



Customer Journey Management

Enthuse your customers, thanks to digital transformation of marketing, sales and service.

A Guide by ec4u
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ec4u

Foreword

Dear Valued Reader,

A while ago, I was in a Deutsche Bahn train. That's nothing unusual in itself. The day was almost over and, like many fellow travelers, I had to catch the connecting ICE train from Stuttgart to Munich. The train was late while heading for Stuttgart and I just couldn't afford to miss the connection. One could have naturally asked the conductor, if we'd make the connection. But that meant having to first find a conductor – a hopeless quest in an overfilled train.

I could feel the growing unrest all around me, with "will we make it" being the hot topic of the hour. As it happened, many fellow travelers were also heading for Munich. So, I pulled out my smartphone, opened my Twitter account "@skirchem" and sent a question to Deutsche Bahn's online info unit. They suggested asking a conductor. That's a no go, I responded. They tweeted back "just give us a moment, we'll look into it." Soon thereafter we heard an announcement in the train: they'd been notified that quite a few travelers on board were heading for Munich and so they had arranged for the ICE in Stuttgart to wait for our arrival. I thanked the online unit. I was happy and many around me were amazed at "what all one can do these days."

What had happened? Nothing really special. All I did was take advantage of the most easily reachable point of contact for me, the customer service unit of the Deutsche Bahn – online via Twitter. The response time was faster than expected. The outcome, and especially the handling, exceeded even my expectations. Once again a happy customer of Deutsche Bahn, I just sat back relaxed for the rest of the journey to Munich, regardless of the delay and the need for my own initiative. Sure enough, many others shared this.

Are you thinking that this should be obvious? Yes, it should be, but then you must know precisely where these customer contact points are – points that should be designed to make such an effort a breeze. That goes for marketing and sales departments too. This guide will show you the best way, stepwise, to address this. Have a good read and I look forward to a lively discussion with you.

Kind regards,



Sabine Kirchem



Sabine Kirchem

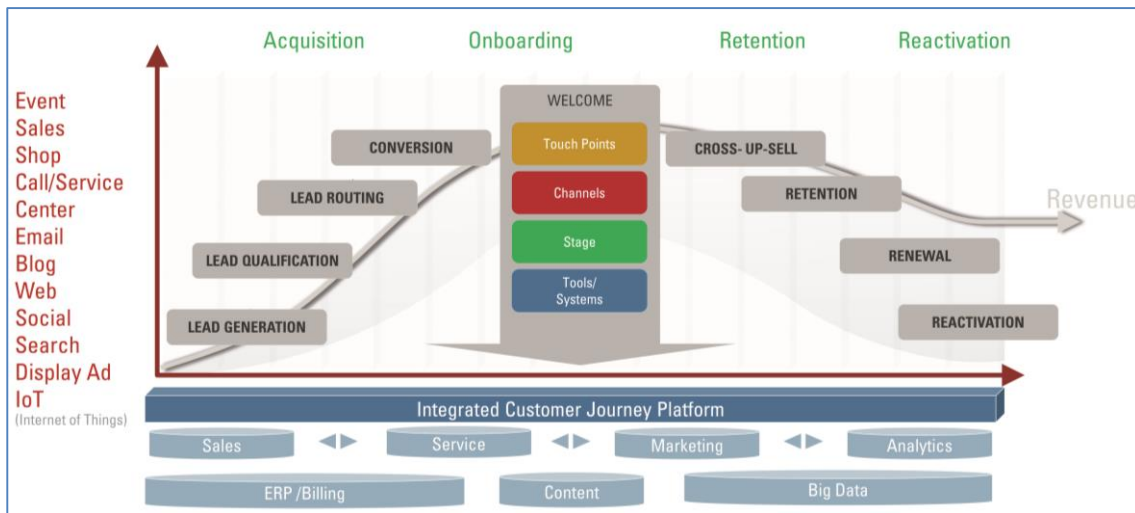
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1. What is a Customer Journey?

A customer journey defines the customer’s path from the first to the last contact (or touch point) with your enterprise. One can also view this as a lifecycle, since a customer can decide to keep in touch after making a purchase (hence, there is no defined end of the purchase cycle but, instead, a repeated possible start). As a loyal customer, the person can continue to buy more products or serve as a brand advocate by recommending your enterprise.



Customer Journey with included "Integrated Business Platform", source: own diagram

A customer journey commences when the customer deals with a problem (pain point) that can be solved by an enterprise’s product. The enterprise or even the customer’s own interest can initiate such a confrontation. Thus, the start of a customer journey is not always tangible for an enterprise.

The next part of the journey comprises communications processes with your enterprise that include personal elements (contact via email, phone) and impersonal ones (banner, white paper, blog). All of these aim to convince the customer to buy your product. Traditionally, these paths used to be called a funnel through which the customer was directly guided.

