FIVE STEPS TO MANAGE THE CUSTOMER JOURNEY FOR B2B SUCCESS

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Executive Summary

Today's customer is more educated and connected than ever before. With seemingly endless choices, and unfettered access to information from peers and other sources – standing out in the market is harder than ever. And lowering prices is not always a winning strategy. So, how can you attract and retain more customers in this new world of business? By focusing on creating extraordinary customer experiences.

Studies show that customers who experience consistently positive interactions with a company are likely to buy from that company again, and again. For example, a recent McKinsey report states that 70% of buying experiences are based on how the customer feels they are being treated. And, 55% of customers would pay extra to companies to guarantee better service, according to Defaqto Research. Conversely, a customer is 4 times more likely to defect to a competitor if the problem is service-related than it is price or product-related(1).

So, how can you get started building a customer-centric organization that consistently creates extraordinary customer relationships? While this is no simple task, the following are five solid steps any organization can take towards aligning their internal operations with the true customer lifecycle. They are:

- Mapping the Customer Journey
- Identifying and Addressing Gaps in the Customer Journey
- Creating a Total Customer View
- Automating Processes to Better Align with the Customer
- Creating a Cycle of Analysis and Adjustment

These five steps can serve as the building blocks of any customer focused business transformation. In the following pages, we will address each step in more detail.

While customer journey mapping sessions do not actively include customers, it is important to properly staff from an internal perspective. All too often, mapping sessions can be "over staffed" by executives: those with the most distance between their daily activities and the customer experience. While it is important to have both executive input and sponsorship – making sure employees with a more daily grasp on customer interactions are involved. In short, it is important to make sure the attendees selected fully represent the voice of the customer.

Also, often only marketing and sales and customer support executives are involved in formulating the customer journey map. Instead, it is important to think more broadly. Are there individuals or departments involved in post-sales, non-support roles that touch the customer? These may include: product delivery, training, accounting/billing, and other operations.

So, if the mapping session involves more "hands on" employees that face the customer, and more departments than just marketing, sales and support, the likelihood of a more accurate customer journey map increases. And after all, the point of the exercise is getting closer to the customer to enhance every interaction they have with the organization.

Step 1: Map the Customer Journey

The concept of the "customer journey" as it pertains to creating exceptional customer experiences is nothing new. After all, how can we build a business without some understanding of the interaction between our products and services the customers who purchase them? However, until recently, many organizations have generated customer journey maps that are primarily "inward focused" – meaning, they were heavily skewed towards how the company perceives the customer journey.

Today, in a world where the customer is in far greater control of how and when they buy, we need to visualize journey maps that stem from the customers' perspectives. So, while we may have an "ideal" buying process from a company perspective – performing a customer-focused journey mapping exercise can help discover how customers truly go about the buying decision process.

When creating a customer journey map, it is important to consider not just how customers go through the process of purchasing and receiving goods – but rather starting the mapping well before that phase. Think about the awareness factor: how potential and existing customers find your products, and how they begin to align their needs with your offerings. Conversely, it is important to consider not only how customers purchase, but how they typically receive products and services – taking into consideration the level of product or contextual knowledge needed to be successful with the product or service. After all, the goal is to build life-long, profitable relationships that are mutually beneficial.

It may or may not be necessary to involve actual customers in these sessions. But, in order to get a truly inclusive and honest view of the customer journey – taking time and conducting surveys, holding customer interviews, and other activities to capture the voice of the customer can provide key insights in building a journey map.

Step 2: Find the Gaps, Please

Once you've created a customer journey map that stems from the customer perspective, now is the time to start aligning how the customer thinks, with how the organization is structured. While performing this alignment, certain "gaps" may be uncovered – areas where the customers' expectations differ from how the organization is built to serve that phase of the customer journey.

For example, in many business-to-business (B2B) scenarios, there can sometimes be a significant time gap between the completed purchase and the actual receipt of that product or service. This may happen because of poor post-sales communication with service delivery teams. Or, sales may close a deal, but not properly insure the customer has included the right stakeholders throughout the deal and contract process – thus leading to potential delays in the collection of revenues.

