THIRD EDITION

2021 State of Customer Journey Management & CX Measurement

Insights and trends from 1,150+ CX leaders worldwide

Pointillist®

About This Report

Customer experience is more important than ever in 2021. But what makes some organizations more effective at managing customer journeys, measuring outcomes and improving experiences than others?

Pointillist surveyed over 1,150 CX, marketing, analytics and customer care professionals from various industries across the world to discover what separates leaders from laggards. In this report, we'll explore key findings and insights regarding:

- Primary CX management and measurement challenges

- Effective approaches to measure and improve CX

- Benchmarks for customer journey management maturity

- Top CX investment priorities

- Important KPIs and metrics

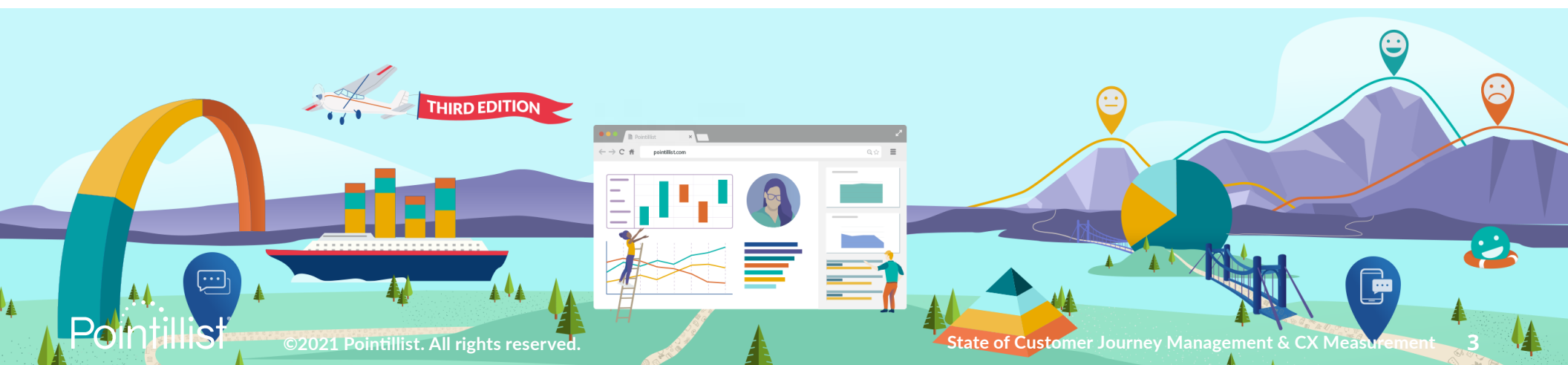- Key capabilities and strategies that separate top performers from their peers

THIRD EDITION

Contents

Executive Summary

The past year saw dramatic shifts in customer needs and behavior. Organizations that are rapidly maturing their approach to customer journey management and CX measurement were better equipped to meet evolving customer demands and achieve their business goals.

01 Journey Management Maturity Separates CX Leaders from the Pack (*See page 6*)

The most effective teams rely on journey-based approaches to CX. Top performers align their organizations around customer journeys with dedicated roles or teams to manage, measure and improve CX. High performers are more satisfied with their results and more effective at critical CX capabilities, such as integrating and analyzing omnichannel data, taking data-driven actions and quantifying the impact of CX on business outcomes.

02 Quantifying ROI Remains the Top CX Challenge (*See page 11*)

For the third consecutive year, quantifying the ROI of CX initiatives and investments remains the top challenge for organizations. This challenge makes it difficult to construct a business case for further investment. High performers are much more effective at quantifying the impact of CX and are much more successful with obtaining increased CX investment.

03 Digital Transformation Succeeds by Focusing on the Customer (*See page 15*)

State-of-the-art digital experiences are now more important than ever to customers and companies alike. Yet most companies still struggle to deliver the experiences customers demand. High performers look beyond simple cost reduction and make sure digital transformation initiatives create digital experiences that delight their customers and enable them to quickly buy, use and fix issues themselves.

04 CX and Marketing Don't See Eye to Eye (*See page 19*)

Most marketing teams believe they are tightly aligned with CX teams, but most CX teams do not agree. At top performing organizations, CX and marketing teams are much more likely to be aligned on customer-centric goals, approaches, metrics and initiatives. Tightly aligned organizations are more likely to be satisfied with CX results and investments, as well as more effective at analyzing omnichannel behavior and taking actions that improve CX and business outcomes.

05 Organizations Still Struggle to Deliver Consistent Omnichannel Experiences (*See page 22*)

Most organizations still struggle to deliver seamless and consistent omnichannel experiences. The primary barriers continue to be data and organizational silos, in combination with the limitations of legacy tools and technology. This makes it difficult for organizations to satisfy customer needs regardless of the channel a customer starts in—or chooses to switch to—before they reach their goal.

Introduction

Breakdown of CX Performance Levels

To identify key factors that seperate top performing teams from their peers, this report groups respondents into three segments based upon overall satisfaction with their organization's CX performance.

Average Performers

Somewhat satisfied with their organization's overall CX performance and the outcomes of their CX investments

High Performers

Very or extremely satisfied with their organization's overall CX performance and the outcomes of their CX investments

Underperformers

Not at all or not so satisfied with their organization's overall CX performance and the outcomes of their CX investments

18%

46%

36%

Journey Management Maturity Separates CX Leaders from the Pack

> "Companies cannot solve customer needs within the traditional organizational silos. Companies that use customer journey programs to realign their organization around their customer can realize improvements of 20 to 40 points in customer advocacy scores, cost reductions of 15% to 25%, and revenue increases of 10% to 20%."

