

# The Customer Journey Analytics Buyer's Guide

How to Evaluate, Buy, Implement & Succeed With Customer Journey Analytics Software

EVALUATE

BUY

IMPLEMENT

SUCCEED

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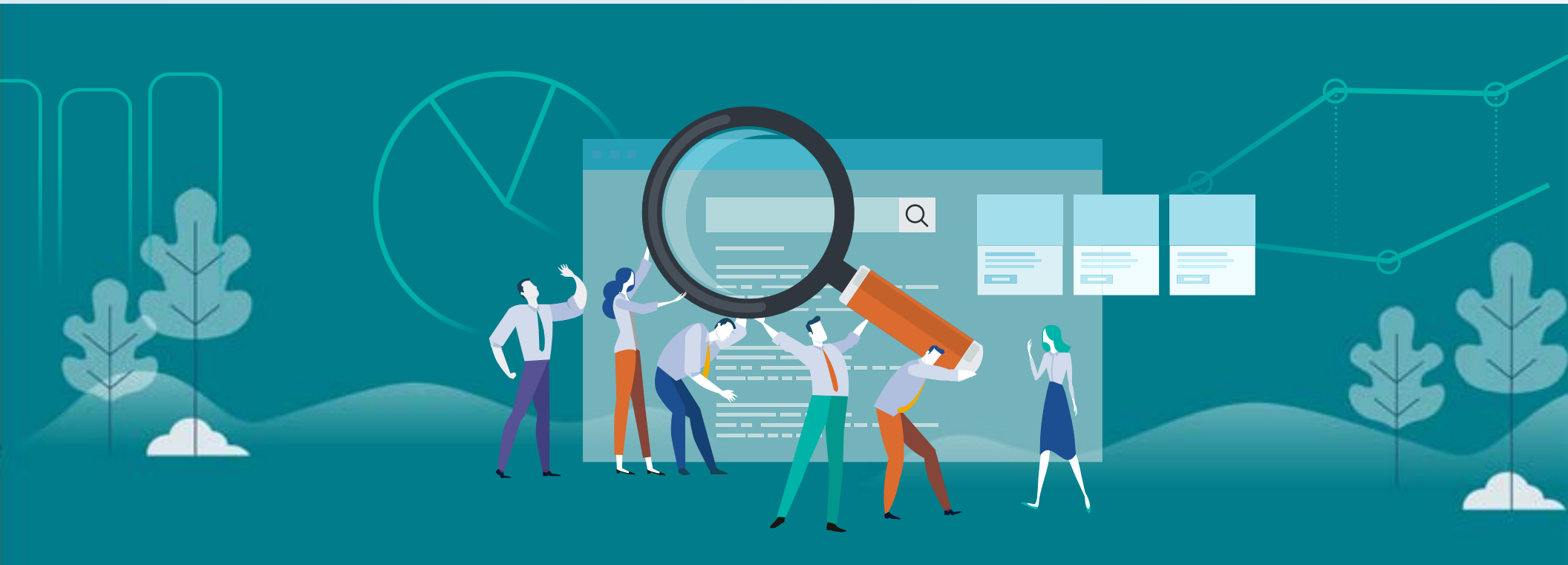
# Introduction

Customer journey analytics is a lot more than a software solution –it is a whole new approach to analytics that involves having a journey-based mindset and becoming customer-obsessed.

Companies transforming to become customer-obsessed are using customer journey analytics to become insights-driven, fast, and connected. To get the best results out of customer journey analytics, you need to follow a systematic approach so that you're using it throughout the organization instead of in a silo; and it is a change management tool instead of a one-off project.

This buying guide will help you pick the best customer journey analytics platform that suits your needs, implement it effectively and measure your success against the goals you set.

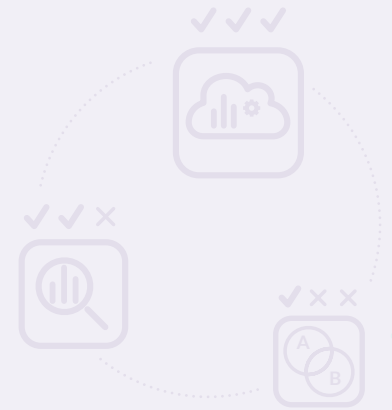
# How to Pick the Best Journey Analytics Platform for Your Needs



**To the surprise of many marketing and customer experience professionals, analyst firms such as Gartner and Forrester are largely in agreement on the definition of customer journey analytics. But, once you begin to look into customer journey analytics at a deeper level things become much less clear.** This is because customer journey analytics is not a monolithic approach designed to address a single problem.

Since there are a variety of problems that customer journey analytics can be used to solve, all customer journey analytics tools do not include an identical set of capabilities, nor do they prioritize the capabilities they do include in the same way.

To avoid wasting time comparing apples to oranges the key is to clearly understand and prioritize your business needs and use them as a yardstick to choose and evaluate the solution that best meets your needs. In the following pages, we will describe the three primary capabilities customer journey analytics and how you can use them to evaluate different journey analytics platforms.



Forrester defines customer journey analytics as “an analytics practice that combines quantitative and qualitative data to analyze customer behaviors and motivations across touchpoints and over time to optimize customer interactions and predict future behavior.”

# Three Primary Capabilities of Customer Journey Analytics Platforms

## 1. Journey Discovery

### Your Needs:

- Understand and communicate your customers' actual journeys
- Uncover behavioral segments
- Measure the impact of customer behavior on KPIs (revenue, customer lifetime value, churn, etc.)

### Best Solution:

Analyze customer behavior data across touchpoints and over time to uncover meaningful customer segments, the paths they take to achieve a specific goal and to quantify the impact on your KPIs.

Journey discovery is a quantitative approach to customer journey analytics where customer behavior data is analyzed across touchpoints and over time to uncover meaningful behavioral segments and the paths they take to achieve a specific goal—what Forrester calls the 'bottom up approach' to customer journey analytics.

Journey discovery is the best approach to reveal the numerous paths your customers actually take, as they engage with your company across channels and over time.

“What’s important to remember is that customer journeys aren’t created; they’re discovered. When we try to create journeys, we fall into one of these two traps: we either hallucinate customer needs or throw away the customer experience playbook altogether and focus on the needs we know intimately: our own.”

- Jake Sorofman, Former Gartner Analyst

# 1. Journey Discovery (con't)

The first step to journey discovery is to integrate all your sources of customer data (digital, web and mobile analytics, CRM, call center, point of sale, voice of the customer, and others). Once your customer data is unified, then the separate pieces of data that have been collected on each individual customer must be associated through identity matching—a process that recognizes which data actually refers to the same customer.

With a platform that enables journey discovery, you can uncover and visualize frequent, costly, problematic, or promising customer journeys. You can determine how many customers participated in each step of a specific journey and were affected by a particular issue. This data helps you to visualize specific behaviors like drop-offs, skipped steps, repeat steps, duration, pain points, and channel switches.



# 1. Journey Discovery (con't)

A global travel company, for example, used journey discovery to focus on the journeys of 20,000 anonymous customers and connect their online and offline behaviors—incremental holiday bookings, email open rates and click-through rates to create unified journeys. It engaged in more relevant, personalized conversations based on these findings and saw thousands of dollars worth of incremental bookings in just a few days.

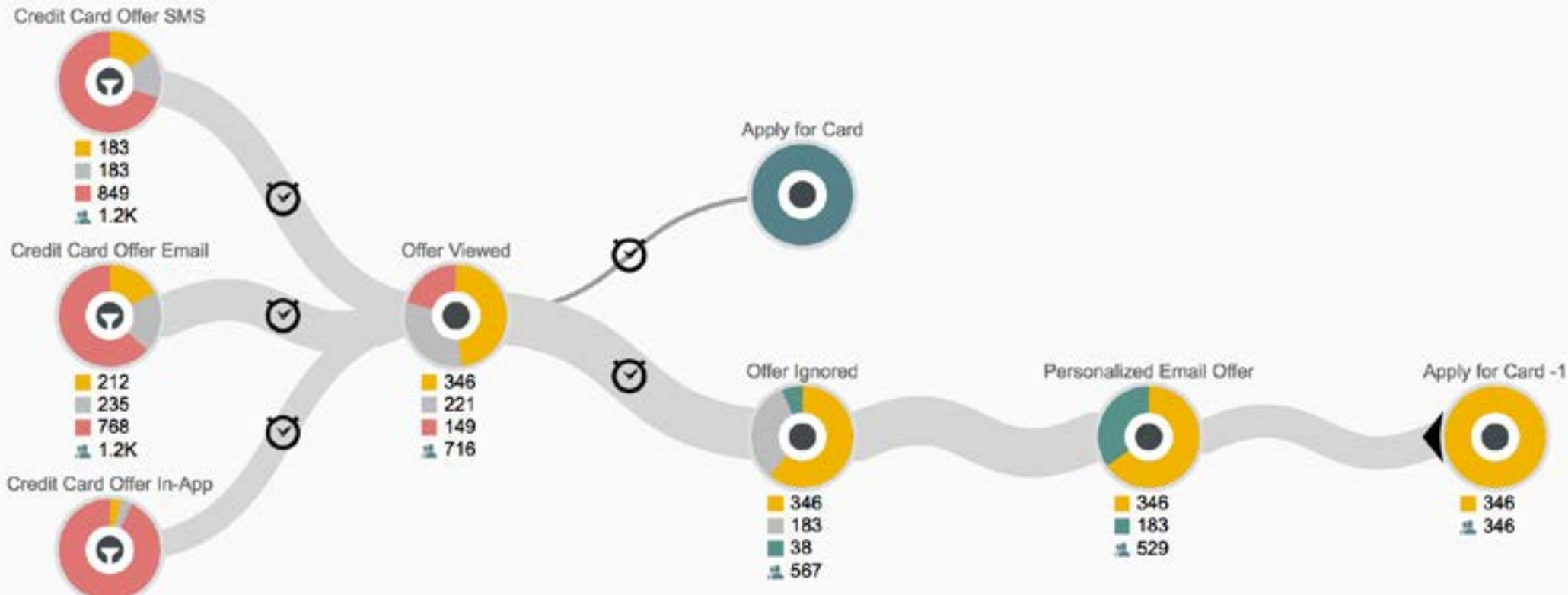
## Journey Discovery Creates a Bridge Between Customer Behaviors and Business Outcomes

Companies have traditionally looked to improve customer

experience by focusing on particular touch points. This often leads to misleading results, as customers could rate an individual interaction highly yet be unhappy over the course of an entire journey.