However, nowadays a customer journey is no longer comparable with a one-way street. A Forrester Research¹ survey found that 74% of customers interested in buying a product offline, first inform themselves online. Moreover, 50% of online buyers do not become aware of your enterprise’s product through targeted marketing campaigns – but rather through their own research online. For a long time now, the marketing or sales departments are not the ones that initiate the first touch point with an enterprise. Instead, thanks to search engines, the initiators are social networks and advice platforms that do so individually for each customer and, therefore, without any direct control by your enterprise.

¹ http://blogs.forrester.com/lori_wizdo/15-05-25-b2b_buyer_journey_mapping_basics

Enterprises thus face the task to revamp their traditional sales and marketing organizations to adapt them to the needs of customers. A survey by IDC² showed that these needs keep changing. A survey showed that 60% of 250 enterprises that took part face highly changing demands that have to be integrated into conventional organizations, in order to generate leads successfully.

Above all, this calls for effectively shaping moments along the customer journey, ones that are decisive for a purchase. Considering that one must also integrate moments outside your enterprise's control, it is obvious that enterprises face an exciting challenge.

Moment of Truth & Moment that Matters

One needs to differentiate between a "Moment of Truth" ("MoT") and a "Moment that Matters" ("MtM"). Enterprises refer to a MoT as the instant when a customer is confronted with their products and marketing actions. This is the when the customer decides whether the product really meets her/his needs and expectations.

From this, one needs to delineate the MtM, which possibly corresponds to the MoT, but can occur for any customer at some specific time. From the customer's perspective, the MtM involves a specific interaction with an enterprise along the customer journey, which can lead to a decision to proceed or stop. As opposed to the MoT, for the enterprise a MtM can be a touch point that appears to be insignificant. No matter how insignificant this may seem to be, the MtM can still have wide-ranging consequences and even cause the customer to abort the buying process.

Let's imagine that you want to buy an item from an online shop. You've already input all the information, just the payment process remains. You wish to pay with your credit card – but the only choices are a direct debit, immediate transfer, or billing. Chances are that you'll look for another shop where you can use your credit card.

Forrester³, a firm of analysts, did a survey called "Moments that Matter" in which 700 marketing decision-makers responded that focusing on these touch points could help boost the ROI by up to 33%. Forrester expanded the definition of MtM by including situations in which the customer had a concrete intention for interacting with the enterprise, and thus self-initiated the contact.

Don Smith released a video cast "FutureSmith⁴." Here he cited Richard Norman, the management expert and creator of the expression, Moment of Truth, stating that it is important for enterprises to minimize touch points in this area. The enterprise can thus a) control them more effectively, and b) focus on optimizing existing touch points.

² <https://onedrive.live.com/view.aspx?resid=EF6D85E9D78903E512542&ithint=file%2cpdf&app=WordPdf&authkey=!ABSXv5ddnyBV6FY>

³ <https://think.storage.googleapis.com/docs/forrester-moments-that-matter-research-study.pdf>

⁴ <https://www.youtube.com/watch?v=Js3CKUyrcW0>

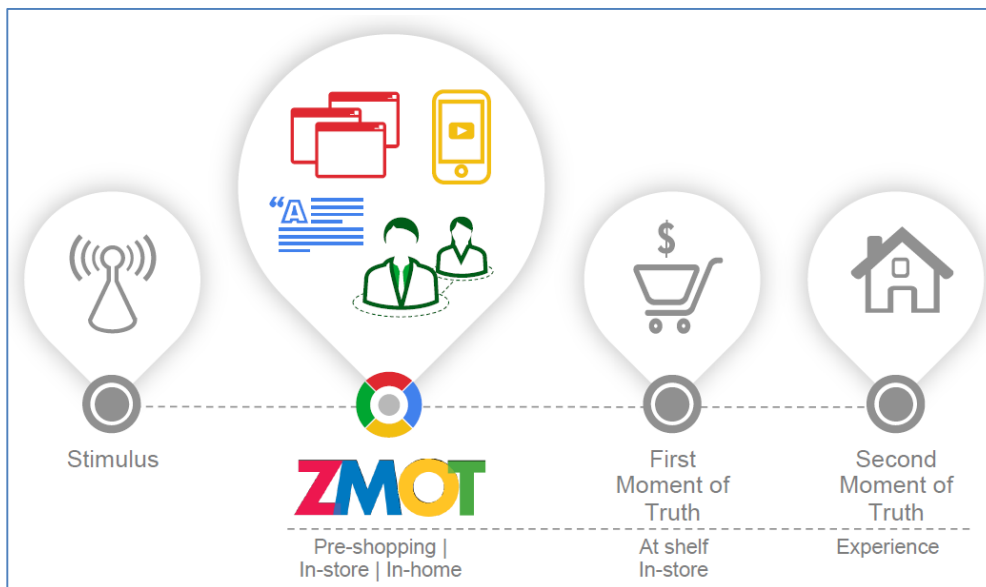
The biggest challenge in successfully defining and shaping the moments lies in walking in the shoes of the customer. This is the only way for an enterprise to ensure that key contacts are optimized, while irrelevant or superfluous ones, in the worst case, are minimized or fully eliminated.

