ESSENTIAL GUIDE TO CREATING EXCEPTIONAL CUSTOMER JOURNEYS

APPLAUSE°

While retailers have obsessed over delivering great omnichannel experiences for years, the pandemic pushed many other industries to expand digital delivery and rethink their customer touchpoints. It's been a painful process for many organizations, particularly those in industries that typically lag in embracing technology, such as financial services, healthcare and insurance.

Customer journeys look different based on industry, but customer expectations don't. Users demand intuitive, easy interactions with brands across all channels — industry is irrelevant.

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> **Consumer expectations have become truly liquid across different product and service categories. They no longer compare their brand experiences between two different companies in the same space. Instead, they compare their experience with a mobile provider to a best-in-class airline or a technology-driven offering."**
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> Source: "Growth: It Comes Down to Experience." Accenture, June 2020.

To make sure your company compares favorably, scrutinize the customer journey across every path a user could take. Make sure each user path is smooth and simple to navigate. How does the online shopping experience compare to in-store? Can customers schedule appointments as easily with your app as they can over the phone? Are all the offerings your users expect available online? Do you deliver great customer experiences across all channels?

Put the customer front and center. Follow these steps to ensure all touchpoints work together to deliver a consistent, cohesive experience that drives brand loyalty.

# 1. Understand the types of audiences your business serves.

Whether you call them customer profiles, personas, or something else, you must understand the characteristics that define the different types of customers you serve. Look at data to understand customers' demographic characteristics and behaviors.

Don't forget to factor in how customers may vary by product, season, or other considerations. For example, a resort may attract college students during spring break, young couples or families during the summer months, and retirees during the winter. These groups all have different priorities, budgets, technology expertise, and preferred channels for booking reservations, all of which impact the customer journey.

2. Map out the customer journey.

The webinar "Validate Your Redefined Customer Journeys Quickly'' describes customer journey maps as a visual illustration.[1] These maps display the customers' process, needs, and perceptions throughout their relationship with a brand. The customer journey map captures goal-oriented scenarios for specific users, and provides the crucial steps and touchpoints.

Customer journeys vary across industries, devices, and physical or digital mediums. They're fluid and dynamic ... and customers expect them to work every time.

Customer journeys flow across multiple devices and channels, including both physical and digital experiences
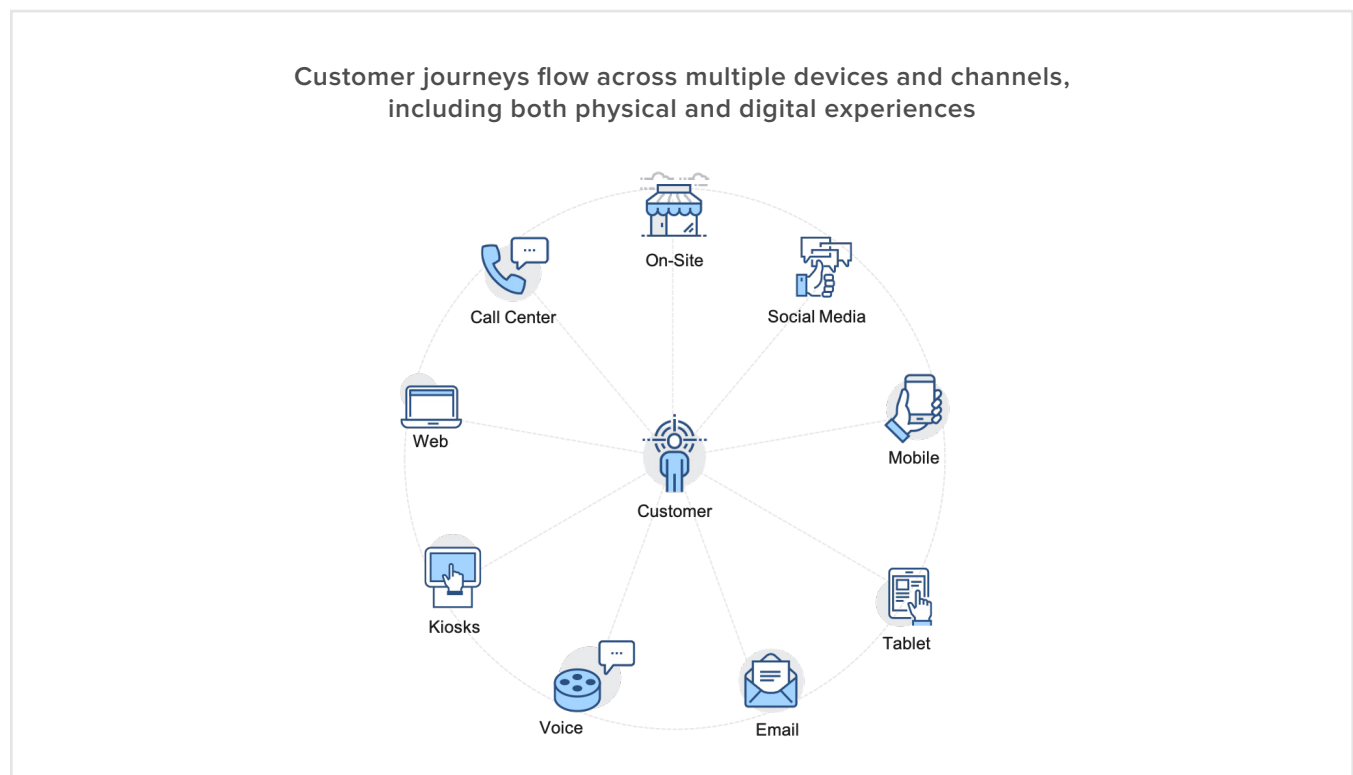
1. "Validate Your Redefined Customer Journeys Quickly." Applause, September 23, 2020.

