BryterCX | IRIS™

THE PATH TO JOURNEY INTELLIGENCE MATURITY

Understanding How Customer Journeys Can Deliver ROI at Every Stage

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Introduction

Too many organizations believe that being customer journey-centric is possible only for multi-billion dollar companies that spend tens of millions of dollars in consulting and have analyst teams in the hundreds.
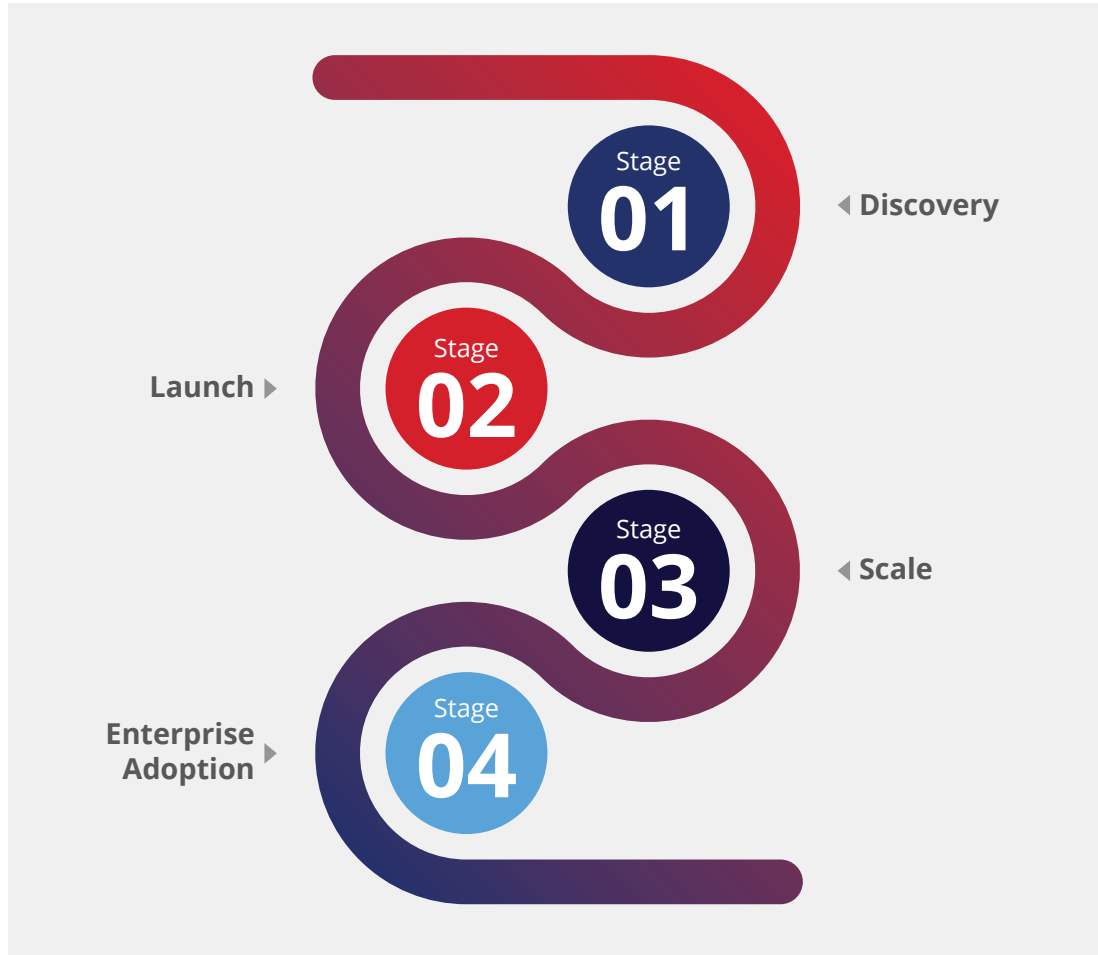
Maybe that was true a decade ago, but technology, processes, and experiences have all evolved. It's now possible for enterprises of all sizes to get a holistic and empowered view of the customer journey.