Bharat Poddar
Managing Director & Senior Partner
Boston Consulting Group

Journey Mapping & Design

Journey Orchestration

Journey Testing & Optimization

Journey Analytics & Insights

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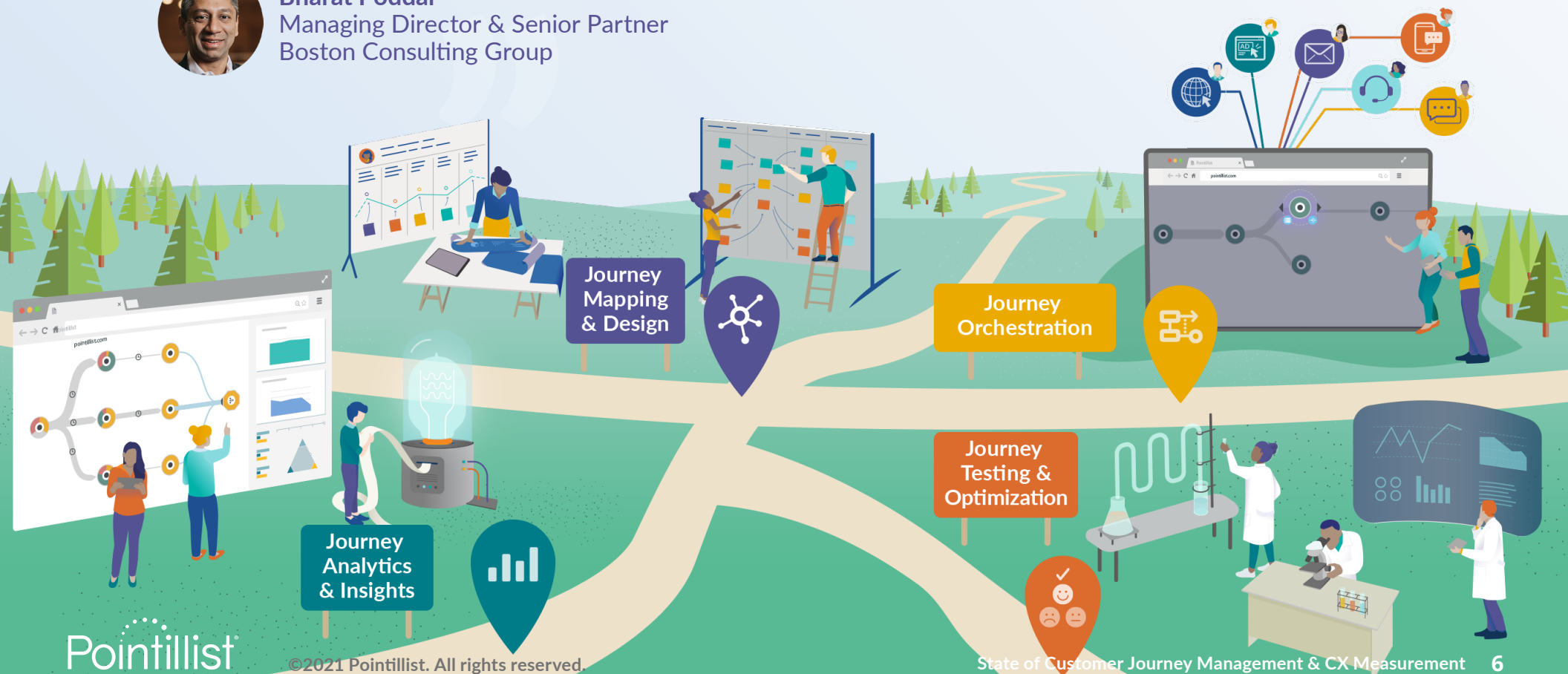
Today, organizations recognize the value of a journey-based approach when it comes to measuring and improving customer experience. In fact, **93% of high performers say a journey-based approach is very or extremely important, compared to just 63% of underperformers.**

The most effective, high-performing teams align their organizations around journeys and use customer journey management to manage, measure and improve CX. **The majority of high performers (68%) have a role or team dedicated to journey management, compared to 31% of underperformers.**

Overall, 53% of organizations currently have a dedicated role or team, 10% plan to add one, and 19% have aligned existing roles/teams with a journey-based approach.

High Performers vs Underperformers

2.2X more likely to have roles or teams dedicated to customer journey management and analytics than underperformers

High Performers Align Their Organization Around Journeys

■ Underperformers   ■ Average Performers   ■ High Performers

93% 63%
80%
93%
of high performers say a journey-based strategy is very or extremely important to their organization's overall success vs. only 63% of underperformers

68% 31%
55%
68%
of high performers have a dedicated role or team for customer journey management or analytics vs. only 31% of underperformers

High Performers vs Underperformers

1.5x
more likely

High Performers vs Underperformers

2.2x
more likely

"Journey managers have the potential to reinvent their organizations, bringing together colleagues from across departments and those unavoidable silos to ensure that customers have a smooth experience, no matter what part of the end-to-end journey they're currently in."

Kerry Bodine
CEO
Bodine & Company

High performers are more effective at integrating and taking action on their cross-channel customer data. They are more likely to track customer behavior in multiple channels and connect that data across touchpoints or systems.

Unfortunately, many organizations struggle to access and unify customer data. **Almost half (46%) of underperformers say they cannot access omnichannel data or data is siloed,** while 75% of high performers do not have these issues. As a result, 87% of underperformers lack a single view of the customer, versus only 41% of high performers.

Siloed data forces almost half (48%) of underperforming teams to independently analyze and optimize the performance of individual touchpoints, rather than the omnichannel journeys customers actually take to achieve their goals.

With more mature data integration capabilities, high-performing teams are more effective at journey management, measurement and optimization.

High Performers vs Underperformers

3-30X more likely to connect data from each channel to 3+ other channels

Top Performers Benefit from More Effective Journey Data Management

Percentage of Respondents Who are Able to Track Customer Behaviors in the Following Channels and Connect It With Customer Behavior From Other Channels

High Performers vs Underperformers

Channel	High Performers (1 or 2)	High Performers (3+)	Average (1 or 2)	Average (3+)	Under (1 or 2)	Under (3+)	Likelihood
Voice of the Customer (VoC) or Customer Feedback Management	33%	30%	19%	13%	8%	1%	**29.1x** more likely
Call Center or IVR	33%	23%	22%	9%	6%	5%	**4.4x** more likely
Web activity or clickstream	36%	20%	22%	11%	13%	3%	**6.7x** more likely
Mobile app activity	34%	27%	16%	9%	8%	2%	**12.9x** more likely
Email	34%	31%	26%	12%	12%	10%	**3.0x** more likely
Physical Branch or Point-of-Sale	26%	22%	17%	7%	8%	5%	**7.1x** more likely
Product or Service Usage	34%	29%	26%	10%	8%	5%	**5.6x** more likely
Billing or Payment	34%	27%	24%	10%	17%	8%	**3.2x** more likely

	High Performers	Average Performers	Under-performers
Can connect data with behaviors from 1 or 2 other channels			
Can connect data with behaviors from 3+ other channels			

Top performers use more advanced measurement approaches and are more effective at measuring and optimizing CX.

High performers are:

