# A PRACTICAL GUIDE TO GETTING STARTED WITH CUSTOMER JOURNEY ORCHESTRATION

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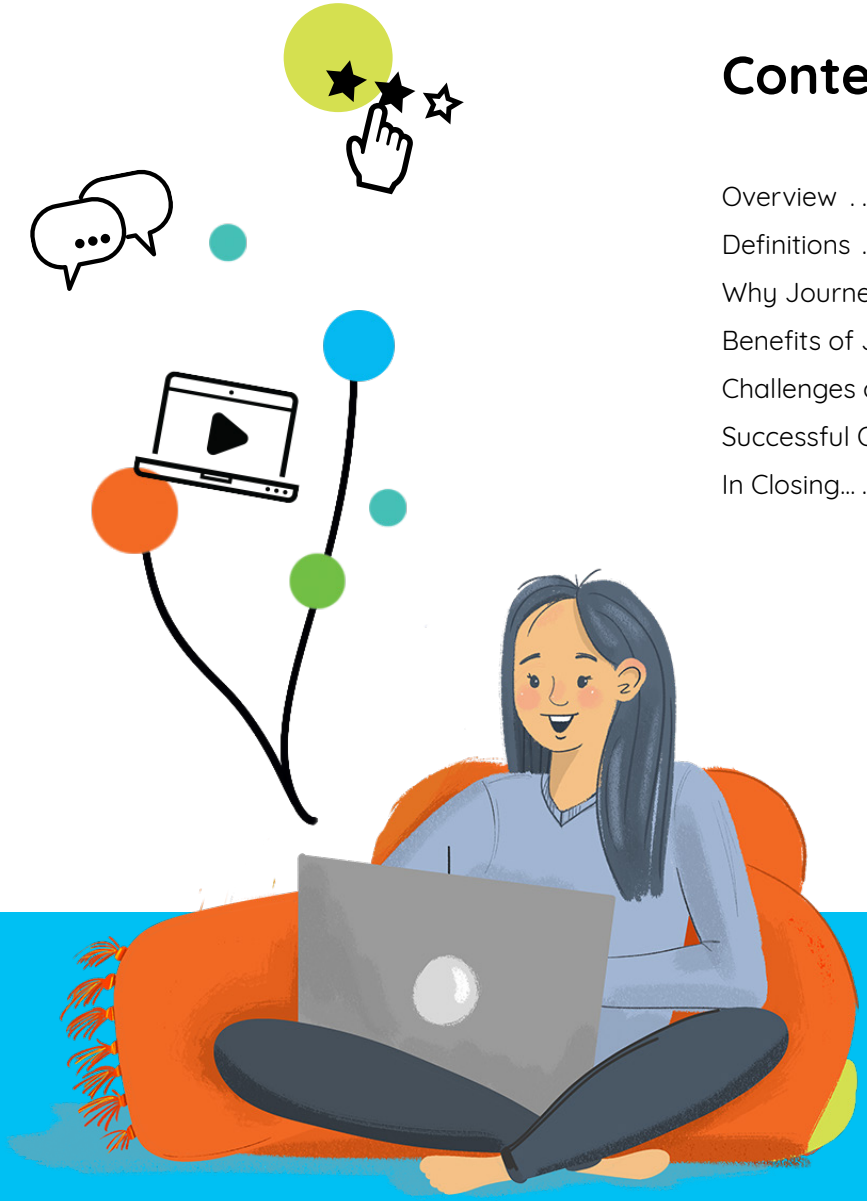
There's an alphabet soup of terms that have emerged in the customer journey mapping arena. As if the concept of customer journey mapping itself wasn't confusing enough because people define and execute it differently, the field has evolved with new concepts to ensure that the customer experience is more proactively designed to meet customer needs. But these new concepts are equally confusing. What do they mean? How do they work together? Do they work together? How do they help you help your customers?

These are just some of the questions we'll explore in this book.



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# OVERVIEW

The customer experience is the sum of all the interactions that a customer has over the life of the relationship with the brand, but more importantly, the emotions, feelings, and perceptions about those interactions.

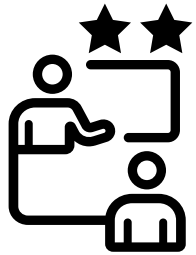
One of the ways we understand the customer's experience is through mapping the customer journey. In this brief sentence, you've been introduced to a couple of different concepts that are interpreted in different ways. We strive to clarify these in this book.

