CXPA | Customer Experience Professionals Association™

Medallia

Personalize, Predict, and Prosper:

Understanding and Implementing Customer Journey Orchestration

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CX DAY
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Meet your presenters

Judy Bloch
Principal CX Advisor

Medallia

Greg Kihlström
Principal

the agile brand GUIDE

Meet Alex & Sarah

Introducing Mobilli

CXPA Customer Experience Professionals Association™

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Meet Alex
He is a long time Mobilli customer and is an Apple fanatic

Irrelevant Experiences
Web. In-Store. Social offers are coming from every direction about the new Mobilli devices - that aren't Apple.

Customer tunes out
Alex gets annoyed, tunes out and is disgusted that Mobilli doesn't know him or his preferred device.

Customer Outcome

- Mobilli never sends me relevant offers!
- Do they value my loyalty?
- Am I getting as much value out of Mobilli as I should?
- Should I start considering other options and/or providers?

Relationship ends
Alex begins to get Apple-centric offers from his Cable provider.

Meet Sarah
She is the CX Leader at Mobilli and has an upcoming readout to the Board about how experience design contributes to the company's goal to improve retention rates by 20%.

Siloed Reporting
Every channel has its own built-in reporting, so it is hard to understand the performance of the buyer's journey.

Mixed Messages
Multiple channels are communicating with customers, often at the same time in the process. Messages are inconsistent, and it's hard to tell what is working and what isn't.

Conflicting Incentives
Each team at Mobilli is incentivized for *their* channel to be successful, so collaboration is difficult and doesn't happen very often.

Business Outcome

- Missed opportunities to delight customers
- Missed opportunities to optimize cost to serve and revenue
- Customer Churn

Relationship ends
Mobilli loses another customer before they have a chance to win them over because of a lackluster experience.

The Cost of Disconnected Experiences

Poor Experience

Customer Churn

One bad experience can turn 32% of customers away from your brand

Inconsistent Experience

Missed Revenue Opportunities

Employees do not have the ability or time to understand true intent

Impersonal & Irrelevant

Poor Perception

Lack of empathy for what a customer is interested in accomplish with a brand

You don't even know me

Unhappy Customers

One-size-fits all lacks empathy, relevance, and inability to deliver individualized engagement

Solving through Orchestration

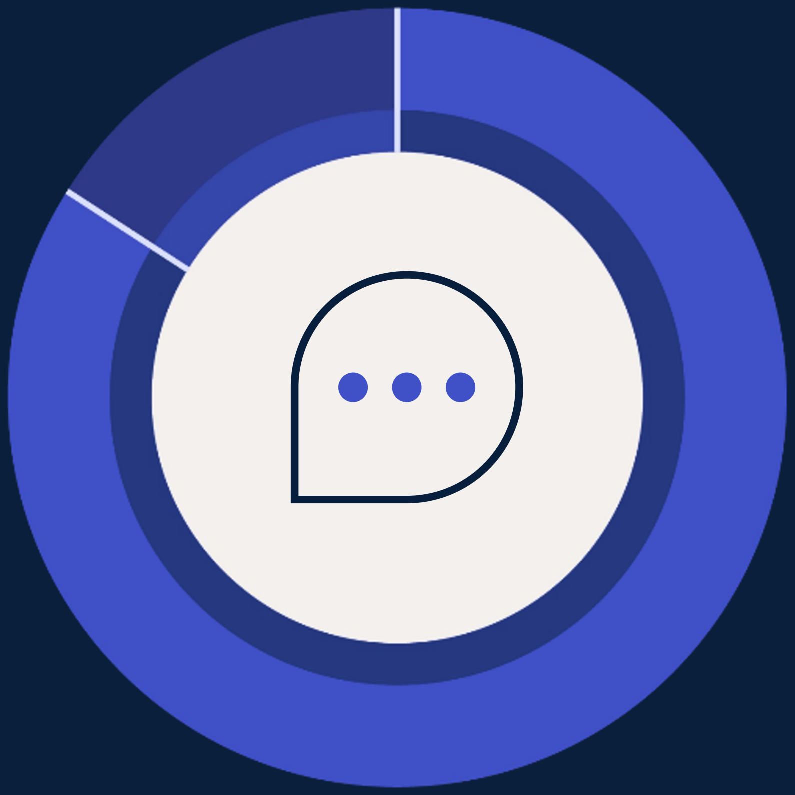
Defining Customer Journey Orchestration

or·ches·tra·tion

noun

The planning or coordination of the elements of a situation to produce a desired effect, especially when done in a way that attempts to avoid notice or attention.