Customer journeys are at the core of customer experience, as customers interact with companies across touchpoints, channels, and over time.

Only by looking at a customer journey in its entirety across channels and over time can real pain points—and therefore opportunities for positive change—become visible.



## 2. Journey Mapping

### Your Needs:

- Transform an organization to become more customer-centric
- Ideate and communicate journeys for new products or processes

### Best Solution:

Create a visualization of your customer's experience, including their actions and emotions, across touchpoints and over time, as they seek to achieve a specific goal.

*Journey Mapping is a way to visualize and communicate your customer's experience across touchpoints and over time, as they seek to achieve a specific goal.*

Journey Mapping is the most widely practiced form of journey analytics and is a technique that has grown in popularity, not only with customer experience (CX) professionals, but also within marketing, customer service, user experience (UX), product management and IT. According to a recent Forrester survey, 88% of CX pros are doing customer journey mapping.



## 2. Journey Mapping (con't)

Customer journey maps are typically created to visualize a specific experience for a particular segment or persona. Next, qualitative data captured in employee notes, interview transcripts, and call center logs, as well as quantitative data from surveys and other databases and systems, is added to the journey.

### Customer-centric organizations are using journey mapping to:

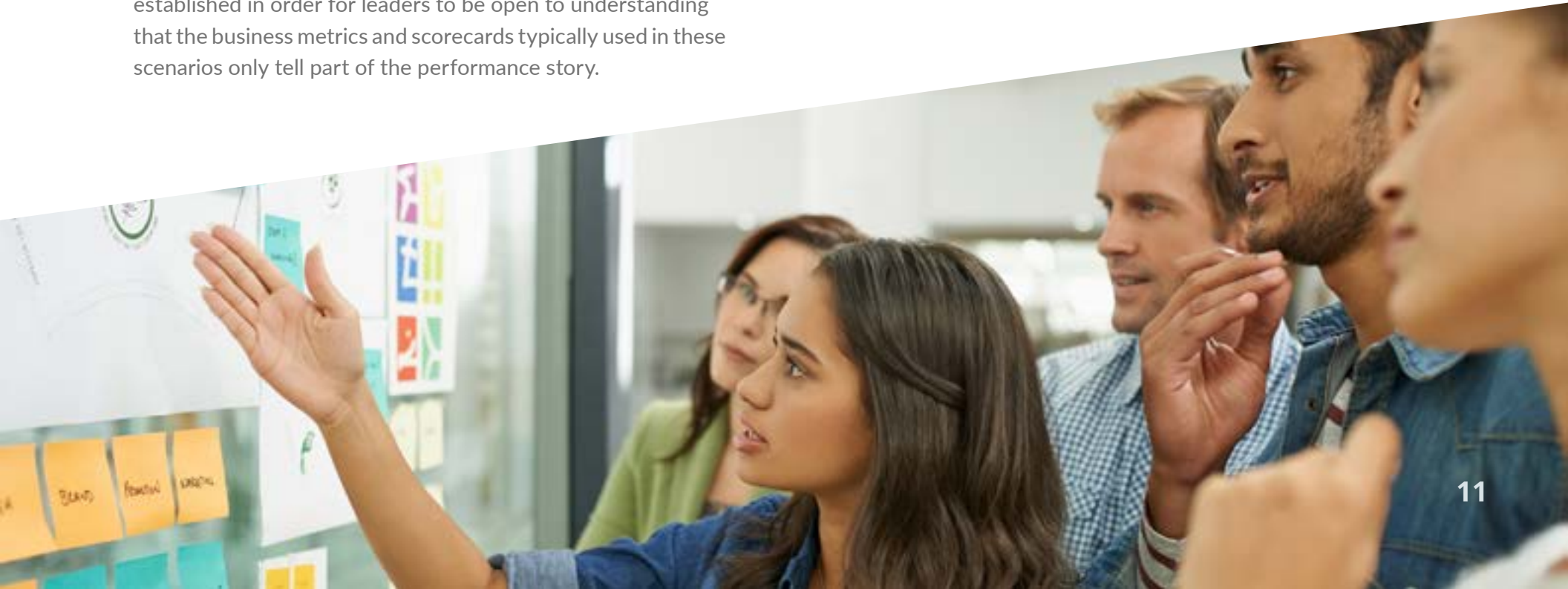
- Establish a holistic understanding across the organization of the customer's current experience across touchpoints
- Identify the key “make or break it” moments in the overall journey
- Identify and prioritize opportunities to improve the customer experience
- Visualize a “future-state” customer experience to spur innovation
- Communicate and align the organization around a customer-centric model
- Serve as a CX change management and governance tool



## 2. Journey Mapping (con't)

Here are a few ways that customer journey mapping can be used to spread a customer-centric culture across your organization:

- Make it a priority to involve key influencers and stakeholders across the organization throughout customer journey mapping efforts.
- Engage leaders throughout the organization, as key stakeholders and collaborators to identify the most important customer journey(s) to model. This is an important first step for building collaboration across silos.
- Use a journey map to demonstrate the impact of customer emotions on business performance. This needs to be established in order for leaders to be open to understanding that the business metrics and scorecards typically used in these scenarios only tell part of the performance story.
- Prioritize the key CX opportunities identified in a high level customer journey map with leadership across organizational silos and use that as a starting point for creating a strategic roadmap for making changes.
- Partner with a specific business unit or other functional group within your organization to drill down on a specific stage or touchpoint in the overall journey. This way, you can better understand whether the product or service they own is:
  - Impacting the customer experience
  - Useful as a tool for re-imagining the experience where it is falling short



## 2. Journey Mapping (con't)

Successful customer journey mapping projects don't just happen by accident. They require careful planning and cross-functional collaboration and management. Successful customer journey mapping projects typically follow a robust approach:

1. Define clear goals for your customer journey mapping project
2. Identify and engage core stakeholders and partners
3. Educate stakeholders on the essentials of journey mapping
4. Create alignment with your stakeholders
5. Create a sense of urgency and ownership

The most common complaint of the journey mapping process is that it is created in a meeting room by employees with an inward focus, in other words with minimal or (in some cases) no input from customers.

Many journey mappers think that involving various teams like finance, R&D and engineering—in addition to the obvious ones like marketing and CX—will ensure their journey map reflects their customers' actual experiences.

But in reality, what they are really doing is documenting internal processes and calling it a customer journey map.

When customer-facing employees put themselves in their customer's shoes and

try to imagine their experiences, it typically results in an imaginary journey that fails to reflect the variety of real-world paths their customers actually take.

Even if you conduct focus groups or interview a few dozen customers, you're not even close to discovering the millions of real, unique journeys taken by your customers.



# 3. Journey Orchestration

## Your Needs:

- Automate interactions at each step of the journey
- Coordinate interactions across channels
- Personalize engagement using information about the customer and where they are in their journey

## Best Solution:

Automate real-time, personalized interactions that improve the journey flow and drive desirable outcomes.

*Journey Orchestration is the part of customer journey analytics that uses predictive and/or rules-based approaches to automate real-time interactions in order to improve journey flow and drive desirable outcomes.*

Existing marketing, customer service and other customer touchpoint systems typically automate engagement for only one or at most a few channels, which cannot capture your customers' real cross-channel journeys. Once you include call center systems, point-of-sale systems and other customer touchpoints beyond marketing, the only way to seamlessly engage with your customers is through journey orchestration.

According to the latest *Walker Sands State of Marketing Technology report*, almost half of marketers (48%) have built best-of-breed marketing technology stacks made up of multipoint solutions, while only 21% use a single-vendor for everything they need.



## 3. Journey Orchestration (con't)

### Cross-Channel Campaign Management and Marketing Automation are Not Customer Focused

Both B2C-focused campaign management platforms and B2B-focused marketing automation systems are evolving from single-channel email applications to encompass web, SMS, mobile apps and more.

So, why do these approaches differ from journey orchestration? Both of these approaches are inherently marketer focused, rather than customer focused. As a result, they are geared towards optimizing the marketers ability to achieve their marketing goal, rather than improving your customer's chance of achieving their own goal.

