

EBOOK

PARALLEL JOURNEYS

WHY BRANDS WHO DON'T UNDERSTAND
THE CUSTOMER JOURNEY RISK FALLING
DOWN AN ENGAGEMENT GAP

A research study by Thunderhead and Forrester



FORRESTER®

INTENT-DRIVEN
CUSTOMER JOURNEYS

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FOREWORD

Analyzing the customer journey is far from a new concept – it's been keeping 3M Post-it Notes in business for years. What is new and uncharted territory is the landscape in which brands find themselves, customer journeys traverse channels, touchpoints and a combination of physical and digital experiences. And each customer is unique.

Today's digital economy has fueled heightened customer expectations and it's no secret that brands have to work harder to retain customers, build an affinity and drive loyalty for brand success.

We worked with our friends at Forrester Consulting to understand the opportunity of focusing on a journey analytics and orchestration practice to build long-term customer engagement. We believe that the [study](#) reinforces just how critical

a customer journey approach is for marketers and CX professionals. Many brands aspire to an outside-in, customer-led approach, but still struggle to meet the needs of their customers throughout their individual journeys.

We think it's time to take action. Marketers and CX leaders can now take advantage of the opportunity that real-time journey analysis and orchestration technology provides to truly understand customer intent and act on that insight in real-time, to drive engagement at scale, increase customer satisfaction, and drive business growth.

So what's the opportunity? Read on...

Jason Hemingway,
CMO Thunderhead



“**Customer journey analytics and orchestration unlock the power of customer data and insights to achieve seamless and connected customer experiences and better business outcomes.**”

Orchestrate Customer Journeys To Drive Engagement, Improve Loyalty To Deliver Business Growth, Forrester Consulting on behalf of Thunderhead.



— 01 —

INTRODUCTION

INTRODUCTION

Technology, the internet, and the smart devices keeping us connected to it, mean that we do almost nothing in isolation. We log the stats of our morning jog, read emails on the train, hail cabs through an app, and pay for coffee with a magic tap. As consumers, we interact and connect before, during, and after a purchase. We leave a data wake: a trail of visits, interactions, queries, clicks and feedback that, taken together, constitute a journey.

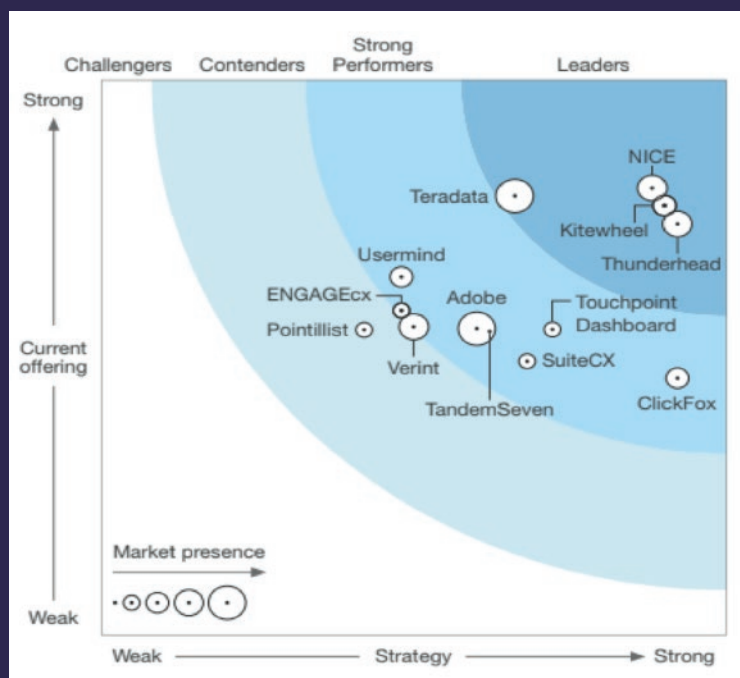
For brands, there's now simply no such thing as a drive-by consumer: rocking up unannounced, making a purchase then vanishing over the horizon. Customers appear first as a visit to a website, a walk into a showroom, a call to customer service, or even as a like or a follow on a social network. It's the first step in a journey that may last for weeks or years. The customer journey spans both 'real' and

digital channels and comprises a vast number of touchpoints. Vivaly, each journey is unique to an individual, and steered by their own intent.