Using a progressive approach, enterprises can gain understanding of the end-to-end customer experience to enable rapid and informed decision making and drive an outstanding customer experience.

According to market research company Forrester:

- Journey centricity leads to higher revenue, reduced costs, and better CX.

- Journeys offer a better way to measure your success and your customers' success.

- CEOs who acquire journey literacy grasp the big picture in setting strategy.

It's never too late to start. Wherever you are on this path, understanding what to do in order to progress will deliver returns well worth the effort. Moreover, progressing from Stage 1 to Stage 4 will transform your organization's relationship with customers in remarkable ways.

Stage **01** — ◄ **Discovery**

Launch ► Stage **02**

Stage **03** — ◄ **Scale**

Enterprise Adoption ► Stage **04**

What You Will Learn

The focus of this paper is to outline the four stages of Journey Intelligence maturity so that organizations can determine:

- The stage that best describes their current efforts
- Next steps
- Potential ROI for advancement through the stages

You may have one business unit that is further along than another, but our hope is that this framework will illuminate priorities for individual silos or for the business as a whole.

> **"You can't become customer-obsessed without becoming journey-centric."**
>
> Joana de Quintanilha, VP and Principal Analyst, Forrester

Definitions

Customer Journey: The path that customers take when interacting with your company and brand, including online and offline touchpoints. A journey is the series of interactions between a customer and a company that occur as the customer pursues a specific goal. (source: Forrester)

Customer Journey Map: A diagram (or several diagrams) that depict the stages customers go through when interacting with a company, from buying products online to accessing customer service on the phone to airing grievances on social media. (source: Tech Target)

Customer Journey Orchestration: Using data and descriptive analytics at the individual customer level to analyze current behavior, predict future behavior, identify pain points, and modify the behavior to achieve a preferred result. The result is increased customer lifetime value, operational efficiency, and business results.

Dashboard: An interactive user interface, designed to deliver historical, current, and predictive information typically represented by key performance indicators (KPIs) using visual cues to focus user attention on important conditions, trends, and exceptions. (source: Forrester)

Journey Analytics: A practice that combines quantitative and qualitative data to analyze customer behaviors and motivations across touchpoints and over time to optimize customer interactions and predict future behavior. (source: Forrester)

Journey Intelligence™: A holistic and empowered view of the customer journey that integrates analytics, mapping, orchestration, and dashboarding technologies all into one powerful, unified perspective. The whole becomes greater than the sum of its parts. Journey Intelligence provides a full understanding of the end-to-end customer experience and enables rapid and informed decision making to drive an outstanding customer experience.

Taxonomy: The classification of data into categories and subcategories. Taxonomy represents the formal structure of classes or types of objects within a domain. It organizes knowledge by using a controlled vocabulary to make it easier to find related information. (source: Dataversary)

Stage 1: Discovery

Organizations in the **discovery phase** are starting to evaluate how adopting customer journeys might drive better customer experiences and ROI. However, they typically haven't completed significant journey work and may not know where to start.

Starting from the beginning may seem daunting, but it won't be long before you begin to see an impact.

Characteristics

- **Overview:** You believe in the value of being journey-centric, but you may not know exactly how to proceed. You may feel that Journey Intelligence is only for billion-dollar companies with huge teams of analysts.

- **Data:** You have customer data, but you may not have a consistent taxonomy. You may be concerned that your data cannot support journey analytics. You may or may not be doing ad hoc data analysis to gain customer insights. You might be using business intelligence tools to stitch together journeys, but there are significant gaps. You struggle to see strong ROI.

- **Journey mapping:** You may have a high-level view of the path you want your customers to take, but you haven't done any formal journey mapping.

Goals and Objectives

Your priority in the discovery stage should be to develop an understanding of what data you need to support a journey-centric view of customers.

It's worth noting that although you may have 30 data sources, you don't need to organize them all to make meaningful progress towards understanding customer journeys. We recommend starting with four main sources: web/digital, mobile, IVR, and agent desktop.

Other priorities in stage 1:

Taxonomy: The journey taxonomy serves as the foundation for the customer journey-centric enterprise. Develop a consistent language across the organization to define specific activities and events within your data sets. Starting this taxonomy process for the organization will support more effective journey mapping and analytics.

