



GETTING STARTED

5 steps to integrate digital into your CX efforts



OVERVIEW

In today's digital-first landscape, seamless integration of digital strategies is crucial for effective Customer Experience (CX) programs. Bridging the gap between often-siloed CX and digital teams is essential to avoid redundancies and create unified customer journeys.

This requires deliberate collaboration to leverage digital technologies and insights for enhanced CX. This blog outlines five key steps to help CX teams effectively incorporate digital into their efforts, fostering partnerships and building a customer-centric digital ecosystem.

STEP 1

Forge partnerships with digital stakeholders

STEP 2

Map a key customer journey

STEP 3

Set up passive and solicited digital listening posts

STEP 4

Use digital analytics to understand visitor behaviors

STEP 5

Build initial automated workflows

**STEP 1**

Forge partnerships with digital stakeholders

Forging partnerships with digital stakeholders involves identifying and engaging key individuals and teams within the digital landscape of your organization. Understanding their roles, expertise, data, and tools forms the basis for collaboration. This foundational step aims to break down silos between CX and digital functions, paving the way for integrated and customer-centric initiatives. By establishing these connections, CX teams can tap into valuable digital resources and perspectives.

These partnerships unlock synergy and avoid duplicated efforts. Digital teams bring insights into online behavior, while CX teams understand customer journeys. Collaborative efforts lead to comprehensive data analysis, improved journey design, and a seamless customer experience.

- + Meet with relevant teams: Initiate focused meetings to share your CX vision and understand digital objectives. Articulate how collaboration (see table below) can benefit their goals, such as increased engagement or conversion, and identify their critical data sources.
- + Complete a stakeholder mapping exercise: Categorize digital partners based on interest and influence in CX initiatives (e.g., champions, challengers). Identify an executive champion to advocate for the CX-digital partnership.
- + Start with a focused use case: Instead of broad initiatives, begin with a specific project with an enthusiastic partner. Jointly analyze issues using both CX Voice of the Customer (VoC) insights and digital data to drive solutions.

Potential Digital Collaboration for CX Teams

STAKEHOLDER TEAMS

THEIR ROLE

COLLABORATION OPPORTUNITIES

Website & App Development Teams

Ex. front-end, back-end, mobile, QA engineers, DevOps

Design, build, test, deploy, and maintain digital channels, ensuring they are functional, user-friendly, and technically sound.

- + Provide insights on pain points from visitor feedback (e.g. slow load times, confusing navigation)
- + Deliver consistent, on-brand experiences across channels
- + Define test cases based on common customer issues

Digital Marketing & Strategy Teams

Ex. content marketers, SEO/SEM specialists, email marketers, content strategists

Use various online channels to attract, engage, and convert customers, analyzing data to optimize campaigns and drive business growth.

- + Ensure content addresses existing customer needs, knowledge gaps, and common questions
- + Use CX insights to develop marketing content that resonates with key audience segments
- + Track how digital initiatives affect CX metrics (e.g., satisfaction, # of inquiries, conversion rates)

UX/UI Design Teams

Ex. user experience (UX), user interface (UI), Product

Create intuitive, user-friendly, and digital interfaces by researching user needs, designing interactions, and crafting a cohesive visual experience.

- + Create digital experiences that address customers' true wants and needs
- + Design more enjoyable, effortless, successful digital experiences
- + Conduct user research and usability testing to understand customers' needs and behaviors

Data Analytics & Insights

Ex. web analytics, data scientists, user researchers

Collect, analyze, and interpret data from various digital channels to uncover trends, understand behavior, and generate actionable insights to inform business decisions.

- + Generate insights by combining experience, behavioral, and operational data from across channels
- + Use digital data to rapidly identify emerging trends and customer segments
- + Conduct testing and interviews to gain an understanding of customers' emotions, goals, and needs

Product Manager

Ex. product owner, product strategist, product marketing manager

Oversee a digital product understanding customer needs, translating them into product requirements, and bringing those requirements to life.

- + Help prioritize product roadmap based on customer-centric data rather than internal perspective
- + Partner on research to inform product roadmap and ensure customer needs are being met
- + Conduct usability tests on new features and prototypes to identify issues early in the process

IT Support & System Administrators

Ex. IT support, systems engineer, database / network / cloud administrator

Ensure smooth operation of all digital systems, provide technical support, and maintain data security and system integrations.

