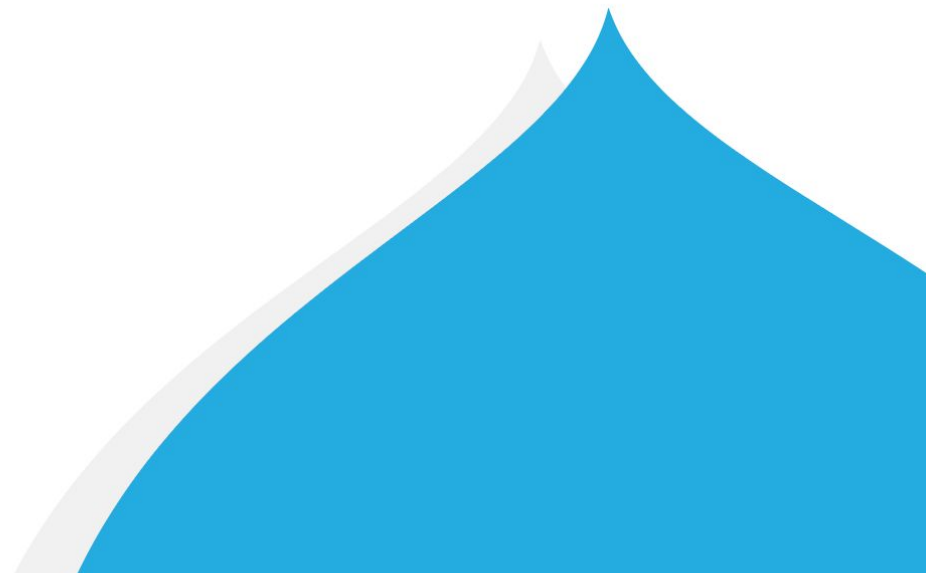# The Customer Journey

How to Deliver a Great Customer-First Experience

About the Authors

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Senior Director of Product Marketing

David Aponovich is senior director of product marketing at Acquia, where he helps articulate the business and technical value of Acquia solutions including Acquia Journey, the company's customer journey orchestration solution. In his role, David champions how organizations are creating new revenue streams, lowering costs, digitizing their business, and engaging audiences more effectively. Prior to joining Acquia, David was a senior analyst at Forrester Research, where he researched web content management and digital experience technology and consulted to Forrester's global clients on their digital transformation initiatives. He also spent six years as web content management consultant at agency Connective DX and previously was marketing director at a WCM software vendor.

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Meagan White is a senior manager of product marketing at Acquia, where she helps organizations digitally transform their business and customer experiences. She is passionate about helping brands maximize their digital efforts by crafting thoughtful, creative marketing strategies and campaigns that helps them connect with their audiences in new ways. Her professional experience includes the creation and management of brand, storytelling, and digital marketing strategies for several start-ups and Fortune 1000 companies across a wide range of verticals. Prior to Acquia, Meagan managed social media, content, and digital strategies for a content marketing agency. Later she joined Intralinks, a software as a service provider, where she led global social media efforts, content, and corporate communications programs.

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Introduction

Consumers are constantly interacting with brands. But how they interact, when they reach out, and why they engage is unique to each person. Everyone's on a path of their own making as they intersect with your business, to buy the product, obtain the information, seek the help, or resolve a problem that matters to them. Successful marketers and customer experience professionals know that having a great product or solution alone won't bring you new business.

To attract and retain customers, marketers must focus on the holistic customer experience — creating and enabling interactions that are engaging, differentiated, and personalized to the individual at every step. Today, this means building an informed, contextual relationship with your audience through every stage of the customer journey. Adopting a journey mindset means the customer's intent and needs come first. Content, offers, and experiences are triggered and delivered in the moment, to the right channel, on an individualized basis. It's a customer-first world, and your brand is just living in it.