Socialization: Begin to socialize the idea of Journey Intelligence within your business unit and to other business units (via workshop or webinar) to get buy in for future omnichannel integration.

Prioritize: Determine where you should start: what journeys are most important? Which journeys will provide the most ROI with the least effort? A third party specializing in journeys can help with this process by facilitating a Strategy and Activation workshop.

Internal Stakeholders

At every step on this roadmap, your success will be heavily dependent on getting help, support, and buy-in from critical internal stakeholders. Here's who should be involved in Stage 1:

- A Journey Evangelist or champion (ideally the business owner, channel owner, or CX leader)

- Business Analyst(s)/Team or analyst team

- Business Subject Matter Experts (as identified by the business owner, channel owner etc.)

- Data SMEs who can access the various data sources and work with the business analysts to ensure the data supports the business needs

External Resources

Organizations in Stage 1 may not have a Chief Customer Officer, CX Leader, or Analytics Team. You can still begin without these resources. There are partners available with the strategic experience to help you get started with both creating a taxonomy and mapping, who can offer tools and advice that will set you up for future success. It's not necessary to make a substantial investment in a consultant in order to begin.

- **Taxonomy:** Tools and workshops around getting data organized to support moving towards journey centricity.

- **Mapping:** Tools and workshops to help you choose high-ROI journeys and map them.

ROI

Stage 1 is a critical beginning on the road to Journey Intelligence. Although the clear ROI starts to come in Stage 2, you will still get value from your efforts. Organizing your data and establishing a taxonomy will provide value for other applications and uses beyond just journey mapping.

Most importantly at this stage, you are creating a meaningful foundation for incredible ROI in the future, not to mention ensuring the organization establishes a proactive and strategic CX vision.

Stage 2: Launch

Organizations in Stage 2 have created a foundation to build upon. They have an established data taxonomy for at least a few of their main data sources and are beginning to map the most impactful journeys.

Stage 2 marks the real beginning of your journey science efforts. At this point, journeys move from an interesting concept to a structure for thinking about customer experience. The touchpoints that make up the individual journeys are no longer the focus; the journeys themselves are.

Characteristics

- **Overview:** You believe in the value of Journey Intelligence and have assigned time and resources to pursuing that goal, including taxonomy and data mapping. You're starting to see omnichannel impacts (such as how changes to the website can affect the call center) but you may or may not have the connectivity or mandate to act on it just yet.

- **Data:** You have access to some cross-channel or omnichannel data. You may have purchased a tool or developed tools internally, and you're still focused more on data mining and generating insights as you work towards journey management.

- **Journey mapping:** You're starting to map a few journeys, starting with those that will have the most impact for the least effort. You're working towards optimizing one or two journeys before adding more. You're starting to see where the problems are in your core journeys and are trying to figure out how best to optimize those journeys.

- **Adoption:** Multiple business units are starting to show interest in journey management.

Low-Effort, High-Impact Journeys by Industry

Insurance:
• Claims processing

Banking:
• Card replacement

Across All Industries:
• Bill pay
• New account or product activation
• Dispute handling

Telecom:
• Plan change

Utilities:
• Start/stop service
• Outage report

Goals and Objectives

You have a few important priorities in Stage 2:

- **Executive buy in:** If you don't already have C-level executives on board, now is the time.

- I**nvestment:** In Stage 1, internal data and processes can be supplemented with minor outside help on taxonomy. In Stage 2, you'll need to invest in tools and resources that can grow with you as you organize more and more data sources, map more journeys, consider orchestration, and more.

- **Data:** In Stage 1, you prioritized your data sources and organized the most important (typically digital, mobile, IVR, and agent desktop). In Stage 2, you should continue to clean up and optimize additional data sources, so that as you're progressing on the roadmap, you have more data at your disposal.

- **Dashboards and KPIs:** Train business owners on journey analytics and develop tiered KPIs and dashboards for different internal audiences.

- **Take action:** Start to make changes to eliminate pain points on journeys with the highest ROI.

