

# Customer Journey Lessons Learned

*Your Guide to Building Lasting Relationships*





Companies that excel in delivering  
*journeys* tend to win in the market.



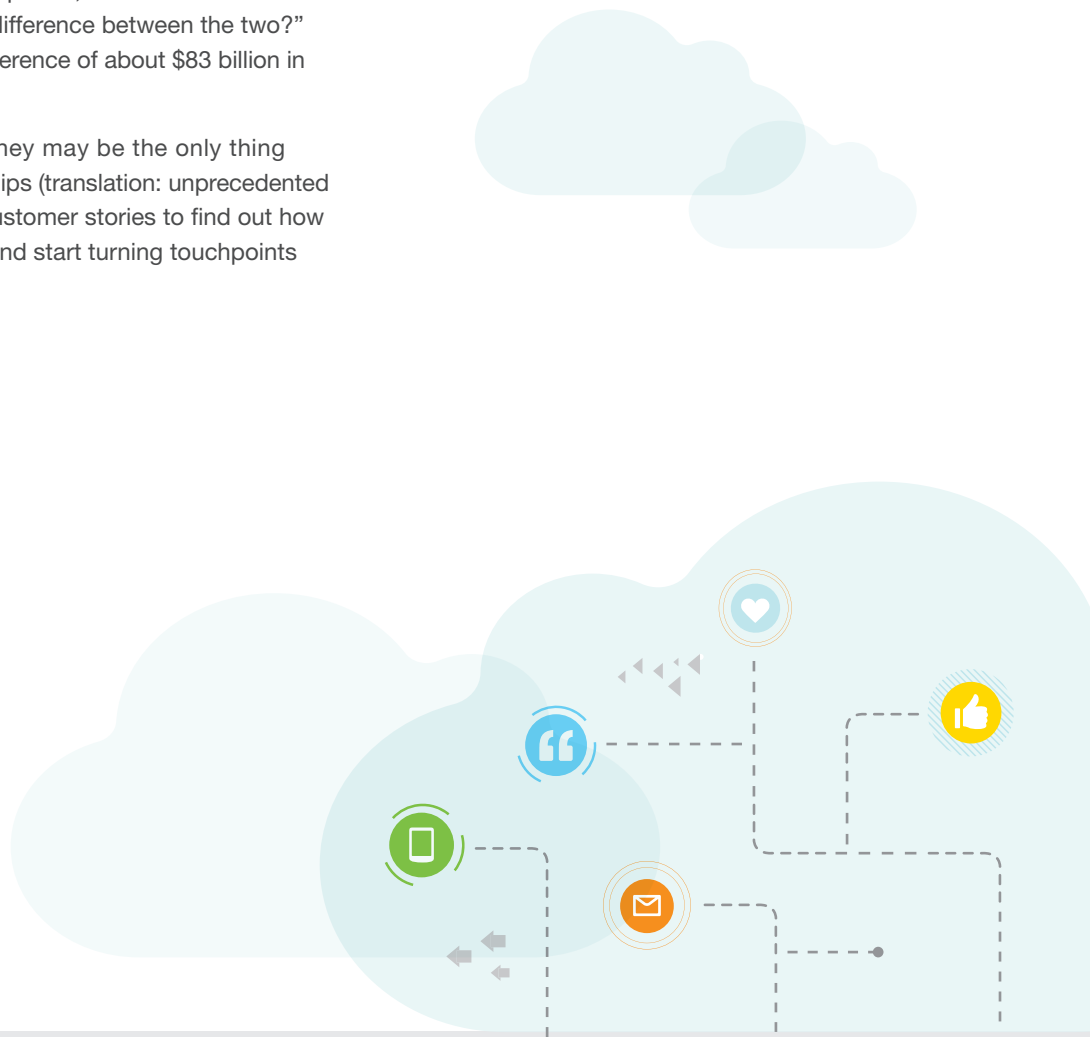
- HBR, *The Truth About Customer Experience*