Why Orchestration is needed: Customer expectations are ever evolving



84%

of customers believe personalized experiences are as important as a brand’s products/services

73%

of customers expect brands to understand their needs and expectations

66%

of customers are willing to pay more for a great experience

Sources: IDC The Future of Customers and Consumers: Using Applied Intelligence to Understand the Customer, February 2021 & Prediction: The Future of CX, McKinsey, 2/21

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Benefits of Orchestration

Average profitability increase

25% ▲

Average improved retention/loyalty

24% ▲

Average expansion in customer spend

24% ▲

Personalized experiences delivery is hard

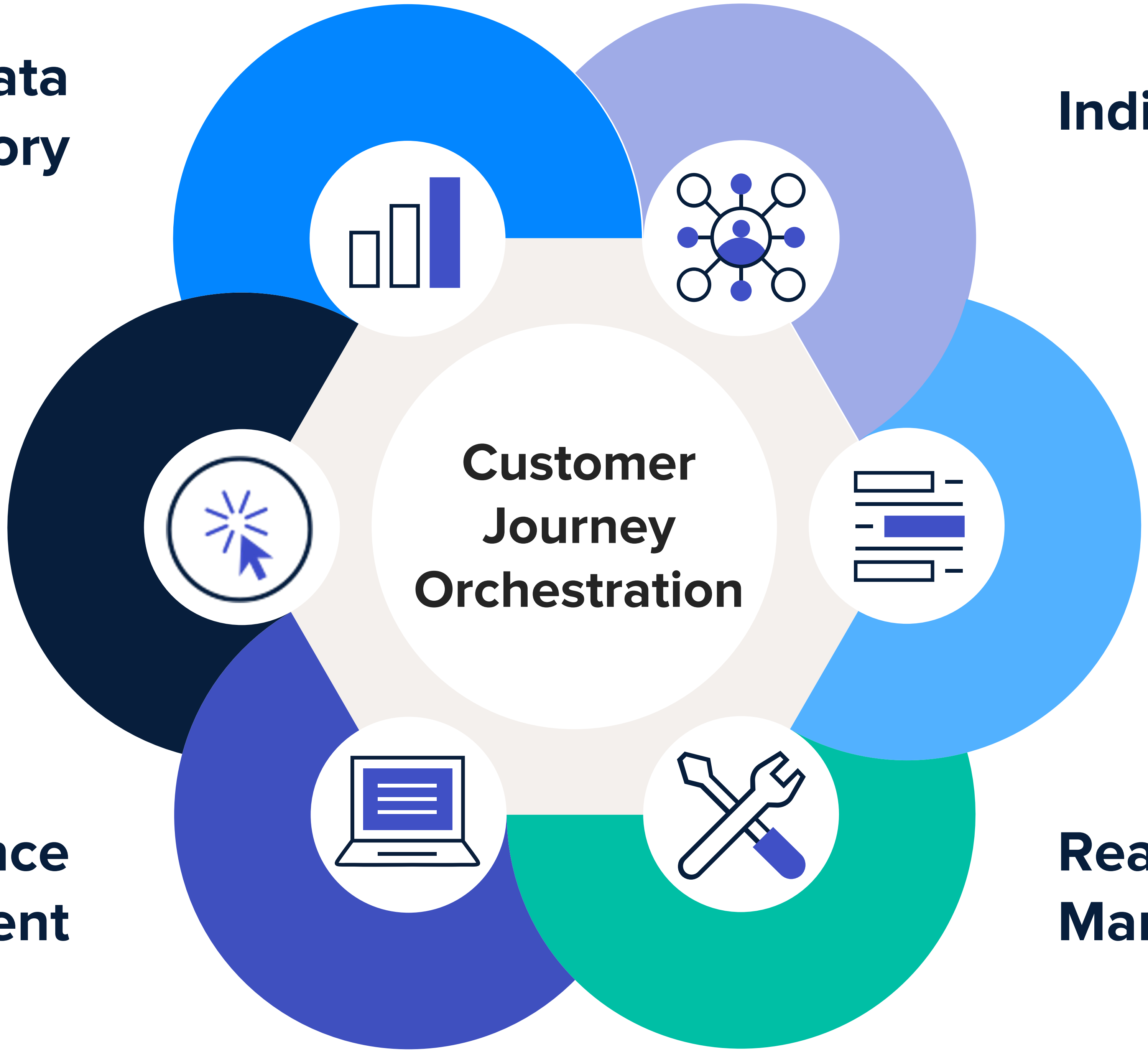
Disconnected Organizations
Customer-facing teams with conflicting goals are not tuned into customer intent resulting in low value, irrelevant engagement

