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EXPERIENCE DIGITAL FREEDOM

THE MODERN MARKETER'S GUIDE TO CROSS-CHANNEL JOURNEY MARKETING

The Journey Marketing Opportunity

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The Journey Marketing Opportunity

The mantra of 'customer first' is not new. Brand marketers and customer service leaders have long aimed to provide seamless customer experience when customers call support, get email promotions or walk into a store. Now more than ever, seamless customer experience across channels is how brands compete for attention, dollars and customer loyalty.

Customer journeys create competitive experiences that drive loyalty and can be the primary influence behind purchasing decisions. Creating a robust and effective customer journey strategy should be a business priority for any brand hoping to compete in the new always-on, digital economy.
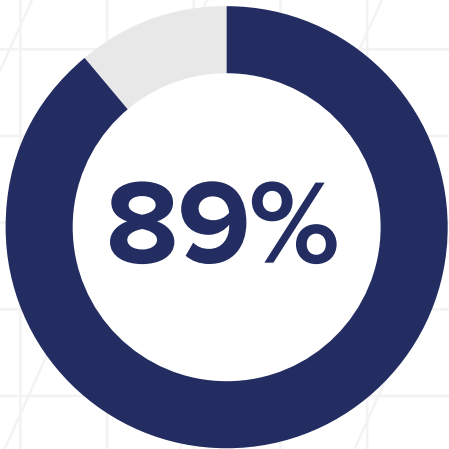
Yet many brands are still struggling to live up to customer expectations. Most brand and digital marketing teams have yet to figure out how to map the right journeys and move beyond the planning stages. The upside is significant — those brands who are at the forefront of customer experience innovation achieve revenue gains of 5 to 10 percent, and reduce costs by

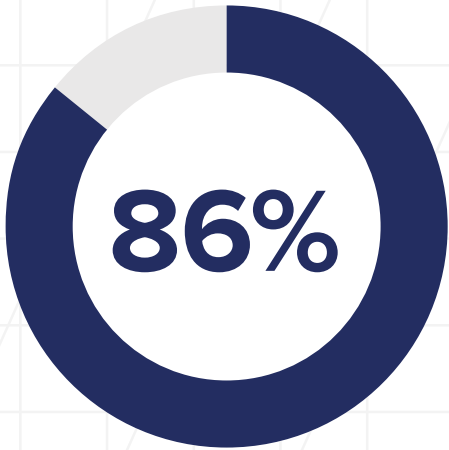15 to 25 percent within two or three years, according to McKinsey.

Let's get started

This guide will walk modern marketers through the steps to build a journey strategy from the ground up, get started with confidence and impact, and grow your cross-channel journey orchestration practice across your organization.

Stage one will help you get started, stage two will equip you to expand, and stage three will enable you to run customer journeys like a pro. In the process, we will point out how you can leverage Acquia digital experience solutions you may already be familiar with — such as Acquia Lift and Acquia Journey, to help accelerate your impact with cross-channel journey orchestration.

89% of companies say that customer experience is already in their primary basis for competition.

86% of buyers will pay more for better customer experience, but only 1% of customers feel that brands consistently meet their expectations.

"In many industries, hypercompetition has eroded traditional product and service advantages, making customer experience the new competitive battlefield."

— Jake Sorofman, Research Director, Gartner

STAGE 01

How to get started with journeys — journey pilots

Getting Started With Cross-Channel Journey

Just like the customer experience, building a journey strategy is a journey itself, and we aim to make it as enjoyable, seamless and valuable as possible. Here's a set of concrete actions that you can take to get started on this journey painlessly, while deriving value for the business that will last.

1. Select a Team of Journey Enthusiasts.

Start with a team of colleagues who are excited about collaborating on journey marketing. Pull from your acquisition and loyalty teams, and invite your digital ops pros. Make sure that you also seek and secure an executive sponsor for your project – they will be key from the start and all the way through the expansion and scale phases.