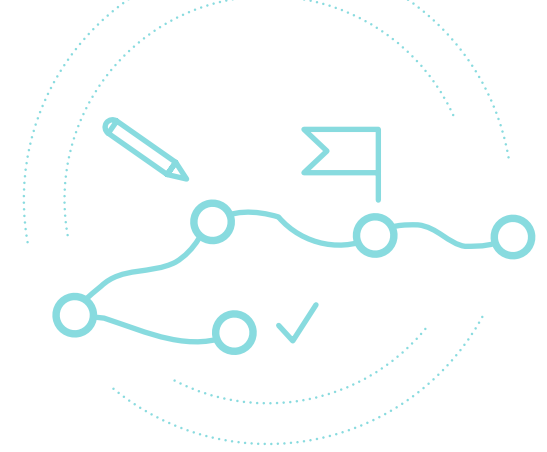
### Trigger-based Engagement

The interactions at customer touchpoints can be orchestrated by triggers that initiate an action via the touchpoint system or by providing touchpoint

systems with real-time information about a customer on demand.

By embedding triggers at any event along the journey, you can automatically initiate next-best actions in real time across all of your touchpoints. For example, you could automatically communicate with a customer via their preferred communication channel (e.g. email, SMS, outbound call) when they reached a defined point in their journey.

Less than half of respondents (43%) in the 2017 Gartner survey characterize their current efforts as “mostly event-triggered.” While that’s up from 29% in Gartner’s 2015 Multichannel Marketing Survey, the reality is that these capabilities are still emerging in most organizations. Marketers are further along than they were two years ago, but they haven’t reached the levels they expected to be at by now. Looking two years down the road, they anticipate being in roughly the same place as they expected to be at today.



### 3. Journey Orchestration (con't)

#### Real-time Personalization

Real-time personalization is a way to automatically deliver tailored content to each customer based on demographic, firmographic and behavioral data. For example, you might set up your web site to recognize visitors from a particular industry and adjust images, text and content accordingly.

Many companies are now incorporating some degree of personalization in their websites. While 77 percent of marketers believe real-time personalization is crucial, sixty percent struggle to personalize content in real time. To create a personalized experience requires real-time access to information that goes beyond basic demographics and purchase history.

60% of executives see personalization as a channel-specific solution that is integrated with only some elements of the tech stack

# Ski Retailer Black Diamond Uses Real-time Personalization to Increase Sales

Ski retailer Black Diamond realized the value of real-time personalized engagement long before its peers. Skiers often know exactly what equipment they need to stay safe and compete, such as avalanche airbags. Black Diamond predicts these needs and pushes the right items to website visitors, rather than waiting till they check out to make suggestions.

Black Diamond uses sophisticated analytics to glean insights from a customer's purchasing history, and combine it with weather conditions and other relevant data to make product recommendations in real time. This effort has reaped rewards for Black Diamond, increasing sales significantly and dropping cart abandonment rates.

# Cheatsheet - Customer Journey Analytics Capabilities

Capability	Your Needs	Best Solution
<b>Journey Discovery</b>	<ul style="list-style-type: none"> <li>• Understand and communicate your customers' actual journeys</li> <li>• Uncover behavioral segments</li> <li>• Measure the impact of customer behavior on KPIs</li> </ul>	Analyzing customer behavior data across touchpoints and over time to uncover meaningful customer segments and to quantify the impact on your KPIs
<b>Journey Mapping</b>	<ul style="list-style-type: none"> <li>• Transform an organization to become more customer-centric</li> <li>• Ideate and communicate journeys for new products or processes</li> </ul>	Create a visualization of your customer's experience across touchpoints and over time, as they seek to achieve a specific goal
<b>Journey Orchestration</b>	<ul style="list-style-type: none"> <li>• Automate interactions at each step of the journey</li> <li>• Coordinate interactions across channels</li> <li>• Personalize engagement using information about the customer and where they are in their journey</li> </ul>	Automate real-time, personalized interactions that improve the journey flow and drive desirable outcomes
<b>Journey Optimization</b>	<ul style="list-style-type: none"> <li>• Increase the rate and speed at which customers complete their own unique journey to reach an objective</li> </ul>	A platform to create and test hypotheses to learn how to interact most efficiently with each customer based on their unique journey
<b>Journey Insights</b>	<ul style="list-style-type: none"> <li>• A deeper understanding of customers' needs, behavior and emotions as they seek to achieve a goal</li> </ul>	A journey dashboard to bring together qualitative and quantitative data to highlight factors with greatest impact on goal achievement
<b>Journey Design</b>	<ul style="list-style-type: none"> <li>• Define a hypothetical path and automate the workflow for customers engaging with a new product or service</li> </ul>	A platform that enables you to create a sequence of customer steps to achieve a goal and automate interactions

# How to Maximize Your Journey Analytics ROI

Journey mapping, journey discovery and journey orchestration each address a number of important—but different—business needs. Here are three ways you can combine them to realize a more significant return on your investment.

## 1. Journey Optimization

### Your Needs:

Increase the rate and speed (i.e. conversion and velocity) at which customers complete their own unique journey to reach an objective.

### Best Solution:

A platform that lets you create and test hypotheses to learn how to interact most efficiently with each customer to achieve a goal, based on their unique journey.

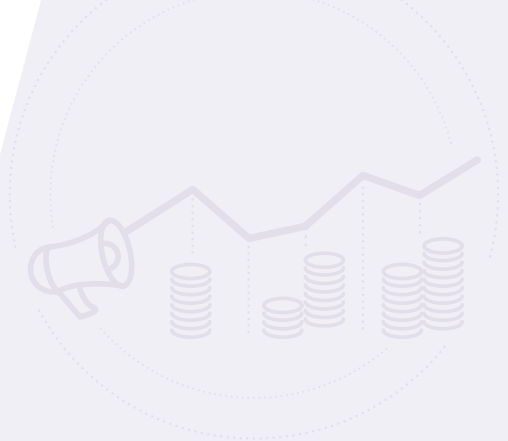
When you use journey discovery to observe customers' actual journeys, you'll naturally start generating new hypotheses on how to improve these journeys and want to design experiments to test your ideas.

Journey optimization is a closed loop approach that combines journey discovery with journey orchestration.

AI and machine learning are often employed to more rapidly evaluate alternatives and choose a method of interacting with each customer that maximizes the speed and probability that they will achieve a specific goal, based on their own unique journey.

Journey optimization is achieved by employing a test-and-learn approach that explores all of the contributing factors —touchpoints, people, training, process, communication, metrics, and technology—that can lead to opportunities to improve the journey.

One advantage of journey optimization is that it enables you to validate (or invalidate) ideas faster and more accurately.



Journey optimization enables you to rapidly and accurately validate your journey hypotheses

# 1. Journey Optimization (con't)

## Why Optimizing Individual Touchpoint Interactions Isn't Sufficient

Although you may already be optimizing individual touchpoint interactions such as website conversions, McKinsey research finds that customer journeys are significantly more strongly correlated with business outcomes than are touchpoints.

A recent McKinsey survey, for example, indicates customer satisfaction with health insurance is 73% more likely when journeys work well than when only touchpoints do. Similarly, customers of hotels that get the journey right may be 61 percent more willing to recommend than customers of hotels that merely focus on touchpoints.

Best-in-class companies optimize customer journeys, not just touchpoints.

Customers experience companies through end-to-end experiences, not touchpoints



Individual touchpoints may perform well even if the overall experience is poor



McKinsey&Company | Source: McKinsey Digital Labs

## 2. Journey Insights

### Your Needs:


A deeper understanding of customers' desires, motivations, behavior and emotions, as they seek to achieve a goal.

### Best Solution:

A journey dashboard that brings together qualitative and quantitative information to highlight those factors that have the greatest impact on the ability of customers to achieve (or not achieve) a goal.

Journey insights come from the synthesis of qualitative and quantitative information that builds your understanding of your customers and their behavior as they seek to achieve a specific goal. They provide a deeper understanding of customers' desires, motivations, behavior and emotions, as they try to attain their objective.

There are two primary categories of journey insights: 1) insights about behavioral segments and the journey paths they take (who, what and when), and 2) insights about the experience customers have on a particular journey, including their feelings, emotions, thoughts (why and how).



Journey insights provide a deeper understanding of customers' motivations, behaviors and emotions as they attain their objective.

## 2. Journey Insights (con't)

Journey insights can help provide a link between marketing or customer experience and metrics such as customer acquisition, conversion and retention rates, customer sentiment, effectiveness of loyalty programs etc.

### There are several ways to obtain the information that informs journey insights:

- Journey discovery
- One-on-one interviews
- In-context observation, also referred to as 'contextual inquiry'
- Surveys and questionnaires, including VoC, CSAT

Customer-centric companies are now mining journey insights. A top global airline, for example, combined quantitative and qualitative data to understand a segment it calls "uncomfortable corporate travelers," whose firms' travel policies require that they fly economy and who are costly to serve because they phone the call center to frequently complain in the hope of getting free upgrades. Deeper insights into these customers' journeys helped the airline avoid their pain points and improve customer experience.

