CUSTOMER JOURNEY

INTRODUCTION OF A HOLISTIC JOURNEY MANAGEMENT FRAMEWORK

Practical tips on Taxonomy and Structuring

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① Executive Summary

In larger companies, many projects dealing with customer interactions and customer experiences run in parallel or within different areas of responsibility. A few examples:

- Marketing works on campaign optimization and a next best offer to existing customers,

- Customer care is responsible for the optimized processing of service tickets,

- Product development prioritizes backlogs based on customer feed-back.

Many stakeholders work on small and large experience journeys of the same customers. However, customers do not experience their journeys separately according to areas of responsibility or topics, but side by side or overlapping. That's why pain points frequently arise at the handover points between sub journeys and the departments responsible for them, like e.g.

- If a customer has to deal with the support team after purchasing a product, which may not be aware of the sales department's previous promises

- If a user has installed an app based on a certain advertising promise which does not fulfill his expectations.

User and customer experience do not start with a single team but must be thought of on a company-wide basis. In accordance with its task, each department pursues own objectives and operates with own terms and levels of detail in understanding customer and user journeys.

> User and customer experience must be thought of on a company-wide basis

Initially, this is fine from the perspective of the specific micro moment. However, when it comes to a holistic view or the understanding of emotions and the comparability of satisfaction measurements, different terminologies can lead to confusion in the company-wide exchange about transaction quality or smooth touchpoint experiences.

If companies want to be customer-centric but do not use a common language, a mutual understanding of customer emotions, improvement potentials and priorities along journeys is difficult to achieve.

A holistic **Customer Journey and User Journey Management** can help along. Since customer and user journeys are established methods in Experience Design and Service Design, they describe the path that people take through the product or service offering and the associated experiences. In this case, it is important to understand, that journeys consist of various customer touchpoints with which people interact.
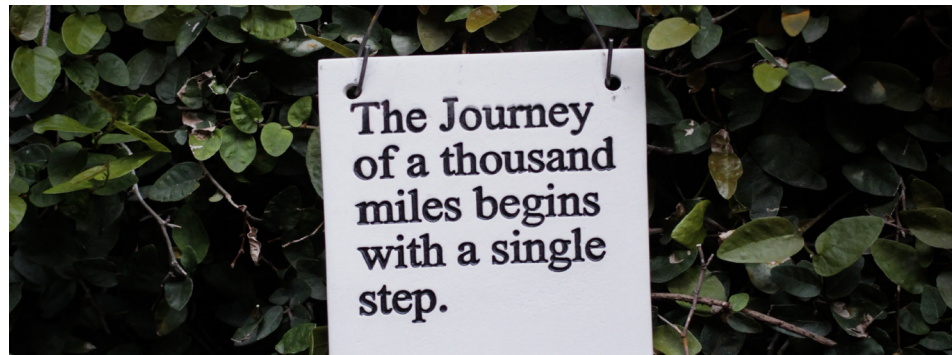
Journey Maps are therefore a proven tool for analyzing and improving the cooperation between different departments from an external perspective. They connect corporate silos and create the conditions for an organization to meet or exceed customer expectations and needs at all touchpoints. The journey (and thus the outside view) is the DNA of a CX framework. However, the customer journey must be anchored in the target vision and corporate culture.

We define a Customer Journey Management Framework as follows:

A holistic taxonomy and terminology implemented in a Journey Management System that enables distributed organizations to quickly identify needs and pains along the customer journey and control improvements.

2 What is the definition of customer and user journeys?

Journeys can be viewed from different perspectives. The most common views are the perspective of customers (customer journey) and the perspective of users (user journey). They provide an overview of both the entire purchasing process and the operational use of services and products.

A **customer journey** describes the customer's view from the initial contact with a company or product, through purchase and commissioning, to use, customer service and customer retention. A Customer Journey Map can visualize activities, needs and expectations, ratings, and quality of experience in addition to touchpoints. Maps can also be enriched with metrics to provide a complete overview of the actual customer journey. Typical phases of customer journeys are: first contact, information, purchase, commissioning, familiarization, usage, customer service and training as well as customer retention.

Phase	Awareness	Interest	Purchase	Onboarding	Use	Service	Retention
Activity				★		★	
Expectation							
Experience							
Contact point							

★ Key moment with high experience impact (moment-that-matters)
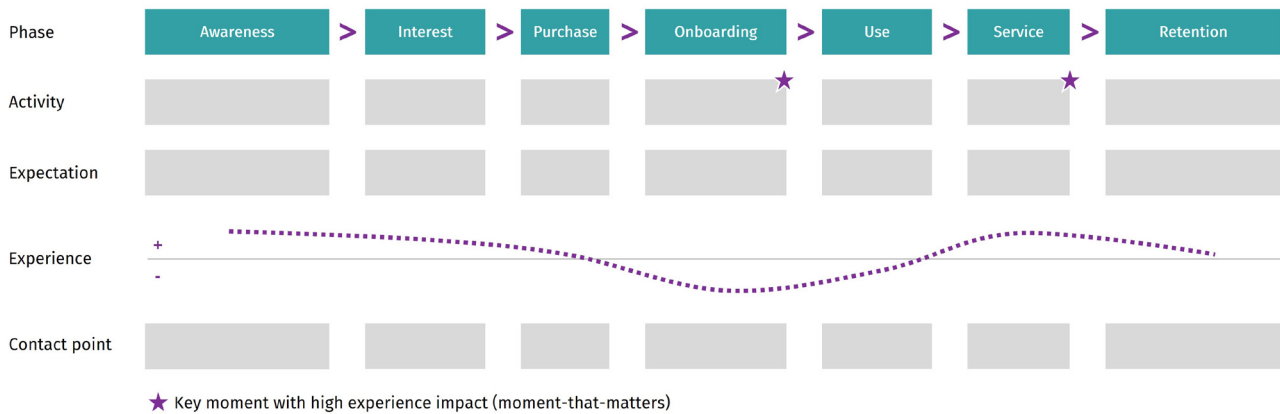
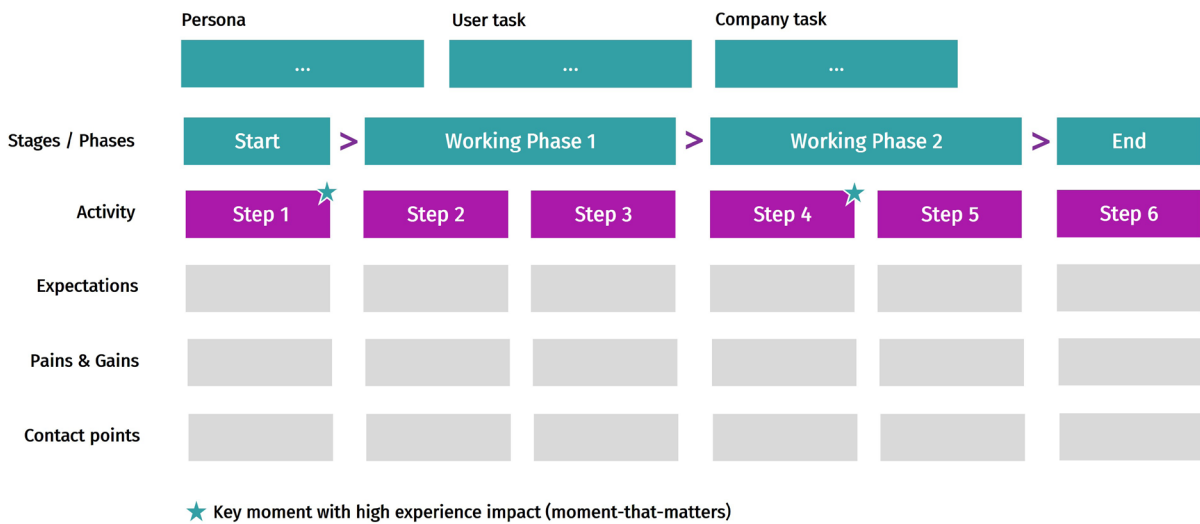Figure: Exemplary structure of a Customer Journey Map (Lifecycle Map)

Figure: Exemplary structure of a User Journey Map

User journeys describe the process that users go through in order to fulfill a specific task or goal. Normally, these journeys begin with the user setting a goal and end with the goal being achieved. Therefore, user journeys can span one product or service or multiple products and services. In addition to the individual steps of the task processing, the User Journey Map can also contain different actions, needs, evaluations, expectations, and customer satisfactions. There are no typical phases for user journeys. Phases are usually the same as the steps in the related business or work process.

It's important to keep in mind: Journey Maps are more than fancy overviews hung as posters on walls or on boards. They show work results and their impact across different organizational units, describe the interaction of customer touchpoints and the resulting customer experience.

Throughout this Playbook, we speak simplistically of "Journeys", which can specifically mean "Prospect Journeys", "User Journeys", or "Customer Journeys". When introducing a Journey Management Framework, it is important to take a holistic approach anyway, regardless of who experiences the transaction from the outside perspective.