Internal Stakeholders

Your internal stakeholders are similar to Stage 1, but in Stage 2, you're starting to educate business owners more and more on Journey Intelligence. You have even developed dashboards at different levels that illuminate the insights most relevant to them.

- Journey champion

- Business owners and channel owners

- Analyst team

- Data SMEs in IT

External Resources

Finding an experienced Journey Intelligence partner in Stage 2 is crucial.

You're starting to dig in and do the real work, even if it's with only a small handful of journeys. You are starting to build journey management capabilities, and you won't get very far if you have to rely only on internal analysts and technical teams.

ROI

In Stage 2, ROI becomes quickly apparent as you start to realize:

- Returns from projects that offer low-hanging fruit (for example, finding changes to IVR that will contain costs or saving money on repeat calls to the contact center).

- Direct association between journeys and cost-to-serve or customer value.

WHAT TO LOOK FOR IN A JOURNEY INTELLIGENCE PARTNER:

Centralization: Journey analytics, mapping, orchestration, and dashboarding work is best when handled by one partner that has a holistic view of customer journeys.

Omnichannel: Customers are inherently omnichannel, and so customer journeys must be as well.

Comprehensiveness and inclusivity: Journey Intelligence should be based on all customers, not just a select sample.

Technology: Cutting-edge journey technology should leverage machine learning and AI, as well as enable human insights.

Experience: Deep experience and understanding of customer journeys in your particular industry is critical.

Process: Expect an efficient, tested, and streamlined process for turning analytics data into information, identifying areas of friction, spotting new problems, and performing deeper analysis when needed.

Stage 3: Scale

Stage 3 is an exciting time on the road to Journey Intelligence. Siloed departments are beginning to share data, which enables impactful omnichannel insights. Word of your success is making its way through business units and to executives, as the whole organization becomes more interested in your progress. You likely have C-level visibility and interest as well.

Characteristics

- **Overview:** Your organization is using multiple tools and methodologies to actively manage and optimize many journeys. You're making continual improvements and always troubleshooting new issues. You have the ability to monitor the impact of those changes.

- **Data:** You have continued to expand the number of data sources and the amount of data involved in journey management. You may still have data silos, but you have access to data across those silos.

- **Journey mapping:** You're mapping all of your most common journeys (between 5-10) and seeing them through to optimization. You're doing active journey management and optimization on an ongoing basis, not just at a point in time.

- **Adoption:** You're making cross-channel changes and seeing the value. You're actively using journey-related KPIs. More and more business units are using Journey Intelligence. Journeys are the accepted CX methodology throughout the enterprise.

Goals and Objectives

Your priorities in Stage 3:

- **Improvements:** Focus on cross channel improvement (for example, improving the website to lower call center volume). Address problems quickly.

- **Data:** Expand your data model, consistently adding more layers and more touchpoints.

- **Mapping:** More journeys and sub-journeys are mapped. Operationalize what's learned from Journey Intelligence for faster action and insights.

- **Adoption:** Begin to expand to enterprise adoption (although full enterprise-wide adoption comes in the fourth stage, you should be moving in that direction in Stage 3). One concrete step: move away from the concept of channel owners and towards a model of journey owners.

Internal Stakeholders

In Stage 3, more groups and business units start using journey analytics, each served by their own set of standard analytics, including:

- End users
- Super users
- Data scientists
- IT
- Executive teams

External Resources

External resources play a key role in driving success. As you proceed through the roadmap, you want to engage a partner who has extensive experience working with clients at the stage you aspire to in addition to experience with the stage through which you're currently working.