By the way, successful moments of truth and moments that matter also result in your staff members interacting with customers at these moments. This makes them happier with their work, the enterprise, and the communications with the customer.

Within the modern customer journey, one also has what is called the Zero Moment of Truth (ZMoT) that exists, in addition to the MoT, at the moment of making the decision to buy or after the purchase. This refers to a phase experienced solely by the customer – without any knowledge on the part of your enterprise – as the first contact with the product or your enterprise, before any specific marketing effort has been undertaken.

What is a Zero Moment of Truth?

In the field of traditional marketing, each customer supposedly has about the same level of knowledge. A ZMoT, however, ensures that through self-determination, each modern customer can become differently informed about the product.



Moments of Truth, source: Google 2011, https://ssl.gstatic.com/think/docs/zmot-consumer-electronics_research-studies.pdf

Hence, both sales and marketing departments must adapt to complex demands of communication steps – because a traditional funnel can no longer be deployed here. An informed customer needs no introductory flyers or sales pitches, but rather material that makes it much easier to make a buy decision.



Increasing customer flexibility drives the complexity of marketing and sales strategies to convert a prospective lead into a buyer.

Enterprises should not view this change as a disadvantage. Instead, adaptable communications models allow you to better target customers and deal with them more personally, which makes the buying experience faster and more positive. Consequently, the probability of creating loyal customers rises significantly.

Nevertheless, you need to gain an overview of each step of the customer's journey⁵ in order to integrate and automate new customer processes.

1.1 The 5 Steps of a Customer Journey

1. Awareness – the potential customer becomes aware of the product
2. her/his interest in the product rises
3. Consideration – the desire to buy awakens
4. Intent to Purchase – the desire to buy awakens
5. Conversion – the intent to purchase is converted; potential to achieve customer loyalty

1. Awareness

A prospective customer's awareness is raised either directly (via marketing campaigns, SEO measures, social media, or your own content), or indirectly (via the ZMoT). The first impression must be as positive as possible. Hence, you must be informed of indirect means and strive to counteract poor reviews, for example.

⁵ Mario Pufahl, Sabine Kirchem:, Die Reise des Kunden gezielt steuern. In: Sales Management Review. Gabler Verlag. 2015. <http://www.springerprofessional.de/die-reise-des-kunden-gezielt-steuern/5871590.html>

2. Favorability

In the second step, you need to convince the customer of the product's benefits. This can be achieved through more detailed and in-depth information, personal advice, or general visibility online via ads or content marketing.

It is important here to ensure that all this happens fast and the customer doesn't have to wait long or click through a jungle to get the info: top priority should be on short communication paths and relevant information. A 2011 study by Harris Interactive/Right Now⁶ found that 86% of the customers aborted their buy process, because they were dissatisfied with the service.

3. Consideration

If a customer dwells on whether to buy a product, it is up to you to convince her/him. This is possible, for instance, by highlighting the product's plus points, or to show a (flattering) comparison with other products.

Value should be put on communicating personally with the customer: a survey by Nielsen Research⁷ determined that emotional factors can convince 90% of all customers to buy – the feeling of being personally of value to an enterprise is part of the package.

4. Intent to Purchase

Once the customer is definitively ready to make a buy decision, you need to deploy various workflows effectively. Logging in and shopping must be fast and easy, and you should address questions and comments immediately and relevantly.

Furthermore, responsibilities in an enterprise often change between steps 3 and 4, in that the customer passes on the info to her/his supervisor for the final decision. Your workflow must be designed to handle that option too.

5. Conversion

Often, a purchase does not end the actual lifecycle of a customer by a long shot, since loyal (i.e., returning) customers are worth a lot more than new customers. You need less of a marketing effort to convince them to buy again and they tend to buy three to four times⁸ as much as new leads.