3 | What is Journey Management?

Holistic Journey Management ensures that all journeys experienced by customers with a company are visualized and are worked on every day. It creates transparency regarding customer experiences and user experiences and increases the effectiveness with which companies align themselves with the expectations of their target group.

An active Journey Management builds bridges between organizational units and brings journey insights into use. Journey Management promotes customer-oriented collaboration within a company and connects the individual departments and their initiatives.

The main goal of Journey Management is to manage the expectations that customers and users have in each journey phase or at touchpoints in such a way that an attractive experience is created. In this context, we define an attractive experience as one that is so appealing that people like to have it again and again and spread the word among their peers.

But Journey Management does not only focus on methods, such as Journey Mapping. It also combines the technical infrastructure with a process and organizational structure and governance.

And last but not least, Journey Management provides all stakeholders with a common view of all customer experiences and user experiences with the company. This enables stakeholders to speak a common language so that insights at touchpoints can be holistically considered, evaluated, prioritized and optimized. Together, all teams can then strive to create attractive experiences for customers and users and learn how to build business success based on insights from the company's interactions with their target group.

> Journey Management aims to manage experiences at each stage of the journey in such a way that an attractive experience is created

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In concrete terms, Journey Management means ensuring that...

- the company's key business processes involving customers or users are visualized via Journey Maps and kept up to date (Journey Mapping),

- a holistic customer experience understanding is created across departmental boundaries within the company,

- journeys and their findings are used in the daily work of employees for making experiences of users and customers more attractive,

- individual elements of the customer or user journey are planned, coordinated, and controlled in such a way that a better company result is generated through attractive customer experiences,

- key moments in journeys that have a significant influence on the attractiveness of the customer experience, satisfaction, or loyalty are measured and visualized using metrics (Journey Metrics),

- a meaningful structure with powerful tools exists so that employees can easily work with journeys,

- employees or their teams have the competencies to use insights from journeys to improve the human experience,

- the management has a good picture of the company's current delivery capability in terms of customer and user experience, as well as the corresponding control options,

- pain points like e.g. media breaks or changing contact persons are identified and improved based on insights.

4 How to start establishing Journey Maps?

The first step is to familiarize yourself with Journey Mapping. To get a feeling for creating and working with journeys, it is helpful if you first visualize a Journey Map for a business process in which users are involved or regarding the purchasing process for a product. When developing the first Journey Map, you can proceed according to the following pattern:

| Internal Perspective | → | Qualitative Survey | → | Mapping | → | Working with the journey |
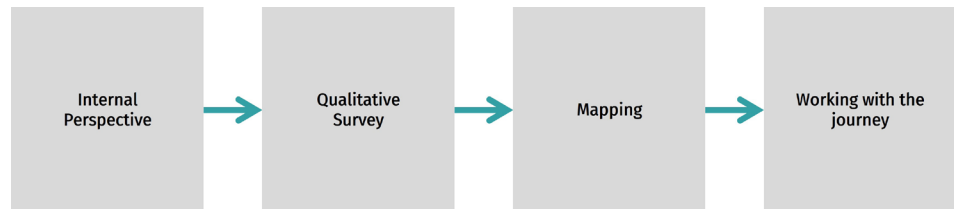
Figure: Step-by-step approach to the Journey Mapping process

4.1. Internal Perspective

It is helpful to visualize the experience knowledge of your colleagues about the specific journey and to develop an understanding or acceptance for the method. Therefore, you need to discuss the question "What do our customers experience at the individual touchpoints and how do they rate this?" in a workshop with the cross-functional development team. Product owners, developers, product managers, sales representatives, service staff and UX professionals, among others, should participate. The workshop goal should be a rough visualization of the journey from an internal perspective as well as the formulation of hypotheses for customer interviews.

Figure: Cross-functional journey mapping workshop

4.2. Qualitative survey of the customer view

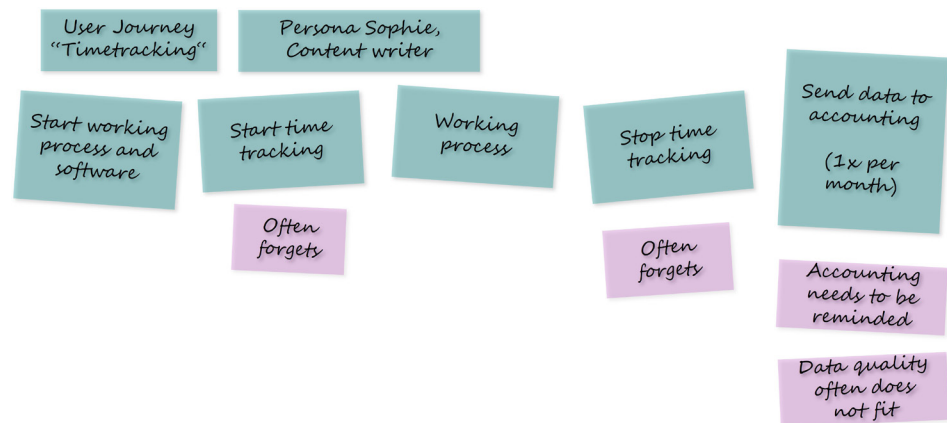In this step, internal assumptions should be validated. This can be achieved by interviewing test persons who have recently gone through the related journey. In these interviews, you can discuss the customer's journey steps and what they have experienced so that you can clarify your hypotheses. A rough visualization of the journey from an internal perspective gives you the necessary orientation. You can also use this Journey Map in the interview as a basis for reflection with the test persons and for documenting the results. In the end, you should be able to derive a journey from the customer's perspective for each interview which you then can combine with the journeys from the internal perspective. This means you supplement the journeys based on the internal view with the customer perspective and correct them if necessary.

	Persona Sophie, content creator in an agency	**User task** Create good content	**Manufacturer goals** Ensure effective billing of all hours				
Phases	Create content order		Create content				
Steps	Art director creates request	Content creator fetches job from ticket system	Content creator considers rough story	Start time tracking	Write content	Send first version to art director and wait for feedback	Pause time tracking
Expectations	*"Content is created quickly according to my requirements"* *"Scheduled time is kept."*	*"There's often far too little time allotted."*		*Time tracking is really not my job. It should be automatic."*			*"Time tracking is really not my job. It should be automatic."*
Pains & Gains				*"That sucks that you have to think about that all the time."* *"I really forget it often."*		*"Sometimes I have to ask several times, and actually I would have to write down times for that each time."*	
Contact points	Ticket system	Ticket system		Time tracking software	MS Word	Mail/Chat	

Figure: Example of a User Journey Map

4.3. Journey Mapping

In the third step, you create the final Journey Map either alone or together with the team. Here you should choose a format that is easy for the team to work with and which allows you to easily update the journey. Therefore, it is not advisable to document journeys in the form of

fancy posters. This may look impressive but doesn't fulfill the afore-mentioned conditions. Board tools, such as Miro or specialized Journey Mapping tools are suitable for Journey Mapping. We will go into more detail about the right tools later.
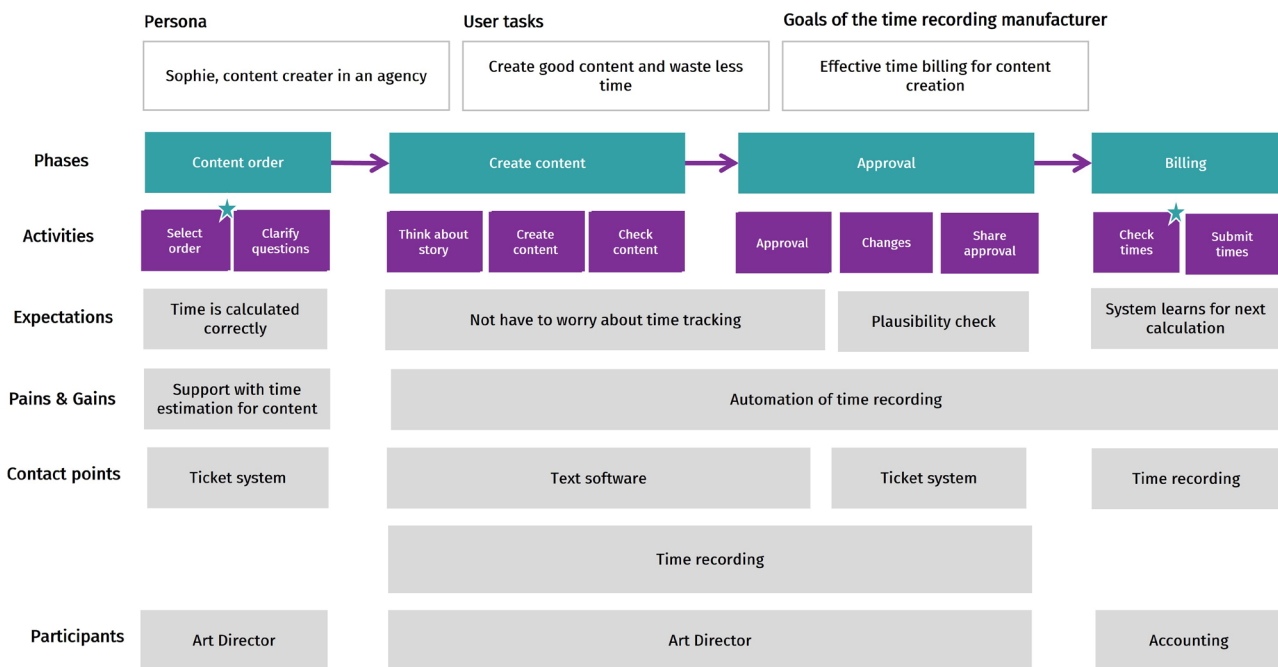
	Persona	User tasks		Goals of the time recording manufacturer	
	Sophie, content creater in an agency	Create good content and waste less time		Effective time billing for content creation	
Phases	Content order	Create content	Approval	Billing	
Activities	Select order / Clarify questions	Think about story / Create content / Check content	Approval / Changes / Share approval	Check times / Submit times	
Expectations	Time is calculated correctly	Not have to worry about time tracking	Plausibility check	System learns for next calculation	
Pains & Gains	Support with time estimation for content	Automation of time recording			
Contact points	Ticket system	Text software	Ticket system	Time recording	
		Time recording			
Participants	Art Director	Art Director		Accounting	

