

EBOOK

# Getting to the Big Stage: Working Together to Improve the Customer Journey

How AI, teams and the tools you already use can provide insights into an ever-evolving customer lifecycle

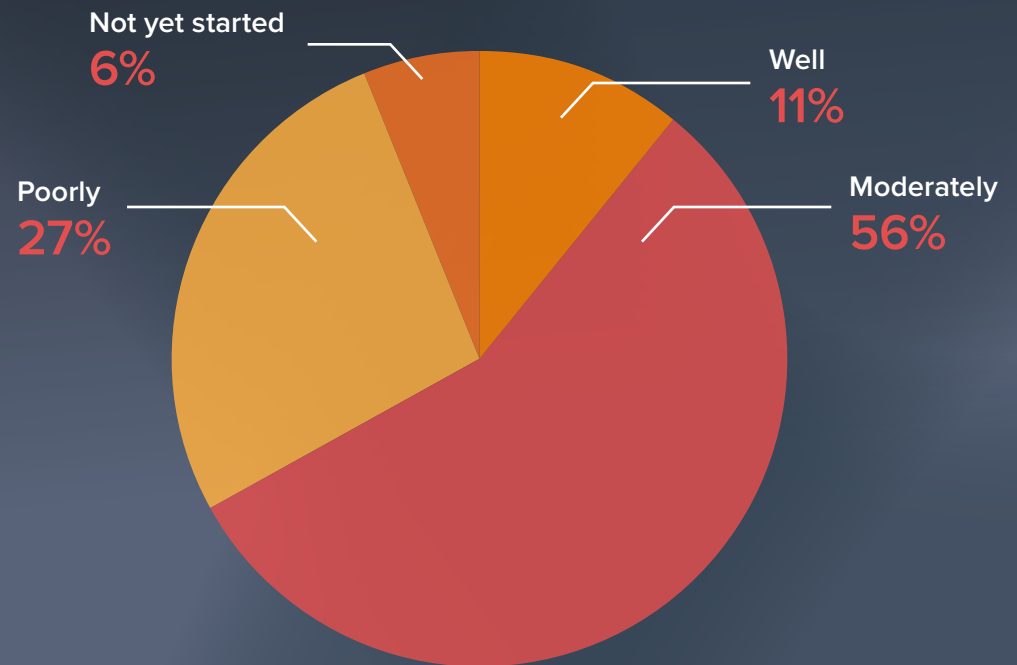
## Introduction

Digital transformation has been top of mind for companies for some time now and continues to be of critical importance for many. The top priority for companies regarding digital transformation is improving the customer experience — **69% of CIOs call this very important, with an additional 24% calling it somewhat important.**

Data from CMSWire's most recent *State of Digital Customer Experience* survey supports this. In that survey of more than 400 CX executives and leaders, creating exceptional customer experiences is either extremely or very important to 79% of respondents.

While it is a priority for many, delivering superior customer experiences is tough for everyone. Customers these days are choosy and will quit a company over even a single instance of bad customer service. In this environment, there's no room for error. Further, companies often have difficulty understanding customer behavior. The majority of those same survey respondents felt their companies understood customer behavior only moderately, with a quarter believing their companies didn't understand customer behavior very well at all (Figure 1).

**Figure 1:** How well do you think your organization currently understands its customers' digital behavior?



Where do companies fail at delivering exceptional customer experiences? Typically, customer experience initiatives fall into one of three categories:

- Participating in endless planning cycles without any follow-through
- Assuming that AI or automating the customer experience will magically fix things
- Actually planning and executing customer experience strategic initiatives

The goal of every business should be to get all their stakeholders to the third stage. Yet understanding the customer journey isn't a simple project, nor something businesses can fix in three months and be done forever after. The customer journey is sophisticated, and the customer experience needs to evolve with it. Data from CMSWire's *State of Digital Customer Experience* offers clues and recommendations about how to best go about creating exceptional customer experiences.