At the same time, a lot of new concepts have emerged over the last several years, whether through analyst firms or technology startups, to ensure that customer journeys are not only mapped but also measured, managed, and orchestrated.

It's the latter concept that we'll cover in this book: orchestration. On its own, it means to plan or coordinate the elements of a situation to produce a desired effect or outcome. IDG describes journey orchestration as "moving from listening and understanding to driving the execution that benefits the customer."

In its Customer Journey Explorer solution, Quadient created a journey orchestration trifecta that includes (1) understanding context and behavior at customer touchpoints and across multiple channels; (2) identifying areas of disconnect between the customer and the brand, combined with changes that need to be made to improve the experience; and (3) using real-time analytics to respond to dynamic and evolving customer needs.

Let's see how that all ties together to benefit the customer!



# DEFINITIONS

Definitions are a good place to start because there's a lot of confusion around this topic, in general. Let's start by providing clarity and getting everyone on the same page.

The dictionary tells us that a **journey** is the act of traveling from one place to another. Similarly, a **customer journey** is the act of – or the steps that a customer takes while in the process of – completing some interaction or transaction with a brand. Just like a journey could include many modes of transportation, customer journeys may involve multiple channels in pursuit of completing the task or achieving the desired outcome. Examples of interactions or transactions include contacting customer service, creating an online account, paying an invoice, making a purchase, or visiting a doctor. (Note that the **buyer journey** is a marketing concept that moves buyers through a funnel from awareness through purchase, which is where it ends.)

It follows then that **customer journey mapping** is the process of capturing what the customer is doing, thinking, and feeling as he/she completes an interaction or transaction while attempting to achieve some goal or outcome. It's a visualization of the steps that the customer takes on the journey, from the moment she had a need until that need was fulfilled. It is customer-driven, from the customer viewpoint. Know that journey mapping is a tool and a process that includes current state mapping, future state mapping, service blueprinting, and implementation.

It is important to call out another term here because it is often used interchangeably with journey mapping, but it is definitely not the same thing: **touchpoint mapping**. It is a tool used to capture and inventory all of the different ways that you touch or interact with customers (or they with you) along the entire customer lifecycle. Based on what you uncover in this map, the next step is to map the journey to and through the painful or problematic touchpoints.

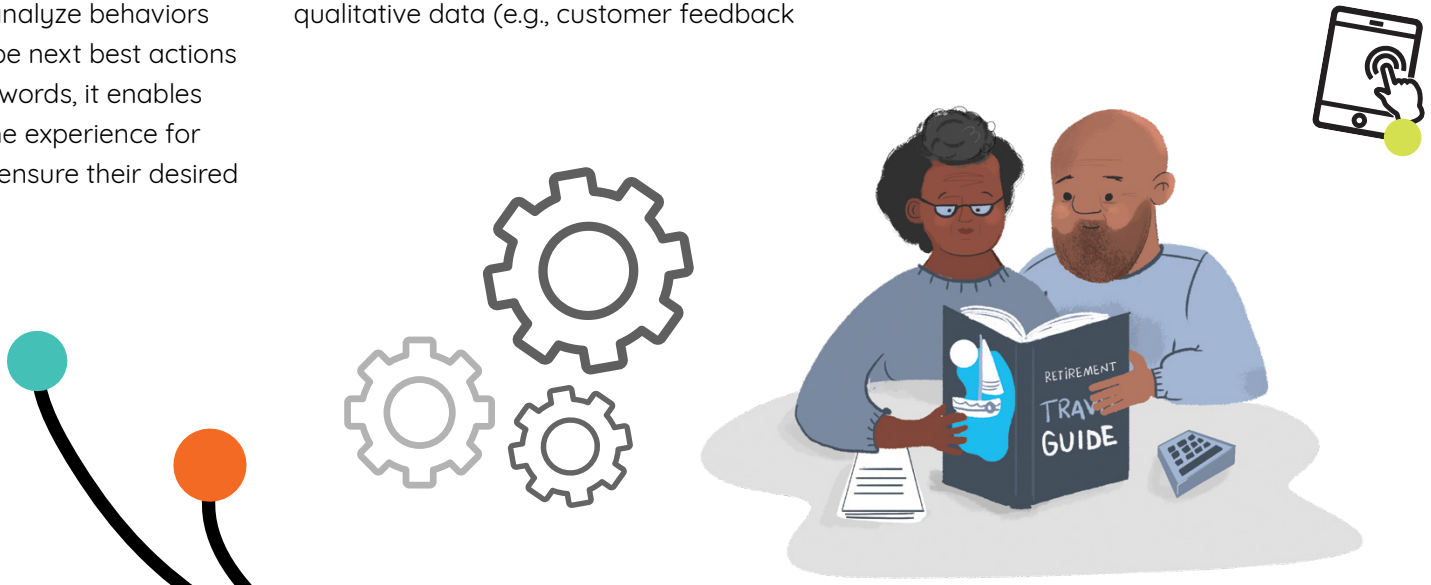
Back to journey mapping. **Customer journey management** takes your journey maps to the next level, to ensure that they don't remain just a pretty picture on the wall. Peter Haid, CX strategist at Lumen Technologies, defines journey management as "the discipline of understanding, planning, implementing, and optimizing a portfolio of journey maps to generate value-building enhancements to the customer experience."