- 1.6 times more likely to use customer journey management

- 1.6 times more likely to score customer journeys

- 3.0 times more likely to use journey orchestration to improve experiences

These approaches enable organizations to measure journeys and quantify the impact of customer behavior on business outcomes, as well as optimize CX by ensuring that every interaction reflects each individual customer's overall experience. Powered by these approaches, top performing teams are more likely to be satisfied with their CX capabilities and effective at measuring the impact of CX on outcomes like revenue, churn, lifetime value and more.
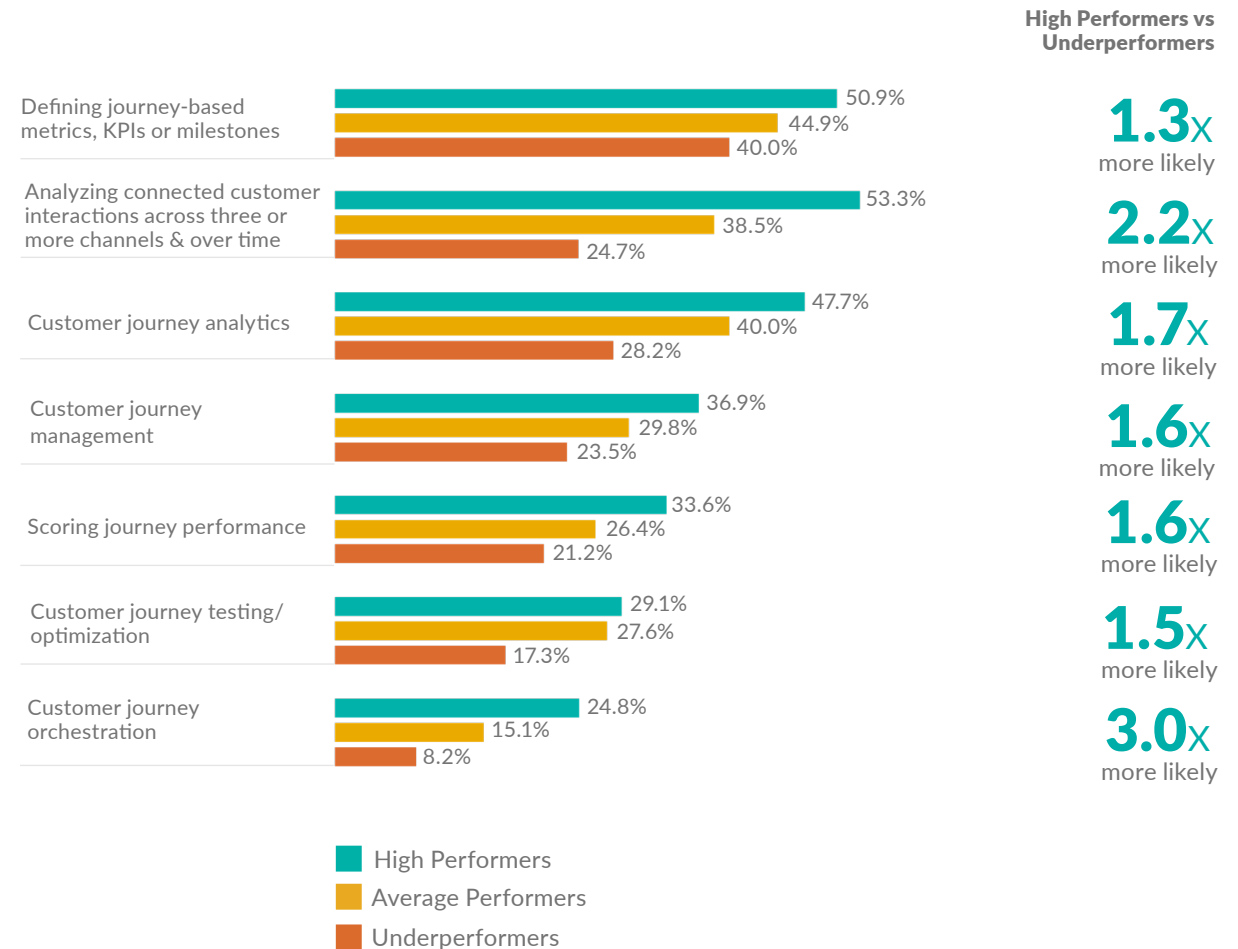
Conversely, underperforming teams predominantly rely on qualitative approaches like customer journey mapping.

High Performers vs Underperformers

5.9X more likely to be effective at quantifying the impact of CX on business outcomes

High Performers Take a More Mature Approach to Measure and Improve CX

Percentage of Respondents Using the Following Journey-based Methods

High Performers vs Underperformers

Method	High Performers	Average Performers	Underperformers	Ratio
Defining journey-based metrics, KPIs or milestones	50.9%	44.9%	40.0%	**1.3**X more likely
Analyzing connected customer interactions across three or more channels & over time	53.3%	38.5%	24.7%	**2.2**X more likely
Customer journey analytics	47.7%	40.0%	28.2%	**1.7**X more likely
Customer journey management	36.9%	29.8%	23.5%	**1.6**X more likely
Scoring journey performance	33.6%	26.4%	21.2%	**1.6**X more likely
Customer journey testing/optimization	29.1%	27.6%	17.3%	**1.5**X more likely
Customer journey orchestration	24.8%	15.1%	8.2%	**3.0**X more likely

■ High Performers
■ Average Performers
■ Underperformers

High-performing teams are more likely to be effective at implementing critical CX capabilities, such as analyzing omnichannel behavior over time, orchestrating relevant experiences given a customer's unique context, quantifying the impact of CX on business metrics and more.

Over 70% of top performers are effective at rapidly generating actionable insights, as well as taking action on those insights, along with customer feedback data, to make a tangible impact. These capabilities enable high performers to significantly improve customer experiences and business outcomes.
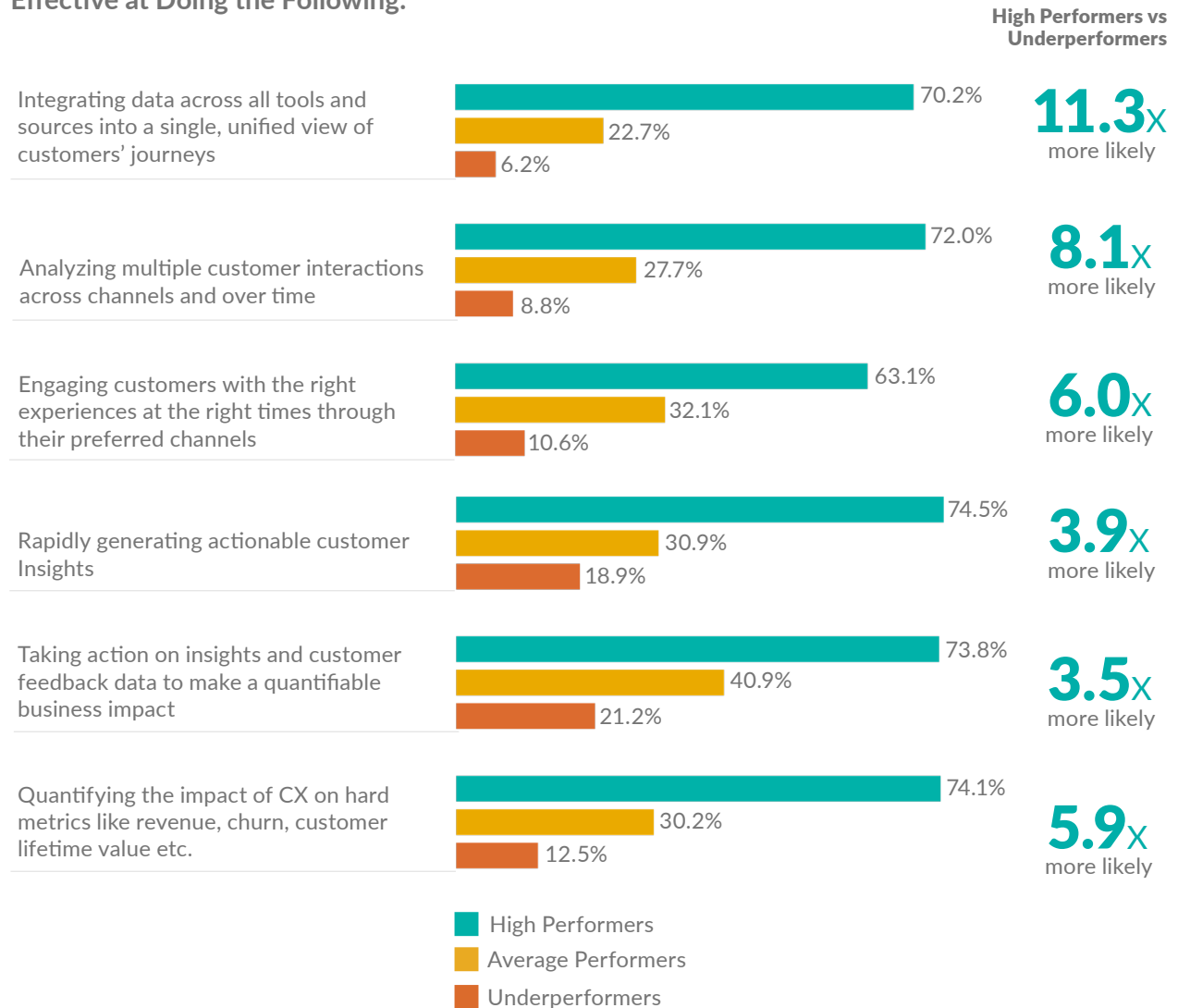
On the other hand, underperformers struggle to master each capability. Data integration is their greatest challenge, with **only 6.2% reporting that they are very or extremely effective at connecting sources into a single customer view.** This heavily impacts their capacity to analyze omnichannel journeys and engage with customers in a relevant way, limiting their ability to effectively measure and optimize CX.