2. Unearth the Biggest Opportunities for Cross-Channel Engagement — those with maximum impact.

If you are already using Acquia Lift you likely don't need to be sold on the *why* and *how* of delivering targeted, in-context experiences that drive engagement, conversion and loyalty. Solutions like Acquia Lift already help you go beyond the marketing segment and focus on the customer to deliver their preferred content and experiences at the right time and place. Now imagine you can take that same concept and apply it across any channel.

- Map your customers' current touchpoints across channels and look for the moments that matter most to identify the interactions that your team can influence for the biggest impact. Common challenges or issues can be associated with unresponsive customers from your core email promotions, customers looking for quick answers on social channels such as Twitter or Facebook, or customers who are contacting your call center and have unresolved tickets or open cases.

- Then determine where you can have the biggest opportunities to tie together touchpoints across one or two channels – Twitter, Facebook, or email, to increase engagement and conversions.

For example, people who are not responding to an email campaign can be targeted with certain banner messages on Twitter or Facebook, or can be included in test text message with win-back or a promotional code with special in-store offers they will be interested in. Since you already have 360-degree profiles based on the history and preferences of each individual customer in Acquia Lift, it's very easy to leverage core customer data in Acquia Journey. You don't have to worry about building any connectors to Twitter, Facebook, or your email systems.

- Map those moments that matter into a cross-channel journey map next – a simple sketch would do. You will use that map or sketch to help you build your touchpoint, content and channel orchestration logic during the pilot step.

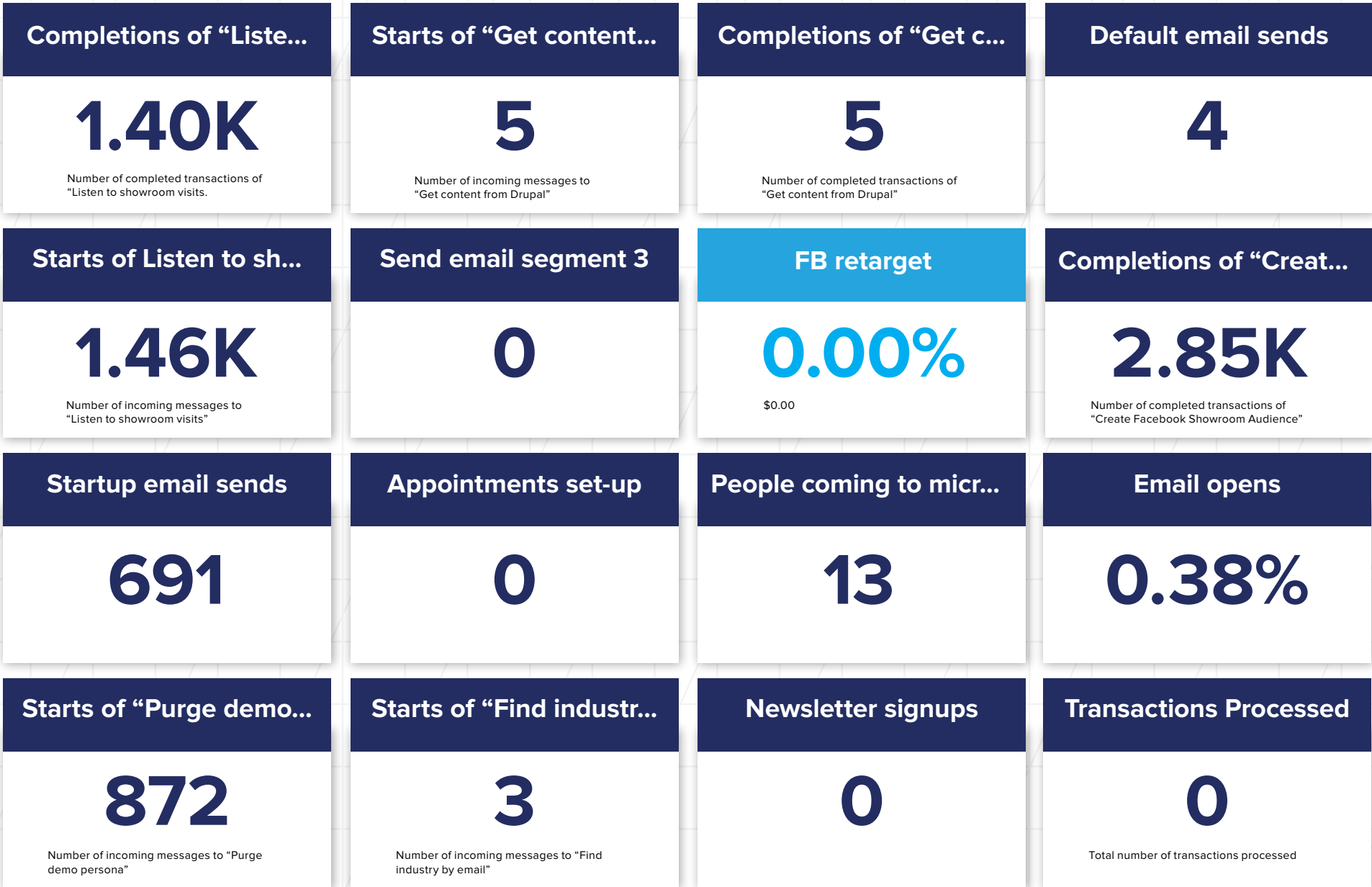**Some questions you might ask to identify the moments that matter include:**

