

A CX Roadmap That Puts Customers in the Driver's Seat

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The Essentials

Business, technology, and marketing executives almost have too much of a good thing when it comes to launching customer experience (CX) initiatives. Why? They are inundated with more CX project requests than the organization can possibly fund, staff, or manage at any given time. Not only do CX projects involve technology changes, but successful initiatives also require a deep shift in the firm's culture – which is both challenging and time-consuming. Executives leading digital transformation efforts must make hard decisions about what to greenlight, what to postpone, and what to emphasize – culture change, new technology, or both?¹

A multi-year implementation roadmap is crucial for establishing the strategy, goals, priorities, architecture, target operating model, culture, and timetable for CX initiatives. Such a roadmap will determine investment priorities and keep the organization focused on projects that deliver the most value or solve the biggest customer issues. Implementation roadmaps will (and should) vary among firms, but leaders can learn from other enterprises and SMBs

already on this path. The three CX priorities that most organizations place ahead of other projects are:

- 1. Launching voice of the customer (VoC) and customer journey mapping efforts** to identify touchpoints, moments of truth, and channels that inform CX investments²
- 2. Providing enterprise access to aggregated customer data**, which in its current form is often siloed, inconsistent, and unavailable across the organization
- 3. Developing a lasting “customer first” culture** through persistent communications, recognition/reward systems, and other organizational change management efforts

Typically, these three efforts must be launched first because they require several months or longer to complete and are often the prerequisites that set the table for other important CX initiatives.

In the meantime, numerous proposed initiatives will undoubtedly surface and business and technology managers will vie for funding and resources. When this

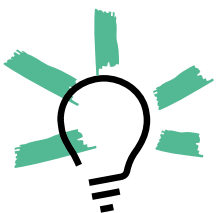
happens, senior executives should follow the organization's CX strategic plan (if there is one), which sets the CX priorities. However, most organizations lack such a plan, which results in challenges, debate, and even chaos surrounding which needs the organization should tackle first. The highest priority projects to greenlight vary depending on the organization, but these four efforts often *follow on the heels* of the three initiatives described above:

- 1. Implementing one or more new digital channels**, such as email, text, chat, web app, social, and/or mobile, to replace or augment older communication styles
- 2. Revamping outdated website(s)** that support limited devices and/or lack dynamic personalization, commerce, natural language processing, facial recognition, and other newer technologies
- 3. Replacing or supplementing legacy customer relationship management (CRM) systems** that are outdated and no longer sufficient for exceptional customer engagement
- 4. Transforming document-intensive processes** that are mistake-laden because of multiple handoffs within and outside the organization³

Assess Customer Experience Readiness by Asking Pointed Questions

All companies are different when it comes to CX because they have followed different paths toward customer engagement and because customer expectations vary widely among enterprises and industry sectors. Some organizations have invested in CX all along, from the early days of e-commerce to the cutting edge of customer service robots and machine learning. As a result, any advice about prioritizing CX initiatives must be put into context – the organization's maturity level, its customer expectations, the competition, market trends, and so forth. Senior leaders should examine the following key questions before spending anything on CX projects:

- 1. Do we really know our customers?** Some organizations stay close to the customer's pulse, following each move the customer makes (with tools such as market location software, personas, and personalization) and responding to customers proactively, while others largely and unwittingly ignore changes in customer behavior while continuing to do business as usual. Does your enterprise honestly know what delights and frustrates customers, and what keeps them coming back? When a customer contacts your business, do you instantly know their history, preferences, issues, and details? Or, do you instead repeatedly ask for the same information (name, birth date, zip code, address, and phone number) as the customer is handed off from one place to another? If



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your organization doesn't know customer patterns, expectations, and behaviors, it must focus on learning about its customers before investing in new technology.

2. What are the biggest business technology trends impacting my target market?

For example, if your company is a manufacturer, is the internet of things (IoT) or augmented reality the highest competitive priority? Or, if it is an airline that gets most of its bookings through travel intermediaries, does it need a big push to collect and aggregate customer data firsthand? If you are in the shipment/delivery business (or could be), will automated cars, drones, and delivery robots change the very mode of operationalizing delivery processes? Perhaps your organization is in financial services or insurance and you think that machine learning will completely change your back-office processes and practices. Ask yourself and your peers what the crystal ball says about trends in your organization's target market.

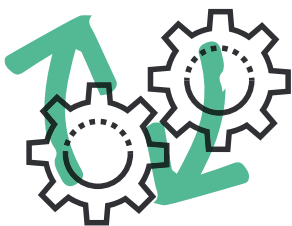
3. What new business models are shaking up our industry?

