Undertake Customer Journey Mapping as a Foundation for Customer Success

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Initiatives: Technology Marketing Effectiveness

Subscription business models mandate an increased focus on clients realizing value through a positive experience. Technology and service providers should implement an iterative outside-in journey mapping and measurement process to continuously improve the customer experience.

Overview

Key Findings

- Due to organizational functions that act independently, technology and service providers struggle to identify, agree upon and execute customer experience improvements.

- Technology and service providers find that analyzing and improving the efficiency of internal processes alone is often insufficient and sometimes can be counterproductive in improving the customer experience.

- As technology and service providers ideate on ways to improve the journey, they need to determine their priorities because it will not be possible or practical to undertake them all at one time.

Recommendations

To improve technology marketing effectiveness, technology and service providers should:

- Undertake outside-in customer journey mapping to better understand the existing customer experience and its relation to current processes, and to identify the gaps that can and should be addressed based on resource and cost constraints.

- Build momentum for your customer experience efforts by identifying quick wins that customers and employees will notice and that will measurably improve the experience or outcomes.
Assemble a customer experience council with cross-functional representation to regularly assess your initiatives’ impact and continue to improve the customer experience.

**Introduction**

Delivering a great customer experience is a major focus for technology and service providers to ensure steady or growing revenue and positive word of mouth. Subscription pricing models now also give customers more alternatives, and savvy providers understand that a good product must be complemented with an experience that will help customers see value from the investment.

The customer journey begins with awareness and the buying experience, but the experience after purchasing the product is critical as well. That is where promised value is ultimately obtained. To provide a positive postpurchase experience, and with an increased focus on customer lifetime value, technology and service providers are establishing customer success management (CSM) disciplines within their organizations.

Customer success management is the business discipline of guiding customers to recognize value through product adoption or service utilization across the customer life cycle. It uses a data-driven approach to monitor customer health and uncover insights that drive technology and service providers to proactive and prescriptive action, leading the customer to renew, expand and advocate.

With a goal to improve retention and grow revenue from customers, CSM teams are tasked with guiding customers through a successful journey.

Technology and service providers must think about the journey in terms of bringing value to the customer rather than streamlining their own internal processes. The customer journey and the technology provider's supporting processes are not the same. The latter must support the former, driving equilibrium between customers’ value and providers’ costs (see Figure 1).
Technology and service providers implementing CSM, or just focusing on improving the customer experience, must determine what changes will improve the journey and help customers realize value. Providers must also balance the investments (resources, time and money) necessary to support those changes against the anticipated benefits.

To fulfill these needs, technology and service providers must direct their CSM teams in collaboration with cross-functional resources to take an outside-in view toward improving the customer experience end-to-end. This research provides guidance for defining and implementing an improved customer journey — through purchase, onboarding, use, renewal and growth.

Analysis
Define Journey Stages, and Identify Moments of Truth
Take a cross-functional approach toward understanding and improving the customer experience with the CSM team at the helm. Cross-functional customer experience teams should use customer journey mapping to take an outside-in approach, which is explicitly from the customer's point of view. Customer journey maps allow you to make incremental, positive steps toward improving the experience and using key performance indicators (KPIs) to measure impact and then continuously improve.
When viewing the customer journey solely from the technology and service provider perspective, there is a tendency to focus on the stages that require interaction and support, such as implementation, onboarding, problem resolution and renewal. But from the customer's perspective, the journey is fuller. They must feel like they are on a path toward value at specific stages of the journey, if not all along the way.

Part of the CSM discipline is to guide customers through that journey. To understand that journey, it is paramount to view it from both the customer perspective (outside-in) and the perspective of what is required to support it (inside-out). Most organizations are likely to identify flaws from either perspective. Further, gaps likely exist between the customer and internal views, which can result in missing information, delays and frustration.

When starting this effort, it is crucial to recognize that the goal is not solely to fix what doesn't work today. The goal is also to define an ideal journey — one that optimizes value. Then, with an eye toward existing processes, the goal is to define what is required to make that journey a reality — what resources, touchpoints, content, events and programs.

