



THE CUSTOMER JOURNEY GUIDEBOOK

**BUILD PROACTIVE, PERSONALIZED
EXPERIENCES**



CONTENTS

- 3** Introduction
- 4** The Case For Proactive CX
- 6** Phase One: Starting
- 9** Phase Two: Piloting
- 13** Phase Three: Rolling Out
- 15** Phase Four: Scaling
- 17** Journey Maturity at a Glance



INTRODUCTION

AT CSG, OUR VISION IS FLEXIBLE, SEAMLESS, LIMITLESS COMMUNICATIONS, INFORMATION AND CONTENT SERVICES FOR EVERYONE.

We clearly see companies' urgent demand for better ways to deliver consistent, real-time personalization across different marketing channels and stages of the customer journey—from onboarding to retention—without needing to invest in massively expensive systems or lock in to a single cloud vendor's ecosystem.

Today, marketers' expertise in delivering consistent engagements extends into all areas of the customer experience, from customer service to points of sale to product delivery and more. Consumers expect seamlessness across all touchpoints with the brands they do business with, and will make purchasing decisions based on the quality of the experience.

More than ever before, customer journeys and the marketers who in many cases spearheaded them are absolutely central to overall brand success. Customer journeys create competitive experiences that drive loyalty and in many cases are the primary influence behind purchasing decisions.

Creating a robust and effective customer journey strategy should be a business priority for any brand hoping to compete against experience experts in the coming years.

As a leader in the customer journey orchestration space, we are sharing a maturity model that we hope will serve as an industry benchmark in a space where concrete best practices are still few and far between. The model serves two main purposes:

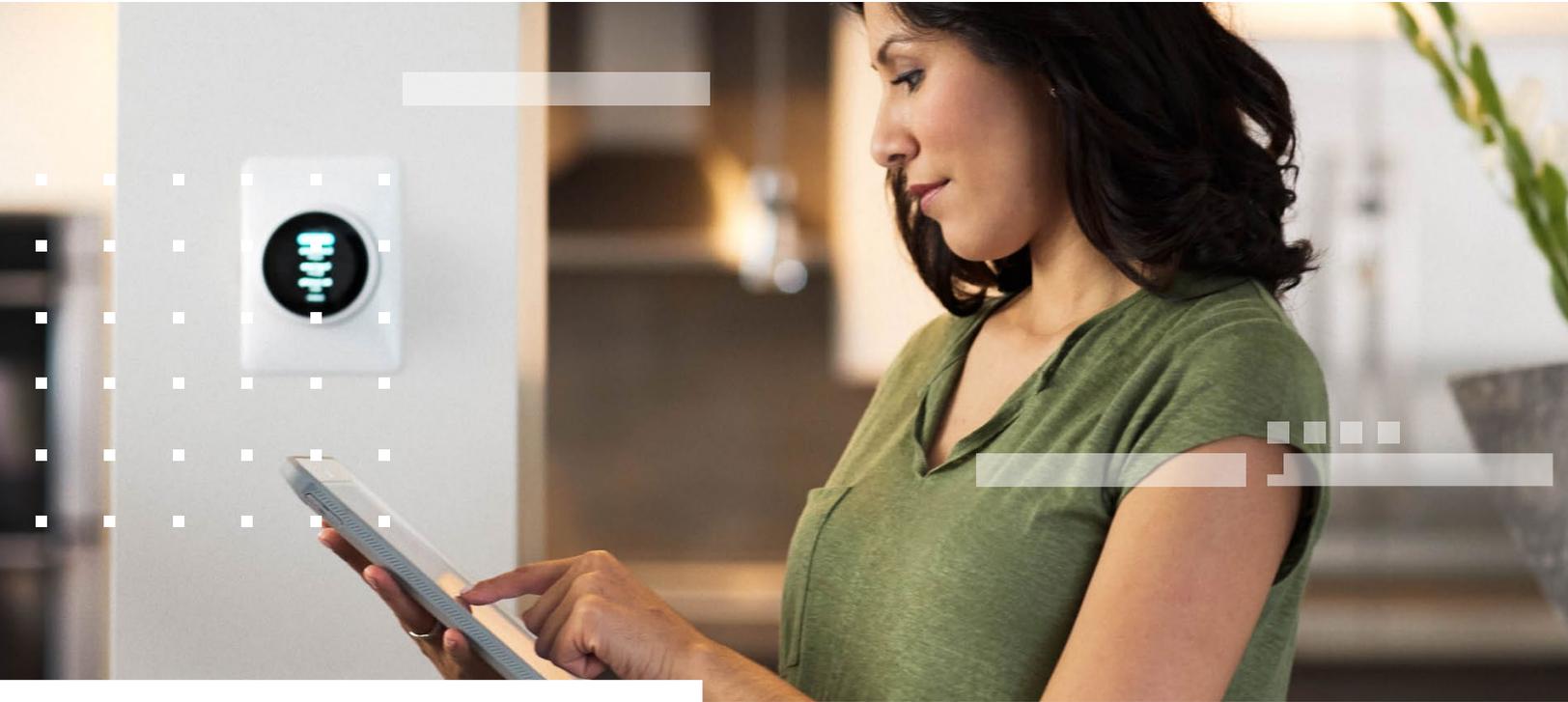
1. TO HELP BUSINESSES ACHIEVE REAL VALUE FROM CUSTOMER JOURNEYS AT EVERY STAGE OF MATURITY