To illustrate, imagine one individual at a large legal firm changes the default courier service for transporting legal documents. If this is done without informing the right people: receptionists, other lawyers, the document archivists, notaries, etc. – they may simply not know to call or use this new service. And if the technology required to be successful is not installed – an electronic code reader for instance – the courier company may not even be able to commence business. Again, aligning along the customer journey means more than simply optimizing the sales process.

By first creating an "outside in" view from the customer's perspective, then aligning that with existing internal processes, it becomes easier to find these gaps. And, it can be easier to solve these problems once it is clear that any changes will have definitive effects on the customer experience.

Step 3: Create a Total Customer View

One of the obstacles to creating extraordinary customer relationships is the sheer inability for organizations to generate a single, unified customer view. And, this is a prevalent issue. Recent surveys have shown that three out of four companies lack a complete view of the customer across touch points.

The reason for this lack of unified customer view across the organization is not surprising. Typically, different departments utilize different software tools, data sources and repositories to manage their portion of the customer lifecycle. While these tools are critical – the result is that the data created and used in these systems simply stays in these systems. Other departments either never get access to this data, or get it in a format or at a time that does not help them when dealing directly with a customer.

For example, B2B sales teams typically receive leads from a marketing automation system. But often they may only receive the name, company and contact information of a lead – without a strong background of how that prospect passed through the "awareness" phase of their journey. This puts the sales rep at a disadvantage. Further along the journey, a customer support personnel or individuals providing training may not have access to the rich information gathered by the sales team – which could help streamline product delivery, training, etc.

In short, a complete and inclusive view of the customer – shared by every customer-facing employee – can provide critical insights along the entire customer journey. However, if the data generated in departmental systems simply stays in those systems – the value cannot be realized.

SIMPLIFYING COMPLEX WORKFLOWS

While automating multi-step, multi-channel processes can seem a daunting task, there are ways to alleviate some of the potential headaches. One way is to centralize the management of customer-facing processes inside the CRM system. This way, there is one core process flow. Many data sources may feed into this managed process, but creating, maintaining, and monitoring core processes becomes much easier when they are based out of a single core system.

So, when automating out of the CRM, make sure that the system can provide the following to make the task of multiple process automation even easier:

- Visual Process Designer: Building complex workflows is always easier when you have a visual tool that helps model and test process flows.

- Support for Multi-Step and Parallel Processes: Systems should be flexible enough to support multiple paths towards completing a phase in the customer journey.

- Mobile Support: In addition to pushing approval and other alerts to mobile devices, modern process automation tools must support a total mobile experience.

Step 4: Build Bridges with Automated Processes

While a centralized view of customer data goes a long way in helping create a business aligned with the customer journey, data is just one part of the solution. Access to the right data is critical, but just as important is creating well-defined frameworks for aiding customers along their journey. This means defining and deploying solid process automation for both customers and the internal employees who can help them along the journey.

It is important to understand that a customer process may span multiple touch points (such as mobile, web, email, etc.) and touch multiple internal systems (a billing system, e-commerce platform, an order management system, just to name a few). When modeling these processes, insure that the data and identity of the customer can be retained as they jump from touch point-to-touch point and from one stage in the journey to the next.

