Five Key Attributes of Best-in-Class Customer Experience Journey Management

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Customer Experience (CX) is a top priority focal point in data-driven digital business transformation. Customer-centricity is not new, of course. However, in the modern digital business context, the conversation around customer-centricity focuses on steps to measure CX, optimize CX, and apply design thinking around CX across the full customer journey. This focus on experience management (measurement, optimization, and design thinking) has broader applications in UX (User Experience) and DX (Digital Experience). In addition, we see experience journey management being discussed and applied in other domains, such as Healthcare (Patient Experience) and Human Resources and Human Capital Management (EX: Employee Experience).

We focus the discussion here on the customer, though of course the concepts can equally well be applied to any digital users or stakeholders (including B2B clients). So, what is CX? Matthew Wride's definition of EX can be paraphrased within the context of CX in this way: *"The Customer Experience is the sum of the various perceptions that customers have about their interactions with your organization."* We examine five key attributes of best-in-class CX journey management for the modern data-driven digital business.

The first key attribute of best-in-class CX journey management is Measurement. CX is something you measure, digitally. But the CX journey is not measured and managed in isolation at independent disconnected touchpoints along the customer's journey (e.g., with the website, the app, the service delivery person, the call center representative, the sales clerk, or the billing office). After all, a "journey" is not a point, but a continuous trajectory with many points. The points are just representative (ideally, informative) milestones along a continuous path. The customer's experience is a reality that lives outside the bounds of our data points. The customer doesn't care about our organizational structure or data silos. So, CX measurement is critically (and holistically) important within and across all of the various digital and non-digital channels through which we engage with our customers in their journey with us. If we get this wrong, the consequences of poor CX could be disastrous, including revenue loss, customer churn, or negative sentiment broadcasted publicly on social media. So, the more points you have to help you understand a customer's experience, the more insights that you will gain from it, and consequently the more likely you will be able to optimize the CX.

That leads us to the second key attribute of best-in-class CX journey management: Optimization.

CX is sometimes perceived as something passive. It is a kind of sentiment metric (*"the sum of various perceptions"*) that is measured "from a distance" about a customer's journey. In that mode, CX management taps into only the lowest end of the analytics maturity scale (descriptive and diagnostic analytics). But wouldn't it be better if we take customer relationship management to the next level? That would mean the application of predictive and prescriptive analytics, based on customer insights across all of our customer interaction channels, to engage interactively with the customer in order to produce a better customer outcome. Predictive analytics can forewarn us of potential dips in CX due to negative events, circumstances, or interactions with the customer. Prescriptive analytics takes CX management to the next level: optimization of the customer experience. Optimization is based upon insights learned through many customer journey interaction touchpoints and channels – i.e., the 360 view of the customer, particularly VoC ("voice of the customer") data. The end result should be that we now know best how to personalize, delight, and establish trust in customer interaction.

Because optimization of CX requires prescriptive action (which is proactive), in stark contrast to diagnostic or passive experience management (which is reactive), this leads us to the third key attribute of best-in-class CX journey management: Engagement. Steve Lucas referred to the application of this concept as the new Engagement Economy in his eBook "Engage to Win".

The best CX journey management solution consists of dynamic, interactive, and near real-time customer engagement: delivering the right experience just-in-time at the right place in the right context. Prescriptive engagement aims to optimize the customer journey as it unfolds by presenting a recommended "next-best-action" (NBA) to your customer-facing staff, based on historic customer data, live digital information, and accurate models of the CX trajectory. To get this right requires customer focus, clear goals, and forward-thinking: that is, design thinking (which is defined as *"a methodology to solve complex problems, and find desirable solutions for clients"*). If done right and done well, the outcomes are jointly optimized both for the customer and for the business.

These outcomes cannot be achieved without a digital infrastructure that shares, blends, integrates, and dynamically models all customer data. That leads us to the fourth key attribute of best-in-class CX journey management: Automation.

Automation should simultaneously be both more and less than you might think. Automation should be "more" in that it doesn't negate the value, knowledge, and personal touch that customer-facing staff brings to customer experience and customer engagement, but in fact, automation should add to, augment, accept feedback, and learn from your staff's use of the NBA insights and recommendations that they receive from the CX journey management solution. That is true A.I. = Augmented Intelligence!