Rather than waiting for returns following lengthy deployments

2. TO ENABLE A PROACTIVE RATHER THAN REACTIVE CUSTOMER EXPERIENCE

In an era when CX is a brand's most important competitive differentiator

We hope you'll find this guidebook useful no matter where you are on your customer journey journey. If you have questions, comments or want to learn even more from a CSG team member, we'd love to hear from you.



THE CASE FOR PROACTIVE CX

What comes to mind when you think of customer experience, or CX? For many brands, the customer experience is how the business responds to a customer interaction. Was a customer service issue addressed satisfactorily? Did a shopper find what they were looking for? Were orders fulfilled on time?

This mindset leads to essentially a binary view of the customer experience in which things are either working or they aren't. When the business receives a signal, like a customer complaint, that indicates something isn't working, then that becomes a problem to solve until that element of the system is back to functioning properly. This is what we call a "reactive customer experience," and it means that the business

spends their time fixing customer issues rather than optimizing the customer experience as a whole.

Unfortunately, in a world where customer experience is a crucial differentiator, this isn't a competitive way to operate. **To compete, brands need to shift towards a proactive CX in which the question is no longer, "What isn't working?" but, "What can we do even better?"** Brands like Amazon and Uber understand that the customer experience doesn't begin when the customer initiates an interaction, but well before. Being proactive and anticipating customer needs before they're stated is how these companies have grown into household names.



JAKE SOROFMAN,
RESEARCH DIRECTOR, GARTNER
IN MANY INDUSTRIES, HYPERCOMPETITION HAS
ERODED TRADITIONAL PRODUCT AND SERVICE
ADVANTAGES, MAKING CUSTOMER EXPERIENCE
THE NEW COMPETITIVE BATTLEFIELD.

What's the key to start shifting from reactive to proactive CX? It starts by moving away from the binary, working/not working view of customer interactions and towards a holistic view of the entire customer journey. Once you have a sense of how customers are progressing through the many touchpoints that make up customer journeys, you can start to shape those journeys into cohesive and anticipatory experiences.

This is the heart of proactive customer experience, and it is completely dependent on an effective customer journey strategy. In many senses, the journey is the experience, and one cannot exist without the other.

The rest of this guidebook will walk you through how to build a journey strategy from the ground up, transforming your customer experience to be completely oriented around the customer themselves. Ultimately, this will make your business more competitive while delivering value along the way. Just like the customer experience, building a journey strategy is a journey itself, and we want to make it as enjoyable, seamless and valuable as possible.

WHY CX MATTERS:



89 percent of companies say that customer experience is already their primary basis for competition. [Source](#)



Only 17 percent of US brands provide good customer experiences, and only 1 percent are rated excellent. [Source](#)



86 percent of buyers will pay more for a better customer experience, but only 1 percent of customers feel that brands consistently meet their expectations. [Source](#)



89 percent of consumers begin doing business with a competitor following a poor customer experience. [Source](#)



Customer experience leaders increase revenue 5 to 10 percent and reduce costs 15 to 25 percent within two to three years.

[Source](#)



Poor personalization cost U.S. organizations \$756 billion in 2016. [Source](#)



PHASE ONE: STARTING

What defines a business that is ready to begin a customer journey strategy? It boils down to one thing: a realization that customer experience is the modern competitive battleground, and moving towards a better, more proactive CX is a business necessity. If you read the previous section and agreed, congratulations, you're now in Phase One and already well on your way to getting started!