The challenge is scale in managing many users and sequencing in real-time actions across many different touchpoints. You don't just have one customer, you have many — thousands, tens of thousands, perhaps millions — and your customers are always on the move. They may visit your site, depart, resurface, read your emails, follow you on social media, call your contact center, and, if you're a retailer, walk into your store to interact with staff or purchase a product. All of which means you have a large and growing accumulation of customer data that can tell you a lot about every individual. And you have many channels of engagement, including those you control — say, website, mobile sites, email, in-store — and other channels on which you connect with customers, like Twitter and Facebook, voice-interaction channels like Google Home and Amazon Alexa, and more. Even if you control of your message and your channels, you can't control who sees your message in what context. As a marketer or customer experience professional, you are no longer in the driver's seat. Your customers now decide the experience they want to have with a brand — what they want to consume, where they want to consume it and when – and they expect that each and every digital interaction be highly relevant and personalized for them. Here's the tough part: It's your job to anticipate, to react fast, and be where your customers are (even at enterprise scale) in each moment of the customer lifecycle. Welcome to the era of the customer journey.
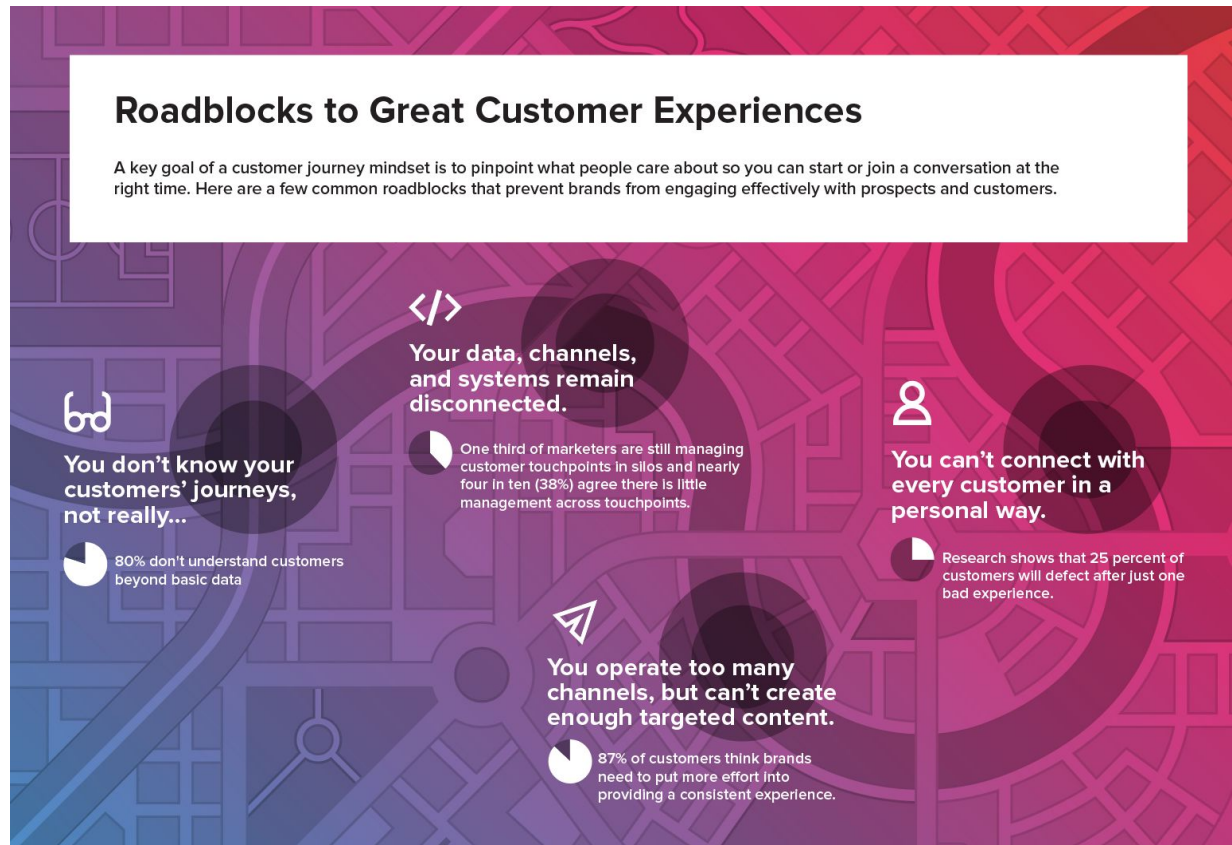
In this eBook, we'll review the challenges of creating relevant, contextual customer experiences, and share the secrets to delivering a successful customer experience that puts your audience first at every point in their journey.

It's a customer-first world, and your brand is just living in it.

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Remove Roadblocks to Great Customer Experiences

Every interaction with your brand is another mile marker on your customer's journey, whether it's a web visit, an email, an online ad, an interaction with a mobile application, or visit to your store. Your goal is to entice them to keep moving down the road (toward conversion, purchase and loyalty) and give them every reason to not take an exit that leads them away to a competitor.