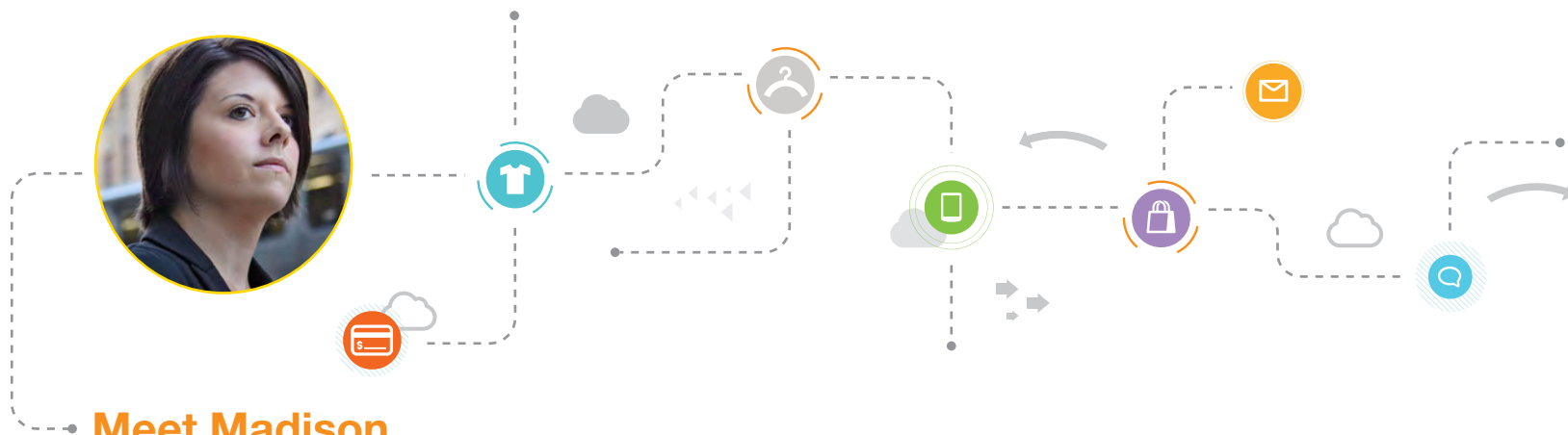
# Customer Journey Lessons Learned

## *Your Guide to Building Lasting Relationships*

So, you're managing your brand's customer touchpoints, but what about the customer journey? You may be asking "is there a difference between the two?" The answer is yes, and it's an important one—a difference of about \$83 billion in revenue for US companies each year, in fact.

The good news is, a focus on the customer journey may be the only thing standing between you and real customer relationships (translation: unprecedented customer lifetime value). So, dive into these real customer stories to find out how you can avoid common customer journey pitfalls and start turning touchpoints into real relationships.





## Meet Madison

She has an eye for fashion and really enjoys shopping. When it comes to choosing where to shop, Madison frequents a high-end clothing store that she knows will always have something to fit her style. And since Madison is taller than average, it comforts her to know that this brand carries clothes to fit her frame. Over time, Madison has built a relationship with the brand—providing her email address, cell phone number, and creating a customer loyalty account. So, she regularly receives the brand’s promotional messages.

Recently, however, Madison has become less engaged with the brand’s communications—including emails, direct mail, and SMS messages—because the content isn’t relevant to her. In fact, she’s received a number of promotions for the brand’s petite line of clothing—which doesn’t resonate with Madison since she’s not a petite buyer. At first, Madison just ignored these messages, but now she’s getting frustrated that her favorite store doesn’t even know what she’s interested in, even after hundreds of purchases logged to her customer loyalty card. She’s wondering why she should bother with a brand that isn’t willing to get to know her.

### Lesson Learned:

Customers aren’t willing to give their loyalty to brands that don’t understand their tastes and preferences or personalize messages specifically to them.