New business models are driving industries and organizations to compete in sometimes wrenching disruption, by changing business practices or implementing a mix of high-touch physical and digital channels for customers and partners. A risk/reward analysis may point to the need for additional website, mobile, and e-commerce investments to bring your business closer to customers

– creating intimacy, loyalty, and trust. Perhaps your organization can use intelligent process automation to support new front-office and back-office processes. For example, one Latin American company is moving from distributors that sell surgical devices to hospitals, to a direct sales approach, which is proving beneficial but also much more disruptive and protracted than expected. This company's new strategy is dramatically impacting its culture, the website, its direct sales organization, the business processes to fulfill orders, and the customer experiences. Thinking through business trends and the associated opportunities and risks is essential to a CX roadmap.

4. Where is my organization located on the technology path to support being customer-driven?

Has your organization stayed up to date with technology trends or has it been slow to implement newer CX technologies? If it has been slow, is there a big-picture plan to drive CX investments or are there instead silos of automation that will be difficult to bridge across the enterprise? Does your organization even have an IT roadmap that is linked to its business strategy? Or, are managers addressing CX pain points at a departmental level – or not at all? Depending on how up-to-date their CX technology plan is, some enterprises will be in catch-up mode and may need to leapfrog more established technologies to sync up with future CX trends.



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Start CX Initiatives by First Understanding Your Customers and Your Own Organization

After senior executives have examined the hard questions about where the organization and its customers or stakeholders are going, it's time to start creating and executing the CX implementation roadmap. (See Figure 1.)

All companies are different, with specific needs and priorities, but most find that the following three projects are critical to the overall success of CX initiatives and should be launched early when executing the roadmap:

1. **Voice of the customer and customer journey mapping.** All too often, organizations have developed strategies based on insights from employees, without reaching out to customers. This inside-out approach is usually doomed to failure

Figure 1
CX Initiatives Start with VoC and Customer Journey Mapping

How To Set CX Priorities

- Expect a multi-year effort.
- Start first with VoC and customer journeys.
- Focus on organizational readiness.
- Give high priority to customer data.



because employees have blind spots about what customers experience. Instead, firms should take an outside-in approach by conducting voice of the customer (VoC) sessions, developing a journey mapping strategy, and creating customer journey maps for strategic end-to-end processes. Inputs from these sessions create the groundwork for launching organizational change management efforts to sustain VoC and customer journey initiatives, and give insights about customer pain points, what delights customers, and what makes them come back. Consider the VoC sessions and journey mapping to be just as important as the technology aspects of implementing CX. Customer journeys point to the essential customer touchpoints, moments of truth, and channels needed to sustain great customer experiences.

2. Accurate and accessible customer data.

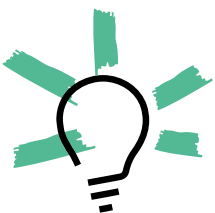
Customer data is usually the launching point for other CX initiatives and should be considered the linchpin of the CX strategy. Customer data holds the key to other CX efforts, such as multichannel or omnichannel, and machine learning.⁴ Many organizations are keen to get started on AI but lack the data sets to support such an effort. Often, prioritizing customer data requires cleaning and organizing the data first, which is a big job because much of the data is likely not useable in its original form. Many organizations strive to create a single customer ID across all business processes, which is also a large undertaking. After being cleaned and organized, data should

then be applied to the firm's customer journey maps, which will most likely surface the need for additional data that goes beyond customer-specific data.

Organizations invariably give their highest priority to data – whether it is developing master data management; implementing data lakes; launching data quality efforts; integrating, rationalizing, and virtualizing data across functional and technical silos; deploying new enterprise apps to better manage data; and/or creating new data sets.⁵ By prioritizing data, firms can then launch CX solutions that depend on consistent, accessible customer data, such as machine learning, predictive analytics, next best action, next generation websites, new CRM technology, and multichannel or omnichannel. Focusing on data is crucial because many organizations are stymied by data silos that inhibit other CX initiatives.

3. Effective organizational change management for a customer-first culture.

In addition to implementing new technologies, the organization must give top priority to becoming customer-driven throughout the workforce. Change does not happen overnight. It requires a well thought out, extended communications plan involving company-wide events, town meetings, numerous one-on-one meetings, peer discussions (face-to-face, virtual, or social channels), plus changes to performance metrics, and many other approaches. Often employees can be extremely resistant to changes if



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the motivation behind them is not fully communicated and if employees are left wondering “what’s in it for me?” Because executives woefully underestimate how much communication is needed, tackling this early in the planning process is paramount for a successful customer-driven company.⁶ (See Figure 2.) It’s all too easy to implement new technologies only to have employee interactions with customers fall short.