Figure: Example of referencing a User Journey Map to touchpoints and stakeholders.

4.4. Working with the journey

To be honest, this is the most difficult step. One way to bring journeys into your colleague's daily work is to use them and your customer's and user's experiences for the discussion with the team. You should evaluate which pain points you want to work on and develop the relevant measures which then should be prioritized as part of the team's back-log or task planning.

If you have gone through this process with one or two teams, you will quickly notice that although you have visualized journeys, they are not being actively used and updated on their own. Now it is time to institutionalize the use of journeys by implementing a Journey Management.

5 | Elements of a Journey Management Framework

Journeys extend across the entire company. They can therefore quickly become challenging in terms of quantity, scope and depth that an overview or control is not easy to handle. In addition, one of the most challenging hurdles is to align a company with journeys and to implement an approach that journey insights are actively used to improve customer and user experience.

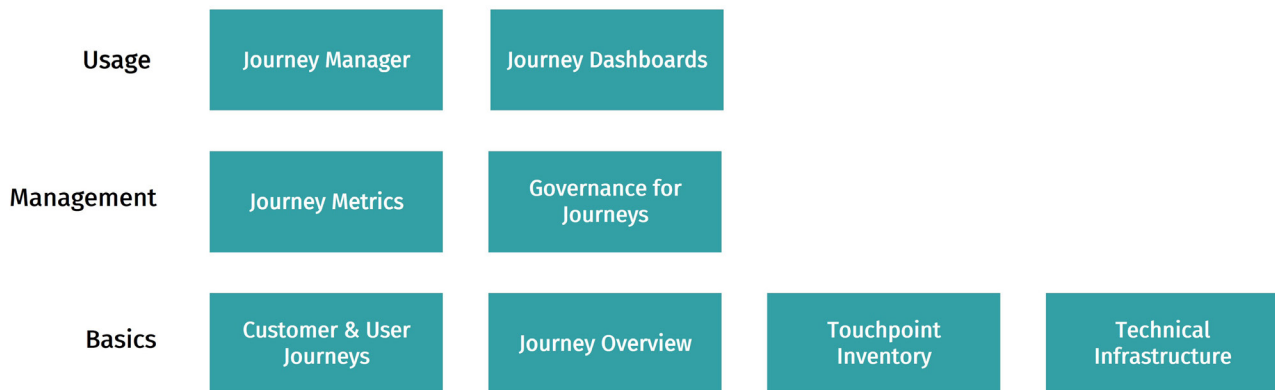|			
Usage	Journey Manager	Journey Dashboards	
Management	Journey Metrics	Governance for Journeys	
Basics	Customer & User Journeys	Journey Overview	Touchpoint Inventory	Technical Infrastructure

Figure: Elements of a Journey Management Framework (excerpt)

For addressing these challenges with the help of a Journey Management, you need the following elements:

- Journeys
- Journey overview
- Touchpoint inventory
- Technical infrastructure
- Journey metrics
- Journey governance
- Journey dashboards
- Community of journey managers

5.1. Journeys

Customer and user journeys build the core of a Journey Management Framework.

There are **customer journeys** that sales and service teams use to optimize customer experiences at their customer touchpoints. There are also journeys that management uses for overarching human-centric control of the company.

And there are **user journeys** that product development teams and product portfolio management use to align their work with customer needs and expectations. With user journeys, a distinction is made between product-specific and generic journeys, since some sub journeys differ in content but not in the process. For example, different products are sold through the same web shop and have the same purchasing process.

5.2. Journey overview

A journey overview is a list of all journeys in a target market that a specific target group experience and which brings together all different journey variants. Furthermore, such an overview supports the prioritization of journeys and makes it easier to recognize connections. Journey overviews are also helpful for giving the management a quick summary if there is need for action in specific (sub-) journeys.

5.3. Touchpoint inventory

The touchpoint inventory lists all touchpoints where people interact with your company. Creating and making the inventory available helps employees to develop a common understanding of the touchpoints they need to look at. The inventory also gives access to the individual data that is continuously measured at each touchpoint.

5.4. Technical infrastructure

A successful Journey Management requires tools and templates. The technical infrastructure ensures that Journey Management can be operated at scale (see also chapter 7)

5.5. Journey metrics

Journey metrics reveal

- what happens along the journey. These **interaction metrics** show levers that give opportunity for optimization (e.g. waiting time, number of errors, frequency of use).

- how customers or users perceive their experiences along the journey. These **perception metrics** help to better understand people's expectations (e.g. customer satisfaction).

- the outcome of experiences. These **result metrics** allow you to determine the impact of customer and user experience on business outcomes (e.g. purchase, referral).

5.6. Journey governance

The Journey Management Framework should provide a binding structure for customer and user journeys so that all journeys in the company are compatible with each other. A binding definition and structure also ensure that various stakeholders have a common basis for discussion.

> The Journey Management Framework should provide a binding structure. This is important so that all journeys in the company are compatible with each other.

You can technically support the establishment of such a structure initially via flat-file templates, eventually via a database-based Journey Management System.

For more transparency, it should be mandatory regulated where in the company journeys are used. If they are part of decision-making processes for new projects, approvals or planning processes, the corresponding commitment should be ensured.

Transparency about customer experiences can initially put managers in unfamiliar or uncomfortable situations. In companies that are not accustomed to a high degree of transparency, a practice phase in dealing with journey insights is necessary. In order to enable and support this process, it is recommended that the installation of measurement points is defined by a company policy.

5.7. Journey dashboards

Journey dashboards show all relevant journey metrics either per single journey or across multiple journeys. They help teams, journey managers and management to see where the company stands in terms of user and customer experience and in which direction the trends are developing.

5.8. Journey manager community

Journey managers are responsible for bringing the journey methods and mindset into the company. They support teams in using and interpreting journey data and bring together people from different frontline departments to eliminate identified pain points or to exploit opportunities. As a community, they regularly exchange ideas, learn from each other, and further professionalize their role.

6 The information architecture of Journey Management

The information architecture of an effective Journey Management Framework rests on three pillars:

- Taxonomy
- Terminology
- Information flow concept

Taxonomies and terminologies should always focus on two main questions:

- What information should be evaluated?
- How should information be filtered, attributed and reported?

This forms the later structure according to which all journey information should be clustered.

6.1. The taxonomy: Organizing information layers in an intelligent way

By implementing a taxonomy system, you can organize information in such a way that it can be distributed and used in the organization. Each stakeholder then knows how specific information fits into the overall context of the Journey Management. The taxonomy is an information hierarchy that needs to reflect the entire organization and should consist of a vertical, a horizontal and an overarching information dimension.
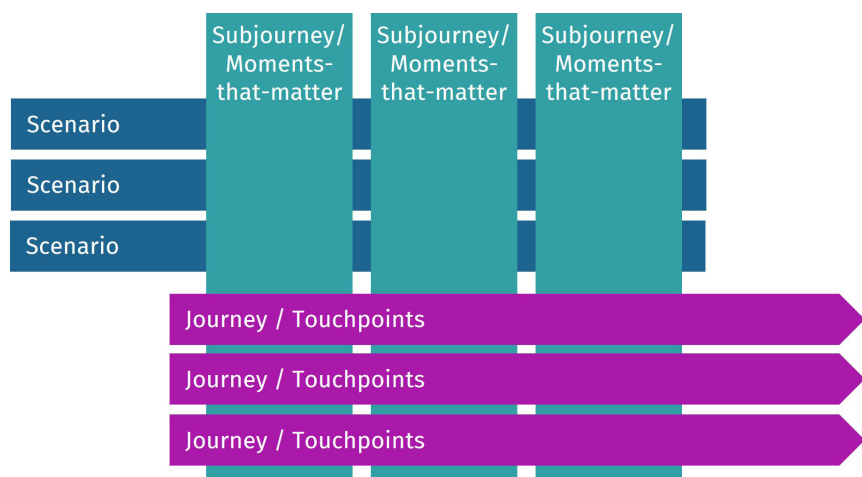

Figure: Journey Management must be able to cater several dimensions

On the vertical information dimension, all customer experience information across the lifecycle is clustered into levels.