An important part of customer journey management is **customer journey analytics**. According to Gartner, customer journey analytics is "the process of tracking and analyzing the way customers use combinations of channels to interact with an organization and covers all channels present and future which interface directly with customers." Customer journey analytics is data-driven and brings your journey maps to life, building on doing-thinking-feeling by adding data along each step and channel of the journey, highlighting the multiple variations of journeys and micro-journeys that customers may take, and enabling the optimization of the customer experience so that customers achieve outcomes and receive value.

That's a great segue into **customer journey orchestration**, which seems to be the next level in this progression or evolution of understanding customer journeys. We'll cover this concept in more detail later, but it's interesting to note that Forrester has placed both journey visioning and journey orchestration under the category of journey analytics. They define **journey visioning** as a practice, i.e., having the right data, insights, and tools to design and deliver a better customer experience, that also requires the right skills, governance, and operational model. **Journey orchestration**, on the other hand, is defined as enabling brands to use real-time customer data to analyze behaviors and predict and prescribe next best actions in the moment. In other words, it enables brands to personalize the experience for individual customers to ensure their desired outcomes are achieved.

Yes, it's a little confusing, but they all work together. The best way to think about it is that you have an umbrella category called customer journey management, and the overlapping and intertwined components within that category include journey mapping, journey analytics, journey visioning, and journey orchestration.

Another way to look at it, according to Peter, is top down and bottom up. Journey mapping is top down, meaning that you work with customers to understand the experience they are having (current state) and would like to have (future state) and then incorporate quantitative and qualitative data (e.g., customer feedback and metrics, operational metrics) into the maps for deeper insights. Orchestration, on the other hand, is bottom up, using data that you have about customers (e.g., feedback, metrics, interaction and transaction data) to both discover and then visualize the experience customers have and then identifying where to orchestrate to enable and ensure their next best actions lead to successful outcomes. In top down, you discover the journey by mapping with customers, while in bottom up, the journey is discovered through the data in your systems.



# WHY JOURNEYS? WHY ORCHESTRATION?

Why are all of these concepts important? Why should brands be using/doing customer journey orchestration? Understanding the customer and the customer experience is always important. Journey mapping takes us there in a customer-driven way, while the other concepts incorporate a data-driven approach to ensuring that customers have a great experience, receive value, and solve the problems they set out to solve. Remember, orchestration is about coordinating the elements of a situation to produce a desired effect or outcome.

Journey orchestration delivers on an expectation that so many customers have today: that the experience is not only seamless and consistent across channels but also relevant and personalized. You must align the disparate parts of the experience to meet that expectation. In order to achieve that, journey orchestration also brings together siloed cross-functional areas to work together and collaborate in the best interest of the customer.

Journey orchestration also delivers on a concept set forth years ago by McKinsey: focus on journeys, not on touchpoints. This is the mantra for customer experience success. It means that, while it's important to look at the individual steps and touchpoints, moments of truth, and channels of the experience, it's more important to remember the whole journey – from Point A to Point B – the entire experience that the customer has with your brand as he's trying to do whatever it is he's trying to do. Focusing on the entire journey affords you the ability to design and deliver an exceptional customer experience.

Why is this concept important? Because journeys are how customers think; touchpoints are how businesses think. The customer doesn't just think about the brand as a website or a phone call. When customers interact, they think about all of the steps that it will take to buy something or to solve a problem. And there are multiple touchpoints and steps – across channels – in that experience that all need to be tied together to create a seamless journey.

