO IMPROVE THEIR UNDERSTANDING, BUT LACK DIRECTION AND NEED "NEXT STEPS FOR MAPPING THE CUSTOMER JOURNEY."**

### **WHAT WOULD YOU SAY TO THOSE COMPANIES?**

The good news is that CJM doesn't have to start with a massive investment and at a massive scale; it can be approached in a way that makes sense for each business. To unlock appropriate next steps, start with asking:

- 1) What does the ideal journey look like?
- 2) What can our current infrastructure support?
- 3) Who inside and outside our organization owns what?
- 4) How will those relationships and responsibilities change in a new CJM-centric world?

These are the questions I ask when scoping out a plan to improve CJM capabilities, as the answers will determine how big of a bite from the apple we'll take.

# WHERE TO START

Customer Journey Management isn't an all or nothing commitment. This makes it easier for marketers to take on POC projects they can successfully handle. They simply need to decide how big of a bite from the apple is needed to generate the customer experience (CX) gains necessary to justify further investment and significant business transformation.

How big of a bite is right for you?



## SMALL

### EASY ACTIONS CAN GO A LONG WAY TOWARDS IMPROVING CX

Actions that make the customer experience better can be as simple as a thank you note or a post-purchase reminder to complete a review. These soft touches nudge the customer to act, and can make a significant difference.



## MEDIUM

### IDENTIFY JOURNEYS THAT ARE DISCRETE AND PUT THEM INTO MARKET

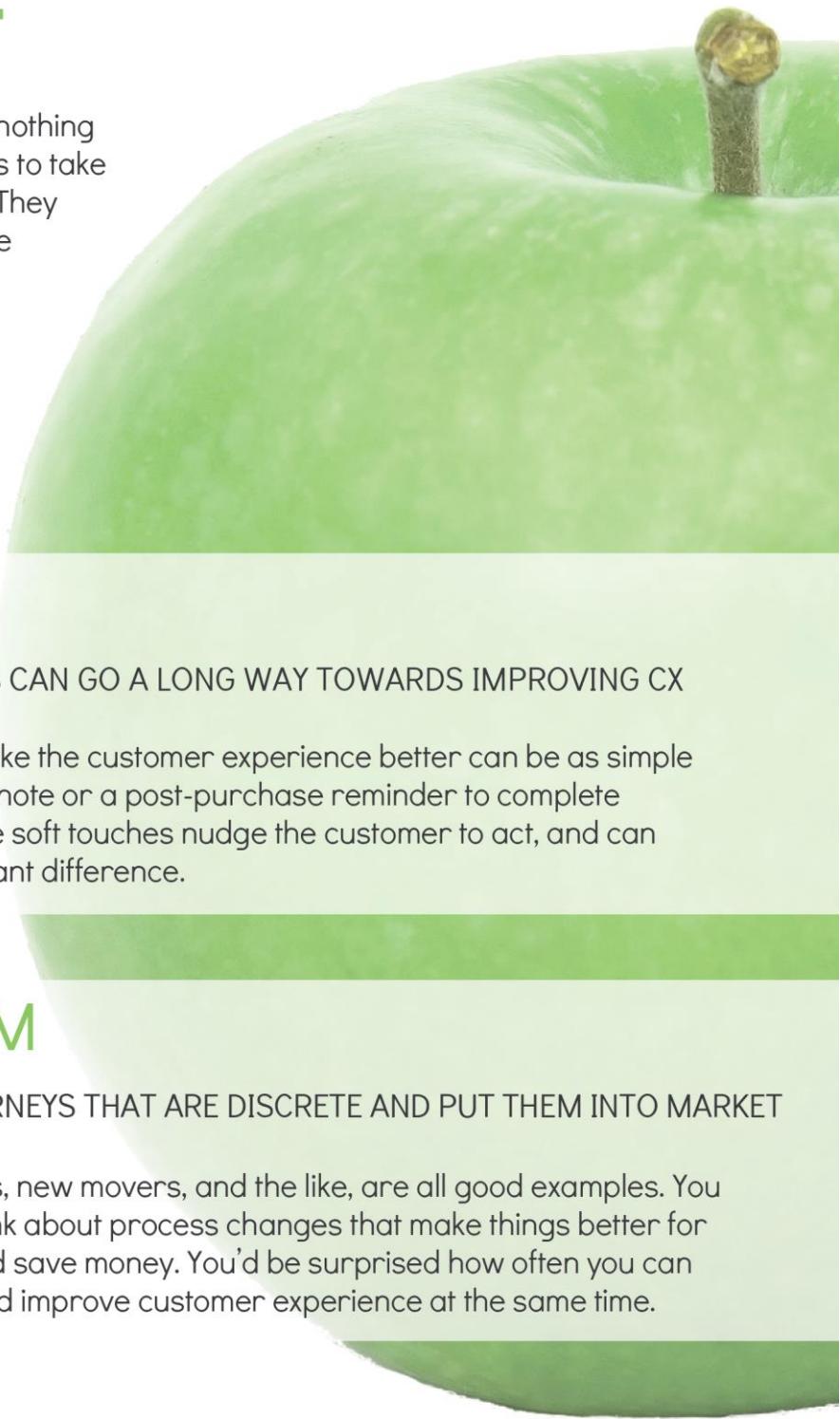
New customers, new movers, and the like, are all good examples. You should also think about process changes that make things better for a customer and save money. You'd be surprised how often you can find savings and improve customer experience at the same time.