Siloed Data
Brands lack a single, real-time understanding of customer intent and emotional needs conveyed in CX signals and disparate databases

Isolated Systems
Systems tend not to communicate throughout the customer lifecycle resulting in high effort, confusion, and dissatisfaction

Omni-Channel Friction
Channels are not set up to allow customers to complete their desired experience or pick up where they left off from one channel to the next

Components of Orchestration



Customer Journey Orchestration

Customer Data Platform/Repository

Individualization

Next Best Experience/ Conversation

AI Machine Learning
Customer Journey

Customer Experience Management

Real-time Interaction Management

Orchestration Strategy Vision

Stage 01

Streamline Closed Loop Follow up with Automation

Leverage technology to automatically follow up on survey feedback with simple/straightforward paths to resolution

Stage 02

Introduce Personalized Action

Leverage the decision engine to suggest - and even execute - next best action that align desired customer outcome & business goals

Stage 03

Scaling to Address the Silent Majority

Identify at risk customers; intercept and guide next best action to prevent potential detractors

Stage 04

Continuous Customer Engagement

Responsively guide individualized experiences, redesigning and adjusting in real-time to optimize customer & brand outcomes

Real-Time Journey Insights

See how customers really move across channels, creating a comprehensive view of each customer journey in real-time;.

Sarah: Orchestration wish list

Sarah is looking to....

Leverage data in existing systems - not another data unification project

Create individualized experiences for Mobilli’s customers

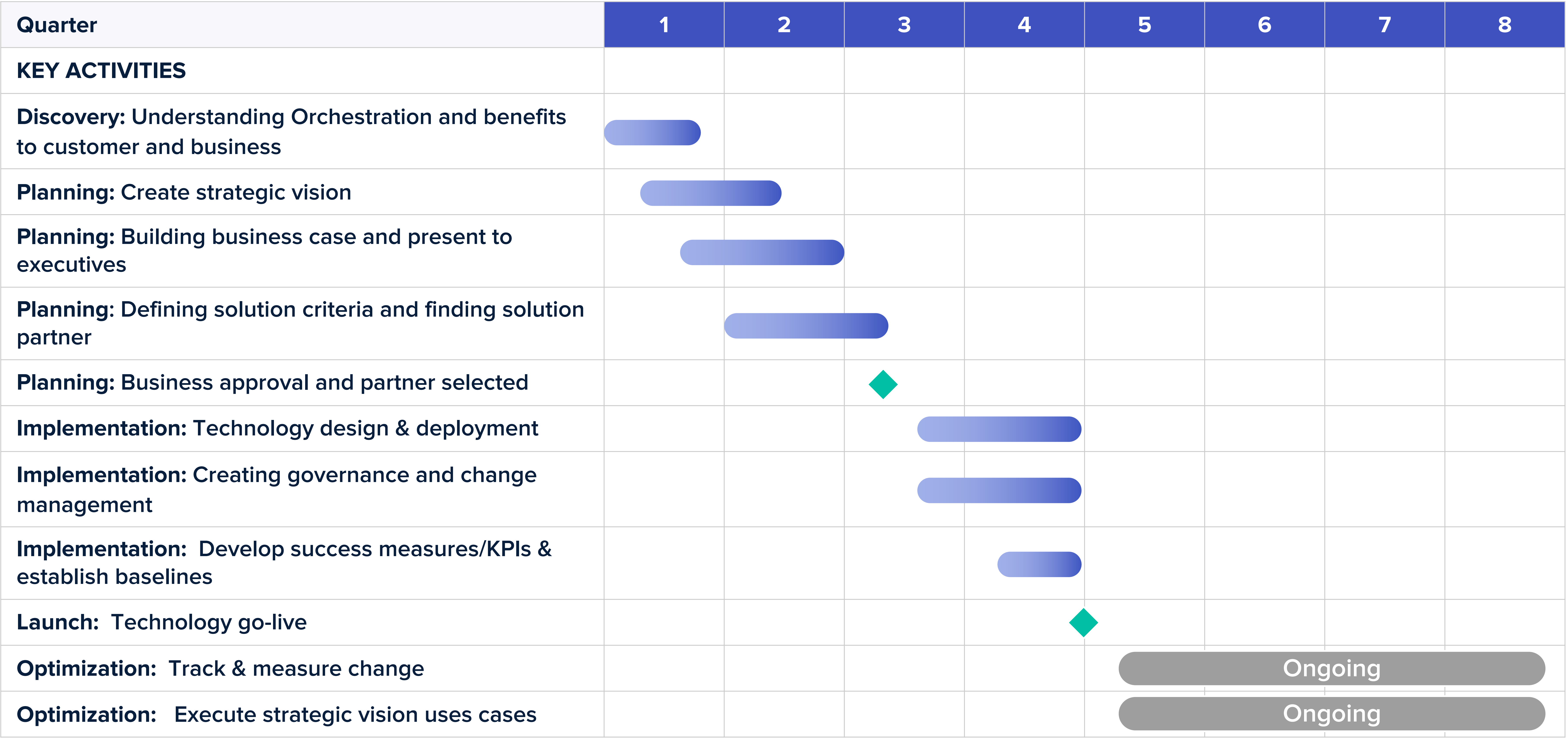
Orchestrate and guide journeys for both customers & employees