Note that not every touchpoint is created equal; similarly, not every journey is important to your customers. With journey orchestration, by combining feedback data with interaction or transaction data, you can gauge which touchpoints are more important or more painful than others and connect those for a better or more seamless experience, while at the same time identifying which journeys are more important – and then enabling, enhancing, and influencing them to ensure the customer achieves the desired outcome. It's real time. It's responsive. It's a continuous improvement effort for how the experience is delivered – and how it is received or experienced by the customer.

> SOCIAL CRM AUTHOR AND STRATEGIST PAUL GREENBERG AGREES: "THERE ARE NO TOUCHPOINTS IN ISOLATION FROM THE OTHER, WHEN IT COMES TO CUSTOMERS. IN PART, BECAUSE THE CUSTOMER ISN'T THINKING IN TERMS OF TOUCHPOINTS, DEVICES, OR TECHNOLOGY. THEY ARE THINKING ABOUT GETTING WHAT THEY WANT IN THE WAY THAT THEY WANT WHEN THEY WANT IT. AND WHAT CAN BE DONE MOST CONVENIENTLY TO GET THAT ACCOMPLISHED. THAT REQUIRES AN ALL-INCLUSIVE OVERVIEW OF THE INDIVIDUAL CUSTOMER'S JOURNEY..."

# BENEFITS OF JOURNEY ORCHESTRATION

Journey orchestration isn't a 2020 concept; it's been around for a few years. Brands that are doing it well see some great benefits, for their customers and for the business. At a high level, they are inserting themselves into the experience in order to enable positive outcomes for their customers. They have connected their cross-functional areas and their multiple channels to deliver a connected experience for their connected customers, are making smarter (customer-driven and data-driven) decisions, and are being proactive by getting the right data to the right people at the right time.

More specifically, customers are praising the personalized experiences – not just personalized for them as individuals but also personalized in real-time – as well as the fact that they are achieving value, fulfilling their needs and solving their problems, and seeing the outcomes they'd hoped for. They love the consistency of the omnichannel experiences, too.

Brands, of course, benefit, too. They are driving more-effective and more-efficient engagement – and building trust – through responsive and real-time experience enhancements, which leads to new business, cross-sell, and upsell opportunities. They have broken down or connected organizational siloes, which improves morale and eliminates not only inefficiencies but also pain points for both employee and customer experiences.

# CHALLENGES OF CJO

Confusion of terminology, plus the advent of data platforms that say they do the same thing, i.e., orchestrate, has led to frustrations around the concept of journey orchestration. For those who have embarked on this journey to orchestrate customer experiences, some have found success while others have experienced setbacks. Some reasons that orchestration initiatives stall or even fail include:

## 1. Culture

A collaborative culture is necessary as various departments across the organization are involved in delivering the journey you're trying to orchestrate. If your culture is not one of collaboration or one that's customer-centric, those siloes will be a hindrance to this work.

## 2. Data Issues

Data is at the heart of designing and delivering a great customer experience. In order to orchestrate the journey, you've got to have data that is accessible, complete, and accurate. But those data requirements and others are hard to meet, so as you can imagine, data and its quality is a big inhibitor in the ability to achieve your orchestration goals.

## 3. Legacy Systems

Disparate and legacy systems (data platforms, transactional platforms, etc.) can and will inhibit the ability to orchestrate the customer journey. Purpose-built journey orchestration technology is needed to overcome this problem.

## 4. Cost

For some, the sheer cost of the orchestration work (as a result of the effort and inefficiency caused by the first three items) has been an inhibitor or has caused it to stall. Again, purpose-built platforms can help you push through some of this, but you'll need everything else to be aligned, as well.