High Performers vs Underperformers

13.1X more likely to be effective at managing and actioning cross-channel data

High Performers are More Likely to Master Critical CX Capabilities

Percentage of Respondents Whose Organization is Very or Extremely Effective at Doing the Following:

High Performers vs Underperformers

Integrating data across all tools and sources into a single, unified view of customers' journeys
- 70.2%
- 22.7%
- 6.2%

11.3X more likely

Analyzing multiple customer interactions across channels and over time
- 72.0%
- 27.7%
- 8.8%

8.1X more likely

Engaging customers with the right experiences at the right times through their preferred channels
- 63.1%
- 32.1%
- 10.6%

6.0X more likely

Rapidly generating actionable customer Insights
- 74.5%
- 30.9%
- 18.9%

3.9X more likely

Taking action on insights and customer feedback data to make a quantifiable business impact
- 73.8%
- 40.9%
- 21.2%

3.5X more likely

Quantifying the impact of CX on hard metrics like revenue, churn, customer lifetime value etc.
- 74.1%
- 30.2%
- 12.5%

5.9X more likely

- High Performers
- Average Performers
- Underperformers

Quantifying ROI Remains the Top CX Challenge

" "Successful experience leaders create value for customers and ROI for the brand. They partner with their CFO to build an understanding of how business cases are developed and learn the levers they use with executives to understand and attach experience initiatives to business goals."

Diane Magers
Founder and Chief Experience Officer
Experience Catalysts

" "Organizations need to understand what to focus on to make customer journeys better at delivering the experience we want our customers to have. Customer Journey Management is a cycle of continuous, interconnected activities that start with knowing who the customer is in the first place, so you can measure their journey and identify the small number of priorities that will have the greatest impact on improving customer perception and financial performance."

Ian Golding
CEO and Founder
Customer Experience Consultancy Ltd.

For the third consecutive year, quantifying the ROI of CX initiatives is the top customer experience challenge.

Most organizations across industries struggle to connect customer behavior and journeys to business outcomes, such as revenue, churn, cost to serve and more. **Only 36% of organizations are very or extremely satisfied with their overall CX performance and the outcomes of their CX investments.**

While organizations are measuring customer experience KPIs, they lack the means to connect these metrics to business outcomes. Almost half (41%) of companies say that they capture improvements in metrics like NPS® or customer satisfaction, but they are challenged to translate that into revenue or cost.

41% of respondents capture improvements in CX metrics like NPS and CSAT but say it's difficult to translate that into revenue and/or cost

Quantifying Customer Experience ROI Continues to be the #1 Overall CX Challenge

Top CX Challenges Overall 2019	Top CX Challenges Overall 2020	Top CX Challenges Overall 2021
1 Quantifying customer experience ROI	**1** Quantifying customer experience ROI	**1** Quantifying customer experience ROI
2 Breaking down organizational data silos	**2** Breaking down organizational data silos	**2** Limitations of legacy tools and technology
3 Identifying and prioritizing high impact opportunities to improve CX	**3** Generating actionable insights quickly	**3** Measuring customer experience
4 Generating actionable insights quickly	**4** Establishing a customer-first culture	**4** Providing consistent and exceptional customer experiences across channels
5 Delivering personalization at scale	**5** Measuring customer experience	**5** Delivering personalization at scale

The inability to quantify ROI often results in stagnant or shrinking budgets. This year, **four of the top five biggest challenges to obtaining additional CX investment are related to quantifying ROI.**

Almost half (42%) of underperformers and average performers say their inability to quantify ROI is the greatest challenge to obtaining budget, compared to only 22% of high performers. Further, **26% of underperformers had a decrease in budget, versus only 5% of top performers.**

39% of CX professionals agree that the inability to determine the ROI of CX investments is the #1 challenge for obtaining additional budget
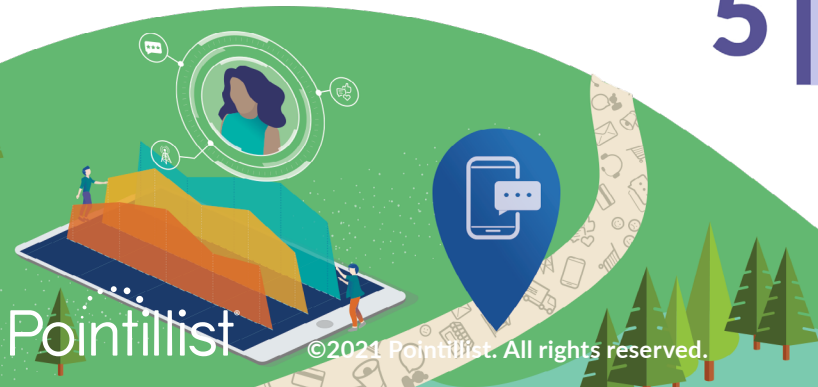
An Inability to Quantify CX ROI Negatively Impacts CX Budgets