**Take an Outside-In View When Thinking About the Customer Journey**

Start with the high-level journey stages through which a customer progresses, such as awareness, purchase, onboarding, adoption and renewal. For each stage, assess what customers want to achieve, what questions they may have and what they must go through in order to understand their current state. Then, brainstorm what that experience should or could be like.

Undertake a customer journey mapping workshop (see How to Run a Virtual or In-Person Customer Journey Mapping Workshop), with cross-functional participation. Include all functions that interact with customers or contribute to the customer journey, such as marketing, sales, professional services, support and customer success.

As you think about the journey, consider and define the following aspects (see Figure 2):
Stage detection — How do you know when a customer has advanced into a journey stage? You may gain this knowledge from the definitive conclusion of a prior stage (for example, when a customer concludes onboarding). Or you may detect that a customer has advanced (for example, you notice the customer is accessing many adoption resources on your site). Or you may see the customer take an action (for example, sending an email expressing frustration). Develop an empathy map of what customers do, say, think and feel — explicitly going beyond a process (doing or action) view. Start with trying to understand and track how customers move from one emotion to another. More sophisticated approaches could lead to semantic voice analysis in call centers to collect more cues in actual transactions.

What is needed by the customer — Try to identify exactly what the customer really needs — for example, help, information, interaction or even just reassurance. Conduct research, asking open-ended questions to drive your understanding of what matters. It may not be a single thing, and it may evolve as the customer moves through that stage.

When it is needed by the customer — Does the customer need something immediately because they are stuck? Or is there a longer window in which it can be supplied?

How the customer wants it — In today’s digital world, the customer may not want human-to-human interaction, preferring instead self-service access to content (such as text and video) or automation (such as bots). Further, the customer may want to access the interaction or resource through different — and possibly multiple — channels to create a connected experience, including web, social, chat, mobile and phone.

Whether it satisfied the need — Did the resource help the customer advance? Or are additional resources necessary? In both situations, how can your approach be improved for future journeys?
As you explore the journey and ways in which it can be improved, do not focus solely on known challenges. In Gartner interviews with technology and service providers that have implemented CSM, the general consensus is that improving “moments of truth” can increase customer satisfaction and retention more than just trying to fix problems. For example, by simplifying a multistep configuration process to activate a product feature, a technology provider can help customers accelerate their time to value. Keep in mind, however, that it is important to meet customer expectations from a servicing perspective. Trying to go above and beyond that point, an overt focus on delighting the customer, may not help you retain or grow the account.

It is easy to become overwhelmed or go through endless cycles of analysis when exploring ways in which to define the customer experience. Focus on the “moments of truth” — when customers have expectations for an intended outcome or experience value. These touchpoints, where customers must see success, should be a priority in establishing prioritization of efforts.
Analyze and Refine Processes to Support the Journey

Supporting any improvements to the customer journey may require additions or changes to resources (such as sales or service employees), technologies or processes. This can be done by identifying the gaps that exist between the desired and current states and your current processes — referred to as “working backward.” Alternatively, this can be done by “working forward,” working through diagnostics, questions, answers and actions (see Video: How to Build and Use a Customer Journey Map).

There may also be more than one way to support the changes needed to reach your desired state. As a cross-functional team, review and discuss your options with an eye toward what is practical and will most likely lead to customer satisfaction, loyalty and advocacy (see How to Prioritize Customer Experience Projects Using a Six-Point Framework).

If you are driving this effort as part of your CSM practice, most CSM platform providers offer services to help you focus on and define customer journeys and your corresponding plays. Consider the following in developing a comprehensive approach:

- Start with a definition of what exists today to help ground the discussion. Employees, regardless of where they are within the organization, know their own internal processes for helping customers move through their journeys. However, they may be unaware of the interdependencies outside their own organizational boundaries, where cross-organizational handoffs can often fail customers. To design an ideal customer journey, it’s important to collaborate and assess these processes and design them to reflect a broader perspective. For example, start with the first-year customer journey, then use an agile, iterative approach to design processes for subsequent years.