This level of monitoring, though, needs to be simple, visual and intuitive. A journey dashboard is a useful way to visualize journey insights, as well as monitor relevant real-time information within a journey-based context.



# 3. Journey Design

## Your Needs:

Define a hypothetical path and automate the workflow for customers engaging with a new product or service or in a new way with an existing product or service.

## Best Solution:

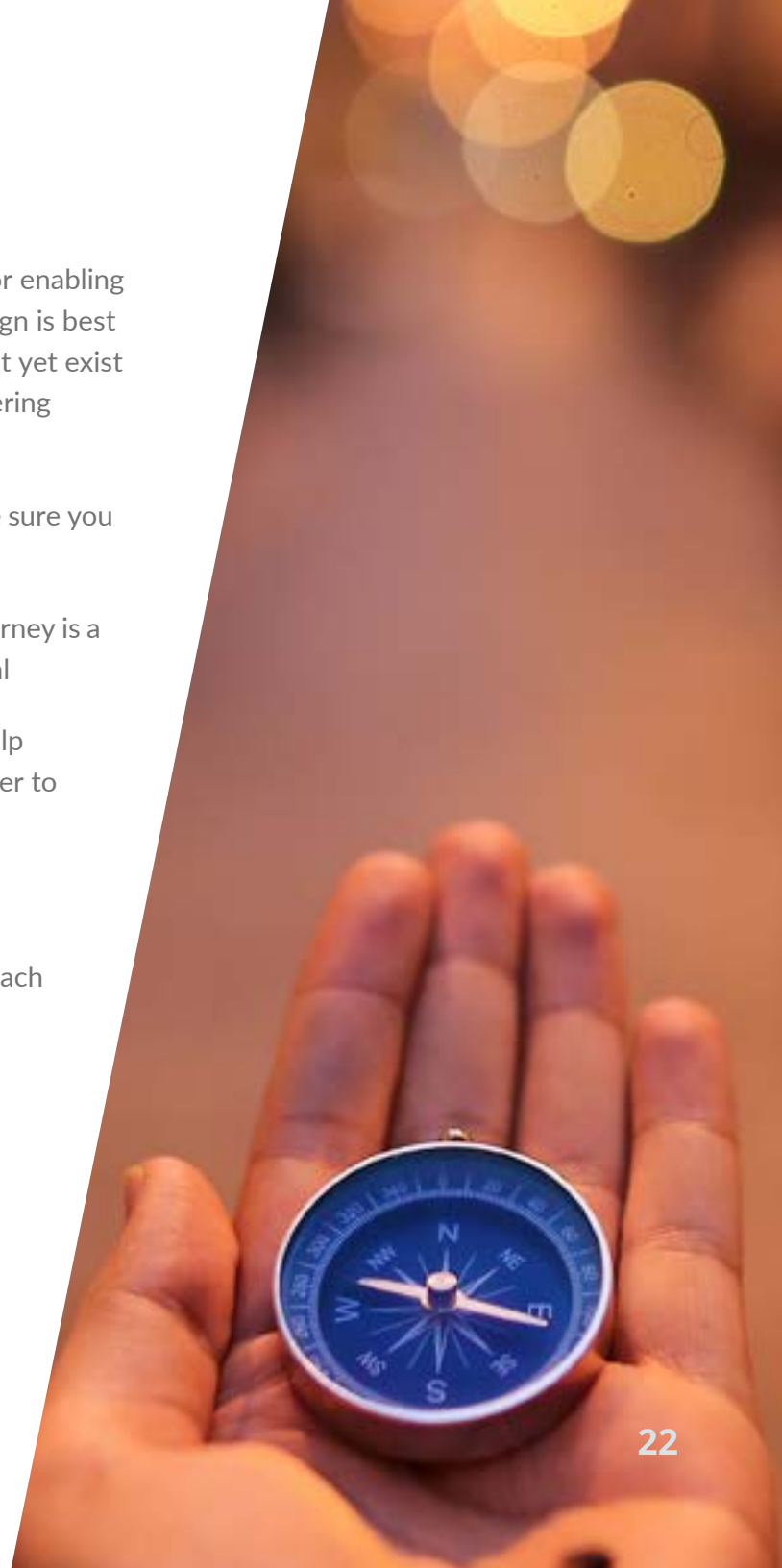
A platform that enables you to create a sequence of steps a customer should take to achieve a goal and automate the interactions the organization will take at each step to encourage progress towards the goal.

Journey design lies at the crossroads between journey mapping and journey orchestration, incorporating elements of both. It is the process of defining a sequence of steps a customer takes to achieve a goal and the interactions the company will take at each step to promote progress towards the goal. It is your best hypothesis for the series of steps your customer will take with—or towards the purchase of—a new product or service.

Journey design is a powerful tool for enabling digital transformation. Journey design is best used for creating journeys that don't yet exist and for re-imagining and re-engineering existing journeys.

For successful journey design, make sure you consider the following factors:

- **Journey goal:** Make sure the journey is a path to an explicit customer goal
- **Progression:** Does each step help your customer move a step closer to achieving their ultimate goal?
- **Touchpoints:** Through which touchpoints or channels will customers engage with you at each step of the journey?





# Sungevity Designs A Compelling Customer Journey

Sungevity, an Oakland California solar panel installer, competes on its ability to create a compelling journey. At first glance, Sungevity looks like a typical residential solar panel provider. But the company understands that their business is more than the physical installation of solar panels.

Sungevity's "product" is a seamless, personalized digital customer journey, based on innovative management of data about the solar potential of each home or business.

Starting with its initial outreach and continuing to the installation and ongoing management of each customer's panels,

Sungevity customizes and automates each step of the journey, making it so simple and compelling to move from one step to the next.

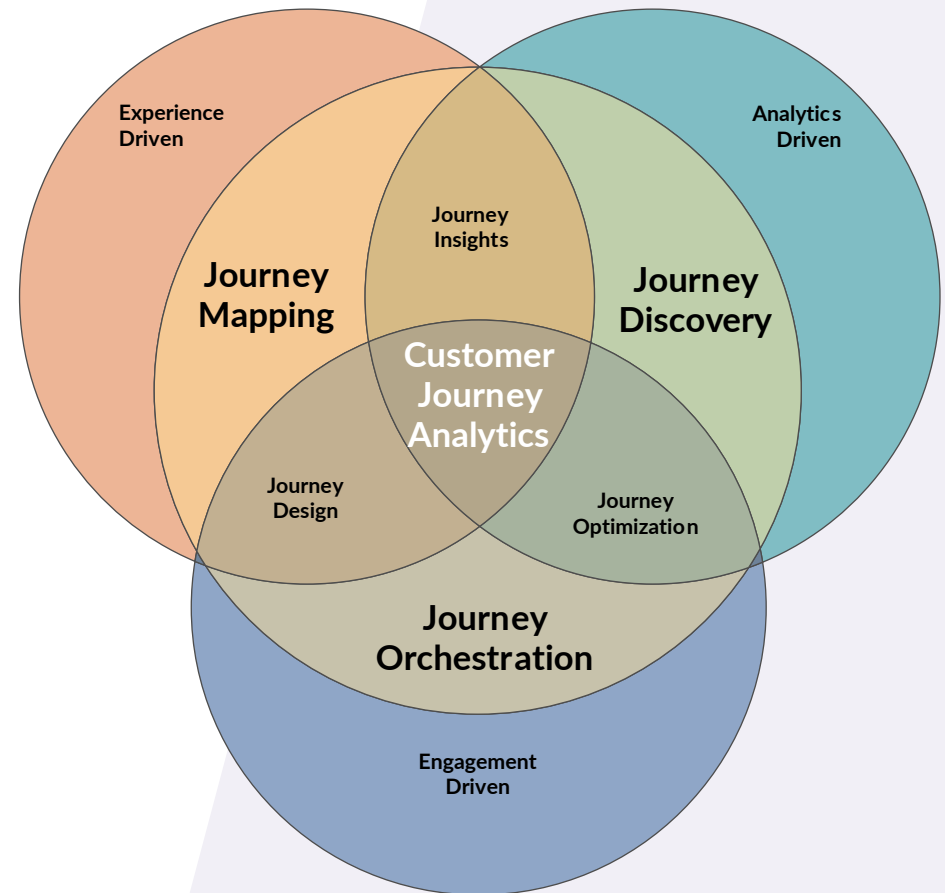
Sungevity makes this journey so compelling that customers who experience it typically don't even evaluate competing solutions.

# How to Use This Framework to Evaluate Customer Journey Analytics Platforms

The most important criterion for evaluating any solution is how well it is aligned with the particular problems you need to solve for your organization. So, the proper evaluation of customer journey analytics platforms begins with a thorough analysis of your company's needs and their relative priority.

Start by reading the descriptions of the three major flavors of customer journey analytics platforms (journey discovery, journey mapping and journey orchestration) and understanding the problems each is best suited to solve. Next, determine how these align with your own organization's needs.

Once you've established your own clear prioritization of these three approaches, then explore the three combinations, while paying particular attention to the one that represents the combination of your first and second priorities. Now you're ready to evaluate individual customer journey analytics platforms based on your unique set of priorities.



# How to Successfully Implement Customer Journey Analytics



# How to Successfully Implement Customer Journey Analytics

A well-thought project implementation plan is important both to ensure your customer journey analytics platform provides the insights required by the business and so that you create the best experience for your customers by fully leveraging the customer journey analytics process and mindset.

