



Smooth Customer Journeys Deliver Smooth Customer Experiences

Smooth customer journeys don't happen by accident. They require careful and thoughtful consideration driven by data and constantly refined to decrease the amount of effort required by your customers to make their purchases or resolve their issues.

Chances are that over time, adding new customer channels and relying on legacy systems has led to you inadvertently creating disjointed customer experiences. This month's Best Practices installment can offer some clear insights that will help you map smoother customer journeys and increase customer loyalty.

Bob Fernekees

VP/Group Publisher, CRM Media
Information Today, Inc.

SILVER SPONSORS



1-888-GENESYS
www.genesys.com



www.zendesk.com

SPONSOR



330 Seventh Avenue
3rd Floor
New York, NY 10001
+1 212 660 1800
info@confirmit.com
www.confirmit.com

Genesys

PAGE 2

MOVING BEYOND
RANDOM INTERACTIONS
TO THOUGHTFULLY
DESIGNED JOURNEYS

Zendesk

PAGE 4

CUSTOMER EFFORT:
WORK IT, SO YOUR
AGENTS AND CUSTOMERS
DON'T HAVE TO

Confirmit

PAGE 6

DRIVING COMPETITIVE
ADVANTAGE:
FOUR PHASES OF CUSTOMER
JOURNEY MAPPING

Bob Fernekees,
Group Publisher
212-251-0608 x13
bfernekees@destinationcrm.com

Adrienne Snyder,
Eastern/Midwest Account Director
201-327-2773
adrienne@destinationcrm.com

Dennis Sullivan,
Western Account Director
203-445-9178
dennis@destinationcrm.com



Moving Beyond Random Interactions to Thoughtfully Designed Journeys

“The journey of a thousand miles begins with a single step.” Although this quote was first attributed to the ancient Chinese philosopher Lao-Tzu more than 2,500 years ago, it’s more applicable than ever to today’s customer experience. With a growing number of digital channels and evolving expectations, customer journeys are increasingly complex. To drive successful outcomes, you must carefully examine and optimize the journey throughout every step of the way—from the first interaction through the entire customer lifecycle.

MOVE BEYOND RANDOM INTERACTIONS

Digital customers create their own journeys as they research, select, buy and consume products and services. These journeys frequently take place across multiple touchpoints over time as customers move forward using their preferred channels.

Channel switching is part of this new reality. With the rise of so many communication options, customers want to use the channel that suits them at any moment in time. Yet, most companies fall short when it comes to delivering this level of engagement. According to the [Genesys State of Customer Experience Report](#), fewer than 30% of companies track their customers’ channel preferences.

Journeys become even more random and difficult to understand when touchpoints overlay siloed departments and business systems, and when there’s no visibility into journeys across channels. Outdated voice-centric, contact center systems simply weren’t designed to support the growing number of consumer-facing technologies. To keep pace with customer expectations, many companies have added new channels as free-standing engagement silos. The result is increasingly fragmented engagement that is frustrating for customers and costly for companies.

As customers and their devices become more integrated and connected via the web, self-service and mobile apps,



contact center systems and processes must seamlessly integrate to support customers on these new touchpoints. In other words, digital disruption is putting the customer experience front and center—creating the need to move to a customer engagement solution that orchestrates seamless, omnichannel customer journeys that build lasting relationships. This requires taking an outside-in approach that places the customer at the center of the business strategy. Today, companies who gain recognition for their customer experience are those who take an iterative, disciplined approach to assessing and optimizing their customer journeys. And this begins with the process of journey mapping.

MAP DATA-DRIVEN CUSTOMER JOURNEYS

To put the outside-in approach into action, you need to understand every aspect of the customers’ buying cycle. This likely begins on a website and continues long after they place an order. Through journey mapping, all customer needs, perceptions and touchpoints are documented for each step toward the customers’ journey goal. These journeys can be mapped by persona and used to

design customer-centric processes for channel customer engagement that serves as the foundation to optimize the overall customer experience.

The most successful journey maps are data-driven and sourced from both customers and direct research, including web analytics, customer interviews and observation. Ultimately, the purpose of journey mapping is to find flaws, weaknesses and opportunities for improvement in current processes. Journey mapping also creates alignment across the enterprise; it drives customer-centric change and focus from disjointed and misinformed teams.

IDENTIFY WHICH JOURNEYS MATTER MOST

As the number of digital channels and touchpoints rapidly grows, so does the complexity of customer journeys. This makes it challenging to determine which customer journeys to map. Some journeys are obvious because of their known problems. However, it’s important to look carefully at the data to ensure journeys are aligned with long-term strategic goals. From there, you can determine which



journeys matter most to your customers and present the biggest opportunities to improve their experience.