⁶ <http://www.oracle.com/us/products/applications/cust-exp-impact-report-epss-1560493.pdf>

⁷ <http://www.obicreative.com/creating-an-emotional-connection-with-your-customers/>

⁸ Paul W. Farris, Neil T. Bendle, Phillip E. Pfeifer, David J. Reibstein (2010) „Marketing Metrics: The Definitive Guide to Measuring Marketing Performance“, Pearson Education Inc

Yet, to retain these customers, your buying processes, service, and support must be thoroughly satisfactory. Most of all, you must resolve problems quickly and professionally. With a bit of luck, your customer could turn into your brand advocate who convinces others in her/his circle about what you have to offer.

1.2 The Buyer Persona: who is really my customer?



In order to be able to apply a customer journey effectively for sales and marketing, it is necessary to identify the lead's personae. This refers to individual customer profiles used as "stand-ins" (representatives) for a brand's target groups.

Such a stand-in helps one to deal personally with different customers, despite the use of automated marketing processes (e.g., emailing). Moreover, marketing campaigns with different targets can be developed for various buyer personae: this covers the diversity in communications with customers and helps generate targeted leads.

Examples of buyer personae could be a department head, CEO, and the digital native, all defined as standard customers for a software firm. Each persona is now assigned vocational or private attributes that are likely to apply to the target group.

The digital native could be one who has just joined the IT department, for instance, or one who shares an apartment with others and privately develops apps. Targeted communications call for certain IT relevance, and should thus be at a professional level. Hence, the digital native needs to be convinced of the software's function, but needs no advice on technical fundamentals.

Workshops are often the place to define biographies of such personae, based on experiences with the customer. That's why, especially the sales and support units must be involved in drawing up the personae. These characteristics should, naturally, reflect the target groups realistically. It's not necessary to delve into every tiny nook and cranny, but the more personal the nature of a persona, the

better the communication. It's worth noting that 38% of all customers surveyed by Genesys Global Survey⁹ consider personalized contact as the foundation for a positive buying experience.

Please keep in mind that 90% of all buy decisions are driven by emotions. That does not mean that your campaigns must be aimed at emotions, but instead that the customer should feel good throughout the customer journey – because each positive experience eases the decision to buy. In contrast, each negative experience feels like such a massive hurdle that the marketing expert, Ruby-Newell Legner¹⁰, states that an enterprise must achieve 12 positive experiences to re-polish its image following a bad experience.

1.3 The Five 'W's of a Buyer Persona

To further refine creation of an effective customer journey, you can finally make use of a journalistic information tool to better understand your customer's needs, background, and level of knowledge. A set of five questions provides you an insight of the context in which the customer approaches your enterprise. Accordingly, you can initiate specific steps to accompany your customer on her/his journey.

Who?

Who is the customer? The buyer persona allows you to stereotype the customer: e.g., to determine the possible level of her/his current knowledge of the product and/or its technical and functional features. Remember that in the course of the buying process, other personae who make the final buy decision may be considered.

Why?

Why is the customer getting in touch with you at this time? Did he/she become aware of you through an ad campaign, or did the person's research not deliver the required information, or is the person looking for personal guidance, or is he/she ready to buy?

When?

At which step of the journey did the customer contact you?

⁹ http://www.ancoralearning.com.au/wp-content/uploads/2014/07/Genesys_Global_Survey09_screen.pdf

¹⁰ <http://www.helpscout.net/75-customer-service-facts-quotes-statistics/>

Where?

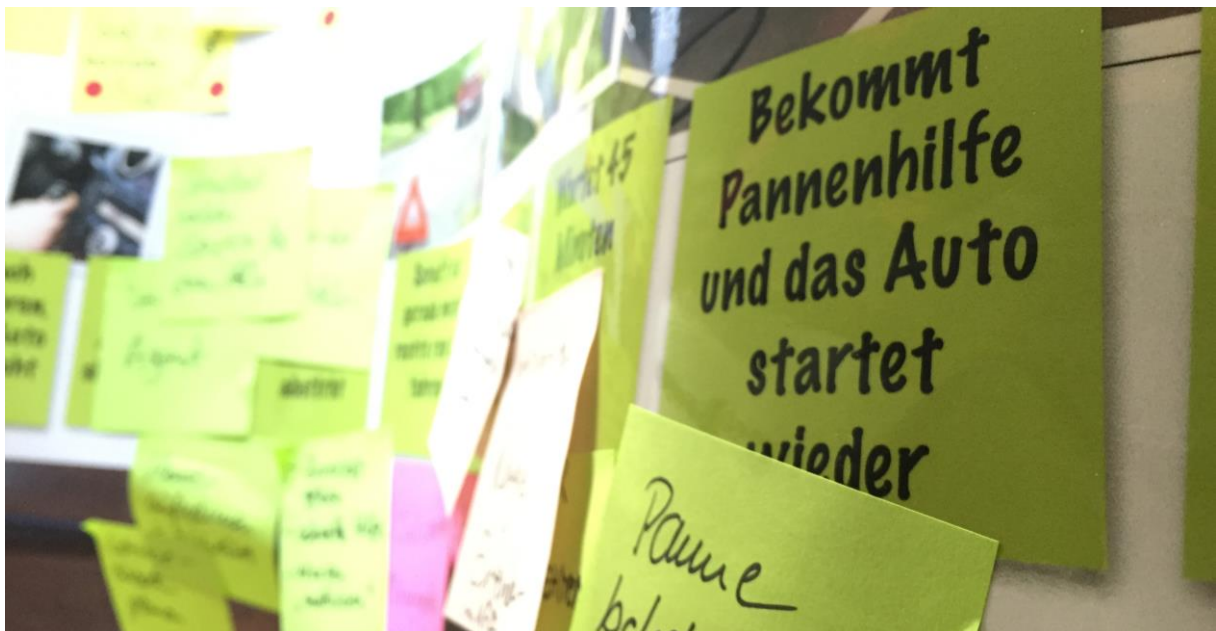
In our modern times of social media, blogs, and ad campaigns, it is necessary to identify the channels used by the customer to get in touch with you. These not only affect further communications, they also require transmission of the information gathered on the customer, for instance, during lead generation via Twitter or from signing up for a newsletter.