Like any journey, the outset is when the process seems the most daunting. The final destination seems far away and the trip is uncertain. Fortunately, we've identified a set of concrete actions that you can take to get started on this journey painlessly, while deriving value for the business that will last.

IF YOU'RE JUST GETTING STARTED WITH CUSTOMER JOURNEYS AND IMPROVING YOUR BRAND'S CUSTOMER EXPERIENCE, HERE'S HOW TO GET THE MOST OUT OF THIS FIRST LEVEL OF CUSTOMER JOURNEY MATURITY.

STEP 1: APPOINT A CX LEADER

Who, within your organization, is most equipped to identify macro issues with CX and spearhead a company-wide transformation? In our experience, it's usually someone higher up in the marketing or customer service team, or a dedicated chief customer officer. It might even be you, since you're reading this!

The point is that, if your customer journey program is to succeed, it needs a champion. That person will be critical moving forward. Oftentimes, a company gives the CX champion a formal title as the leader of customer experience, which gives them an official mandate to embark on the sometimes difficult work of moving the organization in a new direction.

Whether your CX champion has a dedicated role or is simply wearing multiple hats, appointing a lead as the very first step is critical.



STEP 2: IDENTIFY PAIN POINTS

Our experience suggests that most organizations already have a good sense of the pain points and friction points in their customers experience. Some questions you might ask include:

1. Was a customer service issue addressed satisfactorily?
2. Did a shopper find what they were looking for?
3. Is a loyalty program actually keeping customers loyal?

If the answer to these questions is frequently no, these are the types of pain points that a customer journey strategy can solve.

Using these examples to spark your thinking, start by creating a list of the main pain points plaguing your organization. The most pressing ones will typically be those that most directly impact revenue—a complex buying process, poor customer service and lackluster loyalty programs.

Not only are issues that impact revenue the most critical, but they'll help achieve organizational buy-in much more quickly. If you can demonstrate that a CX pain point is directly impacting your company's bottom line, you can be sure that any competent executive will pay close attention and endorse reasonable solutions.

Eventually, you'll be optimizing and anticipating every possible interaction, but for now let's focus on the most glaring issues and list them out.

STEP 3: MAP JOURNEYS

You now have a CX leader and your list of use cases and pain points that your customer journey strategy will tackle. Next, it's time to move beyond thinking about solving your use cases in a vacuum—this one-off approach represents a reactive approach and is not optimal.

To become more proactive, you need to map the customer journeys (the experiences from the customers' perspective) that surround and create pain points.

Mapping journeys sounds a bit technical, but the process really requires little more than a pen, paper and some participants with a solid understanding of how your customers interact with the business. Let's say, for example, that you're an online retailer with a customer retention problem. Check out Figure 1 on the next page to see how a journey map around that issue might look.

The value of the customer journey map here is that it broadens the number of touchpoints related to the pain point. This allows for a more holistic analysis of what the journey should be. Maybe the sales process is too lengthy. Maybe the delivery didn't show up on time. Regardless, creating a number of journey maps centered around critical use cases and pain points will immediately add value by lending more perspective to problem areas along the entire journey and reducing the guesswork that comes with a narrower view.

For now, these maps will just include the "as-is" state of a particular pain point and its surrounding touchpoints. Soon, they'll become a mechanism to collect data about this customer journey from which your organization can learn and determine where the experience can be made even better.



Figure 1: Example journey map of an online retailer with a customer retention problem

STEP 4: IDENTIFY METRICS

After you've identified pain points and mapped the surrounding journeys, think about what would constitute a reasonable resolution to these problems. In other words, set metrics or KPIs. How much more does the conversion or click-through rate, for example, need to increase in order to constitute successful resolution of an issue? What would be an ideal reduction in customer complaints or returns? You'll use these metrics to measure the next phases of your customer journey program.

Retention Metrics:

- Visit Count
- Channel Count

Engagement Metrics:

- CTR
- Time on Site
- Bounce rate

STEP 5: INVEST IN JOURNEY ORCHESTRATION SOFTWARE

Once you've gotten some buy-in and developed maps, it's a good idea to set up journey mapping software to catalog your journeys. Ideally, this

software will eventually connect to customer-facing channels and help you measure and orchestrate these journeys in the later stages of maturity.