- Level 1: Lifecycle Stages (phases)

- Level 2: Stages (Phases)

- Level 3: Customer Journeys

- Level 4: Sub Journeys or Moments

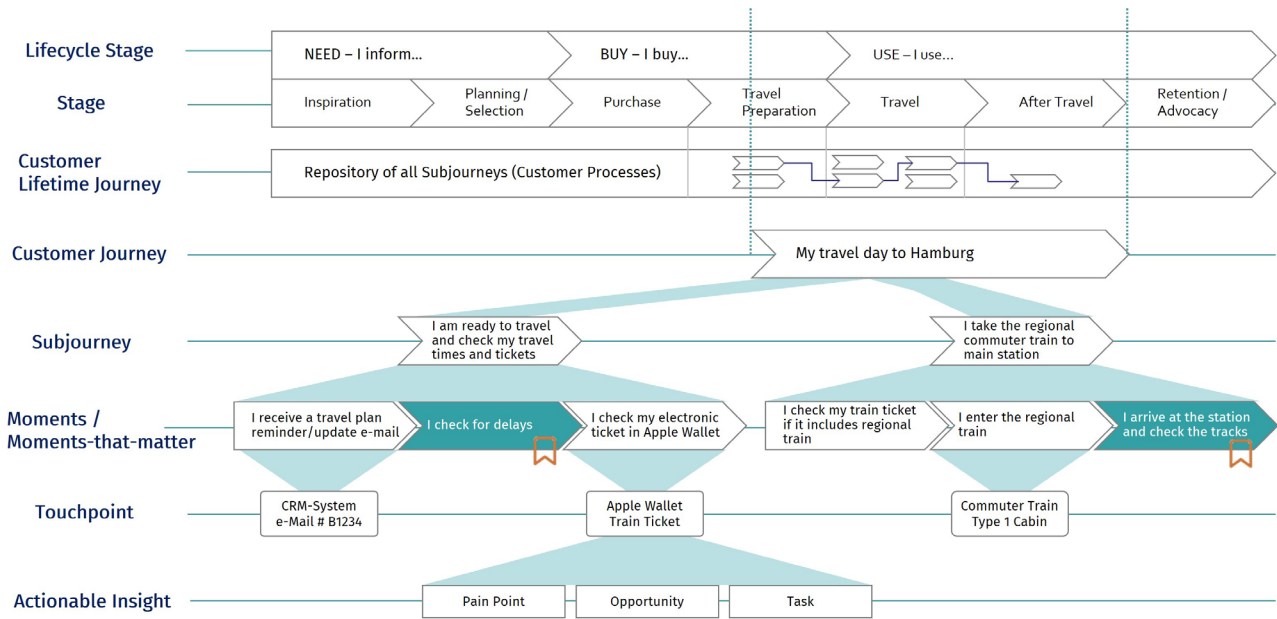- Level 5: Micro Journeys and Touchpoints.

Figure: Example of vertical information levels of a Customer Journey Taxonomy

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Typical phases of a customer lifecycle are e.g. "Need – Buy – Use": This starts even before a lead notices one's product or company, extends over the buying process to the point when the relationship with the company ends. These phases are always specific and vary depending on the industry and company. For example, an e-commerce company has different phase classifications than an insurance company.

Depending on the level of detail, the Level 2 phases within the taxonomy can be divided into different subgroups, such as the individual process-related sub-phases of a company's contracting process. The biggest hurdle is that individual specialist departments in their procedural "silos" initially only have the structure and wordings of their part silo. A vertical taxonomy structure allows companies to overcome these barriers for the benefit of a holistic Journey Management including all stakeholders.

The most important task of a journey taxonomy is to prepare and distribute the information of Customer Experience Management in the company in the same structure

At the same time, there is a tendency to break up the journey structure in unnecessary detail at this level. You should carefully consider whether a further hierarchization of phases for e.g. a later presentation or reporting really brings new and relevant insights.

The most important task of a taxonomy system is to prepare and distribute the information of customer experience management in the company according to the same structure. Depending on the stakeholder and the task, this results in additional horizontal information dimensions. The special feature of these dimensions is that a good framework must be able to map different abstraction perspectives. So, there is no one-fits-all approach.

Abstraction levels range from a very aggregated high altitude for C-level or top management to a detailed abstraction e.g. on click path level for UX designers. Depending on the level, the information and level of detail changes. While management is interested in essential results and overarching recommendations for action, operational teams may focus on deep dives into individual click paths and journey alternatives to understand how customers pass through their experience.

In addition to the horizontal and vertical dimensions, there are overarching information dimensions. On the one hand, they include the touchpoint elements associated with Journey Maps, actionable insights, moments that matter, or sources and files, as well as **alternative scenarios** for the otherwise same journey information, such as specific **personas** or **application scenarios**:

- private customer vs. business customer (Persona)

- "I drive to work alone" vs. "I go on vacation with the family".

- "It is raining" vs. "it is not raining".

6.2. Terminology: One language for all stakeholders

While the taxonomy organizes the information hierarchy, the terminology defines the totality of all technical terms of a Journey Management Framework. The advantage of such a communication standard is obvious: If companies do not communicate and distribute e.g. pain points, opportunities and emotional expectations of their customers in a uniform language, a general understanding about the priority regarding later recommendations for action can hardly develop.

If one business unit refers to the customer touchpoint as a channel, while for the other one the channel is a point of interest or moment that matters, this creates redundancies and does not enable a consistent measurement based CX management. CX and UX improvements can then not be communicated consistently and may not be implemented. Selective improvements at the department level such as marketing campaign optimizations or a good call center script with a chat bot are, of course, still possible. However, the **holistic, company-wide approach** might fail due to incompatibility of documentation, different visualization, and measurements along the journey which can't be compared.

Therefore, the first step in establishing a CX terminology is to collect the documentation distributed in each department, evaluate it, and standardize it in a glossary. After all, very few companies start with CX from scratch. And so the terms used to describe e,g, customer lifecycle phases are often already available in the various divisions and only need to be brought down to a common understanding.

However, if there are too many terms, it is helpful to roughly cluster them for an initial standardization draft. The trick – especially when many stakeholders are involved – is to limit the terminology to the essentials and keep the information density as concise and uniform as possible. **Recommendation: Agree on a few clear terms instead of using several wordings in parallel.**

6.3. The information flow concept: Where do "fresh" insights come from and who receives them on an ongoing basis?

One aspect that has often been forgotten or at least not considered in CX/UX projects is the concept for aggregating and distributing data and insights within the organization. However, the best CX harmonization with journey taxonomy and terminology is of no use if a framework is not subsequently used to distribute data on customer satisfaction or benchmarks regarding the target/actual performance of customer processes. Again, this means distribution across all departments if this reflects the customer journey experience chain.

In addition to CX teams, this approach usually involves IT business partners who can identify and implement the technical platforms and interfaces across departments. In the first step, this is not yet about the detailed description of API's, data dimensions, dashboards, or access rights, but quite abstractly about the identification and description of