Select a partner that has deep expertise with Stage 3 and Stage 4 customers in your industry, so they aren't pushing you for unnecessary projects in Stage 3 but are ready to support your growth to Stage 4. They will:

- Provide a unified platform rather than point solutions
- Offer strategic professional services capabilities, including advisory services for data science as well as deep dive analytics and insights
- Assist with expanding journey orchestration efforts to multiple journeys
- Serve in an advisory role to provide recommendations/key information

ROI

ROI in Stage 3 is dramatic, easy to access, and easy to socialize. You should be seeing:

- Increase in success rates of self service
- Reduction in unnecessary calls
- Customer sentiment on social media beginning to improve
- Increase in customer retention
- Improvement to customer acquisition

FIRMS THAT ADOPT A CUSTOMER-JOURNEY-AT-SCALE APPROACH TYPICALLY SEE:

- 20-40% increase in customer advocacy
- 15-25% cost reduction
- 10-20% revenue increase

(source: Boston Consulting Group)

Stage 4: Enterprise Adoption

Stage 4 is the pinnacle of Journey Intelligence, when organizations are able to harness the full power of the journey-centric approach across the enterprise.

Characteristics

- **Overview:** There is real cultural enthusiasm and broad awareness of journey management. You're viewing your entire CX operation through the lens of Journey Intelligence.

- **Data:** Data silos have been eliminated, and you're operating as a fully omnichannel organization.

- **Journeys:** Most journeys and sub-journeys are optimized, and teams are working to proactively change customer journeys, rather than just reacting to challenges. You're able to explore journey health trends in real-time.

- **Adoption:** Enterprise-wide adoption means all business owners and executives are using journeys to manage and understand CX. KPIs in company reporting have a journey focus.

Goals and Objectives

You have done the hard work and have a customer-obsessed organization. Your job in Stage 4 is never to rest on your laurels. Your priorities should include:

- **Improvements:** You are making continuous improvements and high-value predictions, using journeys to drive meaningful change in your business.

- **Journeys:** Reconceive journeys from the ground up and design them proactively. Implement agile analytics and agile deployments for all journeys, even those that have non-digital components.

- **Data:** All your disparate data sources have been organized and integrated for maximum value. You have a set of tiered dashboards with information relevant to every stakeholder.

- **Adoption:** Operationalize Journey Intelligence by linking journey scores to executive bonuses.

Internal Stakeholders

In Stage 4, virtually everyone in your company should be aware of your efforts to embrace Journey Intelligence. Each person should know journey scores the same way they may have once known NPS scores.

External Resources

Your Stage 3 partner continues to execute and advance your strategic CX agenda. Your partner is now fully integrated with your team; they are an extension of your organization and thus empowered to make even more powerful recommendations and bring actionable insights at every journey and sub-journey.

ROI

In Stage 4, you're going to experience dramatic ROI in all the same areas as in Stage 3, but turbocharged:

- Service costs reduced by 12-18%

- Digital channels see 6-12% increase in containment

- NPSAT and CSAT increase 2-6 points

- Revenue increases

- Identifying problem areas is much faster and easier

- Channel operational and efficiency goals exceeded

Journey Intelligence Roadmap: A Case Study

Stage 1: A CX champion for ACME Incorporated was interested in the concept of Journey Intelligence. She saw bigger competitors sharing their success with journeys at CX conferences, and was interested in emerging analyst research about the value of being journey-centric. However, she wasn't really sure where to start.

She hired a partner to establish taxonomy and organize data from the website, mobile app, IVR, and agent desktop, leaving other sources for a future project. They completed workshops that identified the journeys with the most impact for the least effort: bill pay and new account activation. As she moved into Stage 2, ACME was already starting to benefit from more organized data and journey-centric thinking.

Stage 2: The CX champion worked with internal analysts and the outside vendor to map two journeys: bill pay and open a new account. They started to organize more data sources. The champion was starting to see how weaknesses in the website impacted call center volume, but the website channel owner was still

reluctant to have his success measured by KPIs from other channels.

However, he was willing to make changes that almost instantly decreased call volume. The call center owner made changes to agent scripts that improved first-call resolution. Other business units were starting to see the success she was having, and were becoming more interested in viewing their own channels through a journey-centric lens.

Stage 3: Having proven the value and ROI of Journey Intelligence on the first two journeys, ACME dramatically increased the number of journeys being mapped and optimized, expanding to include dispute handling, brand awareness, and a number of individual and highly profitable products.