- + Resolve customer-facing technical issues affecting digital experiences
- + Share trends in support tickets to identify recurring problems that need systemic solutions
- + Participate in pre-launch testing of new features to identify and prevent technical pain points

STEP 2

Map a key customer journey

Mapping a key customer journey involves visually outlining the end-to-end experience a customer has while trying to achieve a specific goal with your organization, particularly focusing on journeys with digital touchpoints (e.g., online purchase, issue resolution).

A holistic understanding of the customer journey—outlining all interactions from the customer's perspective—reveals pain points and innovation opportunities and ensures strategic alignment across teams. This seamless view enables a more effective digital listening strategy.



How to go about it:

- + Facilitate a journey mapping session: Conduct workshops with relevant stakeholders, including those in digital and non-digital roles, to visualize the customer journey.
- + Use journey maps to plan digital listening posts: For each touchpoint on the customer journey, plan how to gather data to help understand that interaction — it could be a digital survey, call/chat data, or behavioral signals. By doing this, you will be drawing a map of where digital listening posts should exist, and where else data could be gathered to help understand and improve the experience.
- + Connect with non-digital and omnichannel journeys: Recognize that digital interactions often influence or are part of offline experiences. Capture feedback during digital steps of omnichannel journeys to enhance interactions.

For example: Mapping the "new customer onboarding" journey revealed a gap in communication after signup. Collaborating with the web team led to automated emails and better resources, improving the onboarding experience.

STEP 3

Set up passive and solicited digital listening posts

When it comes to setting up passive digital listening posts you'll want to implement always-on feedback mechanisms on your digital platforms (websites, apps, chatbots). These allow customers to share their thoughts and issues proactively, in their own way and at their convenience. This approach helps uncover unexpected insights and pain points, and complements traditional surveys – which are just as important – to give you the full picture.

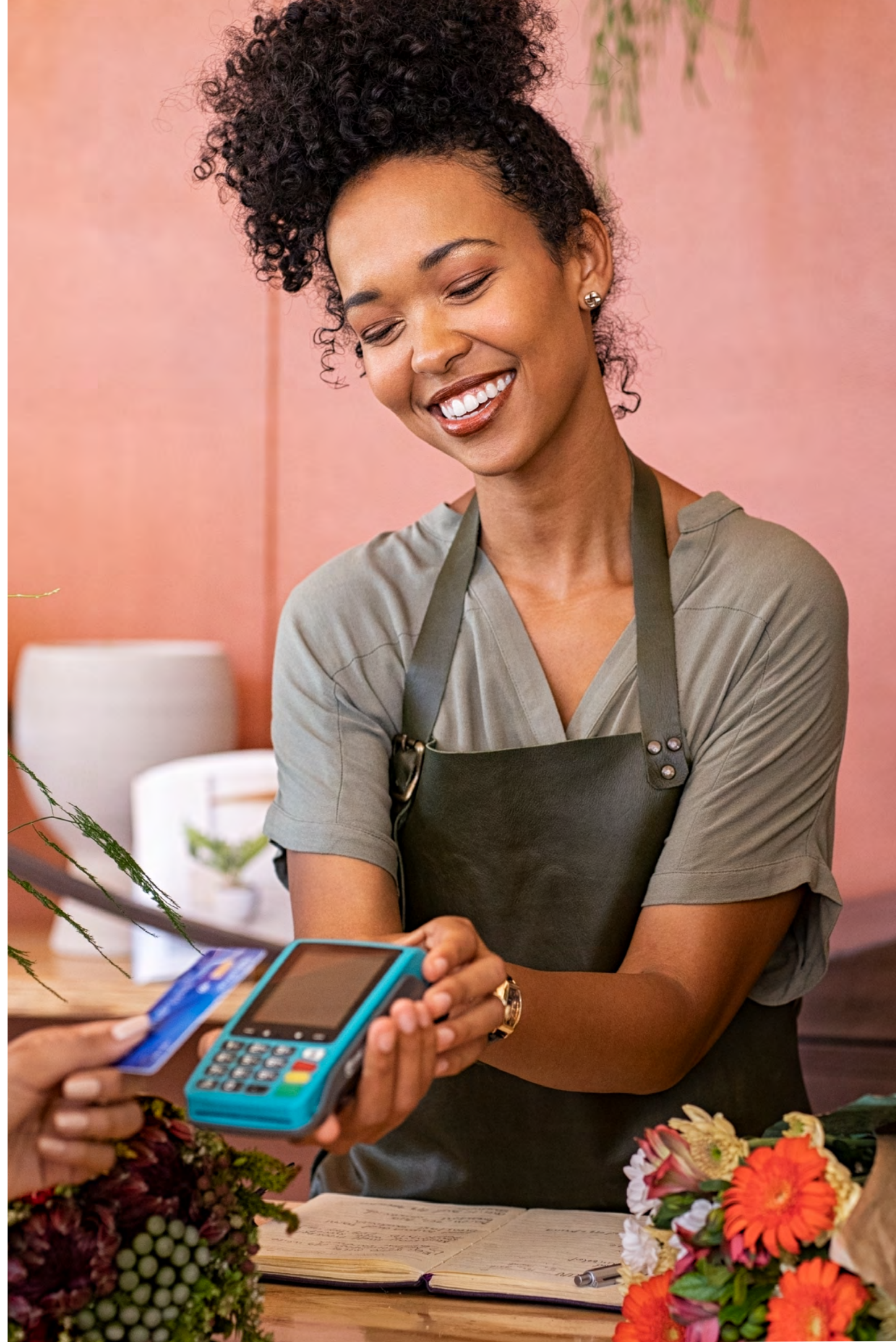
Passive listening captures the direct voice of the customer, allowing organizations to identify usability issues and unmet needs. By offering multiple channels for unsolicited feedback, organizations gain deeper insights into customer experiences.