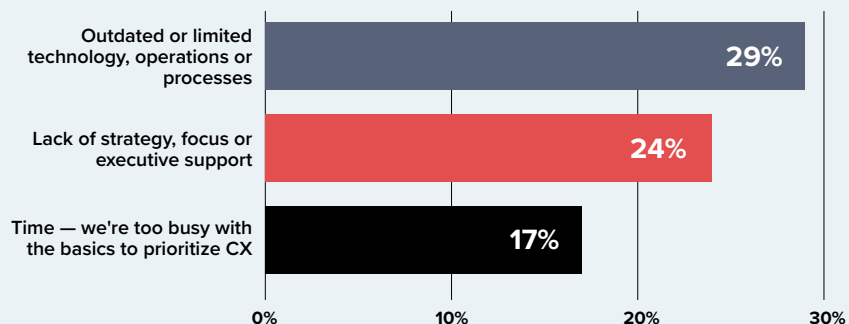
## Recommendation #1: Stop planning and start doing

Getting caught in endless planning cycles won't help companies solve their customer experience challenges. Yet this is often where companies fall down, stuck in the planning phase with no time, energy or support to execute on those plans. According to survey respondents, their top digital customer experience (DCX) challenges include a lack of updated processes, strategy, focus, executive support and time (Figure 2). Making plans to improve the customer journey isn't worth anything if those plans aren't acted upon.

To be truly successful at DCX, you need a way to move from planning through to execution. This doesn't mean abandoning goals just to execute faster — goals are necessary for the plan to work. Without a clear goal, there can't be any successful DCX improvements. Ask yourself: does the company have a clear goal for what they want to achieve around the customer journey? In the survey, respondents identified similar priorities they want to achieve around DCX, such as improving their analytics or better leveraging customer data into actionable insights (Figure 3).

Recognize that the customer is a changing variable, so the customer journey is a never-ending process. It isn't worth it to wait to act until you create the perfect plan, because customers' needs and wants can change tomorrow.

**Figure 2: Top DCX challenges (time and support)**

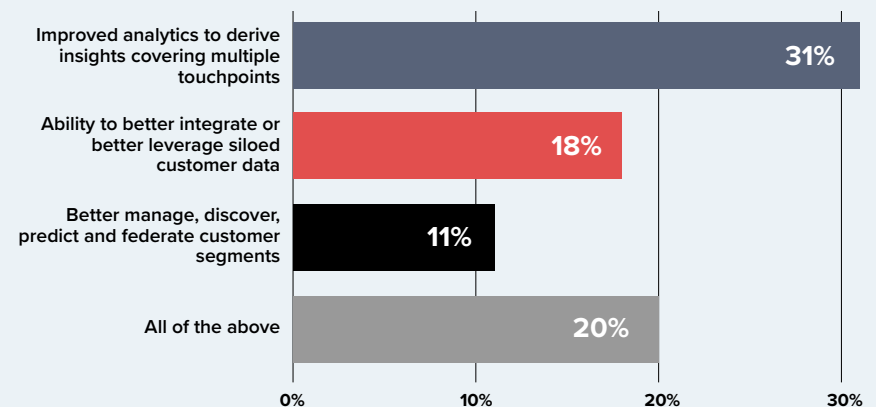


**“People talk about test and learn. The important part of those two is to learn. If you aren't learning, there's no point to testing.”**

**— Mark Smith, VP, Digital Engagement Solutions, Kitewheel, a CSG company**

Iteration may help execution. Undertaking a crawl-walk-run approach is useful to move from the planning to executing phase. Start with a simple achievable journey (such as a personalization-based marketing strategy) and make connections to the business, so you can make the business as a whole move together down the line. Crawling actually teaches you what works and what doesn't when reviewing the analytics of your plan, which allows you to iterate and make a stronger case for your DCX improvement plans.

**Figure 3: Highest customer data management priorities**



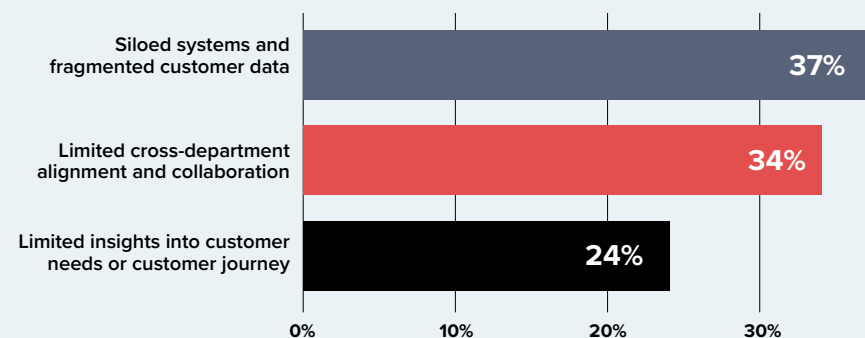
## Recommendation #2: Orchestrate

Siloed systems and limited cross-departmental collaboration are two of the biggest DCX challenges relating to alignment and insights (Figure 4). Without cooperation between departments, improving DCX is just that much harder.