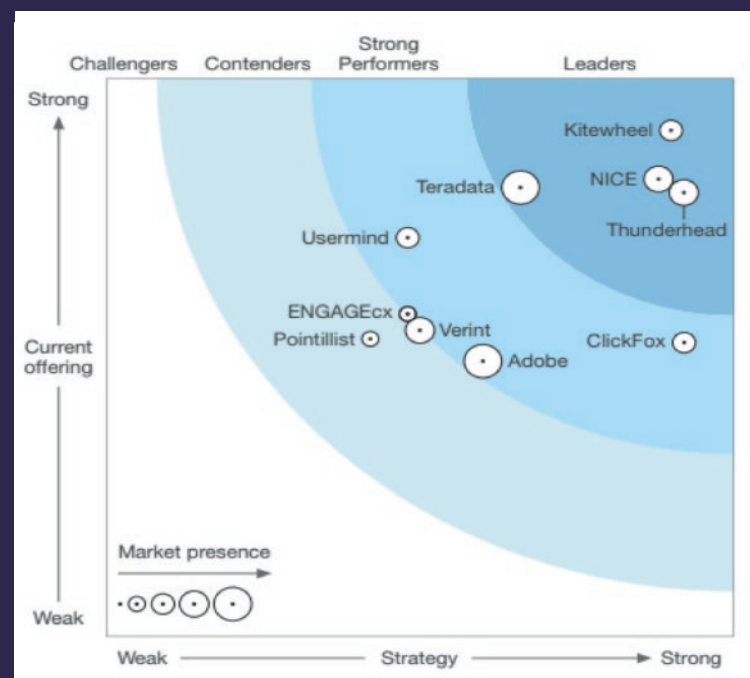
The concept of the customer journey isn't completely new. For some time, customer experience (CX) teams have been looking to move from the channel-centric approaches of old to a modern, holistic, and customer-focused view. The customer journey is an appropriate lens through which brands can gain a deeper understanding of consumers, focusing on their experience, and improving it to deepen engagement and create more valuable relationships.

DESTINED FOR SUCCESS

In the closely related fields of customer journey analysis and customer journey orchestration, Thunderhead is regarded and leader. Far from simply delivering a toolset, we work closely and expertly with brands to reveal customer journeys and the intent that steers them. We provide the analysis, insight and integrations to place the customer - and the successful delivery of their intent-based journey - at the heart of business.



Forrester Wave™: Customer Journey Analytics Orchestration Q3 2017



Forrester Wave™: Customer Journey Analytics Visioning Q3 2017

Brands are increasingly aware not only that their customers are on a journey, but that, with the right approach and technology, they can both understand and orchestrate it for the optimal outcome - for both the customer and organization. Yet the customer journey technology market is still emerging and

evolving, and its vendors each have a different value proposition. Against this backdrop, how well are brands embracing the customer journey, and how effectively are they acting on its insights to deliver better customer experience?

WHAT ARE THE TOP 3 BUSINESS BENEFITS THAT BRANDS EXPECT FROM FOCUSING ON THE CUSTOMER JOURNEY?



Source: Forrester Consulting study on behalf of Thunderhead, 2018.

Thunderhead works with many major brands, each of which began with its own understanding of, and response to, the customer journey. We know from experience that brands often start with an overestimation of their own understanding of, and ability to act on the journey. But is that universally the case? We commissioned Forrester to conduct a major transatlantic survey of business decision makers. Representing CX, executive and marketing functions,

and comprising job roles from management up to C-level, respondents were asked questions about their motivation, investment and experience relating to the customer journey within their organization.

The results, both anticipated and less so, reveal clear messages about how brands understand the customer journey, and how well they're using it to engage deeply with their customers.

MEET THE CONSUMER

Before we get stuck into brands, a few words about today's consumers. We already know that they're more connected, informed and aware than ever: how does that shape what they expect from organizations?

In our digital age there are some givens. Increasingly, we as customers expect a frictionless, 24-hour relationship with the companies we deal with. Our connectivity means we have heightened expectations for customer experience: we're mobile, we use multiple channels, we might just pop into the store and brands need to travel with us. Uniformly, we expect a good experience, but which experiences we want, and the way we define 'good' varies greatly.

Demographics are important. For people born since 1980, experiences in themselves may be more important than possessions - a Harris poll for EventBrite revealed that **78%** of millennials would rather spend their money on a desirable experience than a product. Whatever you hope to sell - holidays, energy, clothes, cars - younger generations value

positive, refreshing, amusing, quirky or stylish experiences, even when they're signing up to something as beige as a bank account.

But demographics aren't everything. According to Forrester data, **73%** of all US online adults say that valuing their time is the most important thing a company can do. And everyone is impatient - the same data suggests **53%** of adults will abandon an online purchase if they can't find answers quickly.