Top Challenges to Obtaining CX Budget

1 We can't determine the ROI of our CX investments

2 We find it difficult to justify the priority of CX initiatives

3 Executive leadership are unclear on the impact of CX initiatives on company metrics and objectives

4 Budgets have been cut or frozen across the organization

5 We struggle to create a robust business case for CX investments

Top Barriers to Quantifying CX ROI

1 CX metrics like NPS and CSAT are difficult to translate into revenue and/or costs

2 Inability to link positive experiences for individual customers with business outcomes later in their journeys

3 Our organization can't quantify the impact of omnichannel journeys on revenue and/or cost

4 Lack of sufficient tools or technology

5 The data required to quantify the impact of omnichannel journeys on revenue or cost, is inaccessible or inaccurate

High performers are much more effective at quantifying the impact of CX and thus do not face similar challenges with obtaining increased CX investment.
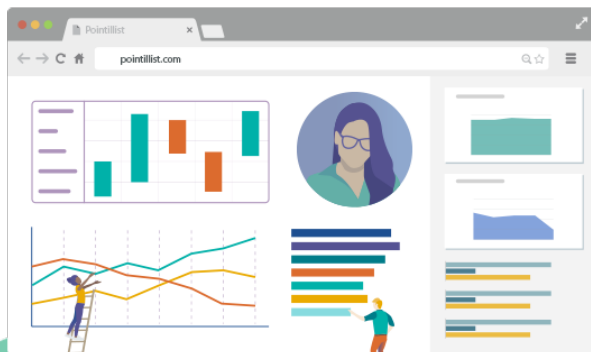
In fact, **top performers are 5.9 times more likely to be very or extremely satisfied with their ability to quantify the impact of CX on business metrics and outcomes and 2 times more likely to receive a budget increase.**

High Performers vs Underperformers

5.9X more likely to be very or extremely satisfied with their ability to quantify the impact of CX on hard business metrics

Top Performers are More Effective at Quantifying ROI and More Likely to Obtain a Budget Increase

CX Budget Changes 2020 to 2021

15% Decreased	32% Stayed the Same	53% Increased

2.7%	11.9%	32.1%	41.2%	12.1%

- ▮ Budget decreased significantly
- ▮ Budget decreased moderately
- ▮ Budget stayed the same
- ▮ Budget increased moderately
- ▮ Budget increased significantly

32%
44%
65%

65%
of high performers increased their budget in 2021, vs. only 32% of underperformers

High Performers vs Underperformers

2.0X more likely

- ▮ High Performers
- ▮ Average Performers
- ▮ Underperformers

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Digital Transformation Succeeds by Focusing on the Customer

"It's time to take a step back and revisit all of your business processes in order to do digital transformation right. It's time to think about the efficiencies, the more effective decision-making, and the personalized experiences your digital transformation will deliver. What are the desired outcomes for all constituents? It's time to think about customers – and all other constituents – and what it means for them when the transformation is complete."

Annette Franz
Founder and CEO
CX Journey Inc.

"The primary reason CX needs to be involved in digital transformation is because digitizing a broken process just leads to a broken digitized process. In other words, without moving forward based on what your customers actually want and need, you risk investing a lot of time and money to succeed only in frustrating them more quickly and efficiently!"

Jim Tincher
Founder and CEO
Heart of the Customer

With lockdowns shuttering storefronts during the pandemic, digital channels were a lifeline for consumers and businesses alike. Over the past year, consumers made their need for exceptional digital experiences very clear, increasing the importance of digital transformation efforts.

This year, **organizations rank a lack of self-help mechanisms as the second highest customer frustration based on negative impact on CX**. The increase from the sixth most negative impact on CX last year to the second most this year underscores the growing importance of digital self-service.

To meet customer needs, companies are prioritizing digital transformation efforts and investments. Respondents report that **increasing digital self-service is the #2 priority for CX improvement** over the next 12 months and **digital transformation is the #2 overall CX investment priority** for the next year.

34% of CX teams say increasing digital self-service is a top priority in the next 12 months

Organizations are Raising the Importance of Digital Transformation

Top Customer Frustrations that Have the Greatest Negative Impact on CX

1 Lack of personalized experiences

2 **Lack of effective digital self-help channels or mechanisms**

3 Failure of the organization to recognize & proactively intervene when a customer is unhappy

4 Customers not receiving timely and relevant communications

5 Employees not understanding customer goals, needs or preferences

6 The organization neglecting to take action on customer feedback

7 Long wait or response times

Top CX Initiative Priorities for the Next 12 Months

1 Improve CX metrics (e.g. NPS, CSAT, CES)

2 **Increase digital self-service**

3 Improve operational efficiency

4 Boost customer retention rates

5 Align the organization on a journey-based approach

6 Grow digital sales

7 Increase upsell and cross-sell rates

Across performance levels, organizations agree that digital transformation is necessary to respond to changing customer needs and demands. Digital transformation ranks in the top three for CX-related investment priorities over the next year.

Top performers prioritize tools that enable CX improvement along with digital transformation. High performers consider approaches like journey management and customer journey analytics critical to their success.

In contrast, underperformers are more likely to prioritize investments in customer data management, journey mapping and customer feedback management.

29% of high performers say customer journey analytics is a top CX investment priority in the next 12 months

Top Performers Prioritize Digital Transformation & Data-Driven, Journey-based Solutions for Investment

Top CX-Related Investment Priorities in the Next 12 Months by Performance Level

Underperformers

1 Customer analytics or insights
2 Customer data management
3 Digital transformation
4 Customer journey mapping
5 Voice of the Customer (VoC)
6 Customer journey analytics
7 Customer journey management
8 Artificial intelligence or machine learning
9 Market or customer research
10 Customer journey orchestration

High Performers

1 Customer analytics or insights
2 Customer journey analytics
3 Digital transformation
4 Voice of the Customer (VoC)
5 Customer journey management
6 Artificial intelligence or machine learning
7 Customer journey mapping
8 Customer data management
9 Customer journey orchestration
10 Market or customer research
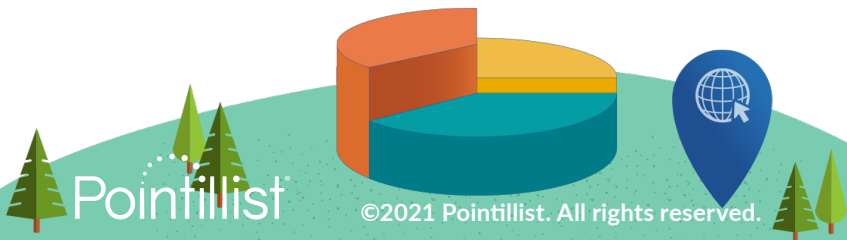
Legacy tools and technology are an obstacle to digital transformation, making it challenging to respond to customers' changing needs and expectations.

Overall, the **#2 CX-related challenge is the limitations of legacy tools and technology**. This challenge did not even make the top five challenges in the previous two years.

Lacking the right tools or technology to collect and/or analyze data is also the #5 CX measurement challenge. Organizations that cannot measure journeys struggle to identify and prioritize opportunities for digital transformation that improve customer experience. Therefore, they can't determine the best initiatives for meeting consumers' increased demand for intuitive and efficient digital experiences.

