

HOW TO ADVANCE FROM PERSONALIZATION^{!!!} TO JOURNEY ORCHESTRATION



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Introduction

The goal of customer journey orchestration is to improve journey outcomes by enabling the most relevant interactions in the context of each customer's goals and their overall experiences.

Customer journey orchestration enables you to engage prospects and customers at optimal points along their journeys, in real time and through the most effective channels.

Many customer experience (CX), marketing and operations leaders want to use customer journey orchestration to deliver better, more personalized experiences that will improve CX and business outcomes like retention, customer lifetime value and revenue.

In this ebook, we'll discuss how customer-centric organizations are using journey orchestration to improve personalization decisions across all channels and touchpoints, enhance CX and achieve their business goals.

UNDERSTANDING CUSTOMER JOURNEY ORCHESTRATION

Enable the most relevant actions that reflect each customer's context

Customer journey orchestration is an approach journey-centric enterprises use to improve outcomes in real time. It allows companies to deliver the most relevant actions that reflect the context of each customer's goals and their overall experiences.

Journey orchestration goes beyond traditional personalization techniques; it leverages customer journey data from every channel, source or system. This way, each interaction reflects your customer's entire experience with your organization — not just the current interaction.

As a result, every moment of each engagement is highly personalized because the interactions a company takes are based on each customer's prior experience and current intent.



Who benefits from journey orchestration

Ultimately, there are three major beneficiaries of customer journey orchestration:

1. The customer

Successful journey orchestration helps your customers reach their goals. By recognizing each customer's current intent and prior experiences, enterprise teams can ensure every interaction helps customers progress toward their goals.

2. The business

Combining orchestration with an approach like customer journey analytics enables journey optimization — a process that leverages artificial intelligence (AI) and machine learning to improve customer experiences. And this allows customers to achieve their goals more efficiently. More importantly, customer journey analytics enables CX, marketing and customer care teams to prioritize customer experience improvement initiatives and quantify the ROI of CX investments.

Similarly, journey and experience designers can combine journey mapping with journey orchestration to execute, monitor and measure the impact of specific design changes and overall experience improvements.

3. The bottom line

Effective journey orchestration also impacts key business outcomes, such as retention and revenue. Forbes reported that 80% of customers said they'd be more likely to do business with a company if it offered a more personalized service.

How a mortgage provider can improve CX with journey orchestration

Executives at a financial institution are monitoring the health of top-level journeys across the consumer lending portfolio using the Pointillist® Customer Journey Management platform. When they're alerted to any changes in the mortgage refinancing journey, they can determine why journey costs are increasing, but self-service percentages are down.

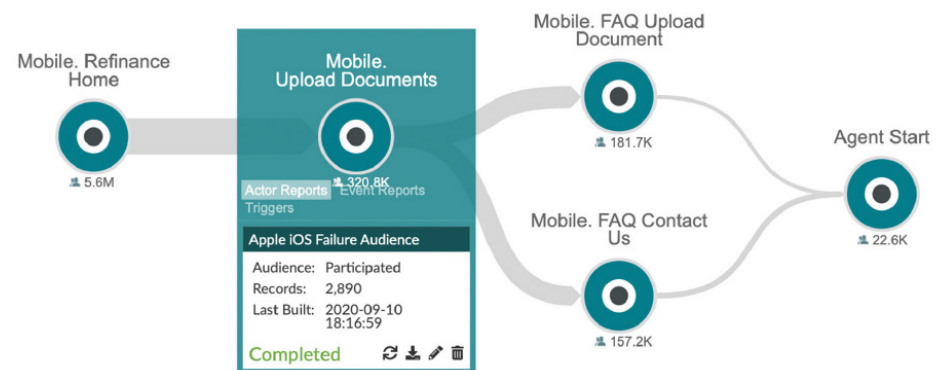
The CX team can investigate the underlying journeys and identify the issue. For instance, the problem might be with the mortgage refinancing journey. The CX team would see that costs have doubled for this journey, as FCR has fallen from 65% to 30% and call volume has increased significantly.