3 tips for mapping a key customer journey:

- + Establish an always-on feedback tab: Implement a persistent feedback button or tab on your digital interfaces leading to a form for categorizing feedback. Include options for screenshots and follow-up.
- + Add embedded feedback mechanisms: Integrate feedback requests directly within specific pages or content to gather context-specific insights.
- + Offer a "Contact Us" form: Provide an easily accessible "Contact Us" form as a central point for customer communication. Provide a structured form with categories for common issues, facilitating efficient routing to internal teams.

An easy to implement example: An always-on feedback button revealed a specific error message frequently reported during checkout, alerting developers to a critical issue. This immediate feedback enabled a quick fix, reducing frustration.



**STEP 4**

Use digital experience analytics to understand visitor behaviors

Utilizing digital analytics involves implementing tools to observe and interpret visitor behavior on your digital platforms. This captures objective data about user interactions, identifying usability issues and areas of confusion.

Digital analytics offers a continuous and unbiased view of the user experience, helping to optimize digital journeys and address potential pain points more effectively.

How to implement behavioral listening:

- + Combine behavioral data with other data: Integrate behavioral data with experience (survey responses) and operational data (e.g., purchase history) for richer context, helping to understand why specific behaviors occur.
- + Understand context through session replay: Use session replay technology to recreate individual user sessions and diagnose issues identified through analytics..
- + Trigger active intercepts based on behavior: Leverage real-time analytics to identify users exhibiting signs of struggle (e.g., excessive backtracking, rage clicks) and offer immediate assistance through help buttons or chatbots.

Example: Digital experience analytics identified users rage-clicking a broken button. Session replay revealed the exact actions leading to frustration, prompting developers to quickly fix the issue, improving overall user experience.

STEP 5

Build initial automated workflows

Building automated workflows involves setting up systems that automatically route digital customer insights to the relevant teams for action, ensuring digital listening translates into tangible CX improvements.

Automation is crucial for efficiently managing feedback and behavioral data. It ensures insights are promptly addressed, fostering a better customer experience.

Considerations when implementing feedback workflows:

- + Identify initial triggers: Collaborate with digital teams to set up key events that initiate workflows, prioritizing based on impact and feasibility.
- + Equip action owners for success: Define the internal teams or individuals responsible for acting on each trigger, ensuring they have the necessary access, tools (e.g., Jira, Slack), and resources for effective follow-up.
- + Build out workflow integrations: Work with technical teams (IT, VoC platform providers) to implement the defined workflows and create a visual Workflow Map to document processes.

An example of workflow usage:

You can create an automated workflow for negative feedback submitted through the feedback tab. When keywords like "broken" or "error" are used, the system automatically generates a high-priority ticket for the development team, allowing for a quick issue resolution.

Other examples of CX-digital partnership opportunities:

- + Integrate digital insights into VoC: Incorporate behavioral, operational, and experience data from digital channels into VoC efforts for a comprehensive customer view.
- + Personalize experiences and feedback: Combine CX insights with digital capabilities to create unique experiences based on individual customer context.
- + Coordinate a consistent support journey: Share digital insights to other teams (like call centers) to create a unified, on-brand support experience across all channels.



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customer experience
to the next level?**

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