A recent [Salesforce report](#) found that 69% of consumers want companies to offer new ways to access existing products and services, such as digital versions of traditionally in-person experiences.[2] The same study revealed that 74% of users said they used multiple channels to start and complete a transaction, while 66% reported using multiple devices.

Businesses must evaluate an ever-growing range of scenarios to adapt to the trend toward switching between devices and channels to complete transactions. Can a person review pricing and plans for a streaming media service as easily on a smartphone as on a desktop computer? What happens if someone starts a loan application on one device and tries to resume on another? If a client schedules an appointment by phone, can they reschedule online? How easy is it for a buyer to return products online that were purchased in store, and vice versa?

Compare two different journeys for ordering takeout from a restaurant:

Order via phone:	Order via mobile app:
Call restaurant.	Open app and log in.
Place order: specify no mayonnaise.	Place order: specify no mayonnaise.
Try to pay via card over phone - NO. Must pay at pickup.	App provides order verification screen.
Get pickup estimate time.	Pay with saved card.
Arrive at restaurant to pick up order at specified time.	Get confirmation via SMS with order pickup time.
Check order to make sure it's correct.	Arrive at restaurant to pick up order at specified time.
Wait another 10 minutes for remake, no mayonnaise.	Check order to make sure it's correct.
Pay via card.	Leave with correct order.
	Get follow-up survey via email next day.
	Complete survey, get coupon code.

To remove obstacles, companies must understand how journeys can shift, what could go wrong at each touchpoint, and the impact or severity of customers going down the wrong path.

2. "State of the Connected Customer - 4th edition." Salesforce. September 2020.

3. Define customer goals at each stage of the journey in clear, concrete terms.

Agile user stories are perfect for this. The format "As [persona], I want to [do this] so I can [benefit]," helps you focus on the customer's wants and needs. In this stage, you break the journey into smaller, discrete steps to isolate and evaluate potential points of failure and opportunities for improvement.

Understanding each customer's perspective, planned action, and goal enables you to assess functionality from the user's point of view. This approach helps you prioritize which components of the journey are more important, such as those that impact the most customers or have the highest costs associated with them. The ability for customers to sign up and purchase goods or services is a top priority, but other segments of the journey may have significant value as well.

Assess data that helps you determine which parts of the customer journey need attention, such as the most frequent abandonment points. For example, if you have many customers accessing your website via mobile device, but relatively few creating accounts via mobile web, there's clearly an opportunity to improve that portion of the journey.