The team uses Pointillist AI to find the root cause of these types of problems. Pointillist AI quickly reveals that the likelihood of a customer calling an agent is much higher if they're trying to upload their documents using the iOS version of the company's mobile app.

The CX team can use this information to notify IT about the problem, so they can fix the app. In the meantime, they can use the journey orchestration capability to activate an audience and update it daily until the app is fixed. The audience can

include clients who've already encountered the problem, as well as consumers already in the refinance journey who are likely to experience this issue soon. Lastly, the CX team can work with marketing to set up an automated communication to this audience that acknowledges the issue and contains a workaround.

Journey owners can measure success by an increase in the completion rate of the mobile refinancing journey and a significant decrease in leakage into the call center from this journey.



WHY JOURNEY ORCHESTRATION IS DIFFERENT

Why journey orchestration is different

While customer journey orchestration might sound familiar, it's important to distinguish between it and other approaches that appear similar. These approaches might already exist, or others could push them as an alternative to reach your organization's elusive personalization goal.

Some of the approaches often confused with customer journey orchestration include:

1. Marketing campaign automation

Marketing campaigns are typically based on customer behavior from one or a limited number of channels. This is often the case because marketing campaign management systems typically contain data from the limited set of customer interactions that marketing controls, primarily web and email. This subset of the customer experience isn't sufficient to enable journey orchestration because marketing channels don't constrain customer journeys.

Campaign automation enables a marketer to efficiently define, execute and analyze hundreds or thousands of campaigns.

For example, a marketer might send a message to a customer's phone that links to a landing page. The content on the page is based on which products that customer has. After submitting the form, the system automatically sends an email with content based on the action taken. Finally, the marketer analyzes click-through rates and conversions.

In contrast, journey orchestration emanates from the customer. The context is centered on their current goal, which is represented by the journeys they're on, and comprises the entirety of their experience with the company.

1. Marketing campaign automation (cont.)

Imagine a customer wants to move money from one account to another via their mobile phone. They encounter a problem completing the transaction and turn to the website first. Then that customer calls the care center for support.

After getting lost in the IVR, the customer goes back to the website and tries the chat feature. The chat platform queries the journey orchestration platform, which determines this is a high-value customer in a money transfer journey who has already interacted with the website and IVR system within the past two days. So it bypasses the chat bot and routes the call directly to a high-priority agent. It also transfers information that will eliminate the customer having to re-explain the entire series of events to the agent.

Campaign management focuses on automating the next action within a series of steps the marketers define. While campaign management puts your customers into the context of marketer-defined campaigns, customer journey orchestration puts all the resources of your company into the context of your customer's individual experience.

Marketers cannot dictate a customer's experience; your customer engages with your business in their own way to achieve unique goals. Your customers direct the experiences, at their pace and through the channels they select. Journey orchestration incorporates the full understanding and context of a customer's experience at every interaction — whether it's instigated by your customer or your company.



2. Real-time interaction management

Real-time interaction management (RTIM) is a capability that organizations use to deliver more contextually relevant experiences. [According to Forrester](#), “RTIM aligns outbound marketing campaigns with inbound, customer-initiated interactions to ensure relevance.”

A common RTIM use case is the dynamic updating of offers on a website. For example, a telecommunications provider might promote new mobile phones for a customer who is due for an upgrade. Let's say the customer purchases a new phone and the company's offer changes to promote phone accessories. However, the customer never activates the new device. Clearly there's an issue. But the company doesn't recognize it because it's solely focused on the customer's current interaction — not the larger journey or her overall experience.

In contrast, organizations using a journey-based approach can take a much more comprehensive set of behaviors into account, including inaction in a parallel Device Activation Journey. They orchestrate actions that help the customer achieve the overall goal (activating a new device) instead of annoying them by pursuing the marketer's goal on a particular web page (completing another up-sell).