Ironically, in an age when technology enables business at scale, it also fosters individuality - and provides the mechanisms with which companies can respond to people as individuals. A 2015 Harris poll found that **97%** of executives felt their customers expected a personalized experience, and according to Salesforce, **52%** of customers are likely to switch brands if a company doesn't personalize its communications with them.

UNCOVERING THE JOURNEY

Traditionally, brands attempting personalization at scale have had to make do with crude tools. Context will tell you something, as might a hurried scan through customer notes fields, but creating and sustaining proper engagement requires an instantly available, authoritative and actionable understanding of the state and history of the customer relationship. When the customer calls, messages, visits or in any way interacts with you, you need to know what they're hoping to achieve, and the best way that you can help them do it.

That presents a huge challenge for brands attempting to manage modern, omni-channel relationships - particularly if they're doing so with legacy tools. Enter the concept of the customer journey as a lens through which to focus on the customer.

At its simplest level, the brand can view the journey as a linked series of interactions between itself and the customer that, taken together, represent the customer's experience, but there's more to it than that. The customer journey is fluid, omnichannel and it takes place in real time.

WHAT'S NEEDED?

Understanding the individual customer journey, and developing the ability to act on it, require technological capabilities.

Customer journey analysis and orchestration platforms need - at a minimum - the following capabilities:



OMNICHANNEL:

Able to gather, parse and analyze data from across business functions, and to encompass all real and digital channels and touchpoints



REAL TIME:

Ability to analyze and act on insight in real-time



SELF-LEARNING:

Evaluating decisions and customizations against results in order to improve relevance and success

Not everyone sees the customer journey in the same way. In this emerging market, some technology vendors have seized on the idea of the customer journey and co-opted it to describe a limited analysis or implementation of the concept. For example, some platforms see the journey simply as a series of data points measuring people as they pass through touchpoints, but customers experience the journey as a coherent and ongoing story. Knowing the stops on a train line doesn't tell you why people want to travel. For the brand, understanding this story as the customer sees it, and helping satisfy the intent by which it's driven, are the keys to building meaningful relationships and deriving the maximum customer lifetime value (CLV).

Thunderhead's concept of a customer journey is radically different to other vendors. For Thunderhead, journeys are an integral part of the engagement fabric. Central to customer engagement,

the journey must be understood from a holistic, customer-centric perspective - it's not some external device to be analyzed, prodded, poked, and optimized with a diagnostic tool, yet that's the approach many others take.

Which brings us to the idea of customer journey mapping, the process of sketching out all the key ways in which brands think customers will move about their business. If the journey is unique, dynamic and living, trying to confine it to prescribed routes isn't going to end well. That's the chief reason why we believe that traditional journey mapping is of limited value. It's usually focused on the business' processes or marketing funnels, and consequently on trying to drive the customer. In fact, when the journey belongs to and is driven by the customer, journey mapping should be based on insights derived from actual data, captured in real-time as customers actually interact across the available channels and touchpoints.

SIX TENETS OF THE CUSTOMER MANAGED JOURNEY

We can all agree that customers are on a journey, but not everyone sees it in the same way. Only by understanding key qualities of the customer journey can brands hope to play the most effective role in it.

What are those qualities? Check out Thunderhead's six tenets of the customer journey:

1

It's the customer's journey, not yours. Journeys are not a business process or a marketing funnel. Each one belongs to the customer, and the business must view it from their perspective.

2

A customer may be on multiple journeys. Customers may have multiple journeys, at different levels, and for different purposes and tasks.

3

Every journey is unique, dynamic and non-linear. Customers aren't on static railway tracks that are mapped in advance. Their journeys are like water flowing through and across your channels, trying to find the route of least resistance.

4

The business must speak with a single voice throughout each journey. Journey progression requires that everything is connected. The business must act with one voice, so it must be able to bridge all silos and touchpoints.

5

Every step is an opportunity to create value for the business and customer. Creating value at every interaction of the journey is fundamental to building engagement.

6

Journey performance is an important and valuable source of customer insight. In fact, the journey is a critical source of insight, and the key to guiding the customer across their journeys.

Journeys are not an end in themselves, but an essential element of customer engagement. It is not possible to build true customer engagement without understanding the unique journey that each individual customer is on. The biggest value is derived from gaining insight into the journey and its context, and using it in real-time to shape value-driven conversations and drive engagement.

FLICKING YOU THE SWITCH

So what happens when the customer journey goes wrong? Ah: switching brands. With competing companies often separated by just a couple of clicks, consumers can appear fickle, but that's to miss the point. Brand switching is often the final stop in a journey that the customer no longer feels they're steering. Where a brand doesn't facilitate customer intent, a gap opens up between expectation and delivery. And when dealing with that gap becomes more effort than changing brands, people move on.