What?

What does the customer want? Is he/she looking for info on a particular problem or simply searching for your product? The more precise your knowledge of what the customer wants, the better you can address and advise the person. (A customer seeking general information on project management is better served, for example, with a general white paper. This should be followed by a product recommendation right at the end; avoid handing him/her a flyer immediately.)

The aforementioned means to identify your customers can be applied to draw up a so-called customer journey map, which serves as a sort of field to help shape likely customer journeys (entry, pain points, state of information). In this way, you can establish marketing and sales workflows to get the customer journey going by deploying automated mailing, for instance.

2. Customer Journey Mapping – the GPS



Let's say you frequent a particular restaurant, but get treated like a stranger each time. Ideally, you'd like to be taken to your favorite table, and asked about your children. Yet, even though a personalized experience is critical for retaining customers and for the conversion rate, journeys for many customers, especially for online commerce, are typically anonymous and dissatisfying.

A survey by ContactPoint Client Research¹¹ determined that only 21% of the service staff asks a customer for her/his name. This happens, although it is often just as important for a customer to have a good buying experience as to actually get a qualitatively high-end product. Primarily in competition, the decisive factors are often linked to customer service, the time to respond to questions, and personalization of communications. Of all buy decisions, 70% depend on whether or not the customer feels that he/she is being treated well (Touch Agency¹²). As in the case of a restaurant where a guest is unlikely to return after being treated badly, even if the food was great, a customer is very likely to not buy a product following a poor experience with the sales or support department.

A customer journey map ensures that the customer always feels like he/she is treated personally, is taken up at her/his state of information, and that the communication is speedy, informative, and professional. The map is the basis for getting processes going, for automating them, and for tailoring them to the customer. At the same time, your employees will be fed the right information to appropriately serve and advise your customer.

To achieve this, you need at least analytics software to collect customer information, such as the channel from which the customer came, what he/she sought or found there, and from which page the customer left the site. The more customer data you can collect and process intelligently, the more precisely you can shape your contact experience and individualize the buyer's persona. Thus, your enterprise can target customer needs accurately and transmit content that is also relevant.

Automated workflows can be activated in terms of the entry point, whether this is an email message requesting a white paper, an invitation to sign up for a newsletter, or information for the sales department to personally get in touch with an especially promising lead (defined in terms of diverse variables).

Beyond that, you can activate long-term mailing workflows that send weekly or monthly reminders with more information or offers, or strive to lure inactive customers back into the lifecycle with attractive offers.

Analytical CRM software can be particularly useful to identify your customer's concrete pain points along the buying process. For example, if the abort rate is above-average at the payment stage, it could make sense to review the process and redesign it to be more informative and/or intuitive.

The customer journey map thus serves to lay down workflows and automate processes, which should be adapted and updated whenever possible and necessary.

¹¹ <http://courteous.com/customer-service-and-telephone-statistics-your-business-should-know>

¹² <http://www.helpscout.net/75-customer-service-facts-quotes-statistics/>

Mapping your customer's journey requires considerable experience. Therefore, it is best to hire a consulting service with extensive customer experience, one that can demonstrate success in defining the relevant steps, workflows, and communication paths. This will help you avoid a trial & error process, and get you straight to implementing proven workflows that can later be matched to your enterprise's requirements.