As with campaign automation, RTIM often falls short for the customer. It's more focused on improving the marketer's effectiveness than improving the customer's experience. While RTIM recognizes the importance of context, the context it uses typically is limited to current and recent transactions; it doesn't consider each customer's current intent and prior experience with the company.



3. Process mining

Many chief financial officers, CIOs, digital officers and operations analysts rely on process mining to document, analyze and improve the efficiency of business workflows. Process mining gives analysts and managers an easy way to analyze event logs within enterprise transaction systems.

Process mining measures the efficiency of a wide variety of business processes, particularly digital processes, from start to finish. Some examples include:

- Manufacturing
- Distribution
- IT service management
- Master data management

Unlike processes, customer journeys don't conform to a pre-planned sequence. Process mining captures neither individual customer behavior, nor the range and variety of customer journeys across touchpoints and time. Therefore, process mining can't orchestrate actions based on a customer's comprehensive experience with your company, even if you couple it with workflow automation to enable action.

Process mining focuses on the method rather than the customer. It aims to improve business outcomes by identifying inefficiencies in the process, rather than helping improve the overall customer experience by identifying impediments that block customers from reaching their goals. The customer isn't the focus — and this approach lacks concepts like behavioral segmentation or audience activation.

There are processes within journeys that you should measure and try to improve, such as the steps needed to submit a payment through the website or for the company to process and deliver a product. But experience orchestration is about more than improving the efficiency of a predetermined sequence of steps. It's about ensuring every moment of your customer's experience is relevant and cohesive.

In short, process mining can optimize aspects of CX, but it's not the comprehensive approach you should take to deliver experiences to each customer that reflect their current intent and prior experiences with your company.

JOURNEY ORCHESTRATION

DRIVERS

Transform from business-centric to people-centric

Campaign automation, real-time interaction management and process mining tools are all aimed at improving the business. Today, leading companies in every industry are transforming from having a culture that's focused on the performance of internal functions and processes to taking a people-centric approach that puts customers and employees first.

This means moving:

- From prioritizing company efficiency and effectiveness to how well you deliver empathetic experiences that drive trust and loyalty
- From operating as siloed functions with their own data sources to one organization that enables frictionless, connected experiences that span the customer lifecycle
- From focusing on workforce efficiency to seeing the employee experience as a way to provide a differentiated customer experience
- From emphasizing the use of AI to improve efficiency and reduce costs by automating repetitive tasks to using the technology to orchestrate experiences that lead to better customer experiences and business outcomes



Shift from automation to orchestration

This shift in focus from automation to orchestration is only possible when you take an “outside-in” approach and view things from your customer’s perspective.

CX, marketing, sales, agents, channel managers and call center leaders all need more than access to customer data; they need intelligence about the entire customer experience, so they can understand each customer’s unique omnichannel journey to help them reach their needs efficiently.

Instead of reacting to customers’ questions, you can learn how to alleviate worry and concern. Instead of focusing on reducing costs, you can build customer and employee trust.

Rather than monitoring single channel metrics, you’ll provide visibility across the entire organization about how well customer experiences are working and which ones should be targeted for improvement.

And you can move from delivering scripted responses to orchestrating more contextual experiences that reflect each customer’s current intent and prior experiences.

The next step is using journey orchestration to enable the transformation from an organization focused on disparate business-focused interactions to one that prioritizes connected, people-focused experiences.



FIVE STEPS TO ADVANCE FROM PERSONALIZATION TO JOURNEY ORCHESTRATION

1. Decide whether to use a centralized or federated approach

Sales, marketing, customer care, operations, billing and other functions all engage directly with the customer. In a typical enterprise, customer-facing teams individually develop a variety of systems over time to interact with and gather customer data.

How do you orchestrate the optimal customer experience when each touchpoint already has embedded personalization logic? There are two predominant approaches to journey orchestration: centralized and federated.