If you've completed this phase, you'll have achieved the following outcomes:

- Created an initial bank of customer journeys that surround key business pain points
- Defined the metrics that constitute success for your customer journey program
- Achieved organizational buy-in to move to the next phase

PHASE ONE EXAMPLE: LUXURY CAR BRAND

When a renowned luxury car brand was getting started with customer journeys, they knew that a better customer experience was critical, but faced two key pain points:

- The website did not deliver personalized experiences to known customers
- Customer inquiries went unanswered for lengthy periods

After completing their Phase One, they made the map in Figure 2 below.

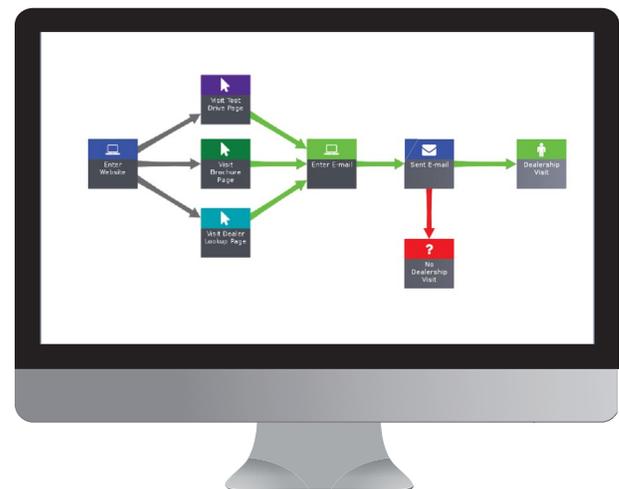


Figure 2: Luxury car brand's Phase One journey map



TOGETHER, YOU WIN.



PHASE TWO: PILOTING

The second phase of customer journey maturity, the piloting phase, is broken into two main parts. First, you'll take your mapped customer journeys and track some analytics around them to understand actual customer activity.

Next, you'll make your first changes to your "as-is" journey maps. Maybe you want to test the impact that a follow-up email or personalized web content will have on a customer's experience? Using customer journey orchestration software, you'll execute your first pilot journeys to see how they perform with actual customers while testing, iterating and tweaking along the way.

This phase is critical because it's the first time you'll start generating real metrics from actual customer journey interactions with customers in order to get a sense of how your orchestrated journeys are performing.

USING YOUR ROADMAP AND KPIS FROM PHASE ONE, HERE'S HOW TO HIT THE GROUND RUNNING AND START PILOTING YOUR CUSTOMER JOURNEYS IN PHASE TWO.

STEP 1: GO FROM CX LEADER TO CX GROUP

When your customer journey program was still theoretical in Phase One, having a single CX stakeholder who worked with others as necessary to identify pain points and map journeys was enough to achieve success.

But, now that you're going to begin deploying and measuring actual customer journeys, you can't do it alone. You need a group of people who can execute, oversee and measure the results of your early customer journey pilots. These people should be members of customer-facing teams with the ability to tweak customer-facing systems. Marketing, sales and customer service are great places to pull these people from.

The CX leader from Phase One will now be responsible for planning strategy, assigning tasks out to the group and managing the collection and reporting of results.



STEP 2: MEASURE BASIC JOURNEY ANALYTICS

Journey analytics allow companies to track and measure how consumers engage with their organization across processes and channels.

It would be highly unusual if your company didn't already track a number of data points that are key to this step. Analytics such as conversion rates, satisfaction levels, and average sales cycle length are closely watched at most organizations, but often in channel or business unit silos. Customer service has their KPIs and the marketing and sales teams have others.

Journey analytics, like journey mapping, requires consolidating those metrics into a bigger picture. This will flesh out the holistic customer journey map of the pain points that you identified in Phase One by putting actual metrics behind the static map.

STEP 3: IDENTIFY AREAS FOR IMPROVEMENT

Now that you've mapped and begun to measure real-world journeys, your journey analytics can start to identify where improvements are needed the most. Start by looking at your initial journey metrics and determining where customers are either not satisfied or failing to proceed to the next step of the mapped journey.

Common issues you might identify could be failure to complete a website form, inability to find a store or make a return, dropping off a phone line during a customer service call, or unresponsiveness following an email. Once you've identified these, you can come up with an operational process to reduce the frequency of the issues.

This means defining journey logic to increase the likelihood of success. Should an incomplete form trigger a follow-up email? At what point does an unanswered email warrant another email? Determining how linking channels together can help reduce points of friction sets the stage for putting those connections into action.