When determining a starting point, you'll also want to factor in organizational goals, costs, revenue, retention, brand reinforcement, customer satisfaction and other KPI-based benefit drivers as weighted selection criteria.

Once it becomes clear which journeys to focus on, you can begin the necessary research and discovery to guide the customer experience design process. That should include:

- Identifying business priorities and opportunities to improve the customer experience;
- Compiling research via observation, contextual interviews and ethnography;
- Defining user needs and improvements based on the research;
- Optimizing the journey based on goals, requirements, cost to implement and value created.

Successful journey design includes cross-touchpoint activities, such as moving from self-service to assisted-service; the use of multiple channels within each touchpoint, including support for multimodal interactions; and the use of proactive notifications like reminders and status updates. These all shape customer behavior and reduce customer effort while improving operational efficiency.

Journey maps identify problems, but they don't solve them. Actionable steps are necessary to improve the customer experience. This begins by addressing the low-hanging fruit, such as removing unnecessary or redundant steps in existing journeys and improving easily correctable inefficiencies. These improvements often eliminate some of the most painful problems that are uncovered by the journey-mapping exercise and drive value that justifies further structural journey optimizations.

SUPPORT ALL CHANNELS AND TOUCHPOINTS WITH A CUSTOMER EXPERIENCE PLATFORM

Routing is instrumental to deliver the personalized, omnichannel experience that customers expect. Yet, most legacy contact center systems can't support this level of engagement. To address the broader challenge of fragmented customer journeys, one of the most-effective tactics is to switch to an open, stable and proven [customer experience platform](#) that supports all channels and touchpoints with [true omnichannel routing](#).

The Genesys® [PureEngage™](#) platform overcomes the hurdles of queue-based routing that limit visibility, data, business users and, most importantly, customers. True omnichannel routing enables you to leverage context, such as customer profiles, interaction history and journey context. It also supports pre-routing decision making, including guiding customers to self-service or prompting post-routing actions, such as conducting surveys or administering follow ups.

TAKE THE NEXT STEPS WITH PREDICTIVE ROUTING

The next stage to create a seamless and smooth customer experience is to use predictive routing to drive optimal journeys through the use of artificial intelligence (AI) and machine learning. Predictive routing uses these innovations to mine data and create the best customer-to-destination match. For interactions that route to a representative, the model looks at all available options and assigns a score to each representative based on the desired business outcome.

Predictive routing also uses self-service to identify which use cases and customer types it serves best. As more interactions are processed, the system analyzes historical data and context to predict outcomes automatically. Using AI to match customers to the best resource at the right stage of their journey improves customer satisfaction and loyalty, while optimizing operations.

CREATE SUCCESSFUL CUSTOMER JOURNEYS

Like many companies, software solutions provider, Red Hat struggled with legacy contact center infrastructure. And that created a disjointed customer experience. The company needed a new system to deliver consistent customer service, greater agility and business continuity.

Red Hat turned to Genesys to create a unified cloud contact center with a universal queue. This enabled them to function as a single virtual team and easily manage interactions in a consistent, seamless manner globally. With their integrated, cloud-based platform, all business units—from sales to customer service to technical support—are linked in a way that creates a cohesive team. Every contact center associate uses the same set of tools to deliver a consistent experience across the company.

This has had an impressive effect on their customer journeys. Customers are identified by their phone numbers and routed to the resource best suited to help them. Associates also have immediate access to customer details and case history, enabling them to solve customer issues more efficiently. And by integrating Genesys with their CRM system, Red Hat associates don't need to use the first 90 seconds of each call to validate customer details. Instead, they spend this time in more meaningful, relevant interactions.

Genesys can help you deliver an exceptional customer experience. With tested and proven customer experience design methodologies and industry-leading customer engagement solutions, you can build smooth customer journeys and shape lasting relationships.

LEARN MORE

Access best practices guidance to meet your company's customer experience goals. Take the [CX Masters Series](#) course to learn how to apply these practices to achieve your business and customer experience goals. ■



Customer effort: Work it, so your agents and customers don't have to

iTunes grew from a simple idea: if you make it easy for people to buy and access content they like, they will pay for it. The point being, people value an effortless experience.

This principle goes beyond acquiring new customers, it also applies to customer loyalty: if your clients feel like they are putting in more than they are getting out from an experience, they will likely start looking for a new partner.

Back in 2010, the Harvard Business Review's piece on "Stop Trying to Delight Your Customers" made the case for driving customer acquisition and retention by empowering your agents to serve up quick resolutions. This practice is essential for your bottom line. There's a reason why Bain & Company's "Prescription for cutting costs" is loyal relationships: according to their research, "a 5% increase in customer retention produces more than a 25% increase in profit."

