cxomni

Unite

# How to Manage Complex Customer Journeys

The Journey Management Framework of The E-Procurement Platform Unite

Success Story

Unite is offering sustainable business solutions. The German E-Procurement platform provides an integrated marketplace called Mercateo and a procurement portal which supports companies and public sector organizations in their buying processes.

The success proves the company is hitting a sweet spot: In 2022, Unite was the first platform company to be recognized by the Fair Tax Foundation for responsible tax behavior. Unite is headquartered in Leipzig, Germany, and employs nearly 800 people across its European offices.
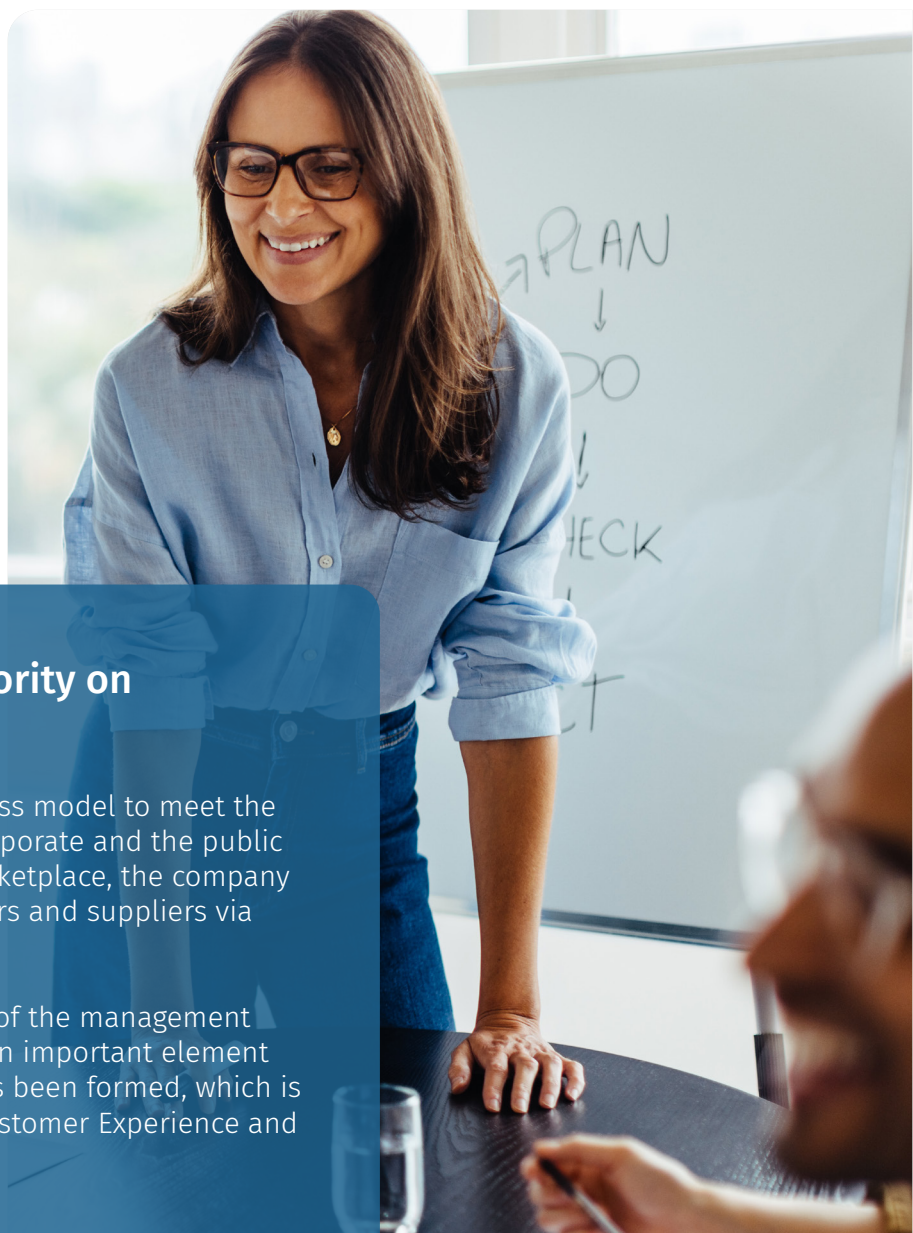
Customer Centricity Is A Top Priority on The Corporate Agenda

In recent years, Unite has evolved its business model to meet the dynamic procurement needs of both the corporate and the public sector. Besides the successful Mercateo marketplace, the company focuses more and more on connecting buyers and suppliers via the platform.