## What is the Right Time to Start Planning for Customer Journey Implementation?

Whether you're just starting to evaluate an investment in a customer journey analytics platform or you've already made the decision and have chosen a vendor, it's time to think about how to implement customer journey analytics in your organization. In either case, you likely have questions around what use cases to pick, how to create a project team and how to prepare your data.



# Steps to Implement Customer Journey Analytics

## 1. Define the Project Scope

Defining the scope of a customer journey analytics project involves setting basic parameters around its size, complexity, goals, and function. The questions below will help you define the scope of your customer journey analytics project:

- Will the project be confined to a single team, such as customer experience or marketing, or will other business functions use the platform?
- What are the quantitative business goals that will influence the journey analytics project e.g., churn, retention, acquisition, cross-sell, upsell, purchase, rate of renewal, etc.?
- Is your organization already aware of specific pain points and friction in your customers' journeys?
- Are there specific journeys or micro-journeys that stakeholders or users are looking to understand better?
- Is there an analytics team in place? Do they track customer journeys? 'Thinking in journeys' is important when it comes to data integration for customer journey analytics, as explained in detail in step 4.
- Has a journey mapping exercise ever been conducted? If recent, these journey maps can provide starting points to start discovering important customer journeys.



## 2. Build a Team

After defining the scope, the next task is to build a team that will steer the customer journey analytics implementation project to success. The key roles within this team are:

### Champion

A successful customer journey analytics project starts with the right champion. It's that simple. A champion is necessary to make the case for journey analytics and convince others in your organization that it is the best approach to meet their goals.

The Champion may or may not be the Project Manager (if not, then make sure to recruit an experienced project manager to organize the project and keep everything on track!). In either case, the Champion usually helps recruit the rest of the project team, gets all the stakeholders onboard and facilitates the entire implementation project, so that all the goals are met.

The Champion is typically an influential member of the marketing, customer experience or analytics team. They are usually viewed by others as a powerful and respected source of new ideas



## 2. Build a Team (con't)

### Executive Sponsor

Every successful customer journey analytics project begins with an Executive Sponsor (typically Chief Marketing Officer or SVP of Customer Experience). This person is crucial in getting the initial project approved and moving it forward. He or she has both the budget and authority to approve and initiate a project of this scope and scale.

### Stakeholders

The Stakeholders are typically leaders of a business unit or function (such as Director of Analytics or VP of IT), whose function or unit either benefits directly from the insights generated by customer journey analytics or will be involved in implementing it. The Stakeholders lend their support to the project from planning to finish and beyond. With their influence, the adoption of customer journey analytics becomes easier in an organization.



## 2. Build a Team (con't)

### Users

This group of people should have some knowledge of analytics and be well-versed in organizational business processes. No background in data science is necessary. Ideally, they should be able to identify relevant questions about customer journeys and how engagement may enhance them. An example of this profile in the Marketing function would be a marketing analyst responsible for monitoring customer behavior, charged with engaging dynamic customer segments based on their demographic, psychographic and behavioral characteristics.

### Data Integration Resource

The Data Integration Resource understands all of the required data sources. They will be responsible for providing access to the necessary applications, channel systems, and customer databases. In most cases, this role is performed by an IT team member who has sufficient knowledge of pertinent data sources and how to access them.



## 2. Build a Team (con't)

### Ensure Project Momentum

Once you have built a team and defined the scope of the project, it is important to create a sense of alignment, urgency and ownership within the members of the team.

Here's a checklist to keep the project moving in the right direction.

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### Checklist: Ensure Project Momentum

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- ✓ Specify how often the team will meet

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- ✓ Define the roles and responsibilities of different team members

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- ✓ Help the team understand how customer journey analytics will help your business and your customers

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- ✓ Don't ask for more time from team members than necessary

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- ✓ Keep the team informed of all developments

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- ✓ Ensure a collaborative process where different viewpoints are heard

### 3. Set Goals – What Will Success Look Like?

At the start of any project, particularly one that involves many stakeholders and has not been tried before like customer journey analytics, it is important to set goal posts and define what success will look like.

#### Success Metrics for the Team

**Champion** – It is important for the champion to understand thoroughly the value of customer journey analytics as an analytics platform and believe that the regular users have built proficiency

to use the platform meaningfully on a regular basis. Ultimately, the biggest success metric for the Champion is to be able to show the Executive Sponsor and key Stakeholders that real business value has been gained through the use of customer journey analytics.

**Executive Sponsor** – The Executive Sponsor will likely consider the customer journey analytics project useful if it positively impacts important business metrics (such as revenue, retention, upsell etc.) and delivers meaningful ROI.



### 3. Set Goals – What Will Success Look Like? (con't)

#### Stakeholders

The customer journey analytics deployment project will be considered a success if the Stakeholders see demonstrated value from it and believe that it will continue to generate insights that have real business value. Moreover, this business value should be applied to their specific line of business or area of interest.

#### Users

A customer journey analytics deployment would be considered successful from a User's perspective when it helps them to do their job better or more easily. Milestones include when a User starts thinking in terms of journeys, can discover journeys on their own, and is able to report on desired metrics within the customer journey analytics platform. Those Users that the Stakeholders trust for unvarnished feedback should have enough hands-on experience to be able to provide meaningful feedback.

## 3. Set Goals – What Will Success Look Like? (con't)

### Success Metrics for the Project

**Project Deployment Time** – An important success metric is whether the customer journey analytics project, as defined, is completed on time. Estimate project duration by speaking with the vendors you have shortlisted and any industry consultants/analysts who may be advising you. For an effective implementation, give yourself wiggle room and plan for unforeseen delays. Once completed, compare how much time you took versus originally planned. Figure out which stages took more time than you planned and determine causes for the delay.

**Training Effectiveness** – A customer journey analytics platform, no matter how easy and intuitive to use, will still require training for users not used to thinking in journeys. You will need to establish metrics for

measuring the success of employee training. For instance, one success metric might be the number of users that discover a new journey or build a journey dashboard in a customer journey analytics platform on their own within a certain number of days after training.

### Success Metrics for the Business

One of the most powerful benefits of using customer journey analytics is that it connects individual customer behavior to important quantitative metrics and KPIs that you and your business are measured by. The key lies in selecting the right metrics and KPIs to monitor and improve, based on the insights generated by your customer journey analytics platform. Pick a mix of financial, customer and operational metrics.

*Good examples of each would be:*

#### Customer Metrics:

- Net Promoter Score (NPS),
- Customer Satisfaction Score (CSAT)
- Customer Effort Score (CES)

#### Operational Metrics:

- First Call Resolution (FCR)

#### Financial Metrics:

- Revenue growth
- Churn rate
- Upsell and cross-sell revenue growth

## 4. Create a Data Integration Plan

Data integration is the backbone on which a successful implementation rests. It can make or break your customer journey analytics project.

Before we get into the details of how to plan for a smooth and successful data integration, it is helpful to understand the basics behind it.

### How to Select Your Initial Customer Data Sources

Whether you're working with a consulting firm, agency or the vendor's customer success team for implementation, it is important to understand and determine the customer data sources that you want to integrate into the journey analytics platform in order to get the desired insights.

### Thinking in Events

The fundamental data type for customer journey analytics is the event. Regardless of how you might think of data today, in customer journey analytics everything is an event. An event-based approach

captures every addition or change to customer data that occurs, whether from a customer interaction, an employee action, an automated workflow process, etc. Treating every change to customer data as an event saves work for data engineers, as no transformation is required.



## 4. Create a Data Integration Plan (con't)

**The Types of Events** - Before getting into details of the structure of event data, it is useful to understand 4 general types of events. These are simply helpful patterns to consider when selecting data:



### CUSTOMER ACTIONS

Interactions initiated by the customer at the touchpoint:

- View Web Page
- Submit Survey
- Call Support Center
- Pay Bill



### COMPANY OUTREACH

Interactions initiated by your company to communicate with a customer

- Email Sent
- Promotion Offered
- Direct Mail Sent
- Outbound Sales Call



### OPERATIONAL EVENTS

Internal actions not necessarily seen by the customer, which nonetheless influence the customer experience e.g.,

- Package Fulfillment



### PROFILE, STAGE, OR STATUS UPDATES

Snapshots of data captured by your company – typically descriptive of the customer, e.g.

- Profile Update
- Contract Update

## 4. Create a Data Integration Plan (con't)

The three components that define an event are the event type, a customer identifier, and a timestamp for when the event occurred.