Roadblocks to Great Customer Experiences

A key goal of a customer journey mindset is to pinpoint what people care about so you can start or join a conversation at the right time. Here are a few common roadblocks that prevent brands from engaging effectively with prospects and customers.

Your data, channels, and systems remain disconnected.
One third of marketers are still managing customer touchpoints in silos and nearly four in ten (38%) agree there is little management across touchpoints.

You don't know your customers' journeys, not really...
80% don't understand customers beyond basic data

You can't connect with every customer in a personal way.
Research shows that 25 percent of customers will defect after just one bad experience.

You operate too many channels, but can't create enough targeted content.
87% of customers think brands need to put more effort into providing a consistent experience.

A key goal of a customer journey mindset is to pinpoint what people care about so you can start or join a conversation at the right time.

A key goal of a customer journey mindset is to pinpoint what people care about so you can start or join a conversation at the right time. To keep them on that highway, you need to offer the best, most relevant information and experiences at the moment they're looking for it and expect it. While the concept of content marketing and personalization isn't new, many companies and teams still struggle to execute this across the full customer lifecycle. There are signs to look out for. Here are a few common roadblocks that prevent brands from engaging effectively with prospects and customers.

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You don't know your customers' journeys, not *really*...

Although you may know your customer, how *well* do you know each of your customers? Well enough to understand and recognize what they want, and when? Ditch your assumptions that have you grouping people in segments. Your customers are on individual journeys that cut across multiple digital and non-digital channels like web, social, commerce, IoT devices, call centers, and in-store. The interactions can be marketing-oriented, but they can also go far beyond the purchase stage into service, support, and loyalty. Whether they're trying to buy a car (or get an answer to a technical question about the light on the dashboard); investigating a new life insurance policy (or trying to update beneficiary information), or book a flight (or filing a missing-luggage complaint), customers are seeking various information, want to ask a question, or complete a task, across a multitude of possibilities at different points in time. Too many companies and brands operate digital-in-a-silo activities, which is a clear indication you're treating each interaction as a one-off interaction, not seamless journeys.

Your data, channels, and systems remain disconnected.

Organizations and brands are communicating across an abundance of channels today. They make this happen using myriad marketing, digital experience and ad tech systems. Finally, they utilize a large volume of data gathered on their customers from CRM, marketing automation, and other data-rich systems. While these tech tools work individually (say, a marketing automation system delivering emails to an audience segment), they typically are not connected to work together.

Too often, random acts of marketing -- such as anthe email blast offering a discount on a product the customer just purchased -- confuse or turn away prospective customers in the chaos of repetitive messages and offers that have no relevance to them. And, in many cases, martech systems aren't talking to each other, leaving customer data and content fragmented across content management systems. You may think you're close to your customers, but in reality you're miles away. This kind of siloed environment makes it difficult for marketers and customer experience professionals to understand individuals' unique interests and behaviors, making it impossible to act and to react to customers' actions based on real time data.

"80% [of marketers surveyed] don't understand customers beyond basic data; 96% of marketers find it challenging to build a comprehensive single view of the customer"
— eMarketer, July 23, 2015

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You operate too many channels, but can't create enough targeted content.

It's tough to know what customers need, and when, in regards to content, offers or information that align with the customer journey. Marketers target many unique personas, each of which consumes different types of content across various topics and multiple channels. People, budget, and time are limited. Often, marketers may make assumptions, rely on outdated information or create one-for-all content due to lack of resources and a poor understanding of their customers' journeys. There's no better way to tell prospects and customers "I don't know you or respect you" by offering generic content which tends to get syndicated across every possible channel. Some organizations, recognizing that something is wrong, feel forced to rip and replace their existing technologies or spend significant time and resources integrating solutions to make the journey more workable (although still very manual). Each option is not ideal and can create major headaches for IT and other teams involved.

You can't connect with every customer in a personal way.

Before you can craft an engaging, contextual customer experience, you need to put yourself in their shoes: understand their interests, behaviors, and key channels they engage on. More than just connect, you need to empathize with them at each point in their journey. What challenge are they looking to solve? Where are they looking for that information? What channel do they prefer to communicate on? How soon do they want to solve their problem, and at what cost? You need to think about the customer's goal, not your own business goals.