### Make Things Right!

The brand in this story can mend relationships with customers like Madison by making one key improvement—personalization. And personalization isn’t simply dynamic content. It’s creating true 1:1 interactions with customers via the device they prefer and with messages relevant to their interests, style, past purchases, level of engagement, and real-time customer behavior. To be successful, it’s key that all of these data points are connected to create a complete picture of the customer. Keep in mind, customers are not “one size fits all”—each and every individual requires a personalized experience from your brand.

“ The size of customer segments is shrinking down to one, where each individual customer is offered a personalized experience based on their individual needs and preferences. ”

- Oracle report

### Best Practices:

- 1 Don't let data pass you by.** Each time a customer interacts with your brand, it's an opportunity to collect critical data that will help you personalize your communications in the future based on each customer's preferences.
- 2 Create customer profiles.** What good is data if it's not in one place? Creating profiles of customer behavior across all channels can help you make the most of your data and tailor messages based on a comprehensive view.

“Global Insights on Succeeding in the Customer Experience Era” – global survey of 1,342 senior-level execs from 18 countries



## Meet Chad

He loves sports, but hates shopping. And with his busy schedule, it's hard to find any time to get to a store. So, Chad does most of his shopping online. Recently, Chad needed to purchase a birthday gift for his dad, and he turned to his favorite online sporting goods retailer. He browsed the website briefly and found a set of golf clubs on sale, which he decided would be the perfect gift. Chad waited until the last minute to purchase the clubs, so he chose express shipping so they would arrive on time. One day before his dad's birthday party, the golf clubs arrived. Chad opened up the package, only to find that he had received the wrong set of clubs. Frustrated, Chad sent back the clubs and visited a nearby brick-and-mortar shop where he settled on a fleece jacket for his dad instead.

Two days later, Chad received an email from the online sporting goods store asking him to complete a product review for the golf clubs. Chad was still irritated over the shipping mistake and being asked to review a product he'd already returned was the last straw. He submitted a negative online review and called the retailer's customer support line to complain—the situation only worsened when the customer support specialist couldn't provide Chad with an update on his refund. Chad hasn't purchased with the retailer since, and he has told his family and friends about the fiasco.

### Lesson Learned:

Only brands that consider every element in the customer journey—and are prepared for the unexpected—will come out on top and develop real, ongoing relationships.

### Make Things Right!

*Good news:* this fix is as simple as setting up data decisions, which would change Chad's course based on his open case with customer support. These data decisions would also prevent Chad from receiving a product review email after returning a purchase or filing a complaint, and could even trigger a more appropriate message—like a discount offer.

Plus, the retailer could equip customer support personnel with more complete information so that they can better respond to calls. If Chad's customer support specialist had received a profile with his transaction history and preferences, the situation could have ended differently.