As part of it's rebranding and an expansion of the management board in 2022, customer centricity became an important element of Unite's strategy. As a result, a CX team has been formed, which is led by Saskia Kraft. She is Global Head of Customer Experience and has been with Unite since 2019.

Challenges

01 Complex updating of customer journeys and CX data with significant manual effort.

02 Many different journey variants depending on use case.

03 Realization of central repository for journeys, sub-journeys, touchpoints, and associated actionable insights (pain points, opportunities, etc.).

Starting to Work with Customer Journeys and Personas

Unite has successfully completed the first customer journey projects with support of an external consultancy. They introduced the concept of Customer Journey Mapping and supported the company with workshops to identify relvant personas. At that time, Kraft and her team were working with white boarding tools. "They gave us a good start," says Kraft. "But we realized that these tools have limitations." For example, editing customer journeys was complex and required a lot of manual effort.

Moreover, touchpoint information referring to multiple customer journeys could not be updated automatically, so each journey had to be revised individually. Especially the integration of Unite's European subsidiaries with their market-specific differences increased the number of varying customer journeys. Depending on the use case, this complexity of different journey types was hard to manage.

With a whiteboarding tool, each specialist department also had to work in separate files, so customer journeys were evaluated at the department level, but not across the organization. And additionally, the feature to integrate CX data was missing. All in all, the entire software set-up hindered transparency and did not allow for a holistic approach.

Finally, Kraft and her team realized that they needed a Journey Management platform for addressing these challenges. The desired software should be able to set up a central repository for all journeys, sub-journeys, and touchpoints with associated actionable insights (pain points, opportunities, etc.) and simplify working with customer journeys.

> **After summarizing our requirements, it was clear: We needed a holistic standard framework and a database-based system approach for addressing these challenges.**
>
> **Saskia Kraft**
> Head of Global Customer Experience at Unite

cxomni Is The Perfect Fit For Unite's Journey Management Approach

But selecting the right software was not only about Journey Management requirements. The acceptance of all employees was also a top priority. "We wanted a solution that people would enjoy working with. We have therefore focused on easy usability and features that help to quickly uncover insights and identify improvements. Furthermore, we wanted to keep on working with the customer journeys we had already created," says Kraft.

Regarding insights, API integration was an important requirement. Kraft and her team wanted to integrate the platform with Unite's software stack (e.g. the BSI CRM) so that customer journeys could be enriched with relevant data.

With cxomni, Unite opted for a software that supports the implementation of a Journey Management Framework and also organizes all journeys, sub-journeys as well as the orchestration of insights. Because cxomni generates and distributes ("orchestrates") actionable insights constantly to relevant stakeholders in the company. With the tagging function, CX teams can sort, filter and process all customer journeys by different categories such as product segments. And the integrated Insights Manager allows filtering and retrieving of priorities, status and responsibilities at any time. Saskia Kraft and her team are convinced:

> **With cxomni, we now have a workflow with which we can not only capture journey insights, but also implement and track them directly.**
>
> **Saskia Kraft**
> Head of Global Customer Experience at Unite

Implementing A Journey Management Framework And A Smooth Onboarding

Implementing the software was closely linked to the development of the Journey Management framework. It was a big advantage that most team members at Unite were already familiar with the topic due to the "journey culture" which had been established a few years ago.

"The great thing was that we didn't develop the framework first and then chose the software. Instead, we implemented both together with cxomni", adds Kraft.

The taxonomies and terminologies for touchpoints and journey phases as well as the information flow concept of the later Journey Management framework were developed with core users and stakeholders from each specialist department.

Further onboarding activities were realized together with cxomni's customer success team. They showed Unite's super admins how to set up the software and explained in basic training sessions the application and most relevant features.

All existing journey maps were migrated so that the team could continue to work with them. Each map was individually evaluated and, if necessary, updated prior to transfer in cxomni. This ensured a high quality and relevance of the migrated journeys into the tool repository.

The First Results Proof the Approach

The most relevant journeys, sub-journeys, and touchpoints are now captured in cxomni. And first journey insights have already caused some "wow" moments. It is important to keep in mind: What may seem insignificant can have a big impact like e.g. a registration button that is difficult to access, or wording that stops customers to take the next step during a certain process.