Notice that two of the top three CX prerequisites – journey mapping and organizational change management – are not about technology but about how CX impacts customers and employees. Whether it is learning more about the customer through VoC and journey mapping, or learning more about employees through change management methodologies, it’s essential to realize that creating a customer-first culture requires much more than new technologies.

Four Key Areas to Prioritize

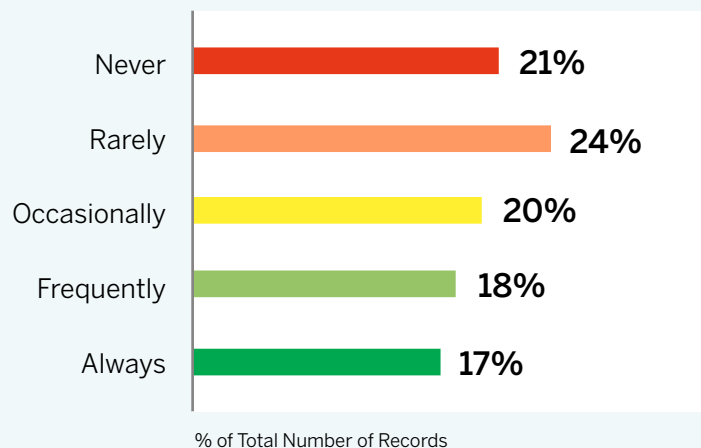
After focusing strategically on customer data and organizational change management, four technical priorities will likely surface (although the specifics will vary across companies):

- 1. Implementing (possibly on an incremental basis) new digital channels**, such as email, text, chat, social, and/or mobile to replace or augment older communication styles. Let’s face it – too many organizations do a terrible job of handling incoming customer communications and engagements. For example, when a customer engages with an organization – whether through phone, chat, social, website, mobile app, or some other channel, the company often does not know customer basics such as name, address, buying patterns, preferences, history, billing

Figure 2
Senior Executives Often Fail to Communicate Key Challenges

Q: How often does your organization openly share the challenges it faces?

Respondents: 30,000+



Source : <https://www.forbes.com/sites/markmurphy/2016/06/05/this-chart-shows-why-so-many-change-management-efforts-fail/#768dfdfa71fe>

information, service issues, etc. Company reps or apps ask for the same information over and over because the firm’s customer data is inconsistent, lacking, or locked up in silos. As a result, customers are often anonymous – giving lie to the term “customer intimacy.” While implementing omnichannel is sometimes too complex and risky for the organization, implementing 1-2 new customer interactional channels is a noteworthy goal.

- 2. Revamping outdated website(s)** that lack personalization, intuitiveness, natural language processing, facial and/or voice recognition, augmented reality, and other newer technologies. For example, if you were to ask a typical consumer to name a website that he or she is passionate about, there’s a high chance the individual will say “Amazon.” The reason is simple: Amazon’s website knows the customer’s interests and

preferences; is easy to navigate; seamlessly and effortlessly moves the customer from buying to paying and shipping (e.g., one-click shipping) – plus the consumer innately trusts Amazon to keep personal data confidential and private (even if that assumption is debatable).⁷ In contrast, many websites seem stuck in the past, doing little more than displaying content and placing orders. Leading retailers that operate with high volumes and higher velocity are seeking new ways to provide their customers with unparalleled experiences. This could involve headless commerce and content, storytelling, globalization/localization, compelling digital assets, personalization based on real-time data, predictive analytics and next best action, product information management, and many other tools.

3. Rethinking and reassessing legacy CRM systems that are no longer sufficient for end-to-end, cross-functional customer engagement processes. Many organizations are stuck with aging, creaky CRM products that hold valuable customer identification and historical data and drive back-office processing, but are light years from delivering great customer experiences and never used to their full extent. Some organizations opt to replace their CRM systems, but since implementing a new product or version takes considerable time and effort, many organizations find ways to extend the life of their CRM solutions by augmenting them with low code applications or robotic process automation. For example, a lot of manual data input can be automated, making data entry faster and less laborious.

Older CRM software can be simplified for the end user and boosted on the back end by good housekeeping, analytics, and even machine learning. One effective strategy is to work on customer journey mapping and/or implementing one or more new customer channels while waiting for updates or replacement of the CRM system.