- Customer journeys should be reinspected based on customer and employee feedback at least every six months. Look for places that require customers to expend the most effort, are the most painful, lead to unanswered customer questions, force customers to wait or are likely to result in error. From there, you can identify the changes to your processes and resources that will best align with an improved customer journey.

- A full customer journey makeover is not the best approach. Choose a few modifications that will reap the most benefits. Consider direct costs, challenges to managing the proposed changes and the resource capacity required to implement them. Full visibility of the effort is required to determine which changes will be most valuable.
Implement Changes Using Building Blocks

Take a crawl-walk-run approach to improving the customer journey. Identify targets, and implement slowly. Your organization — and perhaps the customer — will struggle with too many process changes. It is better to implement them and roll them out slowly, focusing on achieving success before radically changing the process.

To that end, CSM platforms are providing tools to make it easier to define and implement improvements to the customer journey. One example is Totango's SuccessBLOCs, which can be thought of as modular units of success and provide a means to rapidly establish success plays for specific stages of a journey. The value lies in the ability to not only implement the plays but also associate them with goals and KPIs to track and measure their effectiveness. Tools such as these enable you to start a CSM and journey improvement process by tackling smaller goals and working toward milestones that can illustrate impact and ultimately a return.

Whether you use an approach like Totango's or other CSM tools, the focus should be on identifying targets and milestones that you can successfully accomplish. Learn more about the customer as you improve your resources and plays to help guide the next step of your approach.

Use an Agile Approach to Measure and Expand

The customer journey is just that: a journey. Ultimately, it is not something that can be completely transformed overnight. It will change as your product, the customer's business needs and the market continue to evolve. As a result, any improvements to the customer journey must continuously be reassessed. Use a governance model to outline periodic reviews to avoid becoming static in your goal toward improving the customer experience.

Take an agile approach, and test regularly to ensure you are delivering the optimal experience relative to your constraints. A key component of such a strategy is to continually assess:

- What is not working?
- What is working?
How can we improve?

Use customer health scores, and establish KPIs that help you identify the answers to these questions. The KPIs may differ by the customer journey stage, the type of interaction and the resources available to the customer. Consider all the improvement options to understand whether your enhancements are driving toward those goals. Ultimately, assess whether the changes are impacting customer retention and revenue growth.

More near-term options for measuring impact might include:

- Utilization of resources — Do customers take advantage of the content, resources or interactions available?
- Reduced cycles — Do customers advance (successfully) through the stage in less time? (For example, do they spend fewer days in the onboarding stage?)
- Customer feedback — Survey customers at the beginning and end of a journey stage to assess the before and after responses. Do you see improvements in customer response patterns?

Summary

A focus on customer lifetime value, especially for technology and service providers reliant on subscription models, requires ensuring that customers get value and are on a path toward renewal and growth. To improve the customer experience, technology and service providers must implement an iterative and measured approach to customer journey mapping. Balance an ideal customer perspective (outside-in view) with what is obtainable based on resources, processes and costs (inside-out view) to make incremental improvement investments. Establish and use KPIs to identify success and areas for future enhancement.

Evidence

This research is based on existing Gartner research and practitioner interviews.

*The organization profiled in this research is provided for illustrative purposes only, and does not constitute an exhaustive list of examples in this field nor an endorsement by Gartner of the organization or its offerings.*
Acronym Key and Glossary Terms

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<th>Acronym</th>
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<td>CSM</td>
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Document Revision History


Recommended by the Author

Some documents may not be available as part of your current Gartner subscription.

Video: How to Build and Use a Customer Journey Map

How to Run a Virtual or In-Person Customer Journey Mapping Workshop

The B2B Customer Life Cycle for Technology Products and Services

Ignition Guide to Creating a Customer Retention Program as a Tech CEO

Build a Customer Success Management Program to Retain and Grow Existing Client Revenue

How to Use Quick Wins to Build Customer Experience Momentum

Define and Implement Customer Health Scores to Prompt and Facilitate Adoption