For brands, allowing that gap to open up creates a crisis of customer erosion. According to Accenture, in 2017 **61%** of customers globally - and **78%** in emerging markets - switched companies in at least one industry due to poor service. Year-on-year, customer frustration with marketing and sales efforts rose by **2.8%**, with the chief causes of complaint being failure to deliver on promises, being difficult to work with, and mishandling personal information.

THE CLIFF EDGE

**Customer erosion chips away at businesses.
Failure to deliver on expectations means:**

- Sagging customer satisfaction
- Rising costs of customer service
- Decreasing cross-sell and up-sell
- Loss of loyalty and future revenue
- Missed renewals, increased churn

**BUT ALL OF THIS CAN BE ADDRESSED BY BRANDS
WHO ARE SMART ENOUGH TO:**



Recognize that customers are on a unique journey



Analyze journeys to reveal intent and context



Accept that the journey belongs to the customer, and is steered by their intent



Orchestrate journeys in real-time according to intent to drive maximum engagement and value



Implement technology that resolves customer identities to individual journeys



Adopt a long-term view, focusing on building value and trust and using metrics like CLV that support the view

**SO, WHAT DOES FORRESTER'S RESEARCH REVEAL
ABOUT HOW BRANDS ARE DOING?**

— 02 —

**ARE YOU ON
THE JOURNEY?**

ARE YOU ON THE JOURNEY?

First of all, there's no doubt that brands operating in the digital age already understand the importance of the customer. Firms are investing heavily in research and data-gathering initiatives, with **54%** saying that they use both qualitative and quantitative customer research to guide the design of customer experiences. What's more, **49%** of brands confirmed that they track and analyze what happens at brand touchpoints, how those interactions are perceived, and what customers do as a result.

That's a lot of information, and it looks as though many brands are putting it to good use. **45%** of respondents said they allocate company resources based on what matters most to their customers and organization, while **47%** said they provide all employees with training, information and tools to help them execute on the customer experience.

Scratch the surface, though, and the results are less convincing. Only **34%** of brands said that they identified and ranked their most important customer groups, journeys and interactions, while just **26%** communicate CX metrics with actionable insights to employees and partners. Less than a third (**32%**) said they iteratively generate ideas, prototype and test with customers before finalizing a design.

There's a suggestion that despite the investment in customer research, firms are lagging behind in actually prioritizing and acting on CX initiatives. So, while they know the customer is important, there's a missing element when it comes to focusing data-gathering efforts into improved experience, engagement and results.

Could the problem be a failure to view results through the lens of the customer journey?



57%

OF BRANDS SAID THEY
RELIED PRIMARILY ON
A CUSTOMER JOURNEY
APPROACH

BRANDS SEEM CONFIDENT

Ask brands about the customer journey, and there's a strong sense that they're on it. When asked to what extent they took a customer journey-centric approach to creating signature customer experience moments, **57%** of brands said they relied primarily or exclusively on a customer journey approach. Brilliant, especially given that a further third (**35%**) said they also used the customer journey, but in a more limited way. Only **5%** said they weren't using the customer journey at all.

Forrester asked in more depth about organizations' abilities when it comes to understanding and orchestrating the customer journey, and again there's a confidence. Probed on their key capabilities around data fusion and journey design, planning, testing, optimization, orchestration and automation, more than a third of brands said they had these capabilities fully in-house, while more than **80%** said they either had in-house capabilities, or required some support from external partners.

BUT SHOULD THEY BE?

Taken at face value, that's a striking level of capability and confidence around the customer journey, with the vast majority of brands saying both that it factors into their approach to customer experience, and that they have the in-house tools and expertise to analyze and the journey. But if this was truly the case, and representative of organizations as a whole, why would brands be worried about rising customer expectations?

In part, the issue lies with the management and data challenges inherent in understanding and managing customer experience at scale. Asked to rate various factors that affected their ability to optimize customer experience across touchpoints and journeys, almost two thirds (**63%**) cited an inability to act immediately on available data as a significant, major or critical problem. **56%** named an inability to work across silos to optimize customer experience throughout journeys, while **55%** cited a lack of consistency across channels.

Brands' responses to other questions in the survey hint at a disconnect between how they rate their own grip on the customer journey, and what their true capabilities are. Asked what types of data they currently use for customer journey mapping and analysis, only a quarter (**27%**) were making full use of all customer data sources, across all channels, real and digital. **57%** have either partial metrics, or no metrics, to measure how they meet customer expectations across micro and macro journeys.