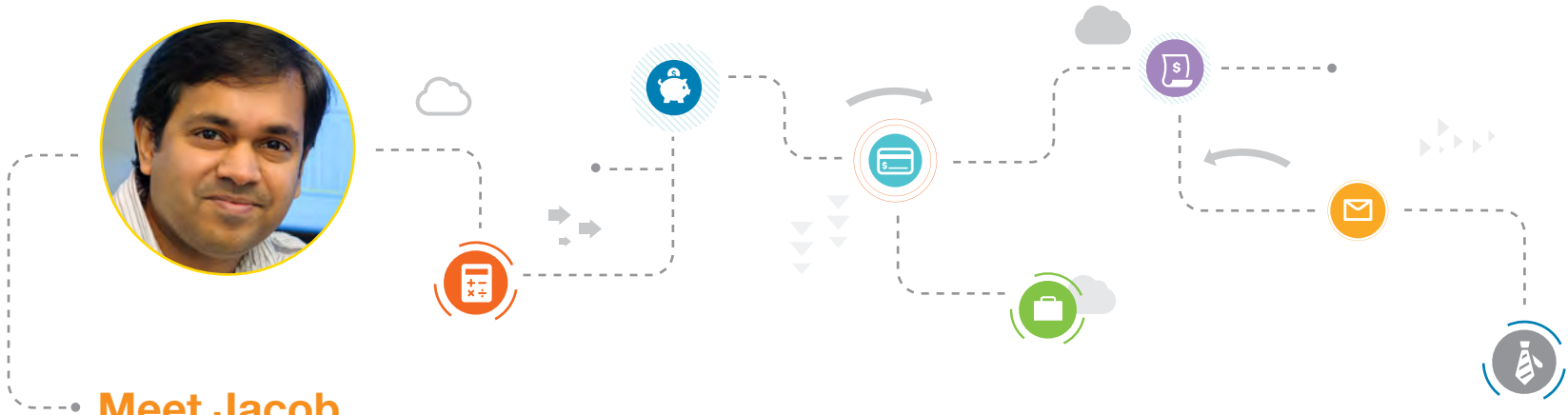
“ Only 26% of companies have a well-developed strategy in place for improving customer experience. ”

- Econsultancy's *MultiChannel Customer Experience Report*

### Best Practices:

- 1 Send messages relevant to a customer's status.** When a customer has an unpleasant brand experience, the last thing they want is a marketing message—especially a product review. By flagging a customer's status, you can create a cohesive experience that matches each individual's journey.
- 2 Bring together marketing and operations.** A customer's journey is more than just marketing touchpoints. Operations activities like customer service, shipping, billing, etc., make a up a key part of the brand experience. When marketing and operations come together you can create truly personalized interactions.





## Meet Jacob

Jacob is a numbers guy who's been banking with the same financial institution for six years. Jacob has his debit, savings, retirement, and credit card accounts all through his bank of choice. He recently switched to paperless statements as part of an incentive program the bank was offering. He didn't expect much to change, but then he started receiving several account emails and the bank's promotional emails on the same day each week. Every Monday, Jacob would receive up to ten emails—including separate account statement emails, credit card promotions, privacy statement updates, and more. Most of these messages were important and relevant to Jacob, but he was overwhelmed with the number of emails in one day, and couldn't understand why his account statements required separate emails when he used to receive them in one mailing before he went paperless. Jacob doesn't have time to read through all of the messages to determine what's important, so he ends up ignoring them instead.

Jacob feels like there must be a disconnect between the departments that handle his various accounts, which leads him to wonder if that affects how well his funds are being managed by the bank. A little concerned, he schedules a consultation with a financial advisor at a different bank to see if he should consider switching.

### Lesson Learned:

When customers feel bombarded by messages—even if they are important and relevant—they lose faith in the brand and could overlook even the most effective communications.

### Make Things Right!

It's clear that the bank was sending Jacob too many emails at once. Of course, the bank could consolidate the emails or spread them over time. But they could also test to find out if email is even the right channel to reach Jacob. He might prefer text message for some of his notifications—and his frequency preferences are likely different for each channel. So, the bank should work to regain Jacob's trust by customizing the messages, channel, and frequency to his tastes. Jacob's level of engagement will be the true indicator of success.





69% of US email users unsubscribe from a business or non-profit email because the organization sends too many emails.