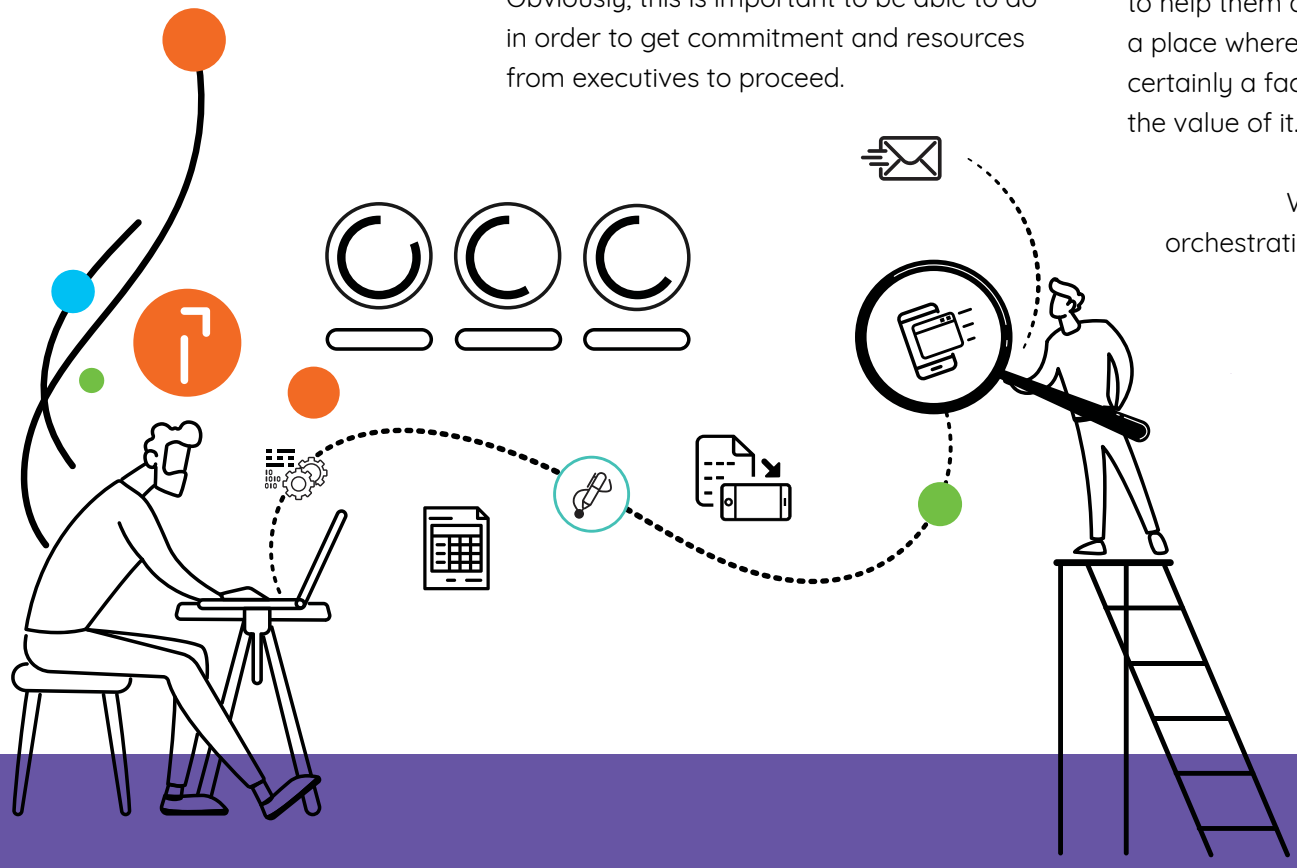
## 5. Value

Mary Catherine Plunkett, Director, Success Portfolio, at Autodesk shared some of the challenges (including some of the ones listed above) that she and her team have gone through in their orchestration work. She noted that the concept is amazing, but proving out the value can be a challenge. How is it really adding value – for the business and, especially, for the customer? Obviously, this is important to be able to do in order to get commitment and resources from executives to proceed.

## 6. Top Down and Bottom Up Disconnection

Earlier, you read that with the top-down approach, you discover the journey by mapping with customers, while in the bottom-up approach, the journey is discovered through the data in your systems. If the two don't work together, if they don't mesh, how will you know customers' desired outcomes and how to help them achieve those? This is often a place where this work fails, and it's certainly a factor in being able to prove the value of it.

What, then, does a successful orchestration implementation look like?



# SUCCESSFUL ORCHESTRATION IMPLEMENTATION

As you can imagine, the items listed as challenges must be corrected and in place for this work to be successful. But let's look at this a bit closer and draw on some of the terms defined earlier. Emily Crane, Senior Manager, Digital Customer Success Journey Practice Team Lead at Autodesk, noted that their customers who are in orchestrated journeys are using more products more days per month, and Autodesk can correlate journeys to higher renewal rates.

## 1. Orchestration Framework

Start by spelling out your framework for the work to be done. Autodesk's framework was straightforward: Define, Design, Delivery. They outlined who their customers are, what their needs are, what the industry and competitive landscape looked like, desired outcomes for the customer and for the business, how to engage with customers, which channels, how to localize, how to ensure coverage around the world, and more.