1. Was a customer service issue addressed satisfactorily?
2. Did a shopper find what they were looking for?
3. Is a loyalty program actually keeping customers loyal?

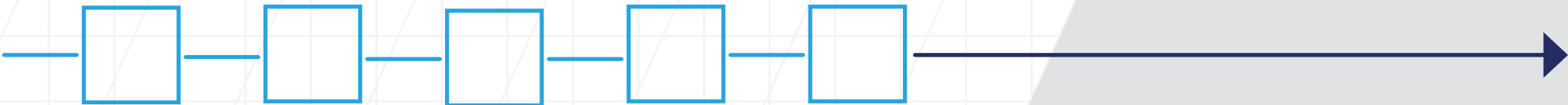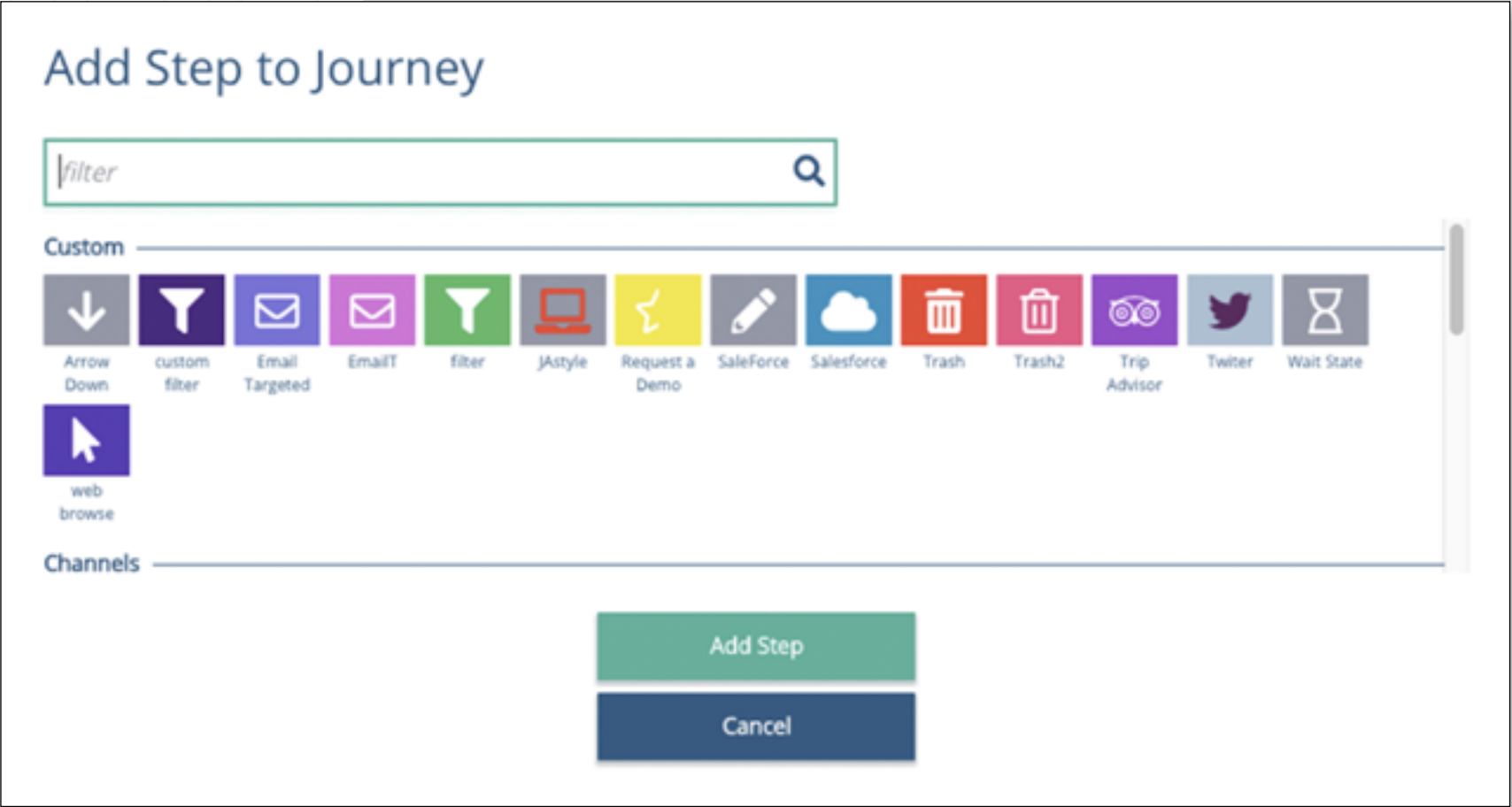**3.** **Define your pilot cross-channel journey campaign success.**