63%

CITED AN INABILITY TO
ACT IMMEDIATELY ON
AVAILABLE DATA AS A
SIGNIFICANT, MAJOR
OR CRITICAL PROBLEM



13%

OF BRANDS SAID
THAT THEY COULD
MAP, ANALYZE AND
ORCHESTRATE CUSTOMER
JOURNEYS AT SCALE

More significantly, only **13%** of brands said that they could map, analyze and orchestrate customer journeys at scale, yet this is exactly the capability they need to deliver on the unique intent and expectations of individual customers. Only in **13%** of firms are customer journey initiatives owned by permanent, cross-functional teams, and yet organizations who seek to engage and have meaningful relationships need to organize themselves around the customer, and work across functional boundaries.

Forrester's research suggests that brands are over-confident in their own customer journey capabilities, or at least that there's a discrepancy between their understanding of the tools and experience they need, and what's actually in place. They may think they're analyzing and orchestrating, but without the ability to operate at scale, and without cross-functional teams to own and enable intent-driven customer journeys, they're allowing a gap to develop between the brand and customer perception of the same journey.

It's a gap they risk falling into.

03

**BRANDS KNOW
THEY NEED TO
ACT QUICKLY**

BRANDS KNOW THEY NEED TO ACT QUICKLY

We're not pointing the finger. The customer journey is still a fresh concept, and the tools, approaches and expertise required to analyze and orchestrate customer journeys are still evolving and emerging. Inevitably, vendors and brands have a variety of views about where we are, where we're heading and what's required to get there. Brands', and even vendors' understanding is developing.

And brands already know they need to add and improve their capabilities. **89%** of firms expect

their spending on customer journey analytics and orchestration to increase in the next year, with half expecting it to rise by more than **10%**. Asked how they would improve customer experiences in the future, **59%** of organizations already had plans to improve the quality of customer data and gain better customer insights. Half (**48%**) planned a focus on customer journey research, design and measurement to drive customer engagement.

SHARPER TECH

At Thunderhead, we believe that the customer journey, steered by customer intent, is the defining concept behind effective and meaningful engagement. The ability to record, parse and analyze the data behind the journey is essential to understanding customer behaviour and intent. This insight is, potentially, invaluable, but its true worth is only realized when brands have the parallel

ability to put it to work. Real-time, context-sensitive, actionable insight is fundamental to orchestrating the customer journey, ensuring that intent can be enabled with the minimum of friction and fuss.

True engagement requires a business-wide focus on the customer, elevating the customer journey to critical importance.

To understand and facilitate the path customers want to take, organizations need the capability to analyse and orchestrate these journeys:



IN REAL-TIME



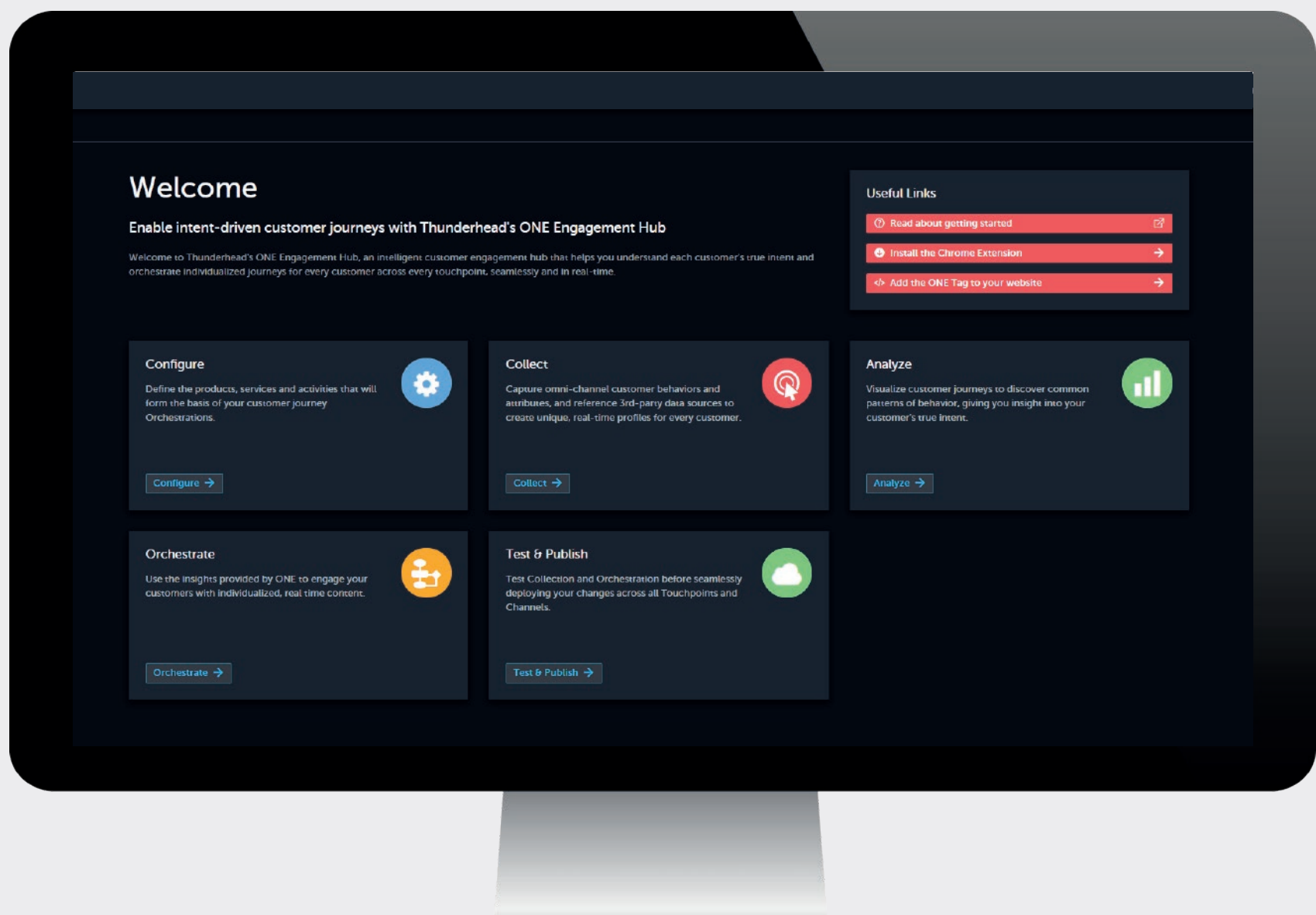
AT SCALE



**BASED ON A DATASET
THAT COVERS ALL
CHANNELS AND
TOUCHPOINTS**

In part, the disconnect between brands' understanding of the importance of the customer journey, and their ability to prioritize and analyze it effectively, is down to tech that can't do the job.

INTRODUCING ONE



That's where we come in. At Thunderhead, we realized long ago that the previous generation of technology would never be sufficient to deliver next-generation customer relationships in the digital era. Driven by this, and guided by extensive business and academic research, we developed ONE - a cloud-based, AI-driven engagement hub that places the customer, and the brand's engagement with them, at the center of the business.

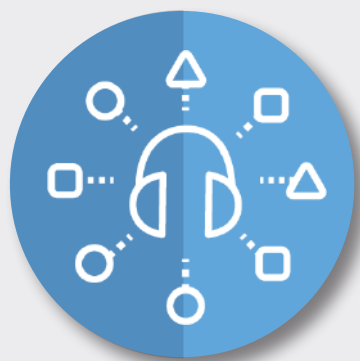
Built on an entirely new layer of technology, ONE works with and across existing systems, liberating data from functional silos to provide real-time analysis and actionable insight on individual customer journeys, their context, and the customer intent that steers them.

ONE lets brands understand, visualise, and optimize the customer journey in real-time. It listens to a customer's activity across all channels and touchpoints, building a view of what they look for: discovering intent, context and behavior as they browse.

ONE builds a unique and adaptive profile based on customer needs, recognizing existing customers and linking their activity to everything else that the brand already knows about them.

ONE then uses this insight to orchestrate individualized journeys for every customer, seamlessly and in real-time.

HOW ONE DOES IT



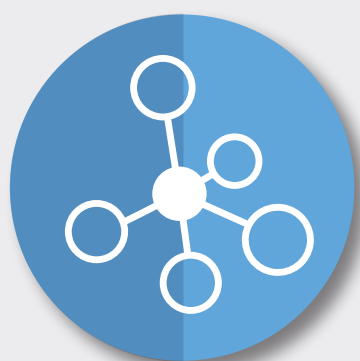
LISTEN

ONE listens and ingests data across customer touchpoints and multiple existing systems such as CRMs. Its Insight Engine captures the real-time user context, including touchpoint, time and identity.



UNDERSTAND

Journey Analytics visualize the customer journey and drop-off points to gain actionable insights, while Intent Analyzer harnesses the power of AI to provide deep advanced analysis of customer intent, predicts customer behavior and prescribes enhanced orchestration.



ACT

The Customer Profile brings insight and intent together with historical behavior to inform the Decisioning and Orchestration Engine, which takes action based on all customer insight to continue the next-best conversation. ONE delivers personalized, optimized conversations, based on the individual customer journey, across online and offline channels.