The focus on initial pain points is essential through the first two phases of maturity, as they position you for success when it comes time to start executing on journeys.

CAUTION:

Many organizations implement standalone journey reporting practices and create independent stacks of data. While using these may accelerate reporting early in the customer journey process, our experience at CSG is that this commonly creates an unwieldy business intelligence environment that runs parallel to whatever system the organization typically relies on.

In order for a journey-centric analytics approach to succeed, it must become part of the day-to-day fabric of an organization's operating model and therefore the metrics must become integrated into the normal BI and big data toolsets. The effort to integrate journey analytics into the existing toolsets early in a project will significantly reduce the work to merge proprietary models into it later.



TOGETHER, YOU WIN.

STEP 4: INVEST IN JOURNEY ANALYTICS & ORCHESTRATION SOFTWARE

Invest in Journey Analytics & Orchestration Software

At this point in your customer journey maturity, your organization now needs new technology before moving further along. Specialized software is required to begin executing on the journey maps and strategy you've devised.

Two specific capabilities are required:

1. Customer journey analytics combines big data, analytics and visualization to help you understand how your customer journeys are performing. It has the ability to connect to your customer-facing channels on one side, and your organization's normal BI tools on the other. Without it, you'll still be dealing with the issue of data silos while manually consolidating and processing data—probably like many of you had to do earlier in this phase of maturity!

Further, journey analytics enable the agile approach that a customer journey program requires. You'll get real-time insight into performance around key metrics.

2. Customer journey orchestration is absolutely critical to any customer journey program. Orchestration tools, like CSG's, enable the execution of journeys by connecting to databases and customer-facing systems in order to deliver seamless and personalized experiences across a wide array of channels.

This is the essence of proactive CX—having an integrated system that touches on every element of the journey allows for an entirely anticipatory experience that goes beyond the basic personalization seen in display ads or website experiences driven by cookies.

A tool that allows you to measure and orchestrate journeys (like ours!) will enable you to make your customer journey program a reality.

CSG Tip:

It's important to go slow and try and drive as much initial value as possible. Demonstrating success in one or two journeys is a lot better to achieve buy-in than launching 10 and quickly becoming overwhelmed throughout the pilot process.



STEP 5: LAUNCH PILOTS

Once you've chosen your customer journey software, it's time to start rolling out pilot journeys. These will be based on the maps created in Phase One and the updates you've planned in step three of this phase. Ideally make sure you have selected a journey technology that supports rapid, low cost pilots, therefore interfacing to all your current systems.

Launching a customer journey requires integrating parts of your tech stack into your orchestration software. Connecting some channels and relying on a consolidated customer data source means that you can deliver a personalized experience across otherwise disparate channels.

At this point, the orchestration engine will start running and be "always-on" tracking and executing the journey. This is often a first for an organization. Once these pilots are up and running, it's critical to constantly monitor and adjust them in real time to ensure they're hitting the metrics you've already identified.

By running these pilots, you will demonstrate how customer journeys can address critical pain points and increase metrics that tie directly to the bottom line.

At the end of this stage, you'll have:

- Created a broader team of CX stakeholders
- Measured your as-is customer journeys against your customer journey map
- Purchased a customer journey software
- Launched initial customer journey pilots
- Demonstrated a business case for rolling out journeys to the broader organization

PHASE TWO EXAMPLE: MASS-MARKET GERMAN CAR BRAND

A beloved car brand sought to deliver a more personalized experience across their website to ultimately improve consumer engagement and drive consumers along their journey. When they came to us, the brand had already identified and created customer journey maps for pain points in Phase One, which included:

- Static, impersonal web experience
- No retention of customer behavior or engagement on the website
- Disparate systems

Using our journey orchestration solution to kick off Phase Two of their customer journey maturity, the company ran several pilot customer journey projects. Initially, using our solution to remember anonymous browsing behavior between visits, the car brand personalized website content to each consumer, including changing the hero image, the order of menu options and recalling vehicle configurations.