Centralized approach

The centralized approach that most traditional personalization and orchestration solutions take puts all the responsibility in one place. It focuses on creating and maintaining a complex set of workflow rules governing every interaction for all touchpoints across the organization. This approach might appear prudent from a governance standpoint, but it creates a bottleneck. It takes control away from employees tasked with managing the experience.

Federated approach

A federated approach distributes personalization logic out to each touchpoint. Rather than centrally defining and controlling every interaction with millions of customers across a sprawling enterprise, a federated approach coordinates and optimizes the experience across every touchpoint.

It doesn't create a complex bottleneck; it enables customer-facing teams to move forward in a coordinated fashion and at their own pace.

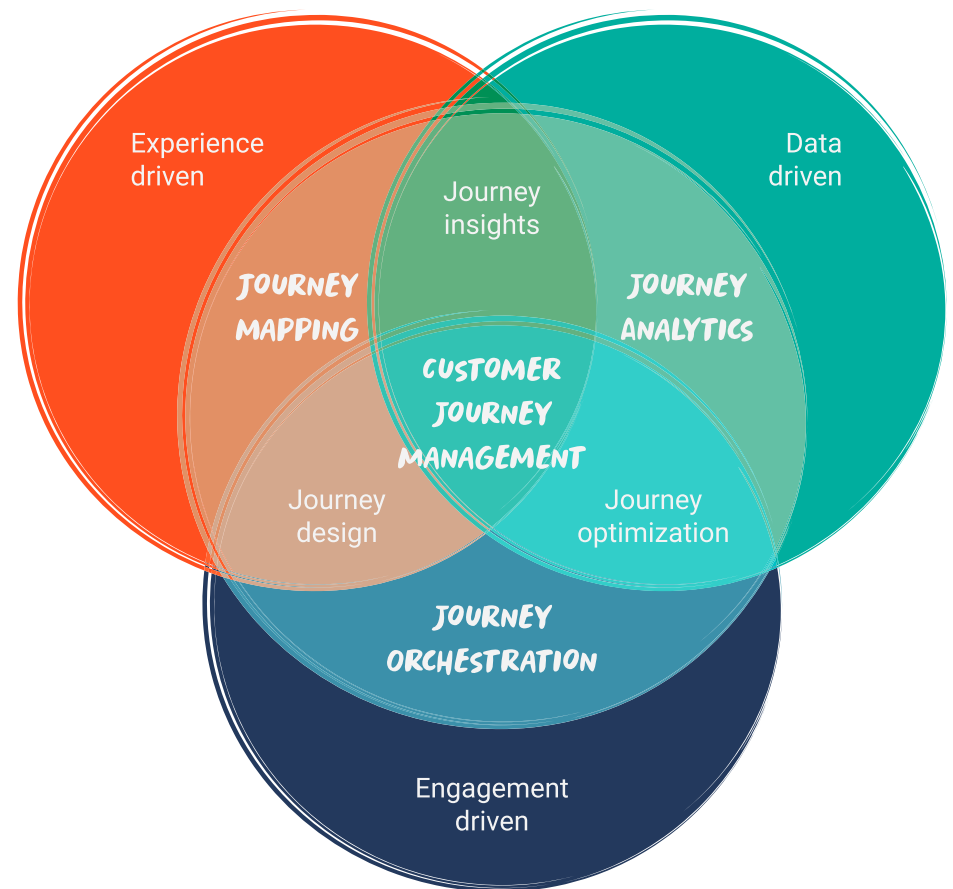
2. Embed journey orchestration with a robust journey management program

Getting personalization right pays dividends. Companies need an approach that enables them to interact with customers in a way that aligns with their current intent and prior experiences — not just the most recent interaction in a siloed touchpoint.

Journey orchestration is most successful when it's embedded within a comprehensive customer journey management approach. This enables teams across your organization to improve CX and business outcomes simultaneously.

As CX teams identify points of failure in high-impact journeys, they typically collaborate with marketing, experience design, customer care and product teams. These collaborations aim to improve journey performance by eliminating those points of failure and improving the overall experience.