### Event Type

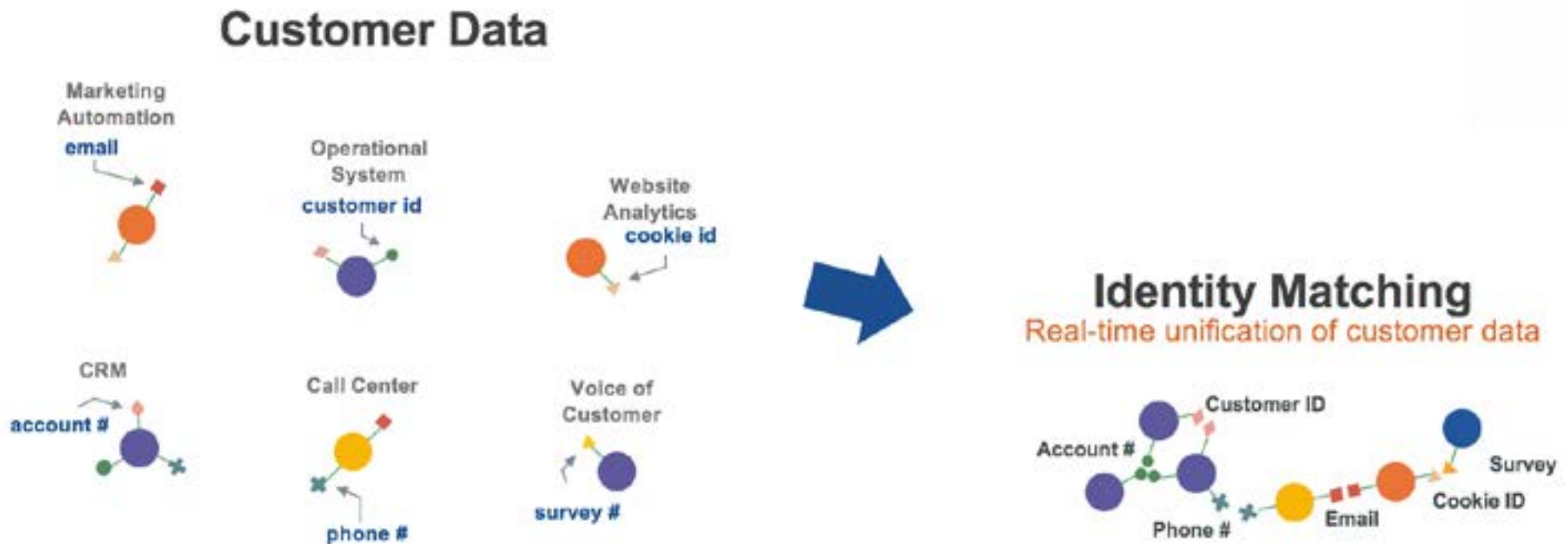
A short description, typically 1-3 words, describing the nature of the event. Event type is often not contained within the data but is assigned manually to events from a given dataset.

### Event Time:

The time that the event took place. Note that this is different from the time that the data was recorded.

### Customer Identifier

Any information which can be used to identify an individual customer. This can be anything from IP Address or Call ID (which are session-based and temporary) to Email Address or Account ID (which are more permanent). It is best to include as many identifiers as are available for a given event to further facilitate identity matching. The example below shows how a variety of customer identifiers are used to create unified customer profiles.



## 4. Create a Data Integration Plan (con't)

### Is My Data Ready for Integration?

The most frequent concern when preparing to embark on a customer journey analytics project is how long it will take you to get your data in the right shape.

Your data may be ready right now—without any additional preparation—depending on the customer journey analytics platform you choose. If efficient data integration is important to you, make sure to evaluate whether your journey analytics platform accepts data in all formats and does not require you to perform aggregations, schema mapping or any others data transformations before passing on the data.

Your data may be ready for integration right now—without any additional preparation—depending on the customer journey analytics platform you choose.

# How the Pointillist Customer Journey Analytics Platform Enables Smooth Data Integration

Raw data can be sent directly to Pointillist without requiring aggregations or roll-ups of any kind. Pointillist can handle data in all forms, whether it is in tables, excel files, server logs, or 3rd party APIs. The Pointillist Customer Success Team has proprietary parsing and mapping tools which make transforming your raw data much simpler and easier than typical ETL processes.

## Getting Data into Pointillist

There are three ways to get data into Pointillist:

**Batch Upload:** Pointillist provides an SFTP endpoint unique to your company. Data in any format may be uploaded to this endpoint. During onboarding, the data will remain on your

Pointillist-hosted SFTP server until the customer success team has created and quality-checked the requisite ingestion script. This process typically takes 1-2 days.

**3rd Party APIs:** Pointillist has a large number of connector libraries for 3rd party APIs. Depending on the level of customization, 3rd party APIs can take anywhere between 1 day and 2 weeks to integrate with and quality-check.

**Pointillist Web Tag and Mobile SDK:** Pointillist's journey tracking tools can be readily instrumented on your website and in mobile apps for any platform. Even in cases where you have existing tracking tools in place for these channels (e.g. Google Analytics or Adobe Analytics), deploying the Pointillist tracking tools can aid in cross-channel identity tracking.

## 4. Create a Data Integration Plan (con't)

### How do you ensure data quality?

Data quality is critical to trusting the output of the customer journey analytics platform, and ultimately extracting value from an investment into this project. Whether you're working with a consulting firm, agency or the vendor's customer success team, ensure that your service provider takes data quality seriously and adheres to a strict QA process throughout integration and beyond by incorporating:

- **Rigorous checks at each stage of ingestion** – From the initial check of raw data to the completed ingestion of data into the customer journey analytics platform, the service provider should complete a thorough set of standardized checks every step of the way.
- **Comparison with Benchmark KPIs** – A world-class service provider will ask you to provide benchmark KPIs for any dataset where accuracy is especially critical. The analytics results produced by the customer journey platform should be measured against these KPIs.

- **Changeable data** – The customer journey analytics platform you choose should allow data to be readily updated. Any issues that are identified may be remedied on an ongoing basis according to urgency and the availability of improved source data.
- **Monitoring and automated alerts for substantial data deviations** – The service provider should ideally employ an automated monitoring and alert system to inform you of substantial deviations in data – such as missing time coverage or interruption of 3rd party data streams.

# 5. Identify Key Use Cases

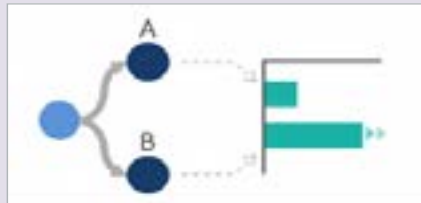
It is important to identify a use case that addresses the most significant pain points being faced by your business. At the same time, be mindful that you are addressing the problems being faced by all the stakeholders involved in the project.

To help you pick the best use cases for your initial implementation, here is a framework that describes six types of customer journey analytics use cases in order of increasing complexity.

## The 6 Customer Journey Analytics Use Cases

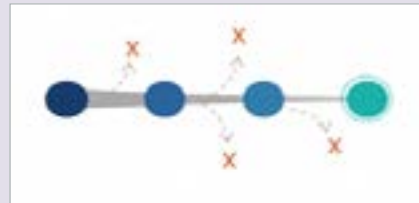
*Ordered by increasing complexity*

### 1 A-B Testing



Determine which alternative interaction or sequence of interactions performs better

### 2 Conversion Rate Optimization



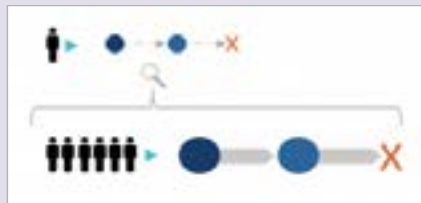
Increase the rate at which customers progress at each step or along a series of pre-defined steps

### 3 Impact Analysis



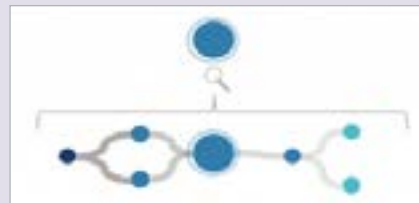
Quantify the effectiveness of interactions at a single step or towards achieving a goal or KPI

### 4 Behavioral Segmentation



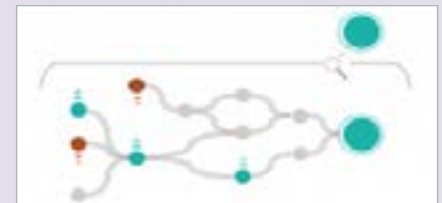
Discover meaningful groups of customers defined by a common path and attributes

### 5 Journey Discovery



Uncover customer interactions along meaningful paths across touchpoints and over time

### 6 Goal Optimization



Use AI to reveal the customers and interactions most/least likely to impact a business goal

## 6. Build Organizational Readiness

Customer journey analytics is worth all the time, effort and resources you invest in it, but to get its full potential you have to integrate it seamlessly within your organization. This integration goes far beyond technology and data and involves your people and culture. Customer journey analytics is a discipline, not a technology, and to truly reap its benefits, you need to build organizational readiness.

### Change management

It's likely that multiple departments and teams will be affected by the results of customer journey analytics, so it's important that they understand and support the initiative. This is where the support and influence of your

stakeholders will come in very handy as their enthusiasm will rub off on other employees.

Start by holding a series of meetings where employees can get answers to questions such as:

- What is customer journey analytics?
- How can it help our business?
- Specific details around training and implementation

Customer journey analytics is a discipline, not a technology, and to truly reap its benefits, you need to build organizational readiness.



## 6. Build Organizational Readiness (con't)

### **Establish a Space for Employees to Learn and Collaborate**

Create an online space using a collaboration tool such as Slack, where employees can ask questions, share results and access resources. Seed the site with educational materials to allow employees unfamiliar with customer journey analytics to get up to speed quickly.