## LARGE

### SWING FOR THE FENCES BY RE-ENVISIONING YOUR CX

CJM can also devise an experience that is so compelling that it makes the idea of even considering alternatives the exception rather than the rule. In these cases, CJM is about re-envisioning and replacing what happens today with an entirely new experience for tomorrow. Apps that allow people to take their picture, see how it looks with different make-up, and complete the order with the look that looks just right, are good examples of this approach. Why go anywhere else?



## RETENTION VS. ACQUISITION

YOU SPOKE EARLIER ABOUT THE FUNCTION OF CJM IS TO MAKE THINGS EASIER FOR THE CUSTOMER. ULTIMATELY THOUGH, STAKEHOLDERS CARE ABOUT ACQUIRING AND RETAINING HIGHLY-PROFITABLE CUSTOMERS.

HOW DO YOU NAVIGATE BETWEEN THOSE TWO OBJECTIVES WHEN THEY DON'T ALIGN?

All businesses need to define their marketing strategy to include the appropriate balance between new customer acquisition and retaining existing loyal customers – it's the classic “leaky bucket” conundrum. Happy or delighted customers buy more, stay with you longer, often have a lower cost to serve (you must deal with fewer complaints) and ideally will advocate on your behalf through positive word of mouth, ratings, and reviews. However, at its core for a sustainable business, you must provide a value prop and experience consistent with your brand promise and operating model.

If your focus requires you to continually acquire new customers, it probably makes sense for you to ensure you are optimizing the new customer journey; for example, removing friction in the customer onboarding journey. Many consumer mortgage companies are working hard to make the new customer journey easier by minimizing duplicative data entry and providing automated credit approval steps.

Ultimately CJM is about an improved customer experience and delivering more positive outcomes. It is hard to see that at odds with business ROI. At the end, the CJM business case revolves around changes in big metrics, e.g. churn, acquisition, migration from trial to loyal customer, and share of wallet. Improving these numbers will move the business forward.

## ROLE OF CJM CHAMPION

WHAT IS THE RIGHT SET OF SKILLS FOR A PROJECT TEAM THAT CAN SUCCESSFULLY DELIVER ON THE PROMISE OF CJM?

As I mentioned earlier, implementing CJM involves orchestrating many moving parts across an organization and its service partners. Ideally it will involve all functions of a business and will draw on in-house expertise – and most likely third party solution

providers – in data, analytics, technology, marketing, sales, and service. Most importantly, a company needs a senior champion to help align functions and priorities.

A senior champion can provide essential guidance, feedback and support to the program team and help break down departmental silos. By demonstrating customer empathy they can provide a visible symbol of an organizational commitment to the customer. Moreover, as a program builds momentum, they will be vital in helping communicate the link between customer programs and ROI – ensuring that boardroom decisions are viewed through a customer lens, increasing the likelihood that progress is maintained towards mid and long term goals.

In reality, when an organization is committed to a “customer-first” approach, it is possible to reduce and manage this complexity by selecting a relatively simple journey initiative to act as a proof of concept. The momentum and learning created by executing a genuinely customer focused initiative with measurable results, usually makes a compelling case for a wider transformation program.

## ABOUT:

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### **Toby Hawkes, Senior Director, Strategic Marketing Services**

As Senior Director on the Strategic Marketing Services team, Toby is responsible for the development of key retail clients. He brings over 20 years of global experience driving strategic change, growth, and improvement programs across numerous industry verticals with a strong focus on the Retail and CPG space. He is passionate about driving customer strategy, experience, lifetime value, and loyalty through the better collection, analysis, and application of customer insights. Current and past clients include IKEA, Rolls-Royce, Nestle, Kimberley Clark, Sephora, Home Depot, Unilever, Lowes, JP Morgan Chase, Exxon-Mobil, Marks & Spencer, and Tesco.