- Data sources

- Insight categories

- Presentation forms

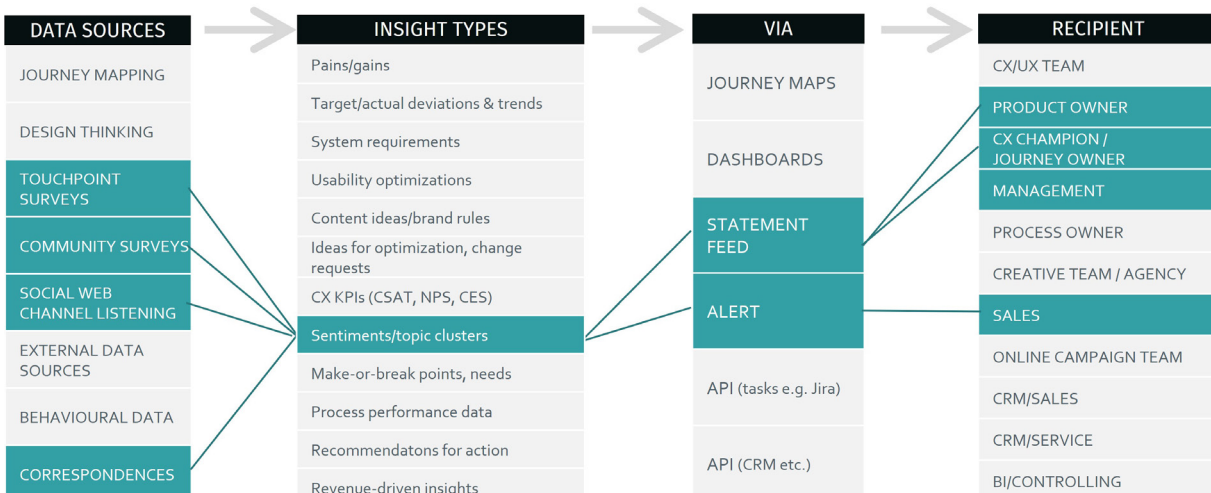- Recipient groups

- User stories

DATA SOURCES	INSIGHT TYPES	VIA	RECIPIENT
JOURNEY MAPPING	Pains/gains	JOURNEY MAPS	CX/UX TEAM
DESIGN THINKING	Target/actual deviations & trends		PRODUCT OWNER
TOUCHPOINT SURVEYS	System requirements	DASHBOARDS	CX CHAMPION / JOURNEY OWNER
COMMUNITY SURVEYS	Usability optimizations		MANAGEMENT
SOCIAL WEB CHANNEL LISTENING	Content ideas/brand rules	STATEMENT FEED	PROCESS OWNER
EXTERNAL DATA SOURCES	Ideas for optimization, change requests		CREATIVE TEAM / AGENCY
BEHAVIOURAL DATA	CX KPIs (CSAT, NPS, CES)	ALERT	SALES
CORRESPONDENCES	Sentiments/topic clusters		ONLINE CAMPAIGN TEAM
	Make-or-break points, needs	API (tasks e.g. Jira)	CRM/SALES
	Process performance data		CRM/SERVICE
	Recommendatons for action	API (CRM etc.)	BI/CONTROLLING
	Revenue-driven insights		

Figure: Example of an information flow scheme

cxomni

7 The technical infrastructure

To get started with Journey Maps, you do not need any elaborate technical support. In the beginning, simple PowerPoint templates or a modern whiteboard visualization tool will get you pretty far. These tools help to develop, discuss and evaluate journeys in collaboration with colleagues and provide a good basis for quick workshops. Since these tools do not prescribe any information architecture, they offer a very good field for experimentation and are suitable for getting started with Customer Journey Mapping e.g. at the department level. In most cases, licenses are immediately available and can be used without major IT support what makes them a valuable interim tool for presenting workshop results, as their operation is similar to a whiteboard with (digital) sticky notes.

What may be a pragmatic solution for individual workshops at team or department level can, however, become a problem from the company's overall perspective: If Journey Mapping is only used partially or temporarily, it often leads to isolated solutions, as each department only visualizes a few relevant customer journeys. The result are one-off journey projects that focus on the respective departmental goals, but not on a holistic and continuously updated view of the customer experience across the entire lifecycle.

Since there are usually numerous journeys with dependencies, alternative paths, and persona variants, simple visualization tools quickly reach their limits. Once a certain number of journeys have been realized, it becomes difficult to maintain an overview due to the wide variety of mapping styles used by external agencies or consultants. But Journey Maps need to be up to date for adding value. The reason is quite simple: Over time the data on satisfaction at the touchpoints and even the user behavior change. This requires a nomenclature and a system that makes every update traceable and that can link permanent data streams to Journey Maps. What then becomes necessary is a true Journey Management System.

> Since there are usually numerous journeys with dependencies, alternative paths and persona variants, simple visualization tools quickly reach their limits

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8 What does a Journey Management System offer?

What distinguishes a Journey Management System from a simple Journey Mapping Tool? The main difference is that a management software can not only visualize two-dimensional Journey Maps, but also aggregate and prepare CX data at maps, touchpoints, or moments that matter, and distribute them to stakeholders as actionable insights.

All elements of a customer journey are then not only visualized on a whiteboard as a poster, similar to a customer Journey Map. However, these tools allow a much more extensive versioning, view variants, dashboards and reports since corresponding database dimensions are available for all logical Journey Mapping dimensions or the much more extensive Journey Management.

These dimensions are e.g.:

- Touchpoint inventory / communication channels

- Time dimension and taxonomy

- Persons involved / target groups (persona, stakeholders, etc.)

- Scenarios (usage contexts, experiences, target / actual scenarios)

- Actionable insights / actions (pain points, opportunities, tasks)

- Prioritization (e.g. difficulty impact matrix)

- Responsibilities / rights & roles

- Data sources / target systems / interfaces

- Measurement and scoring (interaction metrics, perception metrics, result metrics)

- Views and reports

- Control / process integration

A dynamic Journey Map from a Journey Management System helps to identify how customers experience their journey in reality and what their requirements and wishes are at touchpoints. These insights can then be distributed in real time to colleagues in the departments as pain points, suggestions for improvement, etc., so that process optimizations can be initiated in a timely manner.

Journey Management Software is nowadays usually provided as software-as-a-service ("SaaS"), but has to meet higher requirements in terms of data security, compliance and information security management than a simple SaaS whiteboarding tool. This is particularly relevant if the software needs to be integrated with the company's requirements and demand management process systems.
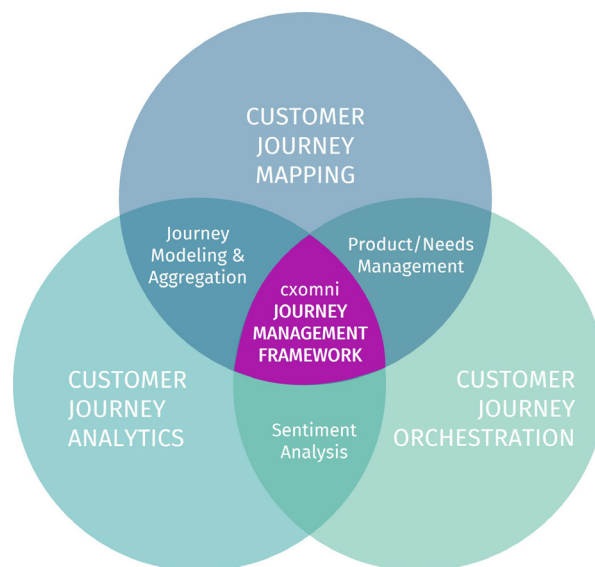
Figure: The application areas of the holistic cxomni Journey Management Framework

Holistic Journey Management software therefore ideally combines these three application areas:

- Customer Journey Mapping

- Customer Journey Analytics

- Customer Journey Orchestration

Customer Journey Mapping visualizes the customer's experience collaboratively across all touchpoints and connects journeys with feedback and measurement data. This makes it easier to compare the emotional expectations and experiences of customers across the entire lifecycle, document them in the context of the journey, and thus often fully understand them from an external perspective for the first time ever.

Different **views** allow to vary the level of detail of a Journey Map depending on the target group: from the high altitude for management to the deep dive in the context of the user experience (UX) of micro journeys. In this way, each stakeholder receives only the information that is relevant to them, and yet the same journey structure can be referenced step by step within the organization, thus establishing or supporting a holistic journey culture.

Customer Journey Analytics allows to analyze the actual journeys based on customer data. Because Journey Management tools aggregate data via APIs from various sources such as Voice of Customer, Web Analytics, or CRM and assign it to the corresponding touchpoints, moments that matter, or sub journeys. Especially by combining feedback data with

transactional data, the context and relevance of optimization potentials become apparent. Typical examples are the analysis of the most important customer priorities, the identification of upselling potentials or the reduction of churn rates at critical touchpoints – in other words, use cases that not only improve CX, but also pay off in terms of the monetary success of the company.

Combining feedback data with transactional data reveals the context and relevance of optimization potentials

To ensure that touchpoint improvements can be implemented promptly, the insights from Journey Mapping and Journey Analytics must be **distributed to the frontline departments** or touchpoint managers. The orchestration engine of a Journey Management Software automatically distributes insights to the responsible stakeholders in Marketing, Sales or Product Development. In this way, they receive in real time recommendations for action in the context of the customer journey, which they can prioritize and implement directly. This workflow guarantees that, for example, pain points from the customer's point of view do not disappear in lists or project documents and can be solved immediately.

9 How to implement a Journey Management System

When implementing a Journey Management System, companies should first create a responsible entity, a kind of central Journey Management team which can then properly structure and coordinate the software set-up.

In the initial phase, many companies seek support from external consultants. In our experience, this helps especially for the development and implementation of a cross-departmental UX/CX framework since a great deal of preliminary work has usually already been done that can be transferred to a Journey Management System. These expert teams can then moderate between frontline departments and stakeholders and provide support in standardizing the various taxonomies and terminologies and with aligning processes. This is important so that the Journey Management Framework is recognized as a universally applicable standard for subsequent Journey Management. To ensure that all responsibilities and process flows can be seamlessly transferred into implementation, we recommend **creating a company-specific playbook** in which all standards are documented as binding for all project participants.