High Performers vs Underperformers

1.7X more likely to use artificial intelligence (AI) to improve self-service channels

Legacy Technology Makes it Difficult to Meet Consumers' Expectations for Digital Experiences

#2

limitations of legacy tools and technology is the number two overall CX-related challenge

#5

lacking the right tools or technology to collect and/or analyze data is the number five top CX measurement challenge

CX and Marketing Don't See Eye to Eye

"Customer-centric enterprises make it a priority to align the entire organization around their customers. Regardless of whether CX lives within marketing or is separate from it, the way a brand markets itself has to be consistent with what customers actually experience or those customers are never coming back."

Dave Edelman
Former CMO
Aetna

"Remarkable CX can be your biggest marketing differentiator. It's imperative that marketing and CX teams align on priorities, goals and initiatives, so they can gain more customers by improving what actually matters to their existing customers."

Dan Gingiss
Chief Experience Officer
The Experience Maker

Organizational alignment is essential for delivering seamless customer experiences. However, marketing and CX leaders provided diverging perspectives.

Marketing teams say they prioritize CX initiatives and are tightly aligned with CX teams. But the majority of CX leaders don't agree.

In addition, marketing teams believe they are more effective at certain CX capabilities than their colleagues in CX believe. In fact, **44% of marketers say they're very or extremely effective at analyzing cross-channel customer behavior, while only 32% of CX professionals concur.**

Further, **55% of marketers say they're very or extremely effective at taking action on customer insights and feedback data to make a business impact, though only 39% of CX teams agree**.

Marketers Rate Their Own Capabilities Higher Than CX Teams Do

Percentage of Respondents Who Agree with the Following Statements:

CX and marketing teams are tightly aligned on a customer-centric approach and goals
- Marketing: 66.2%
- CX: 48.0%

CX and marketing teams regularly collaborate on initiatives to improve customer experience
- Marketing: 69.0%
- CX: 47.5%

Our marketing team prioritizes CX metrics and initiatives, in addition to acquisition and campaign performance
- Marketing: 66.2%
- CX: 40.0%
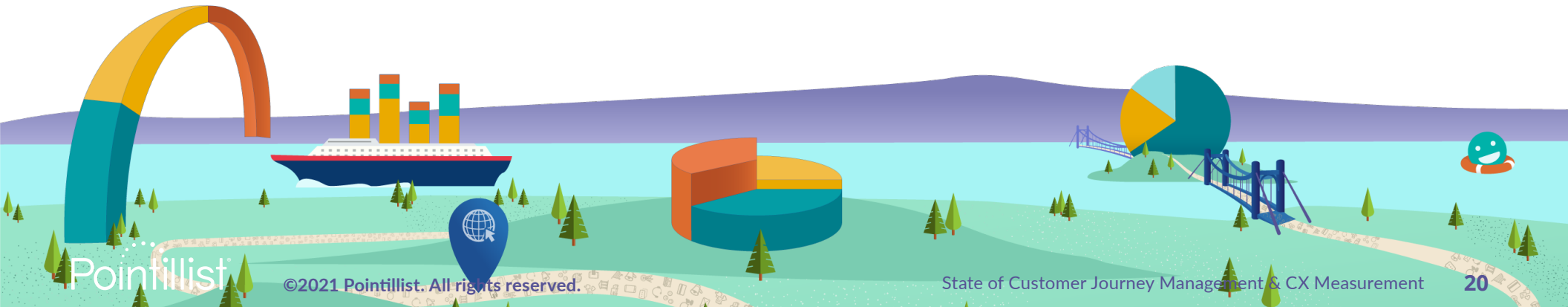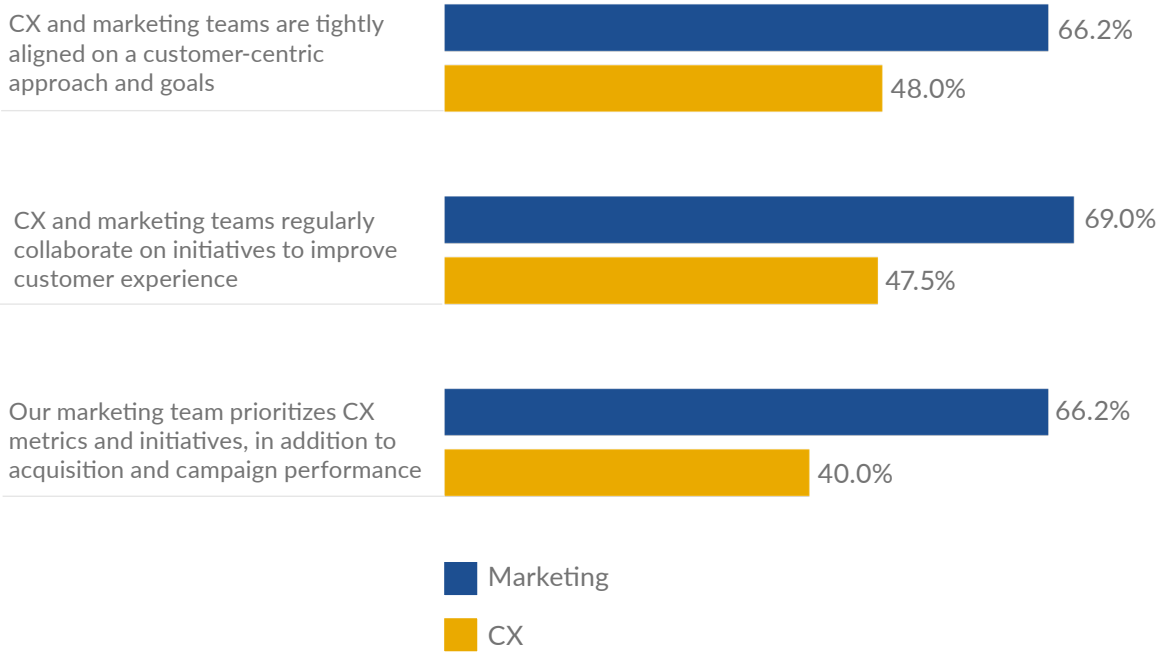
■ Marketing
■ CX

When marketing and CX teams operate independently, rather than aligning their priorities and objectives, they risk frustrating customers with inconsistent, disjointed experiences.