Effective journey management aligns internal teams around customer experience and provides the foundation for successful journey orchestration.



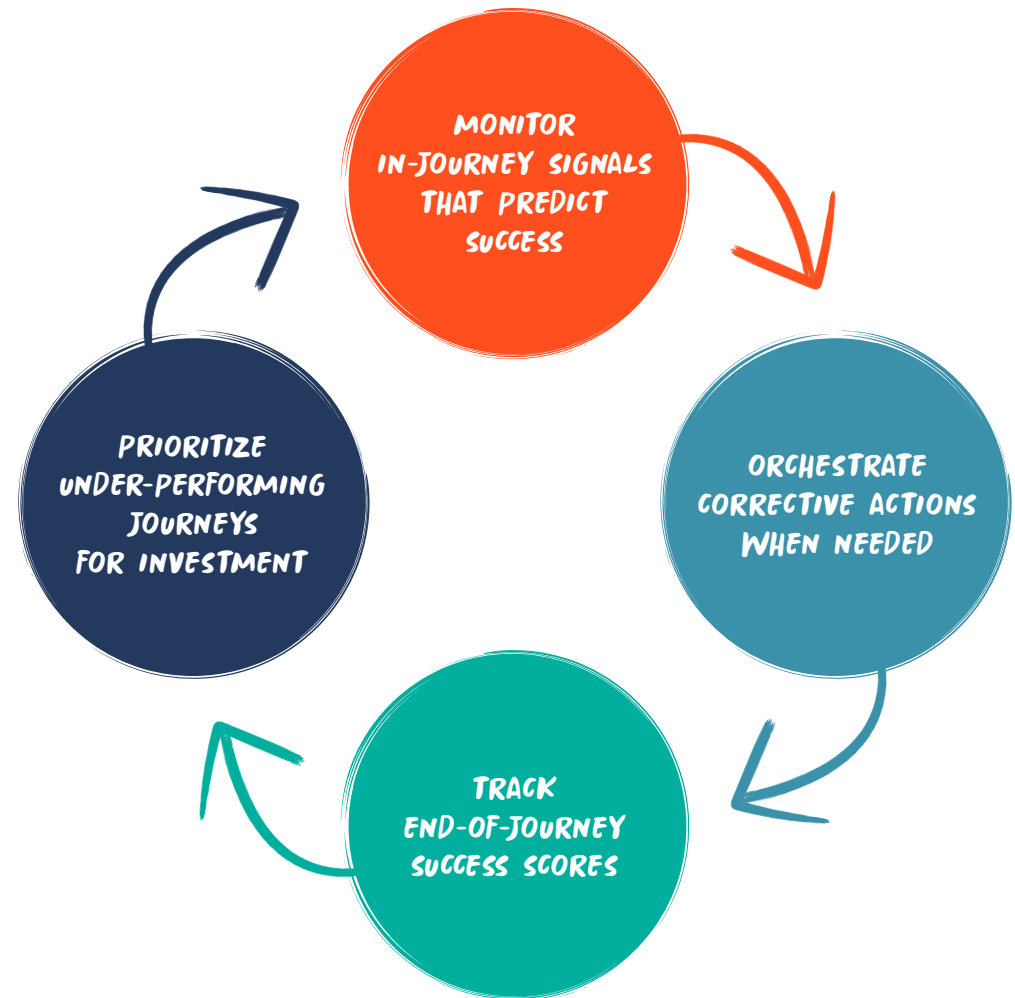
Journey management fuels effective orchestration

Adopting a customer journey management approach is key to successful journey orchestration.

A journey management program enables you to:

- Define signals and KPIs for journey success
- Monitor and measure journey performance
- Prioritize under-performing journeys for improvement
- Act to optimize every journey

Organizations can orchestrate actions that optimize each customer's experience. Integrating data across sources and systems is crucial for effective customer journey orchestration. Leveraging customer journey data across channels and time provides the context needed to determine the actions most relevant for each customer.