HOW DO YOU MEASURE CUSTOMER EFFORT?

Effort is a function of time and energy. These can be independent signals of how much effort was applied or together they can also point to a customer's level of exertion. The harder they are working, the higher the chance they will churn.

Effortless customer experiences require elbow grease to get right. Typically, you'll start by collecting customer feedback via a survey sent out after a support interaction. Make it short and sweet, simply asking them how easy it was for them to resolve their issue (with a short space for any optional comments). This customer feedback is used to calculate your Customer Effort Score (CES). From there, you'll need to delve further to really understand what levers to keep pulling and which gears to turn back.



When analyzing how well your support team is doing to reduce effort, you should be looking at the following:

- How many different places did your customers and your agents have to go to look for an answer?
- Was the issue resolved when they finally reached out? Or did they need to reach back out about a similar or related issue soon after?
- How long did it take for customers and for agents to go through each leg of the journey to resolution?
- Were there processes or obstacles that got in the way of reaching resolution?
- What were some resources, workflows, or skills that helped get to a quicker resolution?
- Are your CSAT and NPS scores competitive for your industry?
- Are your agents confident that they have the resources they need to provide solutions?
- How are you currently tracking and implementing improvements based on customer and agent feedback?

Here are specific metrics that will give you a data-driven baseline for how you are doing: ticket handle time, first reply time, requester wait time, # of touches between your customers and your agents, how many times an average customer contacts your team, Net Promoter Score (NPS), and CSAT. These are all good ways to keep a pulse on whether you are providing a recommendable experience.

Building this picture of where you are now and setting a target CES goal after will allow you to effectively identify whether any changes you make intentionally or unintentionally have an impact on customer effort. Tracking your performance along the way will help you draw a clearer link between the a customer's experience with your team and revenue gains. This will make it easier to make a case for investing in your team later on.

Keep in mind that there may be some noise in the data. For example, your customers may be getting quick answers, but they may not be getting quick resolutions. They may be writing in to ask for many pieces of information that could



have been given to them at once had the agent taken the time to understand what they were trying to accomplish and anticipate what they might need.

They are also outdated “solutions” that need to be reevaluated or stripped away. Scripts meant to increase satisfaction and reduce handle time often get in an agent’s way. Instead of listening and offering straightforward solutions, agents are often asked to go through a series of stale lines; callers end up feeling more lectured than helped.

If you have the means, you may want to try to examine a few randomly selected tickets, calls, or chats a month get some qualitative data which may help you cut through the noise. You may even want to roll out a formal Quality Assurance team so you can keep close tabs on customer effort and experience.

No matter how well you are doing, there is always room to grow. Below are 10 tips for reducing customer effort that you can start implementing today:

TEN TIPS FOR REDUCING CUSTOMER EFFORT

1. Support your support team: Collect feedback about tools/process improvements that could help agents get customers help—and then act on them. Creating an effortless experience for your agents facilitates their ability to do the same for your customers.
2. Make it easy to find the answers by focusing on self-service. Are you surfacing relevant information along the customer journey that anticipates customers’ needs? Or are your agents will spending time working on password reset and invoice requests?
3. Make relevant resources more accessible for agents so they can quickly offer solutions. For example, the Knowledge Capture app allows agents to search for Help Center articles in a ticket view so they can swiftly share to answer questions.
4. Develop solution-oriented and proactive support training and incentives. If you want customers to advocate on your behalf, you should encourage your agents to advocate for customers. Orientation, ongoing training opportunities and your culture should empower and reward agents who push for improvements.
5. Continue training. Regularly review examples of interactions as a team and see if you can collectively spot opportunities to lower customer effort.
6. Keep tabs on what people are saying. When people talk about their experiences with your support team, are they emphasizing how simple it was to get an answer or are they simply saying they were satisfied?
7. Innovate to decrease effort. Try changing how your team or Help Center is structured and see if it makes a difference. Try new features—keep pushing the bar and see where it takes you.
8. Implement an omnichannel strategy so your customers can reach you when they need to. Are your agents prepared to take a call, chat, or email when your emails reach out? How about switch when the customer asks to continue the conversation elsewhere?
9. Track what you are doing like you mean it. Then use the data to modify or eliminate processes when they get in the way of providing closure.
10. Have fun! How you are doing something matters as much as what you are doing. If you and your team are not enjoying what they are doing, you can bet that it’ll show. We all know that when we are having a good time, we feel more motivated, creative, and willing to work to get people what they need.