High performers are much more likely to have a strong alignment between CX and marketing. In fact, compared with underperforming organizations, marketing and CX at high performers are:

- 2.1 times more likely to be tightly aligned on a customer-centric approach and goals

- 2.7 times more likely to say marketing prioritizes CX initiatives & metrics

- 2.1 times more likely to regularly collaborate on CX initiatives

Optimal alignment between CX and marketing results in higher satisfaction with critical CX capabilities. Top performers are **3.9 times more likely to be satisfied with their ability to quickly generate customer insights** and **3.5 times more likely to be satisfied with their ability to take actions based on those insights than underperformers.**

High Performers Align CX and Marketing on Approaches, Goals and Initiatives

Percentage of Respondents Who Agree with the Following Statements:

High Performers vs Underperformers

CX and marketing teams are tightly aligned on a customer-centric approach and goals
74.6%
55.2%
35.8%

2.1x more likely

CX and marketing teams regularly collaborate on initiatives to improve customer experience
76.1%
53.1%
36.7%

2.1x more likely

Our marketing team prioritizes CX metrics and initiatives, in addition to acquisition and campaign performance
69.7%
48.1%
25.7%

2.7x more likely

- High Performers
- Average Performers
- Underperformers

High Performers vs Underperformers

2.7x more likely to have a marketing organization that prioritizes CX metrics and initiatives

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Organizations Still Struggle to Deliver Consistent Omnichannel Experiences

" "Customers are moving from channel to channel because they can and they want to. They are selecting the most convenient and accessible channel that serves them. This means to serve them, companies need a centralized view of the customer and their interactions throughout their journey with your company."

Jeannie Walters
CEO
Experience Investigators™

" "We operate in an omnichannel world. Experience leaders are using journey analytics and orchestration to capture omnichannel touches in order to map, analyze, and improve customer journeys. The happiest journeys honor customer preferences, whatever the channel, while improving results for both the customer and business."

Hank Brigman
President & Touchpoint Strategist
Customer Experience Strategies
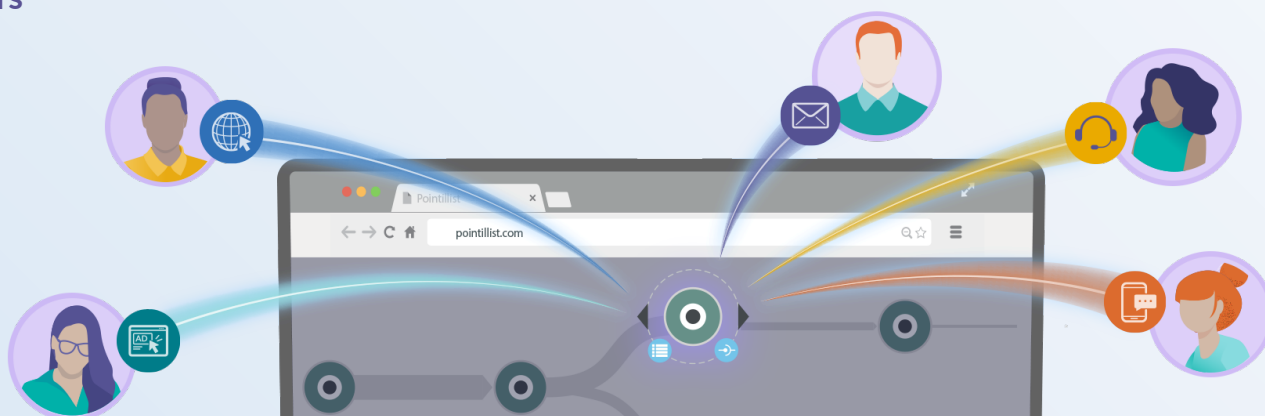
A lack of connected journey data continues to be the largest barrier to measuring and delivering seamless, personalized experiences across channels.

To interact with customers in a relevant way, customer-centric leaders know they need a single source of integrated customer journey data. **But 65% of CX teams do not have omnichannel journey data integrated into a single customer view**. Further, lacking access to siloed data is the #3 CX measurement challenge.

While complex, disconnected omnichannel journeys are a major issue for customers, journey orchestration is not a high investment priority for most organizations.

Overall, only 14% of organizations say that customer journey orchestration is a top investment priority. And less than one third of organizations say that customer data management is one of their top three investment priorities over the next 12 months.

High Performers vs Underperformers

11.3X more likely to be effective at integrating data across all tools and sources into a single, unified view of customers' journeys

Siloed Data is the Primary Barrier to Omnichannel Success

Percentage of Respondents that Describe the Current State of Their Organization in Terms of Managing and Actioning Cross-channel Data as the Following:
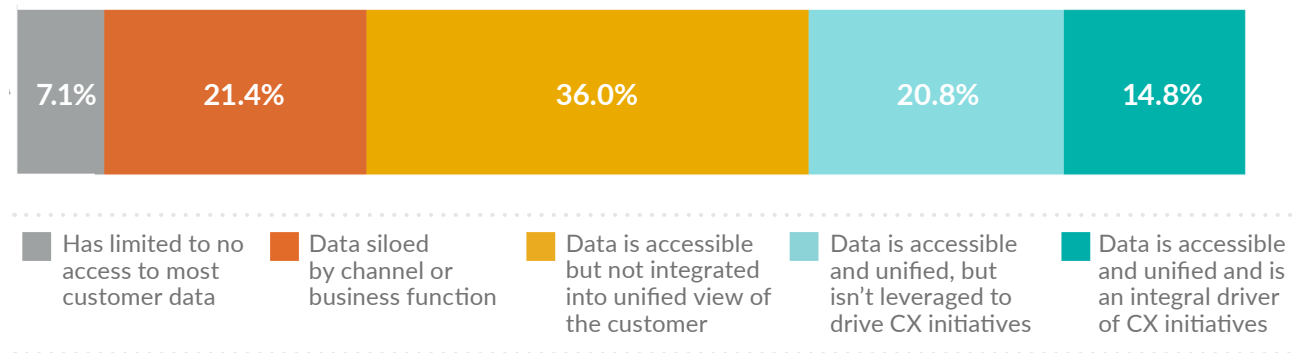
7.1%	21.4%	36.0%	20.8%	14.8%

- Has limited to no access to most customer data
- Data siloed by channel or business function
- Data is accessible but not integrated into unified view of the customer
- Data is accessible and unified, but isn't leveraged to drive CX initiatives
- Data is accessible and unified and is an integral driver of CX initiatives

29% of CX teams do not have access to cross-channel customer data at all or can't access it due to data silos

65% of CX teams do not have cross-channel data integrated into a unified view of the customer

Every enterprise knows that customers expect every interaction—regardless of channel—to reflect their current goals and overall experience. But most teams struggle to deliver relevant and consistent experiences across channels.

Respondents once again believe that a lack of personalization is the #1 driver of negative customer experiences. Delivering consistent, exceptional CX across channels and delivering personalization at scale are the #4 and #5 top CX challenges overall.