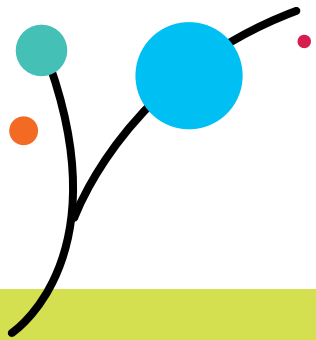
## 2. Customer Understanding

Any work that you want to do to improve or change the customer experience always starts with customer understanding. There are three ways to achieve that: listen (feedback and data), characterize (research-based personas), and empathize (journey maps). The first two feed into the journeys maps, which you need to start your orchestration work with in order to understand the steps the customer takes to complete some task. You've got to understand where along the journey you will need to orchestrate the experience for better outcomes.

To that point, as noted earlier, you've got to view mapping not just as a tool but a process. Maps must be digitized so that you can not only adhere to the rules of mapping (communicated, shared, collaborated, updated) but also to add data to bring the maps to life and to analyze the experience. Another step in the mapping process is to develop your service blueprints in conjunction with the journey maps in order to identify and understand the people, tools, systems, processes, and policies that are currently delivering and supporting the experience. Mary Catherine shared that Autodesk started their orchestration journey with this work.

## 3. Top Down vs. Bottom Up Connection

As a follow-on then, the top-down and bottom-up approaches must mesh in order to ensure that you understand the customer, their desired outcomes, and how and where you can help them achieve those. Emily pointed out that they have explicit data and understanding (what customers told them) and implicit data (they have a product that architects use, and we know the customer is an architect). The next step is to combine the two to set the customer on the journey Autodesk wants for them, i.e., the next best action.



## 4. It's Cross-Functional

Necessary to the success of journey orchestration is a collaborative culture, where cross-functional teams work together and appreciate the value of delivering a seamless, timely, relevant, and personalized experience to customers at every touchpoint along the journey. Implied in that statement is the fact that you must have executive commitment to set the culture and get this work underway.

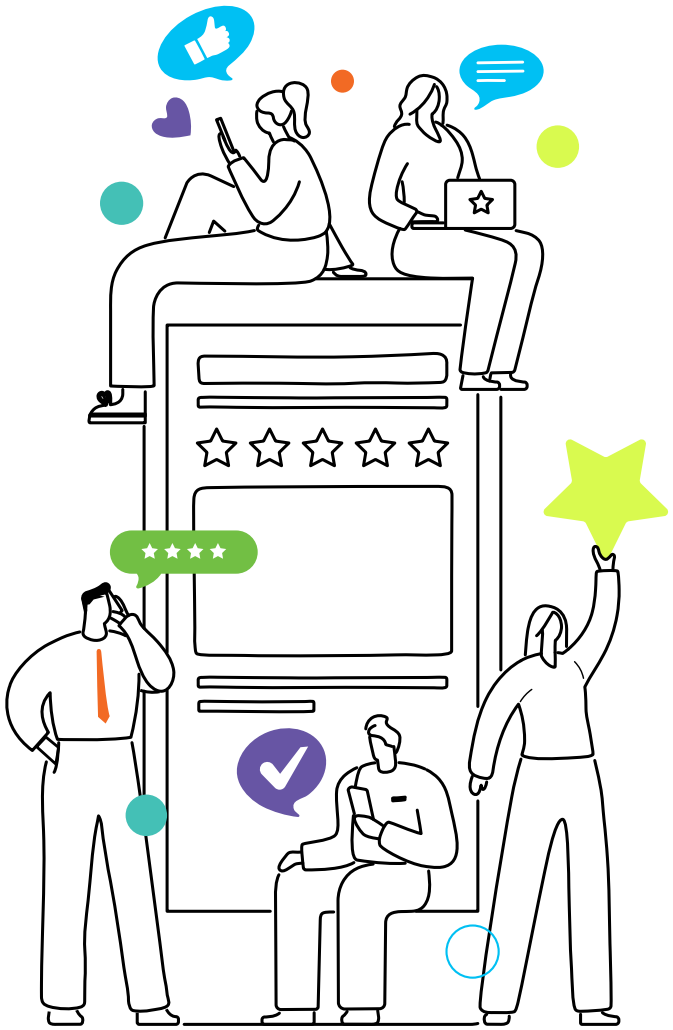
Emily noted that the following teams are involved in their orchestration work: Product, Industry, Legal, Finance, Field Ops, and Platform. These teams working together will lead to success, though it's often hindered by siloes and other challenges that you'll need to address upfront (and likely with executive involvement).