A **flexible** solution with **dynamic, real-time** decision and arbitration engine

Use artificial intelligence to **determine and predict desired outcomes**

Connect customer journeys across all engaged channels

Sarah’s Implementation Plan (Timeline Example)



Quarter	1	2	3	4	5	6	7	8
KEY ACTIVITIES								
Discovery: Understanding Orchestration and benefits to customer and business	▬							
Planning: Create strategic vision	▬	▬						
Planning: Building business case and present to executives	▬	▬						
Planning: Defining solution criteria and finding solution partner		▬	▬					
Planning: Business approval and partner selected			◆					
Implementation: Technology design & deployment			▬	▬				
Implementation: Creating governance and change management			▬	▬				
Implementation: Develop success measures/KPIs & establish baselines				▬				
Launch: Technology go-live				◆				
Optimization: Track & measure change					▬	Ongoing	▬	▬
Optimization: Execute strategic vision uses cases					▬	Ongoing	▬	▬

Fast forward

Mobilli’s orchestration results:

46% Improved customer query and issue resolution

39% Improved products and services

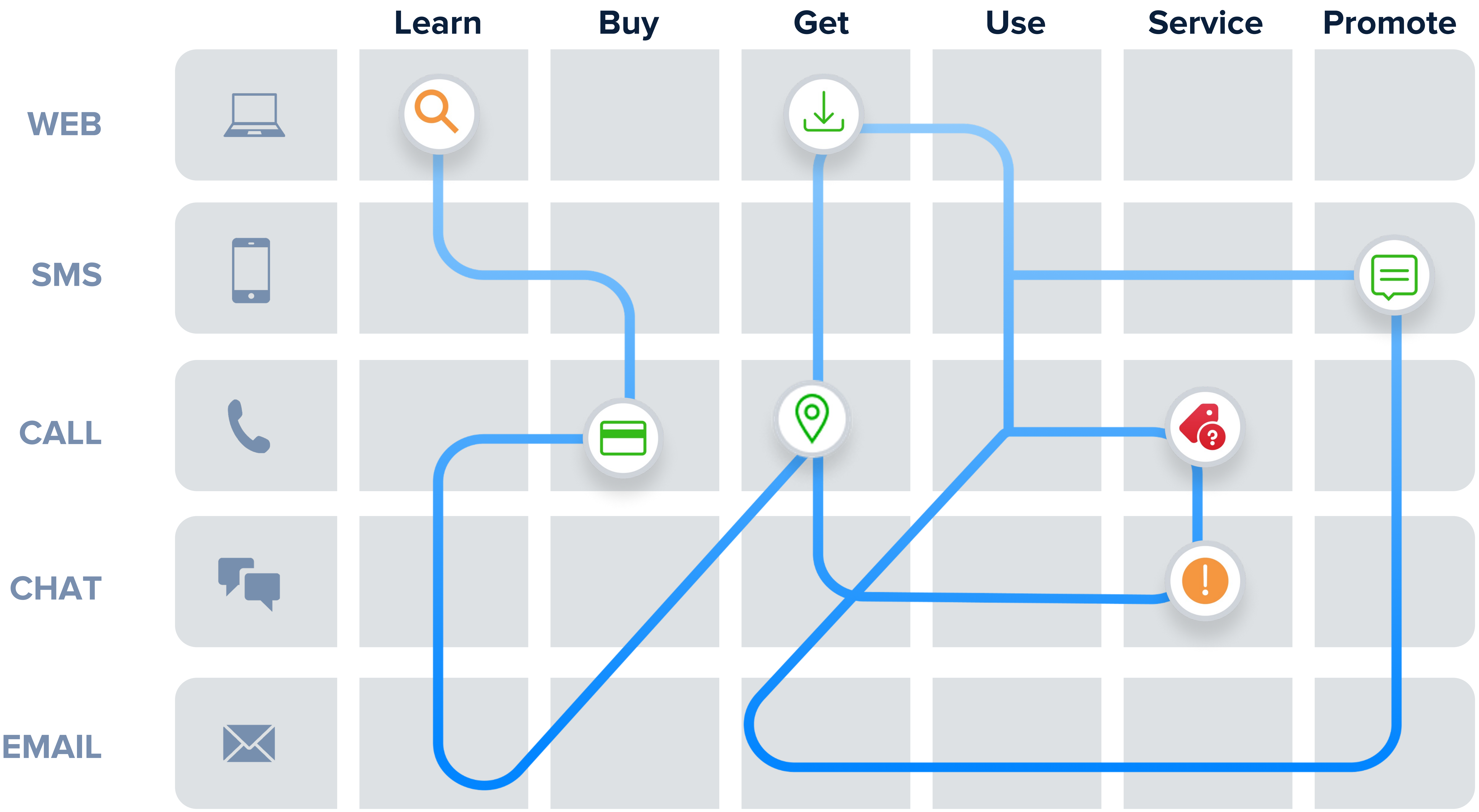
37% Arming sales and support staff with better information

36% Reacting quicker to moments of customer attrition risk

35% More relevant and tailored service, communication, and offers

27% Enabling differentiated and more accurate pricing

WEB	JOURNEY TO NOWHERE
SMS	REPEAT TASKS
CALL	REPEAT ANSWERS
CHAT	LOST REVENUE
EMAIL	INCREASE COST



Learn Buy Get Use Service Promote

WEB

SMS

CALL

CHAT

EMAIL

Meet Sarah