3. Progress from segmentation to journey-driven audiences

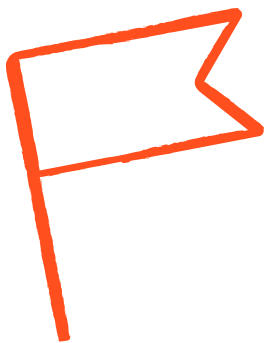
The key benefit of journey orchestration is to improve personalization decisions by bringing the full context of each customer's holistic experience to every interaction. To start, activate journey-driven audiences so you can move beyond static customer segments and tailor your actions.

Look to traditional attributes like demographic information or purchase history first. Then incorporate specific behavior such as "customers who called after a failed payment." Finally, apply time-based constraints like "more than two calls within a three-hour window."

Journey-driven audiences are powerful tools that can improve interactions at individual touchpoints. They bring each customer's current intent and prior experiences right to the point of interaction.

For example, you can use these audiences to optimize interactions on your website or with your contact center agents. Sophisticated solutions allow you to personalize web experiences or route callers to the best agent based on each customer's overall experience. These solutions should also provide every agent with information about the customer's intent and prior experiences, so they can resolve the issue quickly and deliver a more empathetic experience.

And by automatically suppressing marketing emails to customers currently trying to resolve a support issue, for example, you avoid a poor experience.



4. Align internal teams on a unified orchestration initiative

Traditionally, personalization at each touchpoint falls under the purview of the touchpoint owner. So, the marketing team manages complex personalization logic within marketing engagement systems like email, advertising and the company website. The customer care team oversees the call center, IVR, chat and other customer service channels.

For example, sending an up-sell email could be considered the best action for telecom customers who've visited the website or searched the mobile app for bandwidth or package upgrades. The goal is to expand their service. However, for customers in the middle of a support journey, the primary goal is to resolve their current issue. Receiving an up-sell email that clearly doesn't recognize their current support journey can lead to resentment and dissatisfaction.

A journey orchestration approach recognizes the customer is in a support journey and suppresses the offer.

By leveraging data spanning a customer's entire relationship with your organization, journey orchestration improves personalization and creates a better overall experience.

In a symphony orchestra, the conductor doesn't play each instrument. She coordinates the notes individual players make into a coherent and seamless composition.