A third of marketers are still managing customer touchpoints in silos and nearly four in ten (38%) agree there is little management across touchpoints. (eConsultancy)

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What's Possible When You Adopt a Journey Mindset

It's time for brands to rethink what's possible by adopting a customer journey mindset. By doing this, brands can start building and delivering engaging, cohesive and *informed* experiences and leave behind siloed, static content-based experiences that don't ring true. Instead, it's time for brands to leverage rich customer data, with the power to assess and "listen" to activity across channels, and react in real-time to individual behaviors and actions.

Awareness	Consideration	Conversion	Growth	Advocacy

Brands need to address the need to deliver seamless customer journeys across all or parts of the customer lifecycle.

From a technical perspective, this has been challenging work. However, innovations in customer journey orchestration technology make it much easier. New tools can help you map the customer journey, integrate martech and adtech, unify customer data into a central customer profile, and intelligently orchestrate and trigger the best-next actions, offers, or content to make experiences relevant and useful. The right technology can support a highly personalized experience strategy that meets customers needs and achieves business goals. This kind of approach can generate the results you need towin, serve and retain customers for the long run.

Here are some examples of what brands can accomplish when they apply journey thinking to their customer experience strategy:

– **Acquire more customers more easily, based on their specific web behaviors.** When you utilize journey thinking and the right tech solutions, you can automatically activate contextual triggers based on individual web behaviors, personalizing prospect engagement, boosting conversions, and generating more ROI from web marketing efforts that drove them to your site in the first place. *Think of an auto brand automatically triggering an email invitation to come test drive the exact car a visitor just configured on their website, then posting a Facebook ad or SMS message to the individual if they don't immediately respond.*

– **Convert more customers faster and more efficiently, based on "listening" to cues on social channels.** When you utilize journey thinking and the right tech solutions, you can leverage known prospects' social media posts related to your brand, product or service to orchestrate a smart social reply or personalized email based on their context (the time and place in the customer journey). This can drive more conversion and sales opportunities. *Think of a software vendor triggering a custom-offer email to a business purchaser based on a social post asking peers about competitive products.*

87% of customers think brands need to put more effort into providing a consistent experience.
(Kampyle)

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- **Solve customer service questions quickly, before they become big problems or lost revenue.** When you utilize journey thinking and the right tech solutions, you can automatically escalate individual customer concerns or problems in response to an email, text or call; this results in an immediate call-back or best-next communication option, based on a customer's loyalty status or critical moment they're in the purchase process. *Think of a major retailer routing an web-form complaint from a top-tier customer to its A-team customer service team to resolve a purchase issue quickly and satisfy the customer - creating a happy customer, preserving their loyalty, and boosting the likelihood of future purchases.*

Journey thinking and execution is proven to improve your customer experience and boost your brand, sales, customer loyalty and growth. Your prospects and customers expect better out of your organization than mass-audience, batch-based emails or tone-deaf service and support responses. Customer journey orchestration goes further than personalization of a website experience: Think of journey orchestration as contiguous experiences across any and all channels that matter to your customers, in which you leverage all the data you have on customers, based on a 360-degree composite that's always current, enabling you to plan the sequence and then trigger an action to deliver the right information or offer at the right moment, to the right device or channel.

Research shows that 25 percent of customers will defect after just one bad experience. (McKinsey & Company)

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Steps to Creating Customer-centric Journeys

In planning for your customer journey strategy, know that it's not a straight shot to a positive outcome. Expect turns and even an occasional detour; it's all part of the process. The best place to start is by thinking about your marketing and customer experience tactics and aligning them with your customers' challenges and goals. Think too about what an ideal state for your customer experience might look like. Here are a few best practices to make navigating the roadblocks a little easier and to get you going on the right track.

6 Steps to Creating Customer-centric Customer Journeys

It's time for brands to rethink what's possible by adopting a customer journey mindset. In planning for your customer journey strategy, know that it's not a straight shot to a positive outcome. Here are some best practices to make navigating the road-blocks a little easier and get you going on the right track.

Take the time to understand your customers' motivations and map the customer journey.
Maximizing satisfaction with customer journeys can increase customer satisfaction by 20%, lift revenue by 15%. (McKinsey & Company)

Unify customer data to create a 360° actionable customer view across touchpoints.
35% of organizations believe that having the right tech for data collection and analysis is critical for understanding customers. (eConsultancy)

Connect your disparate martech and adtech to work seamlessly together.
Maximizing satisfaction with customer journeys can lower the cost of serving customers by as much as 20%. (McKinsey & Company)

Understand your content ecosystem and personalization capability.
86% of customers who received a great customer experience were likely to repurchase from the same company. This is compared to just 13% of those who received a poor CX. (Temkin Group)

Trigger the best actions & offers at the right time.
Companies with the strongest omni-channel customer engagement strategies retain an average of 89% of their customers, as compared to 33% for companies with weak omni-channel strategies. (Aberdeen Group)

Create a report card that indicates what's working (and what's not).
Across industries, successful projects for optimizing the customer experience typically achieve revenue growth of 5 to 10 percent and cost reductions of 15 to 25 percent within just two or three years.

