THE NO-FAIL, 3-STEP GUIDE TO
Digital Customer Experience
INVESTMENT

INTRODUCTION

From healthcare to high tech, organizations have named the customer experience as their top strategic performance measure.[1] Proven to increase customer loyalty, drive revenue and boost customer lifetime value, customer experience has become the competitive battleground for business, predicted to overtake price and product by the year 2020.[2]

With the number of connected devices rising, those experiences have become increasingly digital. In fact, businesses aiming to improve the overall experience of their customers are pouring the most resources into improving the digital customer experience (DX).[3] This includes the systems that help them manage and connect brand experiences across the customer lifecycle—otherwise known as a digital experience platform (DXP).

Deciding how to invest and develop a strategy for your DXP can be challenging. After reading this paper, you'll better understand:

▶ **Why keeping your focus on the customer is critical to the success of your digital experience efforts**

▶ **How a DXP implementation checklist can help you benchmark your customer experience maturity, identify gaps in your digital strategy, and guide your customer experience investments**

▶ **How to align your organization around your vision for digital customer experience**

▶ **How to calculate the ROI of your digital experience platform**

FROM CX TO DX:
What Does It Mean?

CUSTOMER EXPERIENCE (CX)
The sum of all interactions a customer has with a company, across all touchpoints and all phases of the customer lifecycle, including how customers perceive those interactions.

DIGITAL CUSTOMER EXPERIENCE (DX)
A subset of the customer experience covering the digital interactions customers have with your company.

DIGITAL EXPERIENCE PLATFORM (DXP)
A platform that manages, delivers and optimizes digital experiences consistently across every phase of the customer lifecycle.

CUSTOMER JOURNEY MAP
An integral part of DX strategy, this is a diagram that illustrates many of the interactions a customer has with a company, including buying stages, touchpoints, customer goals, motivations and feelings.

[1] "2017 Global Customer Experience (CX) Benchmarking Report," Dimension Data, 2017.
[2] "Customers 2020," Walker Info, 2013.
[3] "Your Digital Experience Technology Strategy Starts with a Customer Journey Map," Ted Schadler, Forrester, December 20, 2016.

STEP I

Keep Your Focus On the Customer

Digital experience platforms were designed to help you deliver customer experiences that set you apart from the competition. But if you're not sure how your current experiences are performing, it's difficult to know how to develop your DXP strategy. These tips can help ensure that you keep the customer at the center of all your digital experience initiatives.

Benchmark your customer experience maturity

Forty-four percent of organizations think customer experience is too hard.[4] It's true, there are a lot of moving parts to consider — from defining your customer experience team to making the most of your social media listening technology. And at the heart of it all sits your digital experience platform.

Getting your DXP implementation right is critical to delivering the best experiences to your customers. Once your platform is in place, you can pull all of your customer data together to provide seamless personalized experiences across devices and channels. This means higher customer acquisition and retention rates.

Using a DXP implementation checklist, you can identify gaps in your organization's digital strategy, and resources to help guide your customer experi-

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[4] "2017 Global Customer Experience (CX) Benchmarking Report," Dimension Data, 2017.

ence investments. At minimum, your checklist should cover three main areas required for successful DXP implementation:

► **The customer journey**

► **Organizational alignment**

► **Technology infrastructure**

As shown in the sample DXP implementation checklist, each area is made up of a series of components you can use to evaluate your maturity. For example, organizational alignment includes defining objectives and deliverables, and identifying your customer experience team.

DXP Implementation Checklist

This sample checklist can help ensure that your digital experience platform implementation is successful, giving you the foundation you need to deliver memorable customer experiences.

THE CUSTOMER JOURNEY	
Quantitative and qualitative research on customer "jobs to be done" has been completed.	
Customer personas have been defined.	
Journey maps have been created.	
Clear ROI goals have been established, and analytics capability is in place to measure success.	
ORGANIZATIONAL ALIGNMENT	
CX team members have been identified and are committed. (Members may include: team leader, project manager, change management leader, department representatives, researcher, analyst, information architect, database administrator, content manager, UX lead, designer, developer, trainer)	
All departments and teams understand the voice of the customer.	
TECHNOLOGY INFRASTRUCTURE	
DXP information architecture	
Customer journey orchestration tool	
Personalization engine	
Cross-channel analytics	
Marketing automation	
Content management systems (CMS)	
Social listening technology	
Other technology interfaces may be needed and integrated	

Understand your customer journey

Forrester defines a digital customer experience platform as "software to manage, deliver, and optimize digital experiences consistently across every phase of the customer lifecycle."[5] This emphasis on the customer lifecycle makes mapping your customer journeys an important exercise in determining how to optimize your DXP to grow revenue and retain customers.