Businesses need every division working together to improve the customer experience. Orchestration, in concert with planning, is the best way to learn, iterate and develop new DCX improvements and strategies. In this way, journey orchestration is like a jazz ensemble. Each musician needs to cooperate to make harmonious music, even when one musician changes key. Orchestration to improve DCX means implementing both strategies and technology to ensure that all departments are working towards a common goal, adapting to changes in real-time.

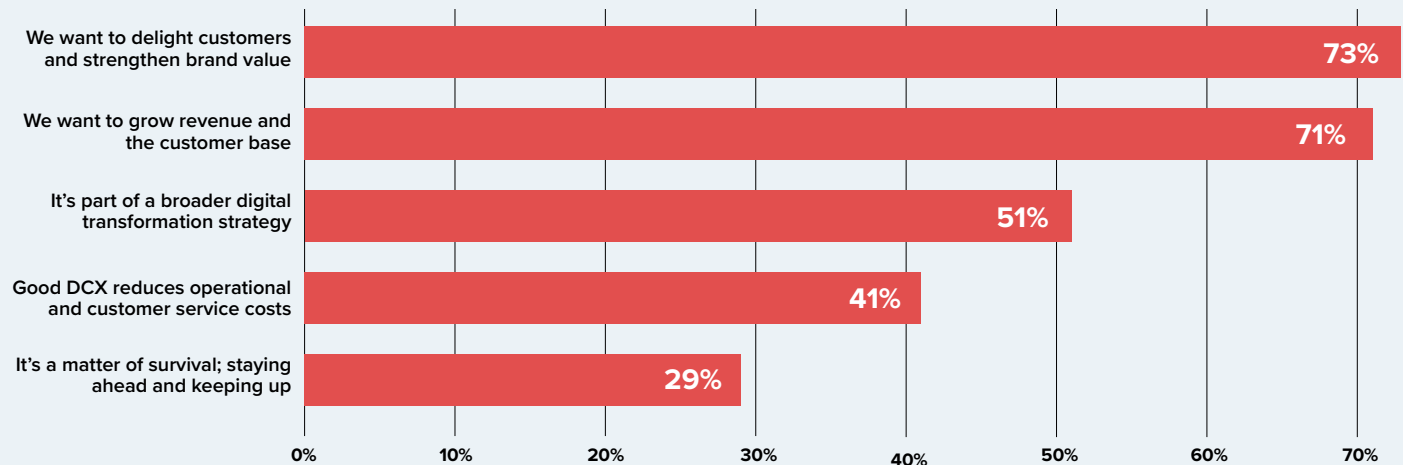
One particular area requiring better cross-functional collaboration is customer journey mapping — a visual representation of how and where customers interact with your brand. This is an area that can fail if companies get caught in the trap of endless planning. Without the proper alignment, companies will continue to produce customer journey mapping that never goes anywhere. Successful journey maps get input from all departments. This allows you to identify what's working, where customers face challenges, and whether your current journey strategy meets your business goals.

**Figure 4:** Top DCX challenges (alignment and insight)



# BRAND AWARENESS

**Figure 5:** Why is DCX a priority at your organization?



But what are companies' priorities for improving DCX? The majority of survey respondents want to prioritize DCX to strengthen their brand value. Increasing revenue and growing the customer base are also priorities for the majority. Four in 10 see improving DCX as a way to reduce operational costs (Figure 5). The common theme