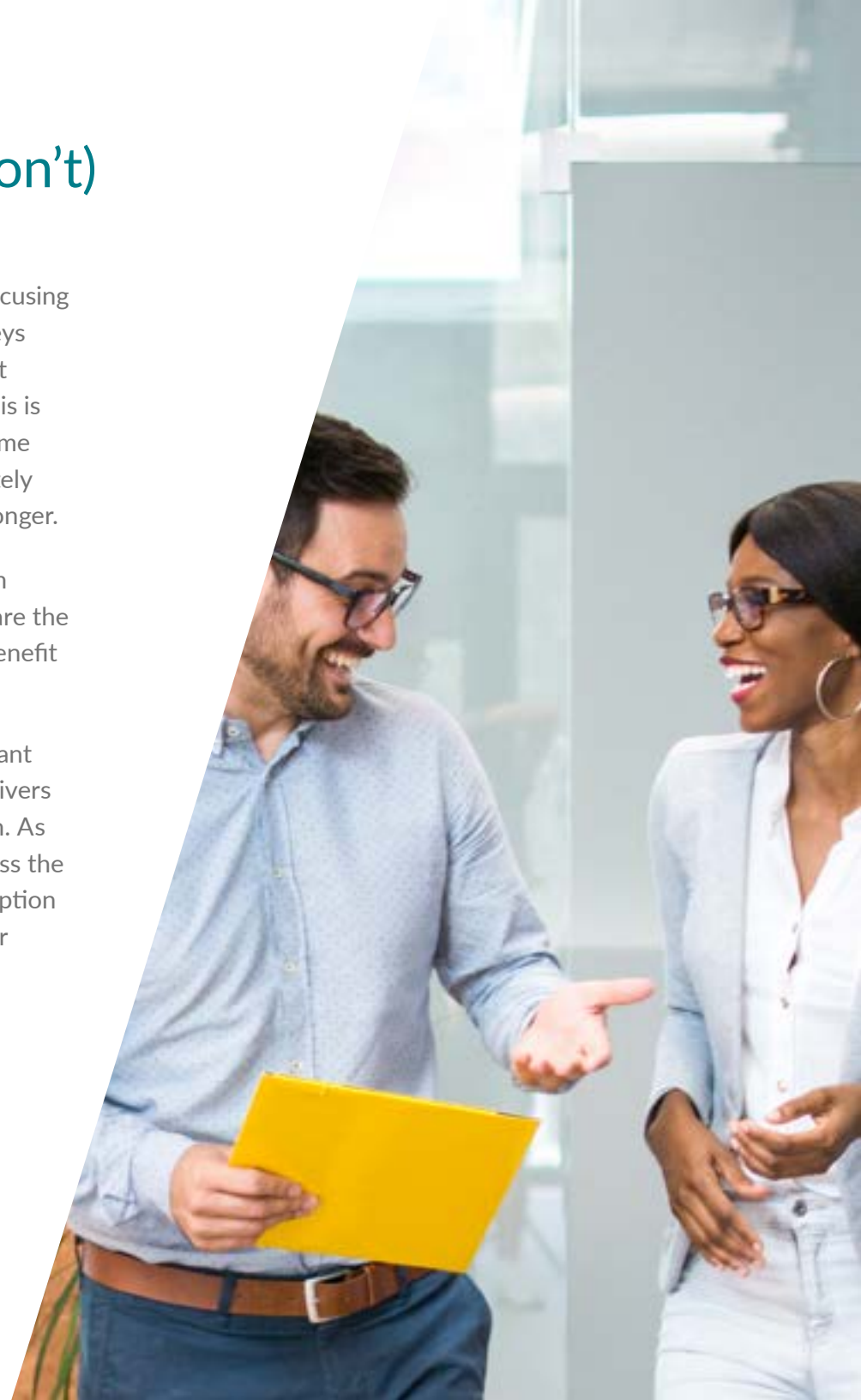
### **Instill a Journey-based Mindset Throughout Your Organization**

Company culture is a set of shared values throughout the organization and you can influence it over time by instilling a journey-based mindset

throughout your organization. Articulate the importance of focusing on end-to-end customer journeys as opposed to single touchpoint interactions. Appreciate that this is a long-term effort and while some early adopters will be immediately enthusiastic, others may take longer.

As you start seeing results from customer journey analytics, share the insights with others who can benefit from them.

Compile a repository of important customer journeys, their key drivers and the metrics related to them. As you share this information across the organization, you will build adoption and organizational readiness for customer journey analytics.



## 6. Build Organizational Readiness (con't)

### Employee Training

Training is a critical piece of making sure your organization is ready to successfully implement customer journey analytics. To ensure adoption and usage of your new customer journey analytics platform, make sure the users are properly trained.

Training is most successful when conducted in-person but if that is not an option, a live webinar would work too. Groups of 2 to 5 users are ideal so the trainer can provide personal attention to each user.

Be sure to map out your training plan with the vendor in advance, keeping in mind the schedule of your users. In addition to the initial training, also plan for some ongoing training in case your users encounter some difficulty.

### Governance

Large enterprises typically have a central governance team in place that is responsible for setting project quality standards, fostering communications and sharing best practices. The governance board is responsible for increasing the success rate of customer journey analytics projects undertaken by the organization, while at the same time taking into account the risks involved.

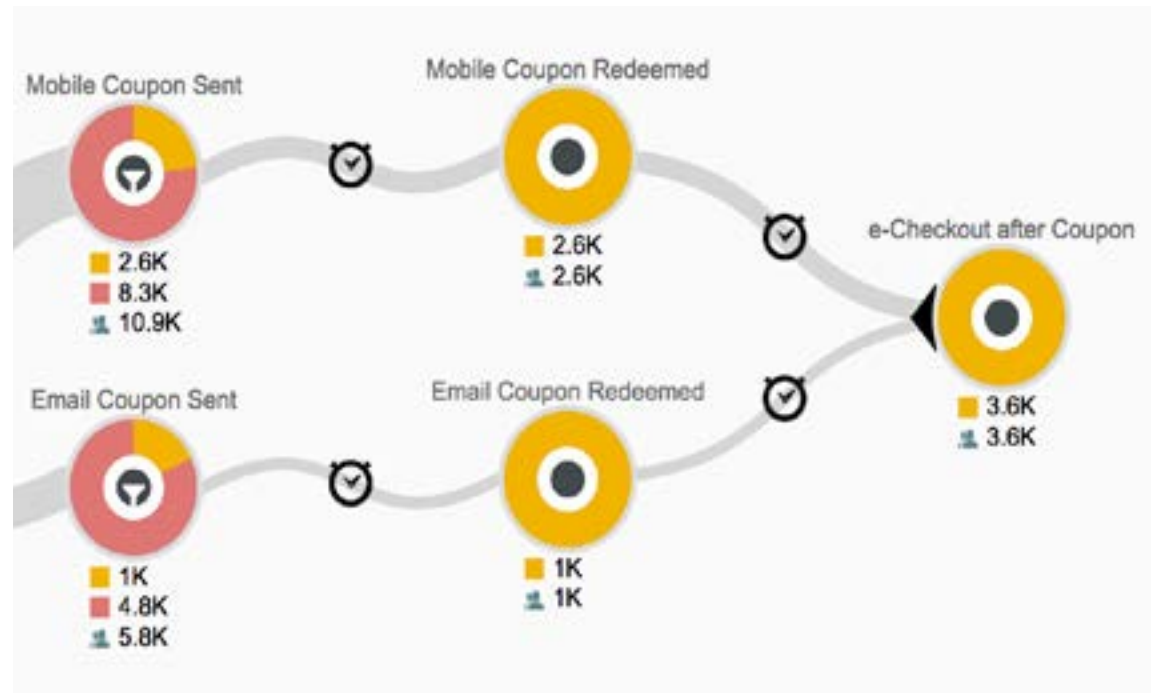


## 7. Invest in the Right Customer Journey Analytics Platform

Now it's time to invest in a good customer journey analytics platform that will meet all your needs and be the right fit for your organization. The key to making a good choice is to clearly understand and prioritize your business needs and then use them as a basis for determining the best customer journey analytics platform for you.

### Decide Whether to Do A Pilot

Some large companies, depending on budget and scope, prefer a phased implementation that starts with a paid pilot or proof of concept. Running a paid pilot helps ensure that the project is properly resourced and prioritized by your internal team, including your stakeholders. By implementing journey analytics at a smaller scale first, it provides a large enterprise with an opportunity to identify any implementation challenges early, before moving on to enterprise-wide adoption. However, the decision to conduct a paid pilot depends upon your company size, project scope, internal processes and governance.



By documenting the lessons learned during the pilot, ironing out hiccups on a smaller spectrum and testing out the effectiveness of your planned process, you can make more effective decisions about resources.

# 8. Develop Journey-based Insights

Whether you've decided to do a Pilot or jump right into a more comprehensive implementation, a critical first step is to ensure your users have the confidence to use the customer journey analytics platform on their own to perform meaningful analyses and identify opportunities for improvement.

This is the time to dive into the most important use cases you had identified as a team in Step 5 of this implementation plan.

## Discover Real Customer Journeys

All the hard work that you have done up until this point is now ready to start bearing fruit. You have chosen the customer journey analytics platform and integrated customer data from different sources, your users are trained and ready to go—it is now time to start discovering real customer journeys.