A customer journey map helps you understand the different ways customers interact with your brand, as well as their goals, motivations and feelings. You can use the map to identify and prioritize interactions that prevent customers from meeting their goals. Then, look for ways your DX platform can help improve these experiences while adding value to your business.

The user experience of your digital channels and touchpoints is the most direct reflection of your brand. To achieve a seamless customer experience, you should be constantly evaluating your customer journey maps against the behavior of your customers to identify opportunities for improvement within your DXP.

> Journey maps are the backbone of customer (hence, digital) experience programs.
>
> — FORRESTER[6]

How to Map a Customer Journey

Follow these steps to get started with your customer journey map.

GATHER YOUR PERSONAS Personas are critical for understanding who your customers are, why they buy, and which buying objections they have. If you have multiple personas, consider creating a journey map for each one.

DEFINE BUYING STAGES These are different for every company. If you're a retailer, for example, your stages might include Need Recognition, Research, Compare, Evaluate, Purchase and Post-Purchase.

IDENTIFY TOUCHPOINTS Customers interact with your company in different ways for each buying stage. For example, while on her smartphone, a customer might see an ad on social media for a pair of wireless headphones. Later, she uses her laptop to browse your site for a pair she likes. Next, she visits the store to try on different styles, and then goes back home to finalize her decision, and purchases online. If the size is wrong, she calls your customer service line or returns to the store to exchange.

MATCH CUSTOMER GOALS WITH STAGES Think about what your customers want to accomplish at each stage of the buying cycle. This allows you to see the difference between customer expectations and their actual experience.

INCLUDE CUSTOMER SENTIMENT Add customer quotes and examples from personas or sentiment analysis to get a better understanding of which aspects of the experience customers enjoy, and which are frustrating.

USE THE RIGHT TOOLS A customer journey mapping tool can help you create customer journeys and connect touchpoints with data so you can deliver better customer experiences.

[5] "The Forrester Wave™: Digital Experience Platforms, Q3 2017," Mark Grannan, Stephen Powers, Sara Sjoblom, September 21, 2017.
[6] "Your Digital Experience Technology Strategy Starts with a Customer Journey Map," Ted Schadler, Forrester, December 20, 2016.

Prioritize areas of opportunity

Once you've mapped your journey, it's time to decide which areas of the customer experience to work on first. Look at each touchpoint or interaction, along with all of its supporting data, to identify areas where you can help customers reach their goals, while helping your business meet its own.

For example, if you see that customers are consistently frustrated when dialing into your call center, try out some self-service options to give them more control over the process. This change not only helps your customers get resolution more quickly, but cuts down on the resources and costs needed to keep your call center staffed and running. Your DX platform can help you connect the dots between all of the touchpoints in your customer journey, ensuring your customers have the best experience no matter which stage they're in. ■

STEP 2

Align Your Organization

Delivering impactful digital customer experiences means aligning your entire organization around customer needs and expectations. However, 40 percent of marketers say that different functions in their company work in silos when it comes to customer experience.[7] To get everyone aligned around your digital experience initiatives, you should focus on three areas:

- ▶ **Goals and vision**
- ▶ **Communication and collaboration**
- ▶ **Roles and skills**

Goals and vision

Make sure IT, marketing and the rest of the organization are aligned around your goals and vision for digital experience, and how it relates to your larger customer experience strategy.

For Northwell Health, the largest healthcare provider in New York State, getting alignment around their vision of reinventing healthcare is an ongoing process which began with a focus on the patient experience.

Groups across the organization participated in a workshop in which they created a story map of the patient journey, which included everything from hospital check-in to follow-up doctor visits. Through this exercise, participants were able to see how all steps of the patient journey are connected, and better understand the roles they play in delivering the best experiences to patients.[8]

[7] "Implementing a Customer Experience (CX) Strategy Best Practice Guide," Econsultancy, March 2017.
[8] Personal interview, Kellye Rogers, Director, Solutions Strategy, Phase2, December 7, 2017.

Communication and collaboration

Getting others in your organization to support digital customer experience initiatives and technologies starts with speaking their language. For example, your CEO and CFO will sit up and take notice if you talk about how your digital experience platform pays off in terms of growth and revenue, whereas the CIO will be most interested in the security of your DX platform, and how well it integrates with the systems your company already has.