Your next step is to identify the metrics that matter and collect baseline vs. improved outcomes.

- Map out your baseline performance – e.g. email open rates, email click-through rates (CTRs), your email conversion rates for existing promotions, etc. For channels such as Twitter, look for metrics like reach, engagement, and visits to your website.

- Set your desired new performance thresholds – percentage increases for opens, CTRs, increases in traffic to specific pages, etc., so you can easily monitor your journey performance and report on immediate improvements in reach, engagement or conversions.

- Leverage advanced journey metrics dashboards such as the ones offered in Acquia Journey. Journey helps you visualize customer engagement in real time so you can test, measure, and respond to your customers' exact needs with the best next response.

Here's how Journey helps you monitor and tweak performance as you start:

Completions of "Liste…	Starts of "Get content…	Completions of "Get c…	Default email sends
1.40K	**5**	**5**	**4**
Number of completed transactions of "Listen to showroom visits.	Number of incoming messages to "Get content from Drupal"	Number of completed transactions of "Get content from Drupal"	

Starts of Listen to sh…	Send email segment 3	FB retarget	Completions of "Creat…
1.46K	**0**	**0.00%**	**2.85K**
Number of incoming messages to "Listen to showroom visits"		$0.00	Number of completed transactions of "Create Facebook Showroom Audience"

Startup email sends	Appointments set-up	People coming to micr…	Email opens
691	**0**	**13**	**0.38%**

Starts of "Purge demo…	Starts of "Find industr…	Newsletter signups	Transactions Processed
872	**3**	**0**	**0**
Number of incoming messages to "Purge demo persona"	Number of incoming messages to "Find industry by email"		Total number of transactions processed

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4.

Launch your cross-channel journey pilot.

Equipped with your new journey map, your team can then move to building the flow and logic to tie your channels, content and metrics together.