4. Transforming paper-intensive business processes that involve multiple handoffs between the front and back office, business partners, and third parties.⁸ All too often these back-office processes are only semi-automated because of built-in manual steps and labor-intensive handoffs between workers. Unfortunately, this situation has been “business as usual” for so long that people inside the firm don’t give it a second thought. Compare this with frustrated customers who believe these processes are absolutely broken (and frequently identify them as such in VoC sessions). This quagmire presents a potentially big win for CX leaders, who should seek out and partner with executives in business operations to transform broken processes from the customer’s vantage point; typically, these involve moving work between individuals within the same workgroup, transferring work to another department or line of business within the enterprise, and/or sending requests and updates to business partners outside the firm. Such poorly automated handoffs with limited integration between systems would benefit greatly from intelligent process automation and robotic process automation.⁹



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Call to Action

This entire report is a call to action, requiring bold and informed leadership by the C-suite and other business, technology, and marketing leaders. The key nuggets of learning when creating and implementing a CX roadmap are as follows:

- **Use an outside-in approach to understand your customers.** Seek out the good, the bad, and the ugly of the customer experiences you provide. Find the courage to ask customers what problems they encounter, why they walk away, and what they truly value most.
- **Expand your thinking beyond technology implementations.** Focus on knowing the customers, and also turn inward toward knowing your employees. Recognize that you will never have a customer-first culture if employees resist putting customer experience ahead of anything else. Communicate your reasons for implementing new practices, processes, and software, and when you are tired of communicating about it, communicate some more. You can never overcommunicate your CX message to employees.
- **Develop a CX strategy to drive your investment priorities.** When doing so, look at CX efforts that are or may be prerequisites to other initiatives and the time frames for finishing them.

For example, a customer data project may take two years and be a prerequisite to omnichannel or machine learning. Balance the customer's needs, implementation timing, and technology prerequisites against one another to establish the most pragmatic CX roadmap.

- **Avoid point solutions wherever possible.**

Although it is tempting to tackle CX projects at a departmental level when the big picture work takes too long, try to avoid implementing CX islands that don't connect to the digital experience strategy. Sometimes this may not be possible because the organization's leaders are stuck or have dysfunctional working relationships, but if possible link your CX project to other CX projects and the overall CX strategy.

- **Give high priority to these efforts**

(based on other firms' experiences):

- VoC and customer journey mapping
- Organizational change management
- Customer data
- Multichannel and omnichannel
- Processes involving multiple handoffs
- Website refresh
- CRM renewal

Endnotes

1 For more information on the gap between customer experience and operational excellence, see [Digital Transformation: Bridge the Skills Abyss](#).

2 A customer journey strategy is the organization's technology plan to delight customers by supporting all touchpoints (e.g., points of interaction between a business and its customers or prospects) that span sales, marketing, finance, support, and service, and by integrating the devices, interaction channels, and application silos that support those customers. Customer journey mapping supports the strategy by creating diagrams that depict the stages customers go through when interacting with a company across multiple touchpoints, including the customer's successes, obstacles, emotions, and opportunities for new technology.

3 For a more in-depth discussion of the problems associated with multiple handoffs between employees, partners and customers, see [Intelligent Process Automation: Transform the Customer Experience by Tackling the Dreaded Handoff Syndrome](#).

4 Omnichannel is defined as a customer (or digital) experience approach that delivers seamless experiences across multiple customer interaction channels (e.g., phone, mobile app, email), departments, and/or lines of business. During a single customer interaction, the customer's connectivity and information persists seamlessly, supported by internal data integration and orchestration. Omnichannel applies to all industry sectors, not just retail and online shopping, although it is often incorrectly described as specific to retail, online commerce, and sales transactions.

5 A data lake is a single repository for all enterprise data (regardless of source, structure, and usage) that works by storing data in its native format (e.g., object blobs or files). A data lake supports reporting, data visualization, predictive analytics, deep analysis, statistical analysis, predictive modeling, and machine learning.

6 According to Leadership IQ, a firm founded by leadership guru Mark Murphy, only 35% of senior executives in more than 30,000 enterprises surveyed either always or frequently understand the need to openly communicate the challenges the organization faces. Source: <https://www.forbes.com/sites/markmurphy/2016/06/05/this-chart-shows-why-so-many-change-management-efforts-fail/#1ad9751871fe>

7 There are concerns about Amazon's internal use of data mining across its various businesses such as Whole Foods, Ring, Zappos, Audible, Goodreads, etc. See "11 Companies You Might Not Realize Are Owned by Amazon," <http://mentalfloss.com/article/90915/11-companies-you-might-not-realize-are-owned-amazon> and "Data Mining by Amazon," Thabit Zadari, International Journal of Scientific & Engineering Research, Volume 6, Issue 6, June-2015 867 ISSN 2229-5518 IJSER © 2015 <http://www.ijser.org> <https://www.ijser.org/researchpaper/Data-Mining-by-Amazon.pdf>

8 For a more in-depth discussion of the problems associated with multiple handoffs between employees, partners, and customers, see [Intelligent Process Automation: Transform the Customer Experience by Tackling the Dreaded Handoff Syndrome](#).

9 See the RPA2AI Infographic, https://docs.wixstatic.com/ugd/74369c_75f231f1d18842f7bd00e3968ac932f0.pdf

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