The goal of a customer journey map is to convey a feeling to the customer of being treated personally, while simultaneously automating most of the communications. In 2011, the consulting company Gartner¹³ prophesied that, by the year 2020, 85% of all buy processes will occur without human interaction. Although it may sound somewhat dystopian, this prediction has the potential to drive the automation of precisely those processes that could really work without human interaction (e.g., confirmation that a contact request was sent, shipment of a white paper, or dispatch of a reactivation email message). As a result, sales, marketing, and support personnel can concentrate fully and more effectively on processes that cannot do without human interaction, such as a meeting to give advice, chat with customers, or deal with contractual issues.

2.1 The Customer Needs Content – but what exactly?

In addition to making contact at the right time and that too personally, the content you provide also counts. The map of the customer journey serves as the basis for determining which buyer persona benefits at which stage from which content. The content should be divided into five stages, as long as it also makes contextual sense to customers who enter laterally at stage three.

Good content does not necessarily have to be focused solely on the purchase. It can be enhanced with more information, suggestions, or amusing information graphics – to intensify the customer's trust and, in the best case, possibly assure its viral nature (or popularity) among the social media.

Within your enterprise too, it is necessary to have qualitatively high-value content and monitor it to optimize processes across teams. In the past, marketing and sales rarely had any interfaces, but nowadays the marketing staff is tasked with providing the right content to sales. The analytical capabilities of CRM software can help identify the customer on the journey map and thus deliver the right content.

¹³ http://www.gartner.com/imagesrv/summits/docs/na/customer-360/C360_2011_brochure_FINAL.pdf

Example: a customer queries the price of some software available as a basic edition for one user and as a business edition for up to 50 users. On the dashboard of CRM software, sales will see that the customer had just downloaded a white paper on self-employment. Consequently, one can assume that he/she could more likely want the basic edition, which sales then recommends. The customer feels spoken to directly and reacts more positively to the offer.

2.2 Cross-Channel Marketing vs. Omni-Channel Marketing



Enterprises face another challenge in an area where the map of the customer's journey can also be deployed. We are referring to the steadily growing communications channels that offer customers increasing flexibility to become informed. In the past, multichannel marketing was the leading approach (erroneously referred to as omni-channel marketing). Now, you need to deploy cross-channel marketing services ensure a successful customer journey, with due consideration of the constantly changing ways in which potential leads use them (refer to omni-channel marketing too).

A. Multichannel Marketing

Here, the various channels for communication are not networked. Hence, you can only send the customer straight to one channel for a purchase (traditionally a funnel), or the customer will have to switch to another channel and restart. Modern-day communications are to blame for making this approach disadvantageous. A customer who logs in to Twitter is highly unlikely to reach a decision to buy on this platform – yet, he/she should have the opportunity to get directly in touch with your enterprise.

B. Cross-Channel Marketing

Here, these channels are appropriately linked with each other, such that customers do not land up in a dead end. Moreover, customers can thus be directed from one channel to another, without loss of any information. If a customer posts a question on Twitter, he/she does not have to be directed first to your enterprise's website to re-ask the question via an official contact form. Social networks are growing continually, even for B2B marketing. Hence, if your enterprise opts for such profiles, you will need to take the time and capacity to nurture them. Of customers who complain on enterprise profiles in social networks, 42% expect a response within 60 minutes (Jay Baer¹⁴). If you do not react fast and professionally, you will lose such leads.

C. Omni-Channel Marketing

As with cross-channel marketing, here too customers can switch channels and buy without losing information. The emphasis is on omni, meaning all channels are possible, no exceptions. Viewed through a customer's eyes, this is the most highly integrated form of a customer journey, in that a customer experiences a buying experience without breaks. Everything is feasible, seamlessly – from desktop research, to adding a preferred product in the app's cart, through to a purchase in a real store. An example of this is one where a store salesperson calls up a customer profile online in an app, and advises the person directly in line with the buyer's preferences.

3. Lead Management as a Business-Critical Process for Marketing, Sales and Service

One of the challenges in managing leads is to feed them the right information via the right channel at the right time during the decision phase – to facilitate the lead's decision and thereby acquire the lead as a customer for your enterprise. As such, it is irrelevant whether you are dealing with a new or an old customer. Hence, at the touch points you need to set up a mutually beneficial dialog, which provides information to the lead and returns knowledge of what the lead seeks from your enterprise all the way through to the service department.

This gives rise to a special challenge for managing leads¹⁵: how do you design the interfaces between marketing, sales, and service along the entire customer journey? The outcome of managing leads should be to optimize deployment of resources for the customer – and that too digitally.

¹⁴ <http://www.convinceandconvert.com/social-media-research/42-percent-of-consumers-complaining-in-social-media-expect-60-minute-response-time/>

¹⁵ Christian, C.: Nutzenanalyse und -bewertung ausgewählter CRM-Aktivitäten im B2B-Umfeld am Beispiel der Lead Qualifizierung, 2015.