But ad hoc research and in-depth analysis of customer behavior in the context of the journey help Kraft's team to understand the root causes of these situations. Therefore, it is important that insights are linked to accountability and that a prioritization and scoring system provides transparency.
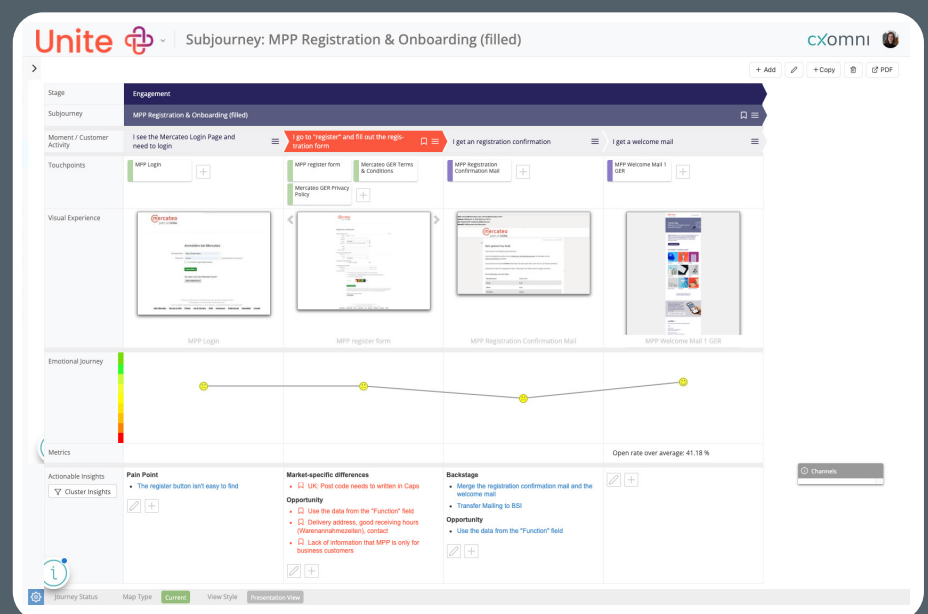
Visualization of Unite's journeys and sub-journeys in cxomni

The global CX management of Unite acts as a catalyst: Employees in different departments create customer journeys based on the uniformly defined taxonomy and terminology, and multipliers in e.g. marketing, product management, UX, or quality management bring ideas for improvement into the organization and monitor the implementation. Customer Journey Management has contributed to a "common language" for all company divisions, which strengthens cross-departmental collaboration and communication.

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"Teams and product managers say that using cxomni has made it easier and more transparent to understand customer journeys and sub-journeys."

Saskia Kraft
Head of Global Customer Experience bei Unite

Difficulty Impact Matrix and scoring system for the priorization of actionable insights
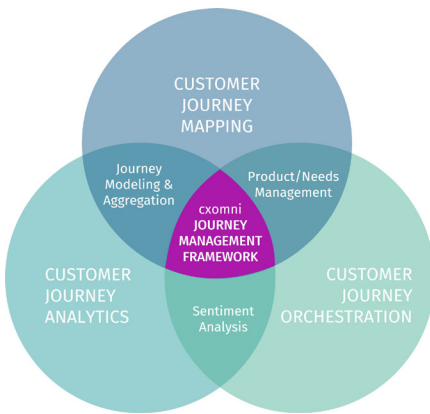
Expanding Customer Journey Management:
What Is Next?

Unite is currently planning to extend the Journey Management framework to other areas, such as operations, so that it becomes a company-wide standard. And the team is thinking about integrating real-time KPIs in order to combine a design-driven approach with a data-driven approach. By that metrics from the BSI CRM or feedback management systems will be integrated into cxomni so that more CX data can be analyzed in the journey context. Another step is the integration of BI and analysis data from Tableau Software.

Unite will also implement a measurement system that delivers results in real time. All findings for optimization resulting from the work with customer journeys and insights will then be discussed in the company-wide Journey Management Jour Fixe.

"We are convinced of the quick success of our Customer Journey Management," says Kraft. "It is now our strategic goal to align the organization more closely with customer journeys so that we can make journey-based decisions for further optimizing our customer experiences."

About cxomni

cxomni is the leading Customer Journey Management platform for aggregating and normalizing all CX data along the customer journey. The software enables customer-centric organizations to identify relevant customer insights, visualize them in the context of the journey, and orchestrate needs and requirements to stakeholders.

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

Contact us now
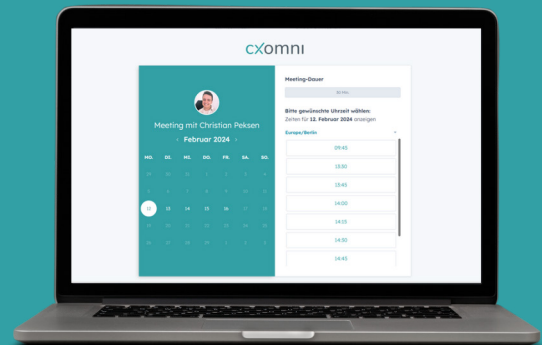
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