Maximizing satisfaction with customer journeys can increase customer satisfaction by 20%, lift revenue by 15% and lower the cost of serving customers by as much as 20%. (McKinsey & Company)

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Step 1: Take the time to understand your customers' motivations and map the customer journey.

If you haven't realized already, your customer is in charge of their journey, and ultimately how and when (and whether) they interact with your brand. So it's time to adopt a customer-first mentality: place the customer in the center of your universe, and think about them as individuals, each with wants, needs, desires and goals. Understanding what they are trying to accomplish in relation to your brand or business — are they trying to buy a new large-screen TV, obtain a new credit card, buy life insurance, get customer support for their new cell phone, book a hotel stay — is the first step to gaining insight into their motivations and needs. It seems so simple but this part of the process is often overlooked. Start to enter their world: think about the channels, touchpoints and content you have and what your customers want and need. It's only then you can start to map a customer journey that aligns with their interests.

Remember to there are multiple types of customer interactions, and they aren't just digital. For example, a customer who is in the market for a new phone or tablet might visit a company's website, register to receive emails, find the brand on Twitter and ask a couple questions, and then finally visit a location in-person to examine and try out the device.

Step 2: Unify customer data to create a 360° actionable customer view across touchpoints.

Building successful personalized customer journeys comes down to having the right customer data and connected systems in place. We know you've got a lot of data. Make it a primary mission to unify this data.

In order to create an end-to-end customer experience that's personalized to everyone, and an effective customer journey, you need all of that data on each individual collected and accessible in one place. From there, you should be able to continually update and enrich your customer profiles with data from any source, ideally in real-time. Real-time customer profiles ensure that you can respond with the best content or offer driven by the best possible context on each individual.

Step 3: Connect your disparate martech and adtech to work seamlessly together.

Brands struggle to manage a diverse (and growing!) ecosystem of marketing tech and adtech that drives content and experiences across channels. The problem is, these technologies operate in silos. They're disconnected, often acting as point solutions for specific channels. While each of the tools in your marketing stack are individually capable, they need to be brought together into one solution that can create a comprehensive view of customer content and data.

To achieve unified customer experiences, it's critical to connect disparate tools. Integrating the technology means it's easier to create an integrated experience — a hallmark of a connected customer journey. This will allow all of your tools to work in unison so you'll have a holistic view of your customer profile, data-driven personalized experiences can be built, and you can deliver those experiences at each point in the journey.

Companies with the strongest omni-channel customer engagement strategies retain an average of 89% of their customers, as compared to 33% for companies with weak omni-channel strategies. (Aberdeen Group)

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Step 4: Understand your content ecosystem and personalization capability.

Delivering great customer journeys requires quality, targeted content to engage individuals. Content is your fuel, your propellant for successful outcomes with customers. You need a clear understanding of your customers' interests in order to create the right content, in the right format (e.g. videos, blogs, white papers), to engage with them across the customer journey. Outline your marketing content and programs with the steps of your customer journey which will help you put a focus on personalization, creating the right content for different personas.

Remember, creating good content is one thing; creating content that will flow into any channel, device, screen or experience is the other. You need to get flexible with your content and distribution strategy. It is possible to get more value out of your existing resources. Seek a platform that will allow you to create content once and use it anywhere. There are a number of digital experience platforms and content management systems (CMS) that are flexible enough to deliver content across any channel – not just web – and can support the journey as new digital channels emerge. Maybe you can syndicate content to email or mobile today, but what about chatbots or devices like Amazon Echo? The essence of the customer journey is that there's no since channel that fits all customers in all moments of need.

Step 5: Trigger the best actions & offers at the right time

To make the customer journey work at scale across all of your personas, customer journey orchestration tools are here to help. This new tech lets you plan for journeys and sequence communications and interactions that are both digital and nondigital, from in-store to web, email, or even social. Your journey tech should be able to map out touchpoints, connect them (and their data) and make real-time decisions based on customer data to suggest the next best optimal path. It should work across any channel to present rich content and experiences that are personalized at the right place and time – keeping customers moving toward their individual goals, and freeing up your team's time to focus on the experience itself.