04

**THE FOCAL
POINT**

THE FOCAL POINT

In an age when everything is meant to revolve around the customer, many brands are stuck simply going round in circles. It's not a lack of data, it's the inability to harness insight and context.

For some brands, the missing element is the very concept of the customer journey, but our research shows they're in the minority: just **5%** say they aren't using a customer journey approach. For many others, it's that, despite embracing the journey, they lack the cross-functional, outside-in organizational focus that's necessary to fully act on journey insights - remember that only in **11%** of firms is the journey owned by a cross-functional team.

Many others find themselves stuck trying to apply existing older technology to a leading edge problem, unable to translate their understanding of the customer journey into actionable insight, real-time decisioning and other vital customer engagement inputs. **73%** of brands are failing to use the full range of their available data to map, analyze and understand the customer journey. An incomplete analysis invariably leads to an incomplete understanding and disconnect experiences.

Forward-thinking brands that truly want to put the customer at the center of everything they do need to organize that way, creating cross-functional, outside-in processes that focus on the customer journey. They need to bust data out of business functions, gathering it into a single place and performing advanced real-time analysis. And of course, they need the kit to support and enable this brave and brilliant new way of working.

ONE is built from the ground up to help brands use everything they know to have the best possible conversations, and make the best decisions about customer relationships at every opportunity. With ONE, brands can engage customers and potential customers in intelligent, seamless and relevant conversations - online, on mobile apps, in the call center and even in-store.

ONE ensures that all interactions are captured and understood, and that outputs such as next-best action marketing are relevant and appropriate, building value for both customer and brand. It's the customer operating system, through which brands and customers can ensure they're embarked on the same journey.



73%

OF BRANDS ARE FAILING TO
USE THE FULL RANGE OF THEIR
AVAILABLE DATA TO MAP,
ANALYZE AND UNDERSTAND
THE CUSTOMER JOURNEY

A PARALLEL JOURNEY WITH ONE



RESEARCH

A prospective customer is browsing the website for their next car.



ONE listens to every user as they interact with the brand to build up a dynamic profile and understanding of intent.

She finds a model she likes and is in her price range.



ONE's captured the interest for a specific model for our user.

The customer uses the online car configurator to tailor the car to their own specification.



ONE listens and captures more information including the model, the engine size and more, even down to the bright red colour they like.

A few days later our prospective customer returns to have another look at the website and receives a personalized experience. She decides to register her interest and gives her contact details.



ONE utilises the intent and activity insight to continue the conversation with the customer. ONE uses captured preferences to ensure our journey is personalized, even down to the red car!

CONSIDERATION

She receives a personalized, and targeted email.



ONE enables the dealership to send a personalized, and targeted email with relevant available cars and offers based on her online behaviour

She has still not made a decision and continues to browse other websites, she sees targeted ads based on her previous browsing behavior intent.



ONE has also shared the same data points used for personalisation with the ad serving platform enabling highly targeted and better performing campaigns to be delivered.

The customer feels she's ready to take the next step in her buying journey. She visits the dealership and speaks to a member of the sales team.



ONE knows where the user is in their journey and gives valuable insight to the sales team, helping them have the right conversation with the customer and talk about relevant purchase and upgrade options.

PURCHASE

She buys her new red car as the experience felt effortless and she felt valued by the dealership.



ONE now enables the dealership to talk to their new customer about relevant service offers and accessories, instead of treating them like just another prospect and continuing to promote irrelevant offers.

TO CONCLUDE

In this ebook we've discussed the consumer of today and the challenges brands are facing. But it's not all doom and gloom, in fact the opposite. The Forrester study has uncovered that brands aspire to use journey analytics and orchestration to ultimately deliver business growth. It paints a bright future for brands investing in customer journey technology, of boosting loyalty and long-term customer engagement.

We think it's time to take action. Forrester commented, 'Unlock the power of the customer data and insights to achieve seamless and connected

customer experience and better business outcomes.' And we couldn't agree more, Thunderhead's ONE Engagement Hub addresses these challenges head on.

Thunderhead is also named a Leader in The Forrester Wave™: Customer Journey Analytics Visioning Platforms, Q3 2017, and The Forrester Wave™: Customer Journey Analytics Orchestration Platforms, Q3 2017.

[Download the Forrester study](#)

“With ONE we're able to understand our fan journeys across every touchpoint in real-time and then deliver a more relevant, personalized, consistent experience for our fans every time. Quite literally a game changer for fan engagement.”

Mike Conley, CIO, Cleveland Cavaliers

“Thunderhead's ONE is a unique platform for customer engagement and quickly gives us the ability to truly understand our candidates and clients and service their needs in real-time, marking a momentous point in our ability to build engagement.”