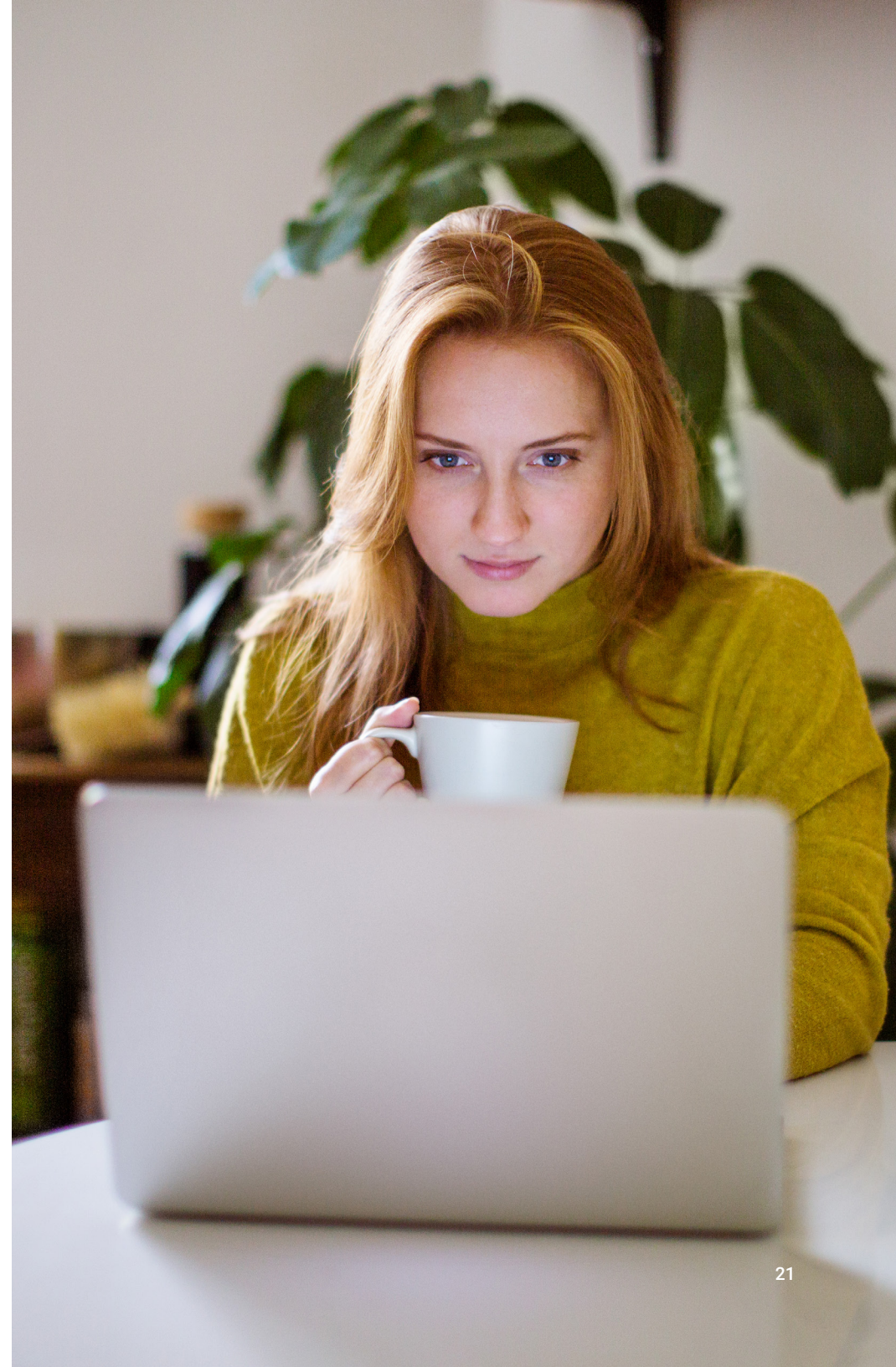
To orchestrate personalized experiences, a CX team must understand each customer's unique behaviors along with demographic data, purchase history, payment history, communication preferences and more.

Business leaders understand that multiple teams across the business engage directly with customers. Journey orchestration is a team effort, not the sole responsibility of one team or department.

5. Select the right technology to enable journey orchestration

Lastly, prioritize technologies that facilitate journey orchestration by supporting enterprise-level journey management programs. Sophisticated platforms support centralized and federated orchestration approaches. And they provide a way to measure, analyze, manage and collaborate around customer journeys.

Consider your current capabilities and your organization's goals. Evaluate the landscape of orchestration platforms to understand which technology best fills the gaps in your CX tech stack.



SUMMARY

From personalization to orchestration

Customer-centric organizations are embracing customer journey orchestration to deliver more empathetic and personally relevant experiences across every customer journey.

By providing better connected and more meaningful experiences that make it easier for customers to achieve their goals, companies can drive trust and loyalty while achieving business objectives.





Deliver frictionless, connected and personalized experiences

All organizations are under immense pressure to boost customer experience while improving business performance. In a world where customers expect a personalized experience on any channel, CX teams must deliver experiences that anticipate each customer's needs by recognizing their preferences, prior experiences and current goals.

That's why customer-centric organizations rely on the award-winning Pointillist Customer Journey Management platform to measure, manage and optimize individual customer experiences at scale.

CX teams depend on Pointillist to:

- Measure omnichannel customer experiences and identify opportunities for improvement
- Quantify the impact of customer behavior on business outcomes
- Orchestrate actions that optimize customer experience and maximize business success
- Align cross-functional teams on customer and business goals

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