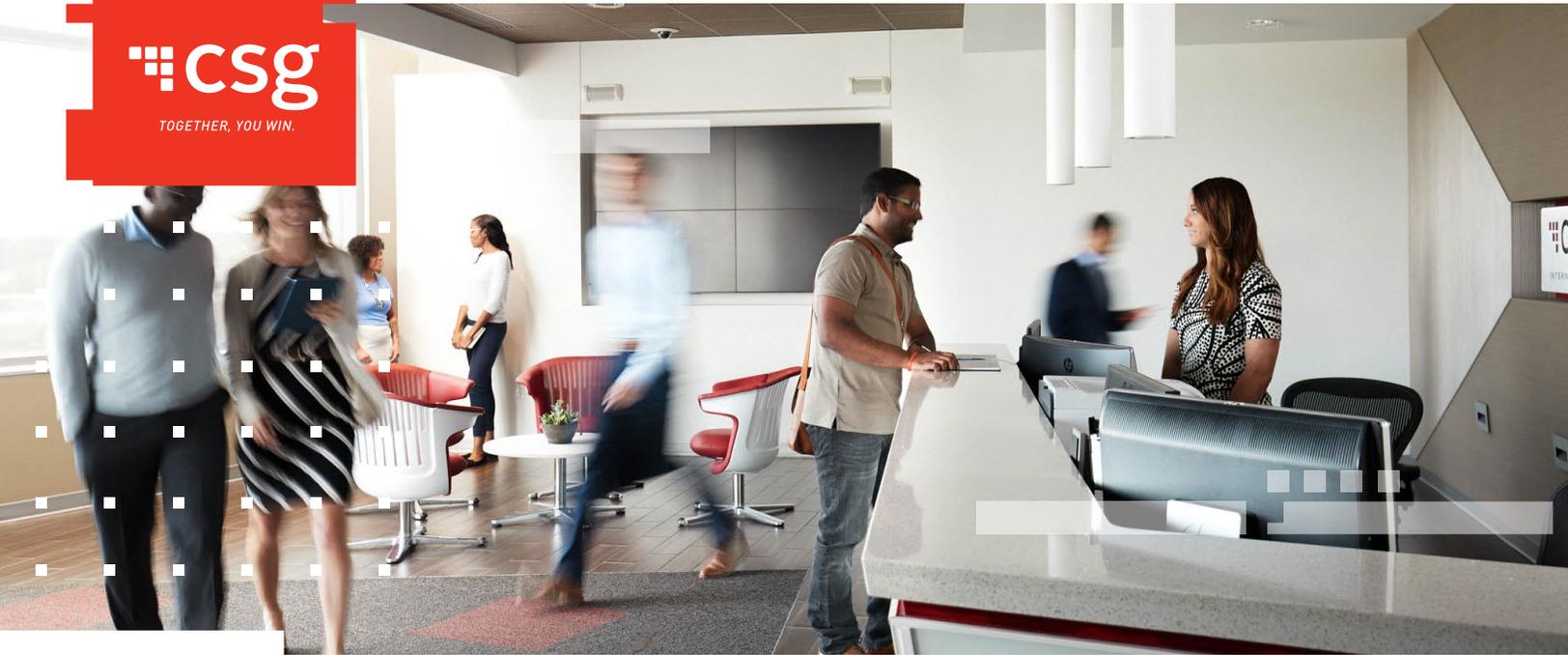
For a second pilot, their team then linked to search and ad servers to identify what brought new anonymous visitors to the website and subsequently personalized content based on this source.

These achieved some great results on their website, including:

140% uplift in pages viewed

110% uplift in dwell time

100% conversion uplift



PHASE THREE: ROLLING OUT

If you're at Phase Three of maturity, you've already conquered the most labor-intensive and difficult phases in many respects. Identifying use cases, mapping journeys, planning journey improvements, investing in and optimizing the required software can all be tough, not to mention getting buy-in from the organization and executives.

At this point, you know why your company needs customer journeys and are well on your way to a truly proactive customer experience. It's time to roll out journeys to the broader organization across verticals. We'll show you how.

STEP 1: CREATE PROJECT TEAMS

Phase Three is all about implementing journeys across core verticals of the business and rolling out on a larger scale. Since customer journeys are becoming a core part of your business, project teams must be created in order to establish ownership and lead their vertical's journey strategy.

These teams are often led by project managers. PMs oversee a group of people similar to the original core stakeholder group but specialized to one area of the business. Basically, you're replicating the original CX leader and team on a smaller scale.

Simultaneously, a team should be focused on beginning to build an organization-wide library of journey best practices and maps. This team is responsible for rolling out expertise to project teams—facilitating journey mapping workshops, analytical reporting workshops and KPI development, plus capturing best-of-breed journey maps and models that can be reused by other teams.