> External consultants can help standardize different taxonomies and terminologies and align processes

As soon as the software goes live, we recommend setting up a Journey Repository – as a kind of counterpart to the Process Catalog – in which all of the organization's journeys are compiled. Only if the journeys of all departments are included, a holistic view of the customer experience is possible. In addition, this repository also works as a central database in which journeys are maintained and kept up to date, e.g., through the continuous incorporation of changes.

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Once all journeys have been recorded, the next step is to identify and integrate data streams. A data discovery workshop with all departments involved is a good way to do this. In this workshop, all those responsible can work out together which data sources are already available and at which touchpoints or moments that matter data measurement makes sense. The Journey Map serves as a conceptual approach that connects the measurement points with each other in the context of customer expectations and customer experiences. This is an important prerequisite before all touchpoints or moments defined as measurement points can be linked in the software to the appropriate data sources, such as real-time feedback (VoC), user research, or web analytics. As soon as the first data streams are available and the actual values are clear, you can define target values for measuring CX performance.
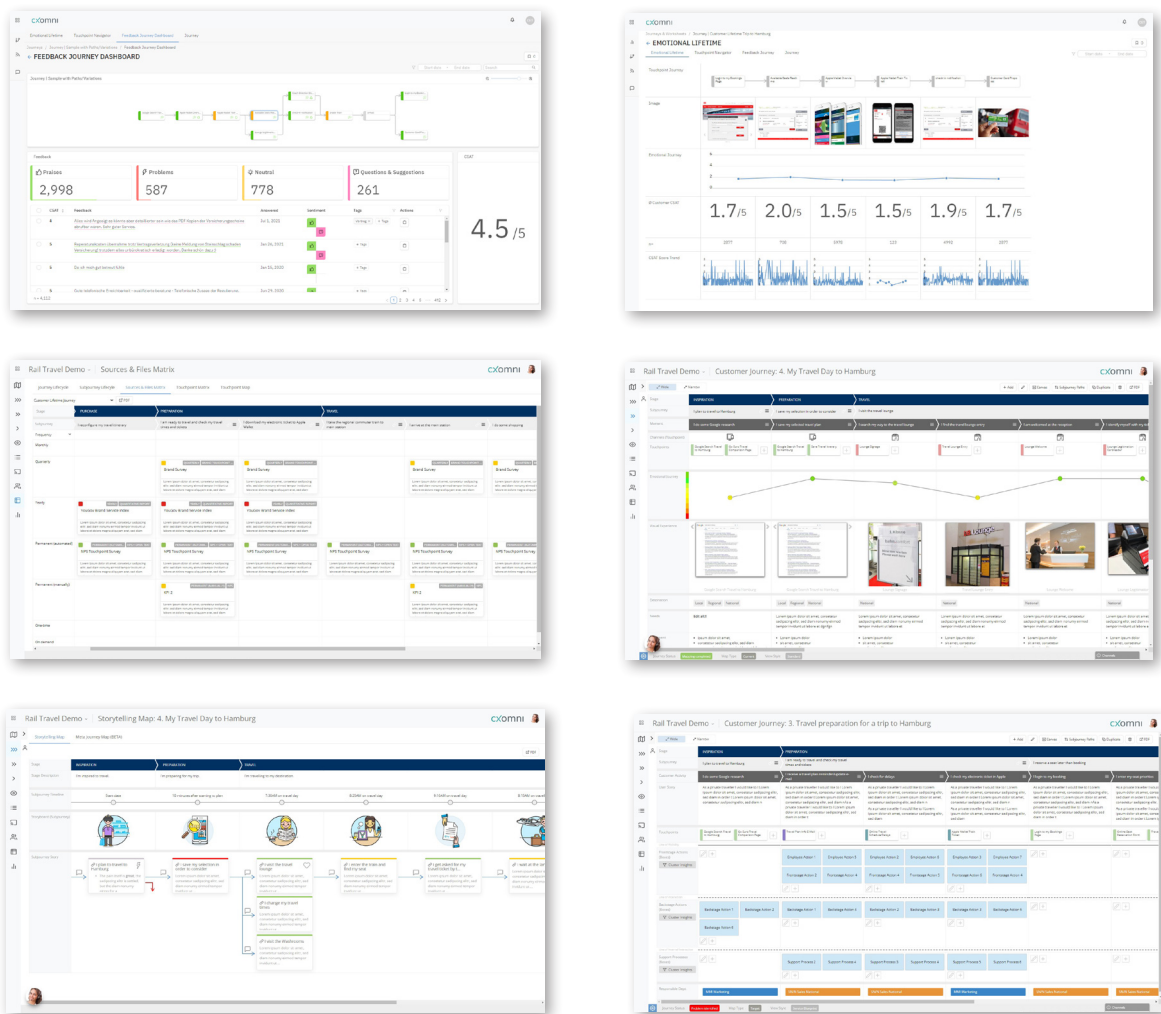
Figure: Database-based CXM systems such as cxomni provide relevant views for all stakeholders

10 Template / checklist for your own Journey Framework

From many holistic Customer Journey Framework projects that we have implemented together with our customers and leading management consultancies based on our cxomni Journey Management Framework, we have compiled the most important dimensions for you here, which you should consider and standardize as part of the project planning. Usually, these dimensions are included in your company specific CX/UX or journey playbook. The – at least partial – consolidation of all dimensions that already exist in the company is valuable preparatory work and serves as the basis for customizing your individual Journey Toolbox in cxomni.

Dimension	Description / Question	Examples / Topics
Scope / Objective	Before you start planning a customer journey, you need to be clear about the goal behind. This can be large or small, depending on your needs. What results do you want to achieve? Assess whether your need can be solved with a customer journey. What resources do you have?	▪ What are your business objectives? ▪ What is your expected impact? ▪ What will you do with the result? ▪ Added value? ▪ Internal pitch for CX vision
Framework / toolbox / playbook	Central definition of an enterprise-wide taxonomy and terminology of the journey framework. Only a holistic Journey Framework creates a "common language" to overcome silo boundaries..	▪ Glossary ▪ Company-specific Journey Framework Playbook ▪ Self-learning nuggets
Journey catalog	Build a binding catalog of all existing journeys and subjourneys.	▪ Counterpart to the process catalog ▪ Journey inventory / journey repository. ▪ Touchpoint catalog / touchpoint inventory

Template / checklist 2/6

Dimension	Description / Question	Examples / Topics
Prioritization of journeys / subjourneys	The complexity of journeys makes it difficult for CX Managers to decide which improvements to focus on first. But focus is essential to ensure that effort is properly invested, so prioritization is essential.	Journey criteria: ■ How often is the sub journey experienced? ■ How important is the sub journey for customers? ■ Balance of pain points / gain points within the sub journey? ■ Impact of process chenages on the sub journey? Impact criteria: ■ Impact on the customer? ■ Impact on the business? ■ How easy is it to change the sub journey? ■ Risk of changing a journey step? ■ ROI of changing a journey step?
Time dimension and taxonomy	Definition of abstraction levels. Not all abstraction levels address the same recipients or need to be used in a presentation. Different presentation depending on the stakeholder.	■ Lifecycle phase / phase / (meta-)journey / sub journey / moment / micro moment ■ Customer lifetime journey ■ How many levels? ■ User Journey / user story ■ Timeline (e.g. "A day in the life…") ■ Alternative paths
Participants / target groups	Who do we want to evaluate for or trigger content to?	■ Persona ■ Customer groups ■ Segmentation / targeting ■ Campaign versioning ■ Stakeholders ■ Key stakeholders ■ Information recipients ■ Mapping teams
Persona	Profiles with the essential characteristics of the target group.	■ Picture / name ■ Quote ■ Moodboard ■ Characteristics ■ Sociodemographic characteristics ■ Media behavior ■ Admired brands

Template / checklist 3/6

Dimension	Description / Question	Examples / Topics
Scenarios / emotional context	Analysis, display and filtering of alternative experience scenarios (experiences). Alternative scenarios are displayed on the basis of the general journey.	- Experiences - Context of use - Future state journey / current journey / scenario journey - Assemblies / series / contract types. - Persona
Context / journey connection	Integration of all journeys into the overall journey repository and combination of different journeys.	- Upstream journey (process) - Downstream journey (process) - Referencing - Alternative paths
Actionable Insights / actions	Information flow concept: How should actionable insights be structured? How and to whom are they forwarded? From which sources do actionable insights emerge? Continuous journey management process?	- Needs / connection to Needs Management - Pain points / opportunities - Requirements Management - Product Management backlog - Research questions
Task Management	Mapping of the continuous journey management process (e.g. regular tasks and reminders guarantee the continuous updating of journey maps).	- Responsibilities - Transfer to task management systems - Implementation workflow - Tracking of tickets / statuses
Prioritization of moments and actionable insights	Identification of moments-that-matter and scoring of actionable insights (pains, needs, requirements) as well as their prioritization (e.g., through a Difficulty-Impact-Matrix). What are the critical experience points from the customer's perspective? Which actionable insights should be prioritized?	- Scoring model - Difficulty-Impact-Matrix 1/2/3 prioritization matrix - User impact vs. business impact - Future needs check - Top 10 pain points / needs / opportunities