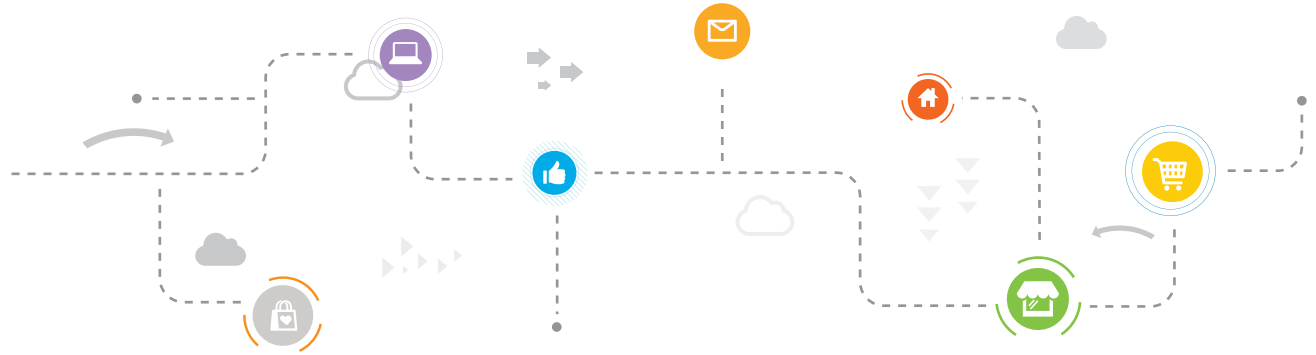
- Chadwick Martin Bailey

### Best Practices:

**1** **Set expectations for frequency.** Know the maximum number of messages you want to send a customer across a specific time period (day, week, month, etc.) and stick to it!

**2** **Learn from unengaged subscribers.** Customers who are unengaged can tell you a lot about your messaging strategy. Look for trends across subscribers—frequency and relevancy can often play a role in engagement.

“10 Facts about How and Why Consumers Like and Subscribe” (2012)



## Meet Stephanie

Stephanie is a brand evangelist for a major home goods store. She shops with the brand regularly in store and online, shares her purchases on social media, and is highly engaged with the brand messages she receives. Recently, Stephanie was browsing the brand's website and found a set of curtains she loved. She added the curtains to her online shopping cart and continued browsing. After a while, Stephanie thought she'd rather just pick up the curtains in store the next day so she could have them sooner. She exited the site without completing her purchase and picked up the curtains in store the next day. That day, she received an email from the brand reminding her to complete her online purchase. Since she'd already purchased the item, she ignored the message. But, Stephanie continued to receive reminder messages for the next three days as part of the company's abandoned cart campaign.

Stephanie wants to continue to love the brand, but she's annoyed that she's receiving messages about an item she's already purchased. She still feels loyalty to the brand—for now—but she's not afraid to share her bad experience on Facebook.

### Lesson Learned:

Customers are operating at lightning speed across online and offline channels, and they expect brands to keep up.

### Make Things Right!

Because Stephanie's favorite brand wasn't able to respond to her real-time purchase, she continued to receive irrelevant emails as part of a pre-determined campaign. This could have been avoided if the brand had been able to change the course of Stephanie's customer journey in real time, based on her purchase. This challenge stems from disparate systems that aren't able to "talk" to one another and share vital information—which Stephanie experiences as a disconnect between her and the brand. This type of disconnect can be incredibly detrimental to customer loyalty.

“ 74% of American senior executives surveyed strongly agree that customers’ experiences impact their willingness to be loyal advocates. ”

- Oracle report

### Best Practices:

- 1 Map out the customer journey.** Take a look at your current campaigns to identify where they fall in the customer lifecycle and if there are potential pitfalls in the customer experience.
- 2 Identify quick wins.** Finding ways to improve the customer journey can have immediate business impact! A good place to start is your customer’s frequency and channel preferences.

“Global Insights on Succeeding in the Customer Experience Era”

## Customer Journey: *Tips to Remember*

- 1** Customers aren't willing to give their loyalty to brands that don't understand their tastes and preferences or personalize messages specifically to them.
- 2** Only brands that consider every element in the customer journey—and are prepared for the unexpected—will come out on top and develop real, ongoing relationships.
- 3** When customers feel bombarded by messages—even if they are important and relevant—they lose faith in the brand and could overlook even the most effective communications.
- 4** Customers are operating at lightning speed across online and offline channels, and they expect brands to keep up.







# Real Conversations Start Here

*The customer journey like never before.*

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