Sample user stories

» As a person who just moved to town, I want to see which restaurants deliver to my home so I can order dinner tonight.

» As a new car owner, I want to get a quote for auto insurance so I can make sure my vehicle is covered if I'm in an accident.

» As a frequent traveler, I want to check my rewards balance so I can see if I have enough points to cover my next trip.

» As someone who feels ill, I want to schedule a doctor's appointment so I can get treatment.

» As a parent, I want to set which programs my children can watch so I can know they're only accessing age-appropriate content.

4. Test whether customers can complete the task using their preferred channels.

To ensure smooth customer journeys, software development and QA teams must cover many different test cases and environments. Often, the volume of test cases required exceeds a team's capacity. Yet failure to test comes at a cost as well. A testing partner can help brands fully vet their customer journeys, expanding test coverage to provide confidence that apps, websites, and digital experiences function seamlessly.

Find testers that mirror your customers' profiles, platforms and devices to get the most relevant and targeted insight. Testers replicate your customer journeys and evaluate user experience, acceptance and sentiment. They help companies go beyond understanding whether an app simply works to learn how users feel about the experience. Focused tests with real-world users reveal opportunities to remove friction from the customer journey. Do testers find working with your company intuitive and simple? Do you offer the features and options customers expect? What would customers change to make the experience better and increase their loyalty to your brand?

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> **It's more than focusing on the functional aspects of an app but considering whether this site would work for a 50-year-old with a certain educational background."**
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> Sumeet Mandloi
> *Director of Engineering, Dow Jones*
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> Read the case study

Conduct exploratory testing with users with the same characteristics and demographics as your customers to evaluate real-world user experiences. Tester feedback offers actionable insights on opportunities for improvement, such as better signage for BOPIS, clearer instructions for mobile check deposits, or different options for streaming media voice commands.

Key considerations for customer journey testing:

» Is your experience intuitive and enjoyable for customers?

» Do you make it easy for your customers to come back and re-order?

» Do your digital applications work as intended in real-world conditions?

» Do your digital applications function across all the devices
and platforms your customers care about?

» Do payment transactions succeed across every payment instrument?

» Can customers earn and redeem rewards?

» Do customers easily understand how to proceed at each step of the journey?

» How do your internal systems and staff respond during peak times?

» Is the experience seamless and consistent across all channels?

» Do new features add value for the customer?

» Are your marketing efforts personalized and relevant for each customer?

5. Streamline customer journeys based on user feedback.

Use the intelligence collected during testing to remove friction from the customer journey, then validate that the changes solved the problem — without creating any additional challenges. Improve consistency across different channels based on insight from testers. Learn from your successes as well as your failures. If one component of the journey works well, can you adopt similar tactics elsewhere? Perhaps customers report that orders placed online are consistently accurate and delivered on time, while those placed in-store are delivered incomplete or late. You may be able to replicate key components of the online process in-store to improve accuracy and on-time delivery.

As you adjust and adapt based on user feedback, you'll improve your customer journeys, better understand customer expectations and, ultimately, gain a competitive advantage. Partnering with Applause empowers companies to assess all facets of the customer journey. From functional tests to ensure apps work properly across all devices and user experience testing to make sure customers love your products to holistic customer journey testing to evaluate your end-to-end experiences to ensure quality and consistency; our testers can uncover opportunities to delight your customers.

About Applause

Applause is the worldwide leader in enabling digital quality. Customers are no longer satisfied with digital experiences that are good enough; they demand the exceptional. The Applause Product Excellence Platform provides the world's leading brands with the comprehensive approach to digital quality needed to deliver uncommonly great digital experiences across the globe – with highly vetted testers available on demand, a complete and enterprise-class technology infrastructure, multi-point digital quality solutions and SaaS products, and expertise across industries and use cases. This harmonized approach drastically improves testing coverage, reduces costs and speeds time-to-market for websites, mobile apps, IoT and in-store experiences. Thousands of leading companies – including Ford, Google, Western Union and Dow Jones – rely on Applause as a best practice to deliver the exceptional products and digital experiences their customers love.

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