Hence, the sales and marketing units should jointly define the requirements that a lead needs to fulfill to be moved up to the next category.

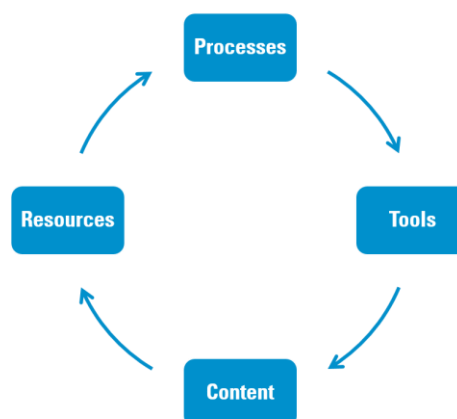
One can illustrate a lead's journey like a funnel and analyze the various phases in detail.



The journey of interested parties, source: own presentation.

Basically, you need to answer the question of how and with which methods, content, and via which channels, and at which phase, you can totally influence and steer the development of a lead.

It is important to understand that managing leads is a business-critical process. Therefore, it is necessary to describe the following in detail for all departments: the interaction of content (what is truly relevant for a prospective buyer), interaction of tools (it should be possible to map, nurture, and measure the buying process fully), interaction of resources (the marketing, sales, and service units must work seamlessly with each other), and naturally the workflow itself.



Most important factors of success for an integrated Lead Management. Source: Janning, 2012.¹⁶

¹⁶ Janning, R., Lead Management und Content Marketing B2B. Präsentation, 2015.

The digitization that communications has undergone in recent years has upended our lives, and has also imparted special significance to the online channel for managing leads: of all visitors to a website, 97% are not ready to immediately buy a product or service on their first visit, simply because they showed some interest.¹⁷

1. 50% of “qualified leads” are not ready at the first contact to conclude a transaction
2. 66% of buyers indicate that consistent and relevant communications with them from both the sales and marketing units is a key success factor for choosing a service provider
3. 35–50% of revenues go to providers who respond first (cue: customer interaction)

It is essential to focus on processing these leads by nurturing them during the decision-making process.

What are the key steps in a process to integrate the management of leads?

1. Lead intelligence

Better understand your user groups, in order to react in a more targeted and relevant manner.

2. Lead scoring

Know and focus on leads that offer the best opportunities.

3. List segmentation

Segment leads in terms of attributes, step in the decision-making process, and/or behavior – to optimize the click-through rate.

4. Lead nurturing

Email messages that nurture leads have about a 4–10x better response rate than stand-alone email messages.

5. Integration of automated marketing and CRM

A marketing automation program (e.g., Marketo, Eloqua, ExactTarget, Microsoft Dynamics Marketing, etc.) must be integrated into the CRM system. This closes the loophole among marketing, sales, and service. By the way, enterprises that automate their lead management system enjoy a 10% growth in revenues within 6–9 months (Gartner).

In the traditional sales funnel, the entire lead management process flows into that for managing opportunities. The leads are transformed into opportunities and sales executes these in a B2B transaction.

¹⁷ Janning, R.: Kunden machen, was sie wollen – Lead Management im Spannungsfeld zwischen Marketing und Vertrieb, Norderstedt 2012.

The service unit is especially challenged here, especially to handle the after sales task. It's no longer adequate to provide channels for phoning or emailing. To successfully manage the customer journey, your service unit must also be optimized. Ideally, this should be set up as a self-service that follows queries from leads and existing customers. Thus, the key issues for a successful service unit are: what's the right content and how fast can one process a query?

Nonetheless, what defines good service?

Reachability

- American Express conducted a survey in which 22% of all respondents' defined good service as one that makes it easy for customers to do business with the enterprise.¹⁸
- Your enterprise must offer several contact points (emailing, phone, social media) that are reachable at clearly stated times and which answer quickly (most customers prefer rapid responses to questions).
- Your contact points must be visible and easy to find on your enterprise's platform (website, shop, blog).
- A customer must feel that it is easy to get in touch with you and that your enterprise will respond quickly to her/his needs. Especially on social networks, the answer must come fast (Jay Baer found that 42% of all users expect a 60-second response time). The holding time on hotlines must also be as short as possible.
- Support, FAQ, or forum pages allow existing customers and leads to inform themselves. These should never be set up to replace your regular service unit, but rather to enhance it.