Template / checklist 4/6

Dimension	Description / Question	Examples / Topics
Responsibilities / rights and roles	Who is responsible for which sub-process? Who updates journey maps? Who is responsible for optimizations?	▪ Touchpoint owner ▪ Journey owner ▪ Process owner ▪ Needs owner ▪ CX ambassador / CX manager ▪ CX/UX circle ▪ Community of journey managers
Data sources / interfaces (aggregation / listening)	Integration of all sources with relevant feedback and transaction data. Which sources contain insights? In which target systems should actions be triggered?	▪ Social web ▪ Survey tools ▪ CRM / ERP ▪ User research ▪ Service center
Target systems / interfaces (orchestration / workflow)	Continuous distribution of Actionable Insights to responsible stakeholders (e.g. needs to a central demand management via API).	▪ Requirements management ▪ Task management ▪ Product backlog ▪ Marketing automation engine
Measurement and scoring	Normalization of data to a common standard: How do we "normalize" or standardize CX measurement? Which scores should be relevant for target agreements?	Scores: ▪ CX score ▪ NPS / CSAT / CES ▪ Normalized company score Journey metrics: ▪ Interaction metrics ▪ Perception metrics ▪ Results metrics
Journey Analysis / Journey Analytics (sentiment and topic clusters)	Ability to analyze data at meaningful touchpoints and structure open text feedback by topic and sentiment using AI-based analysis. Analysis and structuring of all sources of open text data.	▪ Sentiment analysis ▪ Topic cluster analysis ▪ Integration of all sources with open texts (social web, surveys, complaint correspondences, service centers)

Template / checklist 5/6

Dimension	Description / Question	Examples / Topics
Views and reports	Evaluation and permanent reporting (e.g., with the help of journey dashboards): How do we report as uniformly as possible? Which stakeholders need which relevant information?	▪ Journey map view styles ▪ Journey dashboards ▪ Executive views ▪ Service blueprint ▪ Top 3 moments-that-matter ▪ Actionable insights by country ▪ Top 10 pain points by Customer Journeys. ▪ Customer journeys not updated in the last 6 months
Journey Map / Swimlanes	Defining the most important documentation categories on the y-axis of journey maps.	Selected examples: ▪ Lifecycle phase ▪ Phase ▪ Journey ▪ Sub journey ▪ Moment ▪ Moments-that-matter ▪ Customer expectations ▪ Emotions ▪ Emotion curve ▪ Touchpoints / channels ▪ Data (e.g. NPS, CSAT) ▪ Pain points ▪ Opportunities ▪ Responsible department ▪ System / process
Templates	Which templates should be available for new teams (e.g. international teams) in the system?	▪ Journey templates ▪ Persona templates ▪ Journey Management process templates ▪ Language versions
Executive Story / Storytelling	Stories evoke emotions to influence decisions. Therefore, storytelling can be used as a tool for a business case.	▪ Executive views ▪ Prioritization results ▪ Customer quotes ▪ Customer stories

Template / checklist 6/6

Dimension	Description / Question	Examples / Topics
Control / process integration	Organization and process management: At what point in the processes does the external view of the customer journey come into play? Which system links to the journey make sense?	▪ Approval processes ▪ Decision-making processes for new projects ▪ Requirements and demand management ▪ Planning processes ▪ Governance for journeys ▪ Cross-linking ▪ System APIs
Sources and files	Referencing or incorporating all relevant sources (e.g., studies, research, workshop results) at touchpoints and moments along the journey.	▪ Knowledge base or interface to insights database. ▪ Keywording ▪ Key facts ▪ Relevance
Updates	Document, analyze, and understand CX data in the context of journey maps. For this purpose, the journey map should generate "daily fresh insights" through data integration.	▪ Prioritizations (e.g., moments-that-matter) result from the context of the journey. ▪ All customer insights are brought into the context of the journey
Training and onboarding	Customer Journey Management is a continuous change process. It therefore requires a training and onboarding concept adapted to the Journey Management Framework.	▪ CX consultations ▪ Guided tours in the system ▪ Self-learning nuggets ▪ How-to vidoes ▪ User trainings ▪ Best-practice communities
Data security and compliance	Rights and roles as well as anonymization or neutralization of personal data.	▪ Need-to-know principle ▪ GDPR compliance ▪ Consent workers council

11 How data enriches Journey Management

Strictly speaking, mapping existing journeys only makes sense if they have to be evaluated and analyzed. And this is where data and measurement points come into play. One exception is Design Thinking: In the case of newly designed journeys – e.g., for a future service offering – there is of course no data that can be measured. But for all other use cases, data is essential because it makes Journey Maps a sustainable management tool.

Important data sources for holistic Journey Management include web analytics, community surveys, user research, open text sources, the CRM, or service center systems. In other words, sources that capture the **behavior** of the target group **along their journey** or that reflect their **feedback on a specific touchpoint experience**.

> Data sources for holistic Journey Management include web analytics, community surveys, user research, open text sources, CRM, or service center systems

In principle, data is often already available within the organization, but is usually collected and managed in a distributed manner - depending on which specialist department is responsible. And don't worry: the sovereignty over the measurement and analysis in detail should remain with the respective teams and corresponding third-party systems. To build a Journey Management System, it is sufficient to display this valuable data in the context of the journey so that CX teams can continuously validate the assumptions of all Journey Mapping initiatives.

By connecting data from customer feedback or survey results with Journey Maps companies understand how users experience and feel about their journey. Optionally, this data can be refined for further relevant insights into customer behavior and intentions with a **sentiment or topic cluster analysis**. In this way, existing journeys can be aligned with target audience expectations to identify relevant moments that matter that may be impacting CX or to identify new and relevamt topics that engage and interest customers.

Data therefore continuously brings "fresh" insights to the Journey Maps, from which stakeholders and management benefit, because the visualization of customer data through a Journey Map makes the topic tangible and understandable even for non-analysts. And the consistent sharing of insights ensures a better journey understanding, which actively promotes the development of a journey culture and the establishment of a journey mindset within the company.

Data continuously brings "fresh" insights to Journey Maps

Data is aggregated and managed in Journey Dashboards. The filtering options should correspond to the logic of the respective customer journeys and their moments that matter. This makes it easier to switch between data insights, Journey Maps and detailed touchpoint information. Journey Dashboards also define which KPI's should trigger which actions at a touchpoint. For example, at what CSAT value is customer satisfaction at such a high risk that urgent action is required?

But always remember: Less is more. In the beginning, focus on selected, meaningful metrics and their successful optimization. In this way, you can quickly present lighthouse projects that lead to a better experience on the customer side and convince other stakeholders of the benefits of a holistic Journey Management.

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12 The Journey Manager's role and responsibility

Journeys build bridges between departments and organizational units. However, they do not do this on their own. Teams need to have the skills to create, maintain, and use journeys. In addition, there must be colleagues who actively take on the task of collaborating and actively learning from journey insights. This is where the Journey Manager comes into play.

People in this position are responsible for the implementation of success-promoting experiences. Their task is to create transparency in the company about all journeys and experiences that customers or users have. This way they enable (development) teams to act on their own responsibility by using methods such as Journey Mapping or Journey Metrics. Journey Managers also ensure a consistent methodical approach in the teams involved and a consistent measurement and visualization of touchpoint experiences. They bring together colleagues from different departments and ensure that all stakeholders can work collaboratively on pain points and gains in different customer journeys.

People who want to fulfill this role successfully, need the following skills:

- Communication and moderation,

- knowledge of subject domain, target group, and usage processes,

- knowledge of methods: Journey Mapping, Human Experience Measurement, recognizing gains & losses,

- basic understanding of human needs and expectations,

- ability to interpret qualitative and quantitative data,

- overarching understanding of business contexts and processes in the company.

If possible, Journey Managers should be anchored in the process organization which they have to improve so that they can acquire and maintain the necessary knowledge of subject, target group, and usage processes and get to know the colleagues they need to eliminate pain points and process gains with. This will help them to develop an appropriate level of acceptance and overcome the expected obstacles.

If Journey Managers have the task to increase the maturity of teams with regard to working with journeys and/or motivating them to expand pain points, it can be helpful for them to be anchored in a central position, e.g., in a staff unit for CX, rather than in the teams in which they work. This way they don't have to decide between their own personal development and increasing the maturity level or expanding a pain point in the event of a conflict.

Figure: Workshops ensure sustainable implementation of the journey culture in the organization

To ensure that Journey Managers can concentrate on their work, they should be backed up by a journey operations team or individual journey operations experts. This ensures that Journey Managers can work effectively and efficiently. They can define the information architecture standards for journeys and take care that the Journey Management System is configured and operated appropriately. Or they can provide journey templates, conduct workshops and guarantee that there is an appropriate coverage of customer and user journeys within the company. This way, they make the experiences in journeys visible across the board and for the company's management team

The personal development and exchange of experience between Journey Managers can be realized by a Community of Practice (CoP). The CoP uses a variety of formats to ensure that

- all Journey Managers are in-sync,

- experience is shared between Journey Managers and that all peers can learn from each other,

- a sense of cohesion is created within the CoP,

- Journey Managers have an overview of all company journeys,

- external inspirations for Journey Management are brought into the company.