CSG Tip:

If you're not careful, analytics can become especially unwieldy at this stage. Journeys are going to be generating an extremely high volume of data from a wide variety of systems. You'll need the right combination of software and expertise to make sense of it. If you haven't brought one in already, a data scientist will be extremely useful at this stage to ensure that data is being properly analyzed and reported so that business value continues to be demonstrated.

As you map, analyze and orchestrate across new pain points in other verticals, it's crucial to never stop testing and learning in an agile and iterative manner. Identifying issues and adjusting on the fly will ensure that you continue to hit your key metrics.



STEP 2: REPLICATE THE PROCESS

With your team in place, it's time to use the best practices that you developed in Phases One and Two and deploy journeys across verticals beyond the ones you began with.

You're now on your way to being a full-fledged customer journey expert. Here's what you've achieved in Phase Three:

- Achieved organizational buy-in
- Used a core team to train project managers and teams across verticals
- Increased the delivery of key business outcomes by upping the number of live customer journeys

📖 PHASE THREE EXAMPLE: SIT-DOWN CHAIN RESTAURANT

A popular American chain restaurant is a great example of a brand that moved from initial customer journey trials to a fully blown roll-out. First pilots were focused on real-time email for specific segments of their loyalty program—ensuring email content was relevant at the exact time emails were opened—e.g. making lunch offers in the morning, and dinner offers in the afternoon.

Once evidence was collected to make offers more relevant, increase their success rate and grow customer purchase volumes, pilot roll-outs multiplied and grew to become a set of customer journeys serving more of the restaurant's customer base. All customers now receive real-time offers personalized to their previous behavior, location and preferences. These can be delivered over channels such as email, text, mobile push and in-store devices.



PHASE FOUR: SCALING

Your business has built all the required skills for orchestrating customer journeys and now moves into a phase of scaling up and out. While Phase Three was all about deploying journeys to the most critical verticals, Phase Four is when customer journeys become inseparable from the core strategy of the business and start delivering truly a proactive customer experience across all touchpoints and verticals.

If you're ready for the highest level of customer journey maturity, read on to learn what you need to do next.

STEP 1: APPOINT CUSTOMER JOURNEY MANAGERS

At this point, your business requires dedicated staff who focus explicitly on customer journeys and ensure that journeys touch every element of the business.

This is where journey managers come in. The person in this role is responsible for implementing and overseeing customer journeys as a full-time job.

These will likely be people who developed specialized journey knowledge during Phase Three.

Today, journey managers are few and far between as it's still an emerging role. We're just starting to see them appear in industries that tend to have more advanced customer journey programs, such as financial services. If they're not hired from within, qualifications often include experience in product strategy, customer experience and deep knowledge of journeys within industry verticals.

A recent search of job postings show that major brands like Comcast, Estée Lauder and JPMorgan Chase are looking to hire journey managers.



STEP 2: ACHIEVE JOURNEY OPTIMIZATION

Journey optimization embodies the organizational change that takes place at this stage. Rather than piloting or rolling out, the organization has achieved a level of ongoing measurement and refinement of its customer journeys, a focus that likely reaches all the way to the executive level.

Thanks to the role that customer journeys now play in driving core business results, the entire organization will be aware of and involved with journeys in at least some capacity. The organization will have a widely accessible “journey dashboard” to keep the organization aware of what the customers are doing.

It’s absolutely crucial that the same agility that characterized the first three Phases persists as journeys scale across the business and transform the customer experience.

STEP 3: DEVELOP A JOURNEY ATLAS

A journey atlas is a centralized document or database that contains all of the organization’s journey orchestrations across verticals and customer personas. This becomes a living resource that ensures best practices are maintained and refined, and ensures the perpetuation of journeys across the entire business.

Phase Four of customer journey maturity never really ends, so there aren’t any final tasks to complete. But, a business who is in Phase Four is characterized by:

- Multiple journeys are scaled and maintained across the business, and new ones are consistently piloted
- Journeys deliver, and are measured on, their ability to deliver true impact on the bottom line

- The business is firmly oriented towards the customer, and delivers an anticipatory and proactive experience that retains more customers and differentiates from competitors

PHASE FOUR EXAMPLE: BABY FOOD BRAND

This baby food brand has been running customer journeys for over four years. As a pioneer in this space, they have definitely reached Phase Four of maturity. Their work began with the introduction of a “gamified” experience on their website—guiding young mothers through seven stages of their child’s development. These initial journeys were then rolled out to additional channels to deliver personalized experiences via email and the customer service call center.