She got buy in from the board and is seeing reductions in customer churn….

See how customers really move
Sarah now has a complete view of how different audience segments, and customers like Alex, move through the buyer’s journey

Empathetic accuracy
Mobilli is able to provide the next best action or offer to Alex by understanding where they are in their journey and what motivates them

Mobilli Team Outcome

- Content is consistent
- Everyone is working towards a common goal
- Teams are aligned with customer intention
- Employee morale is at an all time high

Business Outcome
Increased customer loyalty and lifetime value through orchestrated experience design, tailored content and offers at the right time, in the customer’s channel of choice

Meet Alex
He is a long time Mobilli customer and is an Apple fanatic

See how customers really move
Alex has been on Mobilli.com drooling over the new iPhone and checking out all of the different features, he also was in store looking at the new phone

Empathetic accuracy
Alex gets a timely trade in offer at a price point he is happy with along with a free phone case incentive

Customer Outcome
- Mobilli knows me
- I love that they anticipated my needs
- Mobilli is my provider for life

Customer delight
Alex accepts the offer and her lifetime value is optimized

Win/Win Outcome
Systematically Act in the moment to delight customers
Optimize cost to serve and revenue

True journey orchestration is about putting a customer-led approach into how a brand manages their relationship with a customer.

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Q&A

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