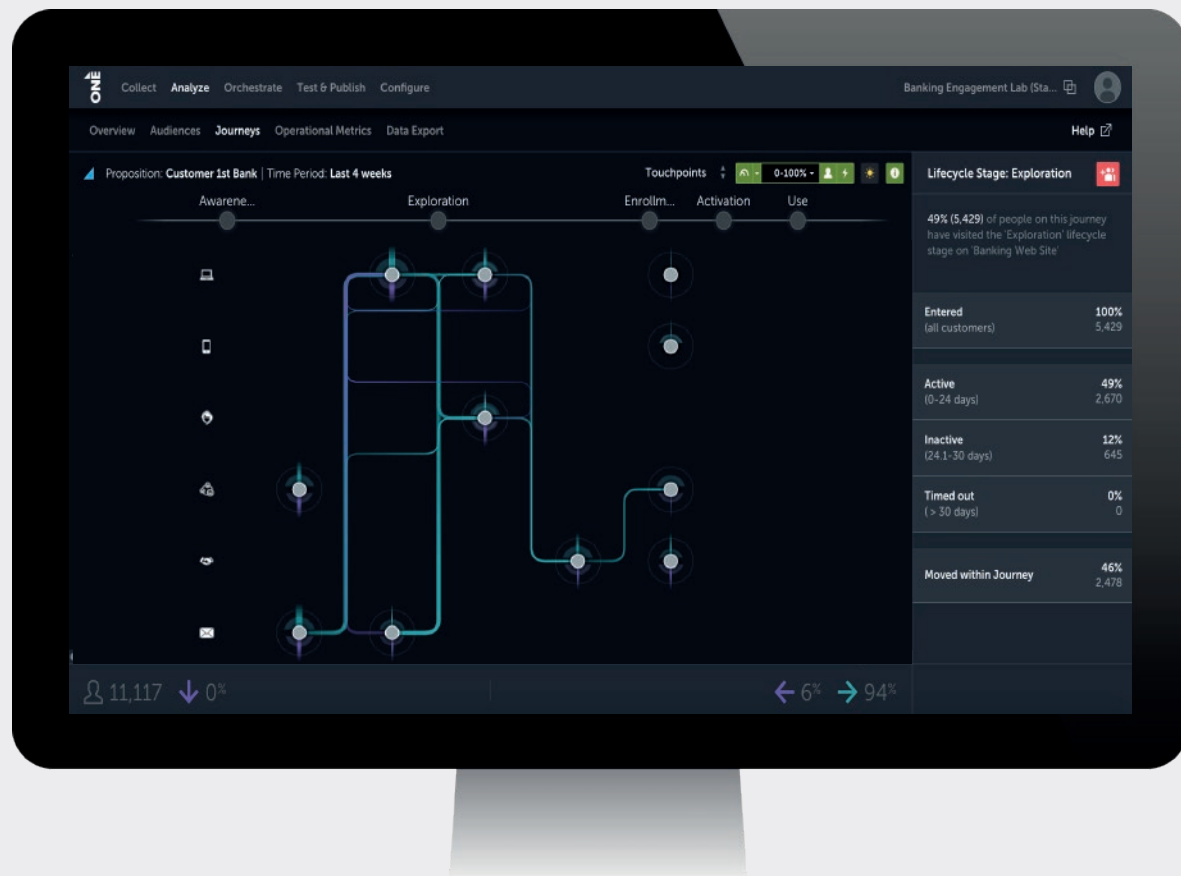
*Eamon Collins, Group Marketing Director,
Michael Page*

“By providing advanced insight into our clients and potential clients, ONE has very quickly helped us to understand their individual needs and have more meaningful and tailored conversations with them.”

*Rob Moody, Chief Innovation Officer, EY UK & Ireland
Transaction Advisory Services*

“ONE allows us to understand customer intent, then use these insights to orchestrate better and more successful customer journeys.”

Jonathan Newman, Chief Digital, Officer Office Depot



ABOUT THUNDERHEAD

Thunderhead is leading the movement to transform customer engagement, enabling brands for the first time to understand each customer's true intent and orchestrate personalised journeys for millions of customers across billions of touchpoints, seamlessly and in real-time.

With Thunderhead's AI-driven ONE Engagement Hub it's now possible for brands to deliver exceptional engagement for every customer across every journey,

driving top-line growth, reducing cost-to-serve, increasing customer happiness and building customer lifetime value.

A recognized global leader in the customer engagement market, Thunderhead is headquartered in London and has its development HQ in Boston.

Thunderhead. Customer Engagement just got personal.

conversations@thunderhead.com



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