When trying to get buy-in for your DX initiatives, keep these tips in mind:

▶ **Explain your objectives:** Clearly explain what you are trying to achieve with digital customer experience, and how you'll measure success.

▶ **Address objections:** Think about what's most important to the audience you're addressing, and be ready to address their specific objections.

▶ **Speak the right language:** Use terms like ROI, revenue, competitive differentiation and growth when speaking to the CEO and CFO. For the CIO, talk cost control, security, innovation, data privacy, data reuse, efficiency and speed.

"The ROI of journey mapping is realized when all employees understand how to align their activities to customer expectations."

— **Forbes** [9]

Roles and skills

Fifty-five percent of organizations agree that the digital skills gap in their organization has widened over the last couple of years, and that they've lost competitive advantage due to talent shortage.[10] The shortage of digital skills spans from hard skills like analytics and cybersecurity, to soft skills like customer-centricity and passion for learning.

Here are some ways you can prevent your own organization from falling prey to the digital skills gap:

▶ **Define a digital skills vision:** Identify the skills you'll need to accomplish your digital customer experience initiatives.

[9] "**How To Effectively Implement Customer Journey Maps,**" Christine Crandell, Forbes, April 9, 2017.
[10] "**The Digital Talent Gap—Are Companies Doing Enough?**" Capgemini and LinkedIn, October 26, 2017.

▶ **Conduct a skills gap analysis:** Take inventory of the skills your organization currently has. Compare where you are now to where you'd like to be in the future.

▶ **Acquire skills to close the gap:** Build up digital skills using innovative training programs and targeted recruiting tactics, and create a network of vendor partners for outsourced expertise.

When looking at key roles needed to build and maintain your DXP, you should consider the following:

Team Leader	Analyst	Content Manager
Project Manager	Information Architect	UX Lead
Change Management Leader	Database Administrator	Developer
Department Representatives	Designer	Trainer
Researcher		

STEP 3

Measure Your Successes

Budget constraints have now become the top challenge in developing digital customer experiences.[11] And proving the value of your DX platform investment can mean the difference between a budget increase and a cut. With only 8 percent of organizations integrating customer experience metrics into their executive scorecards and business operational reviews[12], it's no wonder marketers aren't getting the budgets they need.

If you're not sure where to get started with digital customer experience metrics, here are some top ways to measure success:

▶ **Customer satisfaction (CSAT):** Measures how satisfied a customer is with a particular interaction with your company, such as contacting your support team, or purchasing a product.

▶ **Net promoter score (NPS):** Measures the percentage of customers that would recommend your company to family, friends or colleagues.

▶ **Customer effort score (CES):** Measures how difficult it is for a customer to complete a particular task, such as finding answers to their questions on your website, or completing a transaction using a mobile app.

▶ **Customer adoption rate:** Measures how many customers adopt a new opportunity for digital interaction with your company, whether through a mobile app, kiosk or smart device.

▶ **Customer lifetime value (CLV):** The projected revenue a customer will generate over the course of their entire relationship with a company. In other words, what a customer is worth to your company.

▶ **Engagement metrics:** These metrics could include the number of pages a customer visits while on your site, number of conversions, number of comments, or daily active users (DAU)/monthly active users (MAU) for your site or mobile app.

[11] "2017 Digital Customer Experience Survey," CMSWire, 2017.
[12] "The State of CX Management 2017," Temkin Group, April 2017.

When these metrics are combined, you get even more powerful insights. Following are some examples from a framework that Forrester developed to measure the impact of better customer experiences.

> ▶ **Higher satisfaction drives repeat business, hence higher customer lifetime value.**

> ▶ **Higher adoption of a digital interaction drives higher revenue or lower cost.[13]**

Remember that each company measures success differently depending on their company goals and strategies. That's why it's important to ensure your customer experience metrics align with your overall business metrics. Only then can you be sure that everyone is working together to move the company in the same direction, with a clear focus on the customer. ■

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[13] **"Digital Customer Experience ROI: How to Show Me the Money,"** Todd Schadler, January 18, 2017.

CONCLUSION

Your DX investment just got a lot easier

Customers are interacting with your brand in more ways than ever before, making it hard to know if you've made the right choices with your digital customer experience investment. Putting the customer first is key. Implement systems that help you better understand the customer journey. Align your organization around customer needs. Know how to measure the success of your efforts. By following these steps, you can feel confident that every decision you make will keep your customer experience improving, and your competitive edge growing. ■

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