13 Ensuring sustainable Journey Management

In theory or with an ideal organizational model, it is sufficient to establish transparency about customer experiences for making an impact. In practice, however, it is not enough to visualize journeys, present them in overviews, and ensure transparency with dashboards. So many different requirements come together that a **constant task prioritization is a necessity**. Unfortunately, this often leads to journey insights losing relevance and being pushed into the background.

A sustainable impact of Journey Management does not result from one of the individual elements described above. It comes from the interaction of journeys, journey overview, touchpoint inventory, journey metrics, journey dashboards, Journey Manager community, governance and technical infrastructure.

- Journeys, journey overview, and touchpoint inventory ensure that teams or departments know the journeys and touchpoints they are working on and can assess their importance.

- Journey metrics and dashboards bring your Journey Maps to life. They show what customers experience (interaction metrics), how they experience it (perception metrics), and what this means for your business (outcome metrics). As a result, teams or departments are able to identify where customer experiences are good or where there is room for improvement.

- By implementing a sustainable journey governance and the right technical infrastructure, you create the conditions for a Journey Management that provides a holistic view of the company and enables the appropriate management of customer experiences.

This essentially lays the groundwork. Experience has shown that the impact of these elements is so decisive that a small part of the company voluntarily aligns itself with them. For a higher impact, it is necessary that teams or departments orient themselves to the journey insights and actively work on eliminating pain points or exploiting opportunities.

This happens when, on the one hand, they have the competencies to do so and, on the other hand, when there are people in the specialist departments whose job it is to take care of improving customer experience. That's why the journey manager community is an important building block, but which can only work if the right conditions are in place.

14 Use Cases for a holistic Journey Management

Finally, we want to list a few typical use cases that occur in this or similar ways in most companies. They are intended to show how Journey Management can be designed in detail and demonstrate the additional business impact.

All use cases are based on a company specific standardized UX/CX framework. And they are united by the fact that they use the customer journey as an ordering dimension for the touchpoints so that all data is aggregated according to the journey logic.
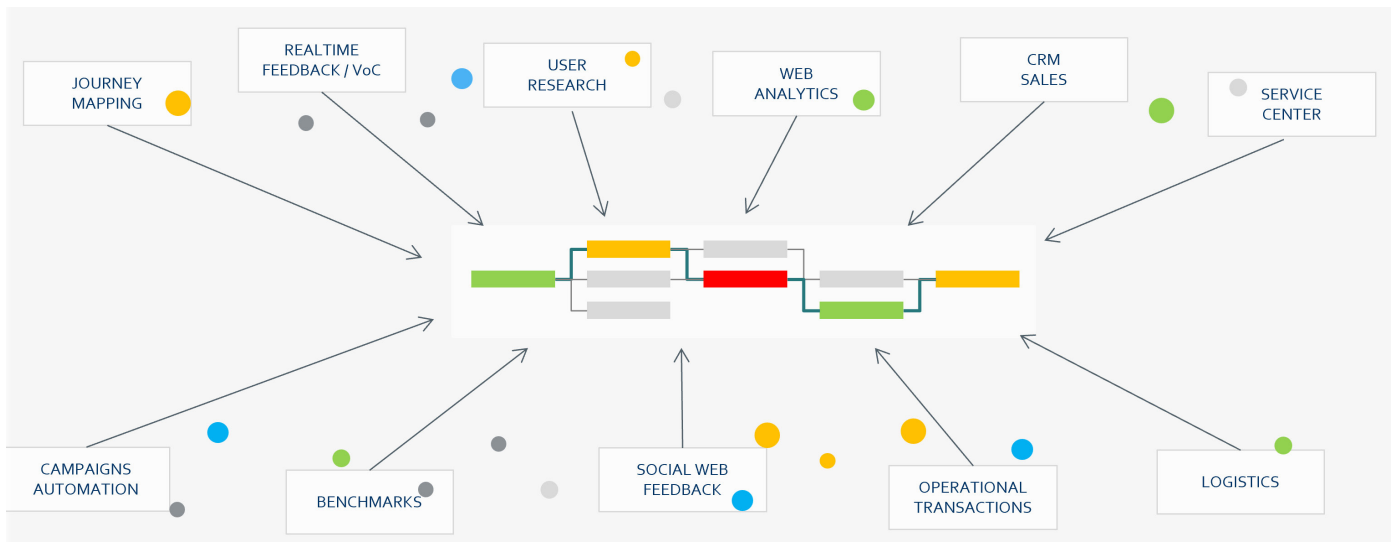
Figure: The journey as a model for aggregating a wide variety of insights in the context of the experience

With these use cases, the entire process of holistic Journey Management can be implemented and initial successes quickly achieved: from **journey visualization** and **data aggregation** to the **orchestration of insights:**.

Use Case	Measures & Implementation	Benefit
Use Case 1: Reference system (central toolbox) for CX standards, CX processes and visualization of the customer ecosystem and customer journeys	▪ Derivation of topic areas (experiences / scenarios / worlds of life) and bidirectional linking to touchpoints & journeys ▪ Unified, framework-based journey mapping tool	▪ Central database (catalog) of all CX standards on customer transactions / customer journeys, use cases, personas, touchpoints / touchpoint groups ▪ Management of all transformation drivers to the customer-centric brande ▪ Establishment of a journey culture (outside-in, instead of inside-out perspective) ▪ Central reference of all external and internal studies that pay attention to CX and UX
Use Case 2: Aggregation of customer insights from various sources at journeys and touchpoints	▪ Integration and analysis of customer feedback from voice-of-customer systems, service center systems, social web and complaint correspondences	▪ Visualization of insights in the context of customer journeys, personas and touchpoints ▪ AI-based categorization of open feedback by topic for CJ Managers ▪ Establishment of a measurement system with target / actual comparisons and target values
Use Case 3: End-to-end integration with the needs / requirements management process (Needs Management).	▪ Referencing user stories and derived needs to customer journeys ▪ Incorporating insights from CX owners and journey managers into the needs / requirements process ▪ Integration into testing strategy (user testing)	▪ End-to-end integration between CX/UX (research, customer feedback) and the company-specific requirements process (needs management, product management, product backlog)

15 | # Summary

An active Journey Management builds bridges between organizational units and brings the insights from journeys into use. In this way, a Journey Management Framework promotes customer-oriented collaboration within a company by linking the individual departments and their initiatives.

In addition, Journey Management ensures a uniform standard throughout the company and guarantees that all those involved in Journey Mapping speak the same language – both technically and organizationally. This helps to **standardize the complexity of customer processes** and transactions that are located at different points in the company. Taxonomies and terminologies are not only needed by Design and CX teams. Those responsible in other areas are also increasingly recognizing the importance of the **outside-in perspective** by working with a Journey Management Framework.

Overall, Journey Management aims to manage the experiences of customers and users in each journey phase or at the customer touchpoints in such a way that an attractive experience is created. In doing so, Journey Management relies on the following elements:
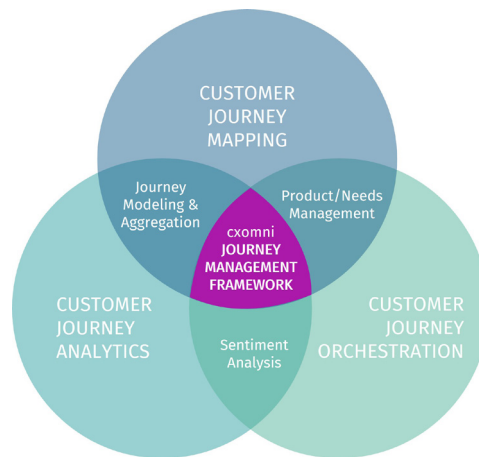
- Journeys

- Journey overview

- Touchpoint inventory

- Technical infrastructure

- Journey metrics

- Journey governance

- Journey dashboards

- Community of journey managers

Drivers are ideally CX or UX teams in conjunction with a community of Journey Managers that provide standardized visualization and measurement technology in addition to a uniform taxonomy and terminology. CX scores such as NPS, CSAT, or star rankings in the app store can then also be combined into a holistic customer and user experience metric as part of this process, which can then serve as a KPI for management.

With this Journey Management Framework, companies can lay the foundations, implement control principles, and thus enforce the effective use of insights from individual journeys.

About cxomni

cxomni is the leading Customer Journey Management Framework for aggregating and normalizing all CX data along the customer journey. Customer-centric companies can identify relevant customer insights faster, visualize them in the context of the journey, and orchestrate needs and requirements to stakeholders.

Do you have any questions about setting up a holistic Customer Journey Management or are interested in a software demo?

Feel free to contact us.