Acquia Journey comes to your rescue at this step too – the intuitive interface lets you add steps to the journey with a simple drag-and-drop functionality:

What you are doing at this step is defining the logic or rules that will govern and improve the metrics for those moments that matter most. For example, you can go after these journey quick wins:

Email Quick Wins:

- React to the customer "moments of need" as soon as these moments occur by triggering personalized emails in real time - e.g. when a customer abandons your shopping cart, follow up with a special offer featuring the specific item saved in the shopping basket via email.

- Implement new rules for managing email flow — prevent real-time email triggers from interfering with existing campaigns by controlling the prioritization of which emails are sent and which emails are paused to maintain a consistent experience for the consumer.

- Use the consumer journey stage for email management and suppression — this will avoid sending inappropriate emails to customers, e.g., sending a discounted offer for an item the customer just purchased.

Mobile / App Personalization Wins:

- Use Bluetooth LE Beacon to introduce individual experiences within a mobile app based on individual consumer data (i.e. prior behavior on other channels, recent transactions, individual-level customer data) and enable cross-channel follow-up of in-store "browsing" behavior — via email, or a "thank you" post on Twitter.

- Dynamically adapt digital out-of-home (DooH) signage in-store based upon the recognized individuals in the environment.

- Display personalized content on the kiosk/ATM based on the individual's prior behavior on other channels, recent transactions or individual-level customer data.

- Develop a mobile loyalty experience that reacts to purchases, interactions, activities, and events on other channels with built-in rules for how to influence consumer behavior in real time, based on their loyalty profile, geo-location, geo-fencing, and other real-time environmental conditions.

Social Media Quick Wins:

- Engage consumers in a social media contest with keywords and hashtags to expand the brand reach and create new opportunities for engagement.

- Start with social lead management and automate customer engagement by using brand and competitor listening across social channels to identify prospects and create a streamlined path to purchase.

- Foster deeper engagement and craft better advocacy programs by building a history of individual comments to identify real fans on various social media channels.

Throughout the pilot process it's important to go slow and try to drive as much initial value as possible. Demonstrating success in one or two journeys can go a lot further in getting to value quick than launching ten and quickly becoming overwhelmed.

STAGE 02

How to expand beyond your initial journey pilot

Expanding beyond your initial cross-channel journey orchestration pilot

The next step in your journey with cross-channel orchestration is to take stock of what's working, share the success and impact across your organization, and secure the cross-organization buy-in to expand beyond the initial pilot.

1. Take stock of what's working.

Your pilot success will depend on your ability to drive better performance and business impact. Use your journey analytics to help you identify where your efforts had the most success. These will depend on the pilot set-up, but look for increases in open and click-through rates, higher conversion rates for offers or win-backs, increased NPS scores, and reduced average sales cycle.

2. Identify areas for improvement.

Now that you've mapped and begun to measure your cross-channel journeys, you can leverage your analytics to identify where improvements are needed the most: Start by looking at your initial journey metrics and determining where customers are either not satisfied or failing to proceed to the next step of the mapped journey. Common issues you might identify could be failure to complete a website form, inability to find a store or make a return, dropping off a phone line during a customer service call, or unresponsiveness following an email. Once you've identified these, come up with an operational process to reduce the frequency of the issues. This means refining journey logic to increase the likelihood of success.

Should an incomplete form trigger a follow-up email?

At what point does an unanswered email warrant another email?

Determining how linking channels together can help reduce points of friction sets the stage for putting those connections into action. The focus on initial pain points — or moments that matter — is key, as these will position you for success when it comes time to start executing on journeys.

Many organizations implement standalone journey reporting practices and create independent stacks of data. While using these may accelerate reporting early in the customer journey process, this commonly creates an unwieldy business intelligence environment that runs parallel to whatever system the organization typically relies on.

In order for a journey-centric analytics approach to succeed, it must become part of the day-to-day fabric of an organization's operating model, and therefore the metrics must become integrated into the normal BI and big data tool sets. The effort to integrate journey analytics into the existing tool sets early in a project will significantly reduce the work to merge proprietary models into it later.

3.

Secure cross-organizational buy-in.

It is time to expand beyond your initial group of believers by getting more people in your company excited about the potential of cross-journey orchestration.