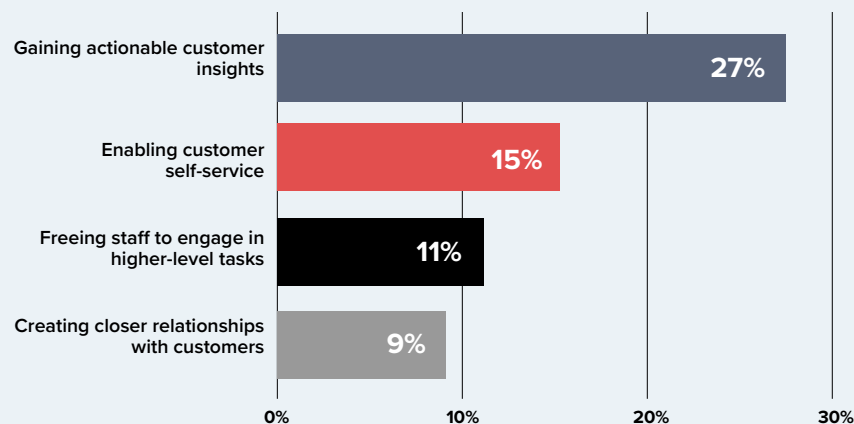
among all these priorities is how they affect all areas of the business, from operations to marketing to sales. Getting teams working together should be a top priority for anyone looking to improve DCX. As nearly a third of respondents said, improving DCX isn't just a nice to have — it's a matter of survival.

## Recommendation #3: Use AI strategically

Companies need to consistently deliver experiences that are right for the customer. AI excels when speed and consistency are the goal. Artificial intelligence (AI) and machine learning (ML) have come to the fore in recent years as companies look for an edge over the competition around DCX. According to research, **artificial intelligence is the number one thing most likely to reshape businesses' CX capabilities in the next few years**. AI is also gaining acceptance among customers. In a recent survey, **55% of respondents reported positive interactions with AI and robotic process automation (RPA)**.

However, some people erroneously see AI as the savior that can do all the work so people don't have to learn. While 72% of survey respondents believe AI and ML will have a significant and transformative impact on DCX over the next 2-5 years, these technologies won't magically fix all aspects of DCX. What it gets you is scale: the ability to go from good to great with fewer resources. AI's power lies in automating the simple things.

**Figure 6:** Where AI/ML will have the most impact on an organization's customer experience



What tasks would be best suited for handing off to AI and ML? According to survey respondents, one in five (20%) list AI and ML capabilities as current DCX priorities. Further, the areas where respondents believe AI and ML will have the most strategic value include gaining actionable customer insights, enabling customer self-service, freeing staff to perform higher-level tasks and creating better and more lasting relationships with customers (Figure 6). At the end of the day, AI and ML are tools, and neither will replace the need for subject matter experts anytime soon. Businesses will still need people to identify challenges AI can solve for the foreseeable future.



## Conclusion

Delivering exceptional digital customer experiences is becoming more critical with each passing year. Yet without the time, leadership support or ability to collaborate cross-functionally, many companies might find themselves stuck in a never-ending cycle of planning for DCX improvements without taking action on those plans.

Making plans without taking action is a wasted opportunity. If companies have done the planning and have a decent idea of what's going to work, why not start? This is the essence of the crawl-walk-run philosophy. By implementing their plans, companies can learn, iterate, and improve for the next round rather than standing still.

Companies must invest in DCX improvements and they need everyone on board. Your business lines need to recognize why DCX improvements are necessary, while your executives need to lend their support in the form of sponsorship, budget and time needed to carry out improvements. Recognize that there will not be a single fix to customer experience and companies can't rely on AI alone to save them. Rather, DCX improvements will be a series of actions that will require time to develop, execute and iterate. The best time to stop planning and start doing was yesterday. The second-best time is right now.





## About



**Kitewheel**, a CSG company, empowers the world's largest businesses to understand and improve the consumer experience with the leading customer journey management platform. Kitewheel's innovative Customer Journey Hub orchestrates intelligent customer journeys by unifying decisions across disparate systems, touchpoints and technologies, and provides seamless customer experiences that drive real-time revenue as well as long-term loyalty through journey analytics and orchestration.



For more than 35 years, **CSG** has simplified the complexity of business, delivering innovative customer engagement solutions that help companies acquire, monetize, engage and retain customers. Operating across more than 120 countries worldwide, CSG manages billions of critical customer interactions annually, and its award-winning suite of software and services allow companies across dozens of industries to tackle their biggest business challenges and thrive in an ever-changing marketplace. CSG is the trusted provider for driving digital innovation for hundreds of leading global brands, including Airtel Africa, América Móvil, AT&T, Charter Communications, Comcast, DISH, Formula 1, Hutchison 3 Indonesia, Inmarsat, Mastercard, Maximus, Microsoft, Mobily, MTN, New Leaf Service Contracts, State of California DMV, TalkTalk and Telstra.



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Our obsessions: next generation digital customer experiences, navigating the r/evolution of work and advancing enterprise learning.