Automation should also be "less" than you might think in that it should not require massive, complex, burdensome, high-latency IT infrastructure that requires heavy lifting to mine massive volumes of VoC data, that ends up being inefficient (with a long "time to solution") and ineffective (with inaccurate recommended actions). Customer Engagement is not real engagement if it is not dynamic, interactive, and near real-time. Consequently, an efficient, effective customer engagement environment must be lean, agile, and human, amplified through automation.

The fifth of our key attributes for a best-in-class CX journey management system is Learning. A Learning System is one that is engineered to exploit the significant value (perhaps greater value) of failure examples that can be used to train the system to do better in similar situations in the future. Such a learning system for CX journey management needs "training examples" of failed CX initiatives and customer complaints in order to learn the who, what, when, where, why and how behind those events, in order to build more accurate prescriptive models. In a sense, the value derived from negative examples in CX is equivalent to the value of negative training examples when training any machine learning model. As someone once said, *"good judgment comes from experience, and experience comes from bad judgment."* Thus, the feedback loop in our "augmented intelligence" automation solution makes it a true Learning System and is critically important in order to maximize accuracy, transparency, and freshness in its NBA recommendations.

So, is there a best-in-class CX journey management solution that actually delivers on all five key attributes: measurement, optimization, engagement, automation, and learning?

There is such a solution, which I discovered recently when I attended the PegaWorld 2017 conference in Las Vegas. The facts are clear: Pegasystems was [named a leader in Real-Time Information Management by Forrester](). The Forrester report states that *"The Pega Customer Decision Hub builds on Pegasystems' traditional decision management capabilities for offline channels to enable personalized email, mobile, social media, web, and eCommerce interactions. It further extends its next-best-action analytics via integrations with adtech platforms and directly with advertising channels."*

Furthermore, at PegaWorld 2017, I heard numerous clients' testimonials of Pegasystems' powerful AI (artificial and augmented intelligence) applications for both predictive and prescriptive customer engagement. Among these, I learned how traditional Robotic Process Automation is moving toward Robotic Case Automation, which delivers machine-assisted guidance to customer service personnel regarding their NBA for a specific customer. The NBA is the right offer, to the right customer, at the

right place, at the right time, in the right context. The focus is on the customer, not the process, though automation of redundant steps in the process does indeed free up customer service personnel to focus more on personalized engagement with the customer. Each customer is a special case, and AI (mining VoC data through data analytics and machine learning) becomes the tool to personalize customer engagement in an interactive, dynamic, "just in time" manner. The customer journey is now focused on interactive engagement (prescriptive and proactive), whose outcome is faster, better, optimized CX (= those *"perceptions customers have about their interactions with your organization"*).

The folks at Pegasystems as well as several of their partners and clients presented an impressive array of success stories at PegaWorld 2017. The application of AI to data-driven customer engagement has enabled many organizations to achieve improved productivity, greater efficiencies, cost savings, and happier customers.

This is not automagic. Key to such successes is the smart integration of data systems and services across all customer touch-points, from the back office to the front office, providing a holistic view of the business process and the customer case, all in one view. As one Pegasystems client put it, all of their employees are now "front office" – they are each responsible for delivering exceptional customer service through best-in-class customer engagement. And what is the result of that? ? Significantly improved CX journey management, from passive to proactive customer engagement!

For specific examples and more information about AI-driven CX solutions, you can read about the software, systems, and success stories of Pegasystems in the following articles:

"Newly Enhanced Pega Platform Helps Businesses Build and Run Better Software"

"New Pega Mobile App Puts The Power of AI in Retail Agents' Hands for More Engaging In-Store Experiences"

"Pegasystems Software Helps Transavia Enhance the Travel Experience and Improve Customer Loyalty"

"Pega Extends Cloud Choice with AWS and Microsoft Azure"

"Pegasystems Launches AI-Powered Paid Media Manager"

"Merkle and Pega Launch Unified Data Management Platform"

"Optimize real-time decision management with a predictive Customer Decision Hub"

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