The beauty of monitoring and improving your CES is that by decreasing your customer and your agents’ effort will lower yours: with every customer retained who promotes your company, you will need to spend less on winning over the next prospect that comes along. By speaking to your ability to drive solutions, the gospel of satisfied customers will be doing effective and powerful promotional marketing and sales for you.

Exceptional customer service should feel as effortless as possible. Equipping each party with what they need to enjoy wonderfully smooth experiences will increase your customer loyalty and build your business. ■





Driving Competitive Advantage: Four Phases of Customer Journey Mapping

Shelly Chandler, VP Consulting, Confirmit

The journeys upon which your customers' embark when engaging with your organization often vary significantly, are rarely linear, and can be downright complex. In fact, the modern customer journey is a complex matrix of cross- and multi-channel interactions that often cut companies completely out of the loop entirely at some important stages, when third-parties may actually deliver the experience.

Understanding those customer journeys is an extremely important part of any Customer Experience (CX) strategy. Journey maps serve as a diagnostic tool and a key recommendation for any fledgling customer experience and customer insights program. They present an objective view of the experience you are currently delivering to your customers, as long as they are validated BY your customers. And of course the primary purpose of CJM is to discover what customers truly value in working with you—not just what they complain about!

Progress has been made in mapping key journeys, but too often it is at a level that cannot really help the organization—often a collection of process steps, or high-level stages, vs. a touchpoint-driven, deep look at where the customers' experiences are not meeting expectations or aligning with the companies' brands.

As customers' expectations of companies grow ever-higher, organizations can no longer afford to treat any customer touchpoint as a standalone experience. Each and every time a potential or existing customer interacts with your brand, you are delivering an experience, whether planned or not. This means that in order to create the hassle-free experiences that customers now expect, you need to smooth out the rough edges in your touchpoints and the way they interact with each other across the journey.

DELIVERING SMOOTH CUSTOMER EXPERIENCES

Customer Journey Mapping helps you to identify the key touchpoints along the customer journey so you can set up

effective listening posts, leverage and protect the touchpoints that are working, and implement improvements in troubled areas that matter most to your customers. With Customer Journey Mapping you'll be able to:

- Determine key moments that matter (strengths, pain points, and improvement areas)
- Identify upstream/downstream issues to drive needed actions
- Engage the organization in CX (communicate, train, educate colleagues)
- Create early buy-in for change to focus on the customer experience

FOUR PHASES OF CUSTOMER JOURNEY MAPPING

A journey map is not a moment frozen in time. Or at least it shouldn't be! It should be a map for action. From diagnosing your current state, to designing the appropriate program to feed your company a regular stream of insights, to designing your intended experience, there's a huge amount to consider and you need to ensure you're able to continue navigating your map while on the move.

It's useful to think of the process in four phases:

- **Align It:** Key executive stakeholder interviews are vital to ensure an accurate understanding of your company's CX program objectives. This information can form the basis of your customer journey map that identifies major touchpoints, as well as some you may not have initially considered.
- **Explore It:** With executive stakeholders on-board, it's important to ensure you build in the views of experts across the business. Here it's important to note that "experts" doesn't necessarily mean heads of departments or the most senior people in your business. Some of the best views of the customer journey comes from the front line. Bring together a cross-functional, customer-facing group to help refine the journey map, identify key moments of truth, and gather details on how you deliver at each touchpoint.

- **Prove It:** Once you have the views of both executive teams and front line/subject matter experts incorporated, there's one more set of views you need to consider. Your customers. To validate your work, seek ways to gather thoughts from customers through the appropriate methods. Qualitative approaches such as interviews for B2B organizations or focus groups for B2C companies are a great way to uncover not only touchpoints you may have missed or underestimated, but the way in which those touchpoints may interact that you had not previously considered.

- **Connect/Monitor It:** With everything in place, you can begin to use your map to identify the best next steps you need to take to remove disconnects from your customer journey and refine processes that support them. There will doubtless be many actions you can take, so it's useful to prioritize those that will have the greatest impact, particularly where quick wins are available. Monitoring your progress is extremely important to ensure the correct level of spend and the resulting ROI on your efforts—once you've achieved the gains you want, move on to the next set!

The challenge after all this work is not to allow your map to atrophy. Your organization is like a living organism, with continual change and evolution that will impact the customer journey. Ensure you build a process for regular review of the map and the listening posts designed to measure, bringing together the right people validate that you have not missed anything critical.

The continual drive for personalized, omni-channel experiences places the customer journey in the design stage of building your CX program. Whether you are just starting out in your CX focus, or need to boost an established program, there is always room for a better understanding of the customer journey in order to provide guidance on the steps you need to take to provide interactions that provide true competitive advantage. ■