## 5. Data, Data, Data

At the root of a successful implementation is data – not just data but clean and complete data that persists throughout the customer lifecycle. Orchestration will only be as good as the data. Mary Catherine mentioned that you have to assume that you have only about 50% of the data that you'll need, and then build out the orchestration based on knowing that. Emily called out that data from channel partners is also necessary and included in their orchestration initiatives.

"DATA IS KING TO DRIVING JOURNEY ORCHESTRATION."

-Emil Crane, Autodesk



## 6. Infrastructure

It's not just enough that you have good, clean data (or is it?!). That data must also be centralized and accessible so that you can enable insights in real time and in the moment. The data must be able to flow freely to the people who need it. At Autodesk, they built a new system next to the old one (before sunsetting the old one) because their existing systems were varied, outdated, disparate legacy systems that could not handle orchestration. Pre-purchase data wasn't connected to post-purchase data, which further inhibited orchestration. The new system, built in the cloud, is a major reason they've successfully orchestrated journeys.

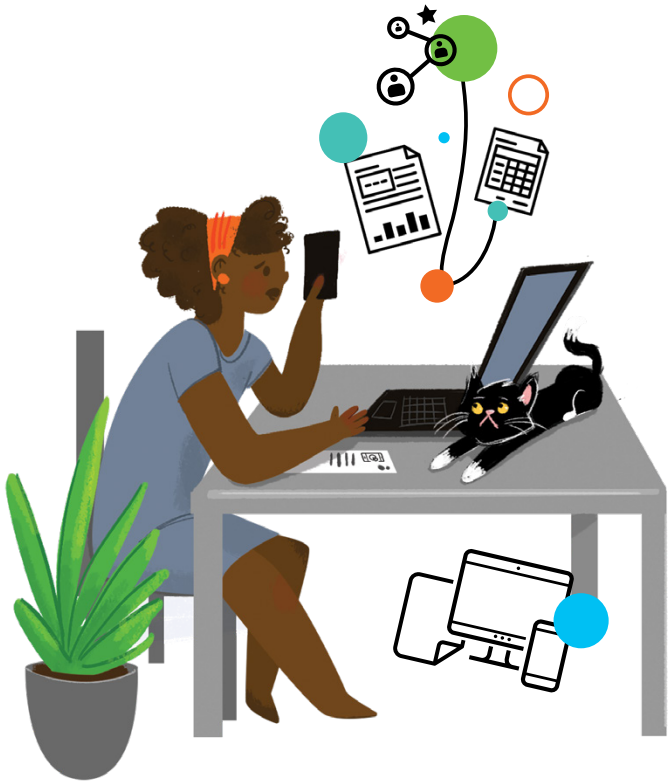
## 7. Analytics

It's not enough to have this data accessible, but you've got to be able to analyze it, pull those insights, and identify the next best actions for the customer. You've got to have the AI/machine learning capabilities with predictive and especially prescriptive capabilities to initiate that next best action.

## 8. Measurement

An important consideration after orchestrating the experience is to get feedback, measure, and iterate or adapt based on the customer's experience, feelings, etc. You want to constantly be measuring to ensure it's working the way it should be.

Journey orchestration is a large, enterprise-wide undertaking. Like any other work of this magnitude, it must begin with executive understanding, commitment, and alignment. With that, you'll have a much greater chance of success because, after all, the goal is to deliver a seamless and consistent experience for customers – and the only way to achieve "consistent" is to have every department onboard.



# IN CLOSING...

We set out to clarify the many concepts that fall within the journey management realm and, especially, to provide a deeper understanding, in laymen's terms, of what journey orchestration is and why it's important to the customer experience and, ultimately, to the business. There's still much work to do to ensure that businesses truly grasp the importance of this concept in delivering a great experience, but the important thing to remember is that data and systems are at the root of your success.
A purpose-built platform or system to enable you to enable the customer to achieve his/her outcomes in a way that is simple, consistent, and personalized will be key to success – either you build it (like Autodesk did) or you buy it. You decide. But don't wait too long. Your customers are thirsting for you to guide them to achieve the outcomes they desire.

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