Designing and Delivering Customer Journeys

10 Steps to Delight

It's the age of the empowered, multichannel consumer. Armed with multiple devices, consumers use multiple interaction channels to engage with businesses. They even hop across touchpoints to complete a single transaction. In other words, their relationship with the business is made up of cross-touchpoint journeys. It's no wonder then that customer journey management has become a hot topic in the C-suite and the boardroom. How can a business get started on improving customer journeys and what are the best practices to orchestrate memorable journeys? Based on our experience in enabling smart, connected, multichannel journeys for leading enterprises around the world, we have identified 10 steps for success.

Step 1: Prioritize

If you are a large B2C business, you probably have all kinds of customers with their own unique journeys. To be successful, businesses need to identify the market segments and journeys that matter the most. A simple approach is to follow the Pareto principle or the 80-20 rule—20% of journey-segment combinations (the combinations that represent the biggest market segments and the most frequent journeys), when optimized, have the potential to make 80% of the business impact! Another approach is the following 2x2 framework (Figure 1). The most frequent journeys that are relevant to the highest-value market segments (top right quadrant) should receive immediate attention, followed by the bottom right and top left quadrants.
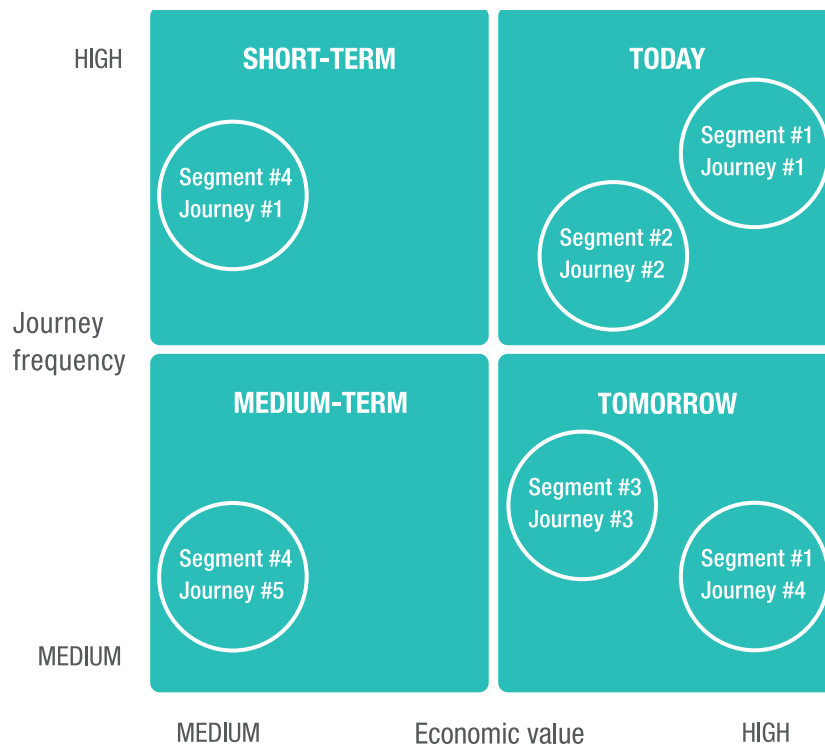

Figure 1: Market segment and customer journey framework

Step 2: Humanize

Use personas to represent segments. Not only do they add color to your research and design, but are also cost-effective shortcuts for understanding how consumers in those segments might behave, and what their goals and journeys might look like. You can even find personas within your own organization for easy access to market segment insights!

Step 3: Divide and conquer

At the top level, the customer has a relationship journey—let's call it a "macro-journey"—with the business. The macro-journey spans the "research, buy, use, and love" stages of a customer's life cycle, and has become overwhelmingly a multichannel and multi-device experience. Macro-journeys, in turn, contain micro-journeys, which might span one or more channels and devices. Examples of micro-journeys are a quick "in and out" search for a product on the website, buying with a coupon offered on Facebook, returning in a store a product bought online, filling an online form to enroll in an insurance policy, calling Support to troubleshoot a problem, or getting help from a community expert on the company's forum about a specific issue.

Start by identifying and optimizing common micro-journeys. It will help focus customer engagement initiatives, as well as deliver better experiences, which, in turn, create happy long-term relationships and brand loyalty. An example of a journey and associated micro-journeys for an Internet-savvy, working mom persona buying and using insurance is shown in figure 2.

Figure 2: Persona of a working mom and a sample journey she takes to complete an online transaction

Before implementing this and any other journey, businesses need to make sure they have the enabling technologies in place. For example, in this case, cobrowse to help the working mom fill out

an online enrollment form for onboarding, and video chat to allow her to show damage to her automobile to an agent in real-time.

Step 4: Identify disconnects

As you analyze micro-journeys and journeys, look for points of abandonment and the corresponding root causes. Why are customers getting lost? Is it lack of relevant information and context-aware sales and service offers, or poor guidance? Is it a limitation of the particular interaction channel? Is it loss of context in a cross-channel transition? Is it inconsistent answers across channels or even by different agents in the same channel? Is it search dead-ends on your website? Knowing the hot spots and their causes will help you figure out where and what changes to make.