Step 6: Create a report card that indicates what's working (and what's not)

You'll never know if you're customer journey strategy is successful without analytics that help you measure and evaluate your performance. Review what's working. Analyze your customer journeys to understand what content individuals are consuming, what channels they're using and when, what's converting, and more.

Iterate, rinse, repeat. Continue to review and improve the key metrics that matter most to your business, but make sure your the customer always comes first. Continue to evaluate and make adjustments to your strategy in order to capitalize on your marketing efforts and provide your customers with the most impactful experience at every touchpoint in their journey.

Across industries, successful projects for optimizing the customer experience typically achieve revenue growth of 5 to 10 percent and cost.
(McKinsey & Company)

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Spotlight by BORN Group, an Award-Winning Global Digital & Content Production Agency

Bottom-of-the-Funnel Content in the Customer Journey – Don't Forget Me

When creating your overarching content strategy don't underestimate the power of personalized, curatorial content. As an experience architecture firm, Born's expertise is in connecting the dots between various channels across the customer journey for one overarching, personalized brand strategy that drives conversion.

One problem we often see with our clients is a tendency to concentrate on creating unique content for the top of their funnel, in turn overlooking the importance of that same kind of content for their more "transactional" digital assets – those that are near the bottom-of-the-funnel, close to the buy button.

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The Importance of Bottom-of-the-Funnel Assets

In retail, product detail pages (PDP) are a great example of important bottom-of-the-funnel content. We guarantee that if you were to examine bounce rates and "time on page" stats to determine where your shoppers spend the majority of their time when browsing your online store, you'd discover that PDPs invariably see the highest amount of user activity. That makes sense because PDPs are almost always rich in the details most relevant to someone who is just about to purchase – a.k.a. the most engaged people on your website. But PDPs don't often go beyond product information to incorporate other forms of personalized, curatorial content – and that is a big mistake.

Consider this: You've spent significant time and resources to capture an audience using beautiful, well-orchestrated marketing campaigns. Don't let that audience then hit the PDP and discover the brand voice (which had so strongly resonated with them) has disappeared. Customer loyalty is an essential part of today's competitive landscape, and it is accrued from brand experiences that inspire and educate from first touch to last across their journey.

Creating a Content Mix that Engages Buyers Throughout Their Journey

Reviews and personalized recommendations can go a long way towards making your PDP stand out, but try to think outside of the box as well. Leverage user-generated content, lifestyle blog posts, or demonstration videos of how your product is used.

We tell our clients that the PDP should have a minimum of four different types of content: product information, education, lifestyle and editorial. The kinds of media used for each of these content types is specific to brand, but they should correspond to assets being broadcast through other channels, such as social, email, SEM and affiliates.

Our recent launch of the new eCommerce shop for Singer Sewing Machines leveraged Acquia for their front end. SINGER worked on a simple way to incorporate projects and blog posts at the bottom of product pages to better surface their significant amount of engaging content. Similar to how "Related Accessories" are automatically pulled into PDPs for machines, SINGER's site is now able to pull in "Related Content" to machines and accessories PDPs.

Now, bring it all together. Bottom-of-the-funnel content like PDPs are important for conversion, but so are all other content assets you're producing as part of the marketing funnel and customer journey. A connected customer experience across channels, one that personalizes content for the individual based on where they are in their journey, can help foster loyalty and remove friction from the buying experience – driving the buyer through the funnel to convert.

86% of customers who received a great customer experience were likely to repurchase from the same company. This is compared to just 13% of those who received a poor CX. (Temkin Group)

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Conclusion

The possibilities to improve customer experience, foster customer loyalty and engagement, and drive conversions and value for your business are enormous. Delivering the best experience for your customers, and connecting with people in the moments that matter, at each point in their journey, is closer today than used to be possible.As the guidance above shows,, it comes down to truly understanding your customers' motivations and having the strategy and technology in place to systems, channels and customer data so you can create a connected customer experience — allowing you to trigger the optimal messages, offers, and information, at the right point in your customer's journey.

As your audiences continue to decide the experience they want to have with a brand, Acquia can help your team navigate the best path forward to delivering the optimal personalized experience across the customer journey.

To learn about how Acquia can help you deliver a customer-first experience, please contact us at sales@acquia.com.

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