- Develop and design your business case — you are looking to demonstrate a business case for rolling out journeys to the broader organization.

- Get your executive stakeholder excited to support you — executive buy-in will be essential to rally all departments to your cross-journey cause.

- Hold a physical or virtual town hall to share the success and enlist others to learn about the opportunities with cross-channel journey marketing.

- Provide the training your new recruits need to move you to the next stage, where your organization will be running many cross-channel journeys across multiple initiatives.

Before you proceed to Stage Three, make sure you have:

✓ Achieved organizational buy-in.

✓ Used a core team to train project managers and teams across verticals.

✓ Increased the delivery of key business outcomes by upping the number of live customer journeys.

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STAGE 03

The digital marketing toolset to orchestrate cross-channel journeys at scale

Rolling Out Cross-Channel Journeys At Scale

This stage is all about implementing journeys across core verticals of the business and rolling out on a larger scale.

1. **Create a journey team.**

Since customer journeys are becoming a core part of your business, project teams must be created in order to establish ownership and lead their verticals' journey strategies.

- These teams are often led by Project Managers. PMs oversee a group of people similar to the original core stakeholder group but specialized to one area of the business. Basically, you're replicating the original team on a smaller scale.

- Start documenting your journey best practices: Simultaneously, a team should be focused on beginning to build an organization-wide library of journey best practices and maps. This team is responsible for rolling out expertise to project teams — facilitating journey mapping workshops, analytical reporting workshops and KPI development, plus capturing best-of-breed journey maps and models that can be reused by other teams.

2. **Appoint journey managers.**

At this point, your business requires dedicated staff who focus explicitly on customer journeys and ensure that journeys touch every element of the business. This is where Journey Managers come in.

- The person in this role is responsible for implementing and overseeing customer journeys as a full-time job. These will likely be people who developed specialized journey knowledge during Stages One and Two.

- Qualifications often include experience in product strategy, customer experience and deep knowledge of journeys within industry verticals.

3. **Achieve Journey Optimization.**

Journey optimization epitomizes the organizational change that takes place at this stage. Rather than piloting or rolling out, your organization has achieved a level of ongoing measurement and refinement of its customer journeys, a focus that likely reaches all the way to the executive level. Thanks to the role that customer journeys now play in driving core business results, the entire organization will be aware of and involved with journeys in at least some capacity. Your organization will have a widely accessible "journey dashboard" to keep everyone apprised of what the customers are doing.

4. **Develop a Journey Library.**

A journey library is a centralized document or database that contains all of your organization's journey orchestrations across verticals and customer personas. This becomes a living resource that ensures best practices are maintained and refined, and ensures the perpetuation of journeys across the entire business.