Again, the key is to think beyond the silos of departments and individual technology systems. Applying a wider perspective when mapping and automating the customer journey enables organizations to gather more information and insights, while also providing a more consistent and satisfying experience to customers each time they engage.
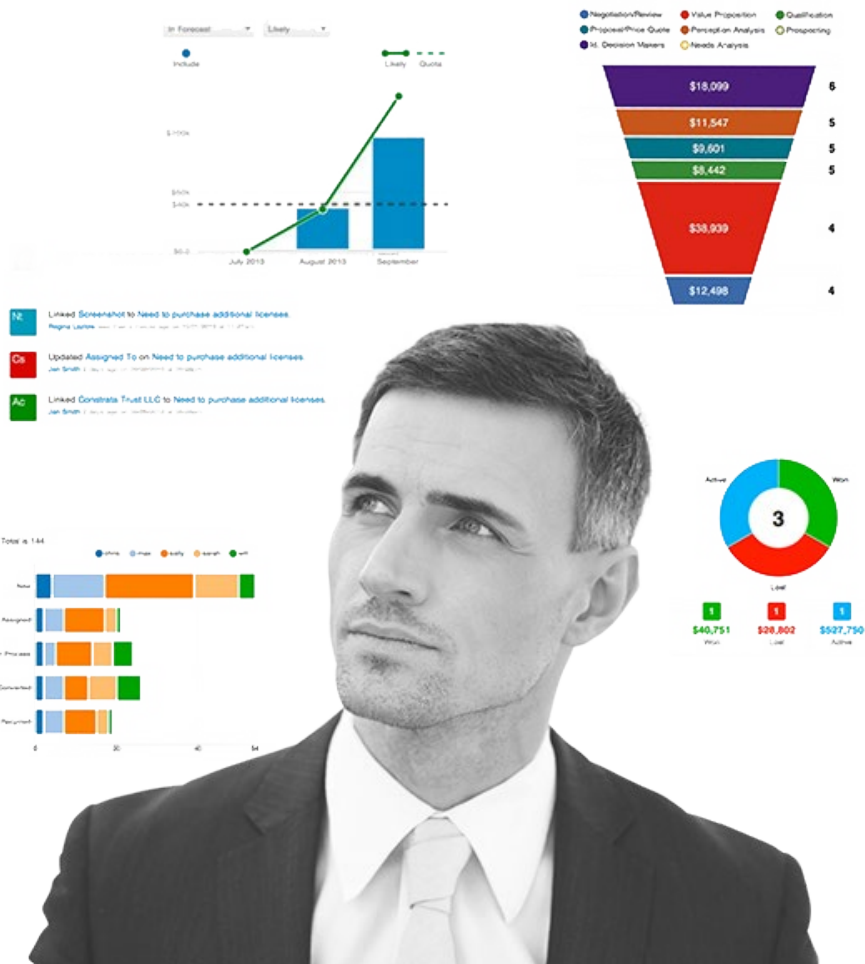
Step 5: Analyze and Optimize

Creating a central data repository and developing more inclusive processes is just the beginning. That is because the customer journey is always changing, and the ability to differentiate through exceptional service depends on being able to quickly address those changes.

If you are creating a truly holistic view of the customer – that data can provide insights into how customers prefer to engage, and how the organization can meet customer needs. Also, if the data is already centralized, collecting and analyzing that data is a far easier and less time consuming task.

Also, creating an overarching strategy towards customer processes makes incremental changes even easier. When a process spans multiple departments, but is contained in one master process flow – tweaking the model to best serve the customer can be an easier task. It is easier to analyze fewer, though more exhaustive processes, and find areas for improvement, than scrutinizing dozens of micro-processes that only live inside a partial stage of the customer journey.

Again, this is an ongoing process – one that is never truly finished. By continuing to ask customers for feedback, and using that feedback towards improving the processes and systems that serve the customer – your organization can align with the customer journey and differentiate in the market.

Conclusions

Making a major business transformation is never easy. However, there are ways to better manage the process of establishing a more customer-centric culture that focuses on creating extraordinary customer relationships. By following the above five steps, organizations of any size can get a head start in this transition.

Note that these steps are not necessarily meant to be followed in order, and many can and should overlap. And while the right technology foundation is necessary to support the transition, technology alone is not enough. Aligning the entire team with a singular goal – extraordinary customer relationships – and managing the cultural and behavioral changes needed to meet that goal, is what's required to make the transition complete.

Sources:

1. http://www.adlibsoftware.com/blog/2013/August/we-treat-every-customer-as-if-they-are-our-only-customer.aspx

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SugarCRM's market-leading Customer Relationship Management (CRM) platform is an indispensable tool for every individual who engages with customers. From sellers, marketers and customer support agents, to receptionists and executives, Sugar provides enhanced intelligence around every user, helping employees make better decisions and create extraordinary customer relationships.

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