You could, for example, begin by testing journey hypotheses that you have previously built, perhaps as an outcome of a journey mapping process conducted by your customer experience team. You can create highly accurate visualizations of high-impact, micro- and macro-level customer journeys without any data science or coding expertise.

Sophisticated customer journey analytics platforms with highly visual interfaces can help you discover journeys in minutes, simply by dragging and dropping relevant 'customer interactions' on to a journey canvas.



# Top Telecom Provider Rapidly Quantifies ROI with Pointillist

**A large, top 5 U.S. telecom provider made a major investment in customer outreach, the likes of which they had not done before. They quickly reached a critical point where they needed to quantify the Return on Investment in order to decide whether to expand, contract or stop further investment in the customer outreach. They needed sophisticated analytical features in a short time and hence employed the Pointillist customer journey analytics platform.**

Pointillist integrated customer data rapidly and easily into the platform—*onboarding 4 billion events (or data points) across 8 enterprise datasets in 2 weeks, 4 calls and 14 emails.*

Within a few days of data integration the customer experience team was able to uncover customer journeys on

their own, without the assistance of data scientists or the IT team.

Pointillist enabled the telecom company to quantify the returns from the customer outreach investment, both in terms of ticket resolution rates and NPS scores. Using Pointillist, they determined that due to the new customer outreach program, NPS scores had gone up by 5 points and there was a significant boost in ticket resolution rates.

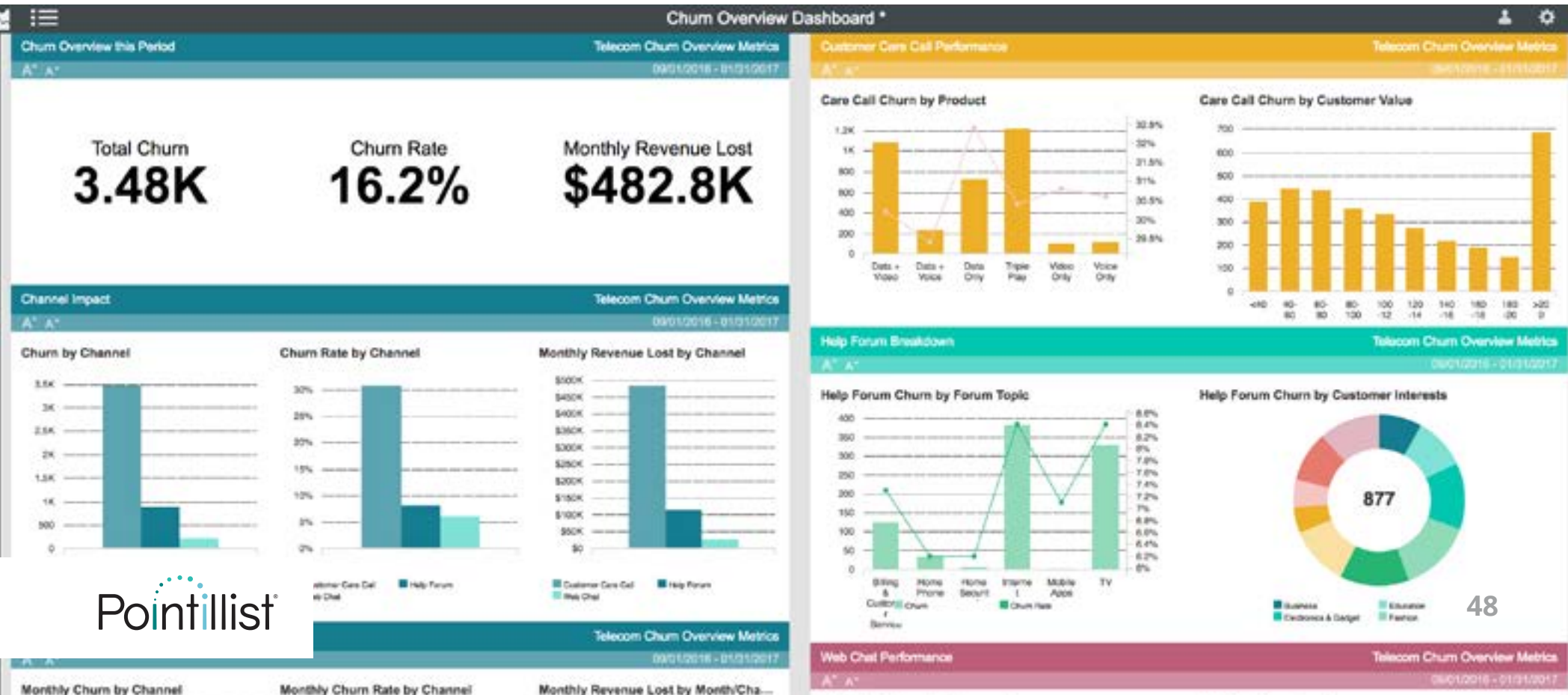
With this insight, the telecom provider was able expand the application of messaging and continue its investment in the outreach program.

# 8. Develop Journey-based Insights (con't)

At this stage, go back and look at the business metrics you had targeted for impact at the time of setting goal. Make sure your journey discovery process has covered those key metrics and you have started tracking those key metrics and KPIs in real time in your journey analytics platform.

This will provide a quantitative link between customer behavior and hard metrics like revenue, profitability, churn, acquisition rate, etc. that measure the health of your business and the performance of your teams.

Create interactive dashboards within the journey analytics platform to present these insights on key metrics on a regular basis to stakeholders and executives.



## 9. Use Journey Analytics to Drive Actions

Look for opportunities to make your insights actionable. Here are three ways to do it:

### Journey Orchestration

Using the important customer journeys you have created in your customer journey analytics platform, look for places to employ journey orchestration to automate real-time interactions and drive desirable outcomes that will impact your KPIs. By embedding triggers at any point along the customer journey, you can automatically initiate next-best actions in real time across all of your customer touchpoints.

For example, a bank can automate sending an acknowledgement email after a customer successfully deposits a check through a mobile app, from within the customer journey analytics platform. This is made possible by using a customer journey analytics platform to orchestrate engagement across channels based on individual customer behavior.



## 9. Use Journey Analytics to Drive Actions (con't)

### Personalize Engagement

Using journey analytics data, you can deliver real-time personalized engagement, which improves customer experiences by incorporating each customer's individual preferences, as well as their recent interactions with your company.

Examples include using customer journey data to personalize website content in real-time and dynamically populating contents of an upsell email based on customer activity data generated through journey analytics.



# 10. Measure Success

It is now time to revisit Step 3, Setting Goals and Measuring Success. Evaluate your progress to date against each of your success categories—Team, Project and Business.



## TEAM

Have the key members of your team started to derive value from customer journey analytics? If you're just starting out, the objective should be to begin seeing results.



## PROJECT

Evaluate whether the project deployment time met the original estimate or exceeded it. (Pat yourself on the back if you managed to deploy the platform on schedule!) In case of a delay, spend some time determining the reasons.

Take feedback from users and their managers on the effectiveness of the training given on the customer journey analytics platform, once the users have become accustomed to using it. Establish metrics for measuring the success of the training.



## BUSINESS

The impact of customer journey analytics on quantitative business metrics is really powerful. Measuring this impact is also made easy by the platform. Make sure you build dashboards and track these KPIs regularly to measure how well the implementation of insights generated by journey analytics is moving the needle on financial, customer and operational metrics.

KPI

# 11. Elevate, Scale & Promote Your Customer Journey Analytics Programme

## Include New Data Sources

Incorporate new data from additional sources allows you to expand the depth and breadth of your analyses. For instance, you can connect data from sources like surveys, social media, web chat, and products to better understand journeys and life events, segment customer behaviors, and gain in-depth strategic insights.

## Spread the Word About Your Successes

At the end of a successful implementation, it is important to talk and educate others about its success. This will bring visibility, support, and additional budget. Remember to lead with quantifiable results and insights as your audience really cares about impact.

## Build a Roadmap for Future Improvements

Stimulate discussion on the next round of marketing or CX improvements by building a Journey Atlas that shows all your key customer journeys. Make your Journey Atlas available throughout your organization and regularly refine it by adding new customer journeys and updating existing ones.



# Conclusion

Customer journey analytics is a new approach to analytics—not just a software platform. As such, adopting and implementing it within your organization is an important investment. With this buying guide, you now have the framework to choose the right platform, as well as plan, organize and start implementing customer journey analytics within your organization. Armed with knowledge, you will be better prepared to set yourself and your organization up for success with customer journey analytics.





## Discover and Influence Your Customers' Journeys

Pointillist makes it easy for CX and marketing professionals to uncover and optimize the journeys that matter to your customers, so you can improve customer experience and marketing results and impact the KPIs that matter most to your business.

- Quickly understand customer behavior across all touch-points & channels over time
- Uncover and predict high-impact customer journeys
- Drive personalized, multi-channel customer experiences

Unlike other journey analytics solutions, Pointillist lets you connect the dots between customer interactions and business goals in seconds, rather than days or weeks. By using machine learning to reveal high-impact journeys and predict likely behavior, Pointillist is like having a personal data scientist that's always on call.

## Contact Us

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