ⓘ REMEMBER

Cross-channel journey optimization never really ends, so there aren't any final tasks to complete. But, if your business is now scaling journeys across channels and organizational units, you are likely doing some or all of the following:
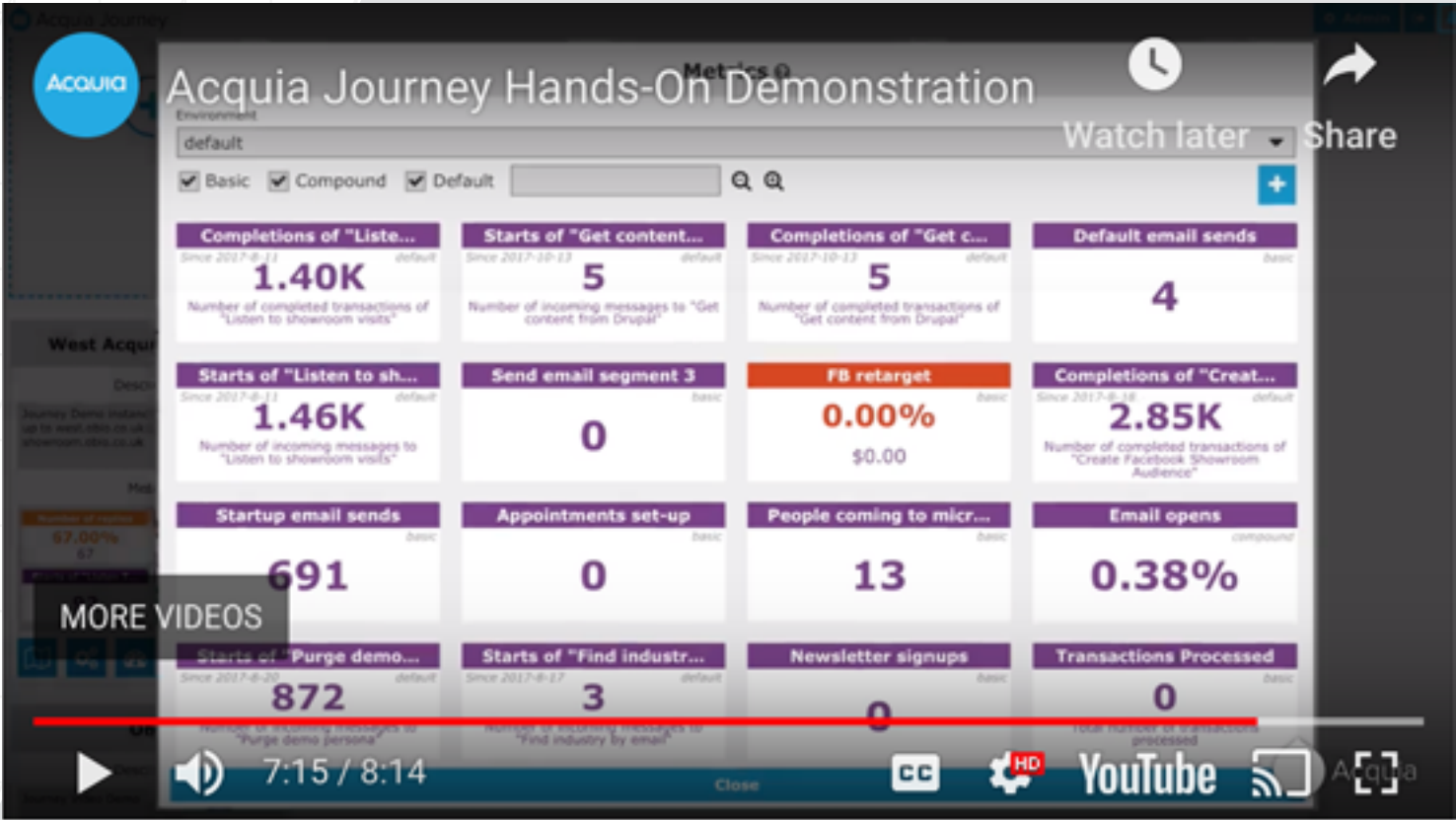
• Multiple journeys are scaled and maintained across the business, and new ones are consistently piloted.

• Journeys deliver, and are measured on, their ability to deliver true impact on the bottom line.

• The business is firmly oriented towards the customer, delivering an anticipatory and proactive experience that retains more customers and differentiates from competitors.

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Getting started with Cross-channel Journey Orchestration has never been easier

No matter where you are on your own journey of cross-channel orchestration, you can rest assured that Acquia Journey can start or grow strong with your organization. You can crawl, walk, or run with powerful cross-channel orchestration rules and analytics.

Acquia Journey orchestrates cross-channel customer experiences so you can deliver the best next action or offer to any individual on any touchpoint. Importantly, Acquia Journey seamlessly integrates your channels with pre-built connectors, so you can deliver personalized and contextual interactions that inspire customers to act at any point in the customer lifecycle.

Journey reaches across channels your customers are already using, including text messages, call centers, website visits, mobile applications, social channels, in-store engagements, and more. And it connects the data and systems you've already invested in to drive rich, relevant customer engagement at any point in the customer lifecycle. Acquia customers already have a head start, because they can leverage their existing deep profile data in Lift to tie social media, email, website, and customer data together to deliver a unified customer experience.

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