Step 5: Parallelize

Customer journeys have parallel enterprise journeys. Here's how the two journeys typically look like (figure 3).
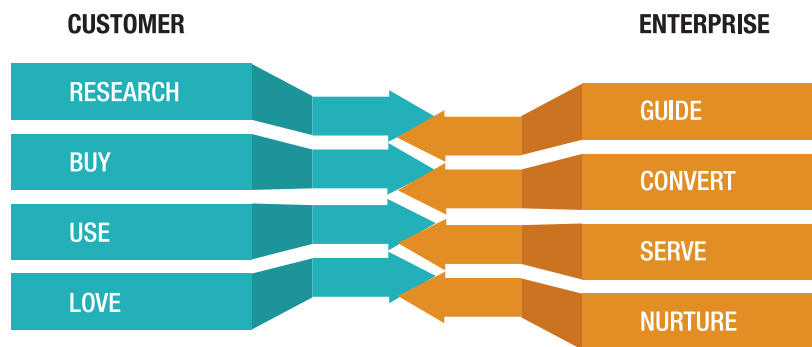

Figure 3: Stages in the customer journey and the enterprise journey run parallel

As you optimize the customer experience, make sure you optimize the agent experience. Agents represent your business and brand in every interaction. Are agents fumbling around for answers? Are they finding different answers in siloed knowledge bases? Do they have to run multiple applications to answer one simple question? Are they at a loss on what and how to sell, cross-sell, and upsell? Are there breaks in context and workflows across channels and people that frustrate agents, and ultimately, the customer?

Step 6: Build on a hub

Consumers adopt and abandon new interaction channels and access devices at warp speed. Today's Facebook might become tomorrow's MySpace, and today's iPhone might be tomorrow's Blackberry. How can you keep up with consumers by supporting these channels and devices as they are adopted, and how do you do it without creating new engagement silos? How do you design and deliver flexible journeys to serve broad markets? The answer is to implement a customer engagement hub.

A concept advocated by Gartner, a customer engagement hub is a platform that consolidates all interactions, rules, knowledge, workflow, analytics, and administration while enabling innovation and differentiation in customer engagement through apps built on that platform. eGain has been enabling such hubs for blue-chip companies for over a decade, allowing them to keep pace with consumer channel preferences, while connecting their customer journeys end to end.

Step 7: Go 3D

Businesses need to take a 3D approach to customer engagement in order to grease the skids for customer journeys. To go 3D, consider context, knowledge, and collaboration for each journey that you are designing:

- **Context:** 360-degree view of the current customer journey and insights from their past journeys, enabled by the engagement hub and robust analytics.
- **Knowledge:** Contextual service content and sales offers, as well as interactive guidance to move the journey forward.
- **Collaboration:** Rich, modern collaboration tools that help create memorable customer experiences while accelerating sales and service through real-time assistance.

Step 8: Look farther

Customer journeys are often broken by non-technology factors such as the lack of processes, policies, procedures, people, and metrics. Sales and service agents need to be empowered with knowledge and process management systems that can help them move the customer journey forward. Policies and procedures can be embedded in knowledge management systems to help scale service and sales with speed and compliance.

Step 9: Iterate, iterate, iterate

Once you have designed the relationship journeys, have your personas test drive them by "mystery shopping." Test driving will reveal possible points of journey disconnects so that they can be addressed before eventual deployment to customers. Once deployed, iterate journey design with journey analytics on an ongoing basis.

Step 10: Innovate and influence

Just like product innovations, journey innovations, too, can be "disruptive" to customers. Designing and optimizing journeys from the customer perspective is good, but transformative journey innovations that don't originate from customers have potential for the "wow" effect. Customers can be influenced to adopt journey innovations through delightful experiences, appropriate incentives, and hand-holding. While teller machines were not common 40 years ago, it's difficult to imagine going to the bank teller for anything these days except the most complex transactions. Mobile banking with smartphones and tablets is an example of another journey innovation that has even

transformed micro-journeys like depositing checks. Once customers are eased into innovations, they will get "addicted" to the new journeys, whether it is cobrowse-aided online form-filling, self-checking at airport kiosks, mobile check deposits, or conversations with auto-chat avatars. This "addiction" will create customer loyalty and generate breakthrough value for the business!

Next steps

As a solution provider committed to helping businesses differentiate themselves through best-in-class customer interactions, eGain offers a complimentary, no-risk, no-obligation assessment of your current customer service and support operation in the form of a Best Practice Assessment Study (BPAS). Based on your priorities, the BPAS can be focused on the specific topic of this document or your broader contact center and customer service operation. If you found the content of this document to be useful, we are confident you will benefit from a BPAS engagement with us. To qualify, send us an email at info@egain.com. We will contact you to set up a mutually convenient time to conduct a BPAS.

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About eGain

eGain (NASDAQ: EGAN) is a leading provider of cloud customer engagement solutions. Trusted by leading brands, eGain solutions help design and deliver smart, connected customer journeys across social, mobile, web, and contact centers.

Headquartered in Sunnyvale, California, eGain has operating presence in North America, EMEA, and APAC. To learn more about us, visit www.eGain.com or call the company's offices: +1-800-821-4358 (US), +44-(0)-1635-800087 (EMEA), or +91-(0)-20-6608-9200 (APAC).