Following the practical experience of building and running customer journeys, the company achieved a 27 percent increase in sales from the customers going through this journey. As a result, they further expanded their activities and moved into optimization mode. The company regularly identifies steps in the customer’s journey where engagement is broken, or consumers pause, are regularly identified and resolved by quickly updating rules or tweaking journey paths.

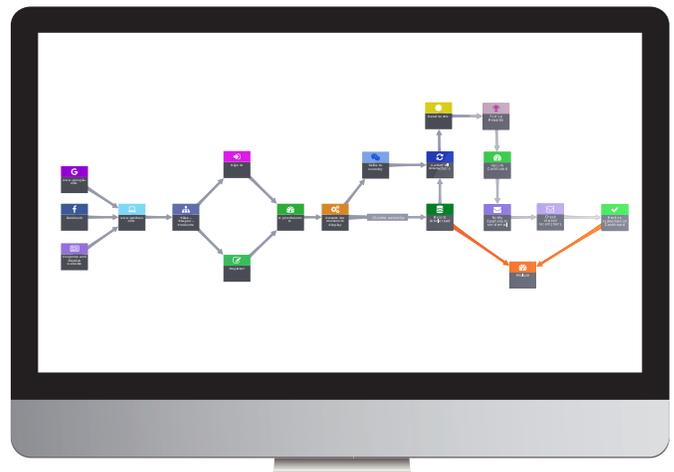
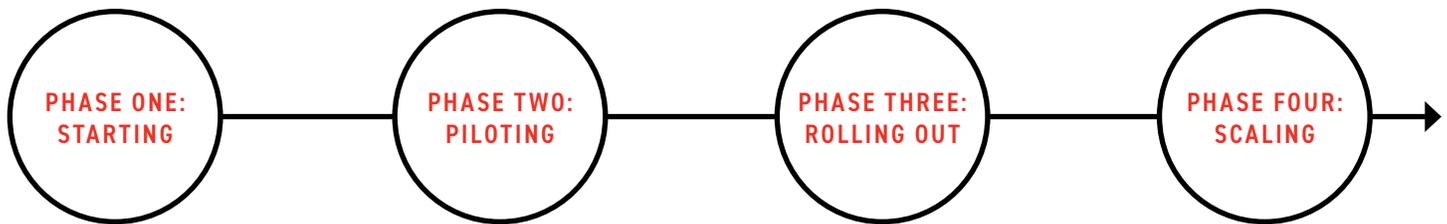


Figure 3: Master map for their journey efforts



JOURNEY MATURITY AT A GLANCE

NEED A QUICK REFRESHER ON OUR CUSTOMER JOURNEY MATURITY MODEL? THE FOLLOWING CHART SHOULD HELP YOU OUT.



PEOPLE:

CX Lead

PROCESS:

1. Identify use cases and key metrics
2. Map journeys

KEY OUTCOME:

1. Funding and support for initial pilot

PEOPLE:

CX Committee

PROCESS:

1. Measure key metrics and ID areas for improvement
2. Purchase mapping and orchestration software
3. Launch pilot

KEY OUTCOMES:

1. Launch and measure customer journey pilot
2. Build business case for broader rollout

PEOPLE:

CX Project Team

PROCESS:

1. Roll out customer journeys across multiple use cases, analyzing and refining along the way

KEY OUTCOMES:

1. Tangible ROI
2. Increase in key metrics
3. Learnings from continuous testing and optimization

PEOPLE:

Customer Journey Managers

PROCESS:

1. Deploy and optimize journeys across the organization
2. Develop a journey atlas

KEY OUTCOMES:

1. Increase in ROI across the business
2. Truly proactive CX



TOGETHER, YOU WIN.



ABOUT CSG

CSG tackles the complexity of business evolution in the digital age for the most respected communications, media and entertainment service providers worldwide. With over 35 years of experience, CSG delivers revenue management, customer experience and digital monetization solutions for every stage of the customer lifecycle. The company is the trusted partner driving digital transformation for leading global brands, including Arrow, AT&T, Bharti Airtel, Charter Communications, Comcast, DISH, Eastlink, iFlix, MTN, TalkTalk, Telefonica, Telstra and Verizon.

Ready to embark on proactive journey orchestration and reap the rewards of true customer satisfaction? For more information, visit our website at csgi.com and follow us on [LinkedIn](#), [Twitter](#) and [Facebook](#).