Executives across the organization were starting to take notice and rely on journey-related KPIs. More data was being included, and bigger teams were working on insights. ACME started to see a measurable impact on retention, loyalty, and profits. Teams that used to have disparate reporting structures were

connected. Each individual business unit was now evaluated by cross-channel impacts (for example, one of the web team's key metrics was call center volume).

Stage 4: Journey Intelligence was fully operationalized. All journeys and sub-journeys were mapped and managed proactively, rather than reactively. Changes were being made in one channel due to insights from another. Executives at the highest level of the organization were aware of and reliant on journey-based metrics. Every journey and sub-journey has its own score that rolled up to an average score that was communicated throughout the organization. ACME started to see service costs reduced and revenue increase dramatically, and shareholders credited Journey Intelligence efforts for the improvements.

CONCLUSION

Journey Intelligence doesn't have to be hard, expensive, or overwhelming.

Start with small, high-impact journeys.

If you're a **small to midsize company**, start with a single journey in the digital channel with supplementary data. It's easy access, low risk, low cost, and high value. Building credibility and demonstrating ROI should deliver access to additional data sources.

If you're a **larger company that is new to Journey Intelligence**, start with 4-6 of your biggest and most common journeys. Show success and ROI, and expand from there.

Some **larger companies are already doing complex, thorough journey analytics, mapping, orchestration, and dashboarding**. The next step to transforming your efforts into Journey Intelligence: bring it all under one roof. Centralizing data and insights provides a much more holistic view of the journey and enables better ROI and easier, more streamlined project management. You can also consider organizing executive incentives around a single, guiding, Journey Intelligence Score.

Whether you are Stage 1, 2, 3, or 4, Journey Intelligence will help you make rapid and informed decisions that drive an outstanding customer experience and impact business outcomes.

How BryterCX Can Help

Understanding that today's marketplace requires customer obsession, BryterCX pioneered Journey Intelligence to give enterprises a comprehensive, unified view of the customer journey.

BryterCX provides end-to-end customer journey solutions including journey analytics, mapping, orchestration, and dashboarding. By bringing these solutions together under one umbrella, you get a unified, omnichannel view of the customer experience. You can make better, faster decisions that impact business outcomes.

We help some of the biggest companies in the world leverage customer Journey Intelligence to make critical business decisions to increase revenue and decrease costs.

Whether you are at Stage 1, 2, 3, or 4, we can help you prioritize investments and efforts for the best returns. We work with some of the largest and most advanced CX organizations in the world

and have designed their systems. We bring this experience and insight to bear when we work with enterprises that find themselves starting on the road to Journey Intelligence.

With IRIS™, our flagship technology platform, we use AI and machine learning to make the lessons we've learned from two decades of journey expertise available to companies of all sizes.

If you're just embarking on Journey Intelligence, we can help you map out one or two high-impact journeys, understand them, orchestrate experiences, identify friction points, and improve the customer experience.

If you're already well on your way to Journey Intelligence, we can bring all the disparate tools you have under one roof, into one platform. We eliminate the need for multiple vendors and technology solutions by offering everything related to customer journeys in one platform: IRIS™.

Connect with a member of our sales team (salesorg@brytercx.com) and learn how to apply Journey Intelligence at your company. We are here to help you succeed.

About BryterCX

BryterCX is the Customer Journey Intelligence™ company, providing end-to-end customer journey solutions designed to take your customer experience to the next level. Comprised of journey mapping, monitoring, analytics, and orchestration technologies, our flagship platform IRIS™ connects your organization's siloed data into a single, omnichannel view and provides actionable insights in near real time. Powered by two decades of journey expertise and industry-leading processes, we've enabled customer-focused organizations to gain significant competitive advantages, unlike any other customer experience solution.

About IRIS™

IRIS ™ is the easy answer for optimizing your customer experience and operating expenses. Through machine learning, this AI breakthrough allows you to discover journey insights and opportunities with ease. IRIS™ uses proprietary journey scores and patented technology, giving you simple visual metrics and alerts to effortlessly measure, monitor and manage the health of your journeys. IRIS™ works efficiently with aggregated data, even from previously siloed sources, giving you a fast, complete, and accurate picture of your customer journeys.

BryterCX | Let's get brilliant.™