Tone

- 17% of all customers prefer polite¹⁹ customer service reps, while 14% prefer human contact.
- Personal contact with the customer is crucial in the service department. Even if the FAQ pages can help resolve an issue, human contact generates more trust as soon as a customer seeks you out directly; moreover, this often saves time in handling the issue.
- Politeness, simple explanations, and patience form the foundation of acceptable conduct with customers. As mentioned earlier, customers talk more of negative experiences than positive ones. A rude customer service rep scares away not just one customer, but probably loses many others in the process.
- Make sure you standardize all manners of addressing and communicating with a customer, for example, to avoid being informal via Twitter and formal in person.

¹⁸ <http://about.americanexpress.com/news/docs/2014x/2014-Global-Customer-Service-Barometer-US.pdf>

¹⁹ <https://www.accenture.com/ke-en/insight-digital-improve-customer-experience>

Quality

- The content is just as important as your tone and response time. Your customer's issue can be resolved only with the right content: i.e., to buy or retain the product, or otherwise stay in touch with your enterprise.
- Unsuitable content and poor support means dealing with the customer longer, while deploying more than the necessary capacity. In the worst case, this could even frustrate the customer.

Here too, the software you select and integrate plays a crucial role. For example, the program could assess how long a conversation lasts with a customer, how often the customer had to activate different touch points to resolve an issue, or whether he/she had to be passed on to specialists for specific issues. Both the marketing and sales units should definitely have access to this information, preferably in a 360-degree view. All three units could thus function seamlessly with each other and cut the attrition rate, boost the conversion rate, and enhance the overall level of customer satisfaction.

4. And how may we help you?

Increasing digitization of communications and the rising significance of online channels have defined a decisive success factor – the seamless intertwining of marketing, sales, and service processes.

At ec4u, we can deliver this requirement through close cooperation of our two firms, ec4u expert consulting and ec4u marketing experts. We empower you to accompany a customer on her/his journey over the entire lifecycle of the project, by rendering services that range from strategy & expert consulting services, to technical execution on proven technology platforms of market leaders in software, through to support and further development. We offer the best possible combination of a two-pronged approach combining our technical expertise with the “best of breed” technological applications.

Our demanding vision is also reflected in the comprehensive consideration of customer-related processes for your marketing, sales, and service units. We enable the departments in your enterprise to work hand-in-hand and offer your customers a smooth experience throughout the lifecycle.

5. Five Steps to an Optimized Customer Journey

A systematic approach is required to set up the customer journey, typically in the following five steps:

1. Define the principles for a customer experience

You first note and systemize all relevant brand attributes and current principles for a customer, plus the overriding goals of a customer journey. Managers need to ask themselves how they presently care for their customers, and how this should look in the future.

2. Analyze the points of contact and identify the moments of truth

Next, note all points of contact with the customer over the entire buying lifecycle and systematically identify the moments of truth.

3. Determine customer expectations and identify the potential for you to stand out

After this, identify the minimum and supplementary expectations and information needs of a customer at each point of contact, and determine the potential to differentiate your enterprise. The sales department should conduct an analysis of expectations and needs along the customer journey addressing an ideal customer (so-called persona).

4. Formulate your services for customers and develop/execute strategies to make contact

At this step, consider your own strengths and the aspects determined in step three to make your enterprise stand out from the competition by formulating a realistic and executable service for customers and sales.

5. Set up control instruments

Optimizing the journey of a customer means: measure, measure, measure. Instituting control parameters and executing them regularly are paramount to achieving long-term success.

Don't hesitate to call us. We would be happy to show you how to steer your customers by systematically applying the five steps elucidated above to optimize the journey of a customer.

For more information or questions or to take part in one of our custom workshops, drop us a line at marketing@ec4u.com.

6. Checklist for a Customer Journey

Use our relatively simple and pragmatic checklist of 19 questions below, to identify areas where you may have issues. If you check ten or more questions as N/A, there is a dire need to revamp your strategy on customers.

	Applicable	Partly applicable	Not applicable
We know all the channels in our enterprise for customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a functional strategy for contacting customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We manage customer experiences proactively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a control system in place to measure and assess how well we manage customer experiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have clearly defined principles for customer experiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We know our moments of truth and use them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We know each touchpoint on our customer journey.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We know our relative strengths along the customer journey.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have adequate expertise to set up our touch points as positive experiences for customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have adequate expertise to set up our touch-points as positive experiences for customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We orient these optimizations to generate a positive experience for our customers along their entire journey.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We can be found by search engines when people look for our enterprise's specific products and services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You can look up information on our products and/or services on our website.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You can look up information on our products and/or services on external websites.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Google searches for solutions to concrete issues that we offer appear on the first page of results.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our customers exchange information and reviews of their positive experiences (e.g., reports of experiences, ratings, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are constant information exchanges and reviews of our service (e.g., reports of experiences, ratings, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We regularly hear from satisfied customers and from enthusiastic ones too.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We measure how often we are recommended and strive to improve this parameter all the time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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