High-performing teams are more likely to have the capabilities necessary to both analyze and orchestrate omnichannel journeys. Top performers are **3 times more likely to use journey orchestration to measure and optimize journeys**. Using this approach, high performers are:

- 8.1 times more likely to be effective at analyzing omnichannel interactions

- 6 times more likely to be effective at engaging customers across channels and over time

High Performers vs Underperformers

3.0X more likely to use journey orchestration to measure & optimize journeys

High Performers Use Journey Orchestration to Optimize Omnichannel Engagement

Top CX Challenges Overall

1 Quantifying customer experience ROI

2 Limitations of legacy tools and technology

3 Measuring customer experience

4 **Providing consistent & exceptional customer experience across channels**

5 **Delivering personalization at scale**

6 Generating actionable insights quickly

7 **Resolving customer identities across channels to build a single customer view**

Top CX Measurement Challenges

1 **Lacking a single view of the customer and customer journey**

2 Generating actionable insights quickly, in real time

3 **Lacking access to siloed data across multiple sources**

4 Lacking the right tools or technology to collect and/or analyze data

5 Lacking sufficient internal time or resources

6 Lacking internal knowledge or experience to extract meaningful insights

7 **Resolving customers' identities across multiple channels**

Appendix

Organizations Recognize the Importance of a Journey-Based Approach

How Respondents Rate the Level of Importance of a Journey-based Strategy for their Organization's Overall Success

Not at all important
0.6%

Has not adopted a journey-based strategy
3.7%

Not so important
2.9%

Somewhat important
14.5%

78%
say a journey-based strategy is very or extremely important to their organization's overall success

Extremely important
40.2%

Very important
38.6%
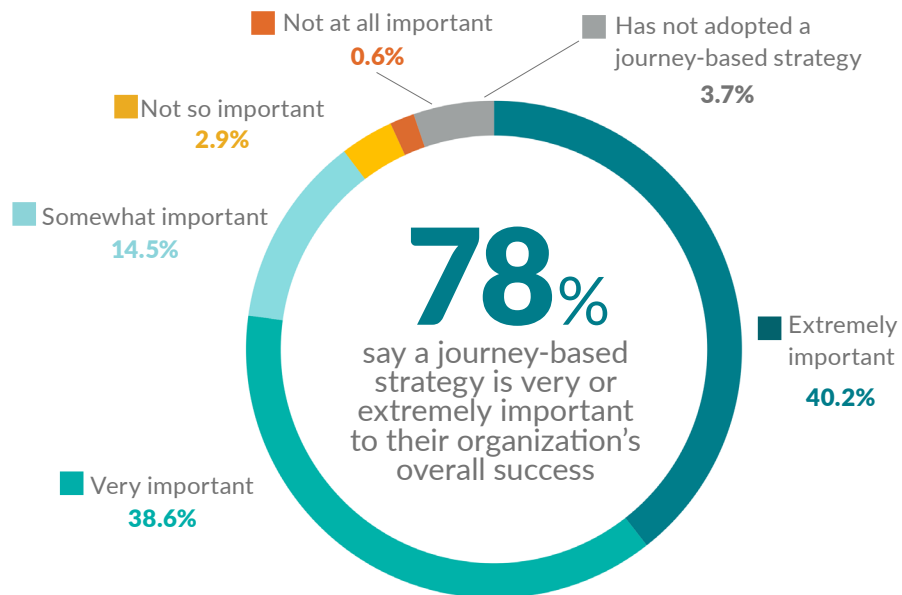
Percentage of Respondents That Agree or Strongly Agree That a Journey-based Approach Has a Positive Impact on the Following:

Identifying opportunities to improve CX
94%

Establishing a single, unified view of the customer
92%

Improving performance & results of CX initiatives
91%

Aligning teams on the most important goals & metrics
91%

Tracking & analyzing cross-channel experiences
89%

Identifying the root causes of CX issues
88%

Personalizing cross-channel experiences
84%

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Appendix

Percentage of Respondents with Journey-based Roles and Teams Overall

Does your organization have a role or team dedicated to customer journey management and/or journey analytics?

■ Not sure	■ No and I'm not aware of any plans to add a role or team in the future	■ No but we plan on adding a role or team in the future	■ No but we have key roles/teams aligned on a journey-based approach	■ Yes, we have one or more dedicated role(s)	■ Yes, we have one or more dedicated team(s)

5.1%	13.1%	9.8%	18.8%	32.5%	20.7%
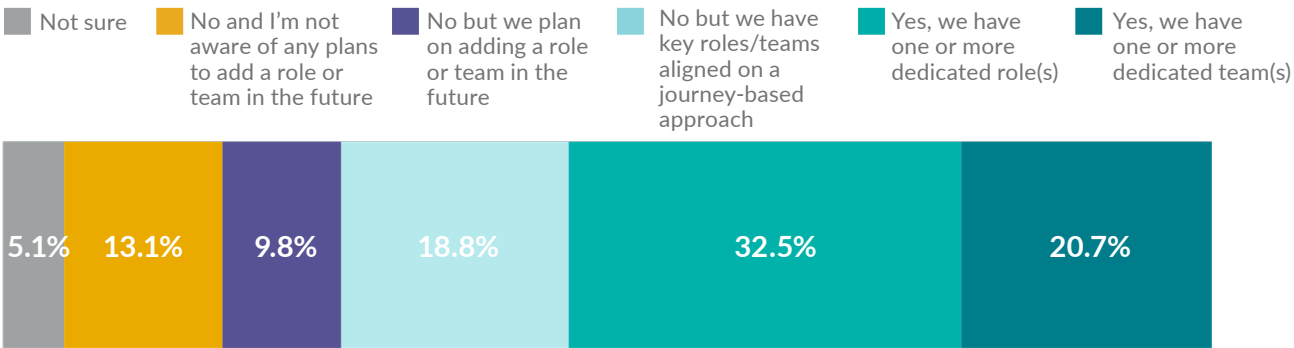
CX Measurement Maturity Levels Overall

How would you rank the maturity level of your organization's CX measurement program?

4.1%	32.0%	43.5%	20.5%

■ N/A	■ Not so mature or not at all mature	■ Somewhat mature	■ Very or extremely mature
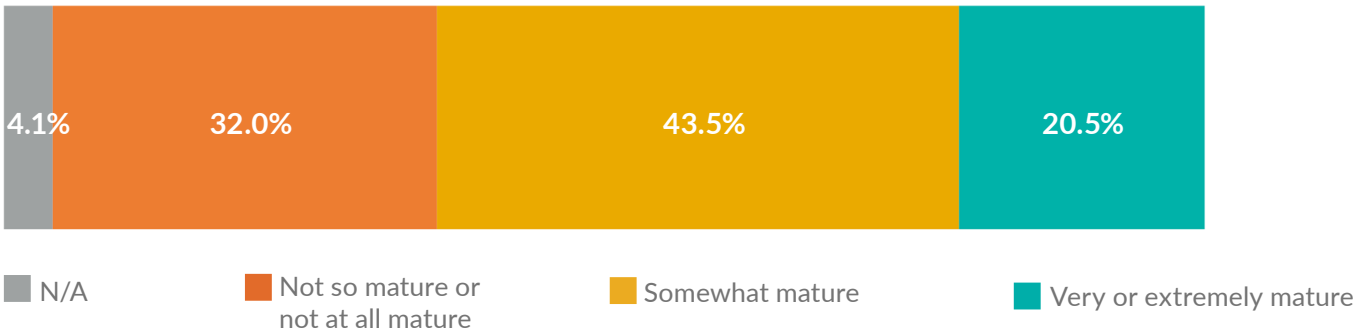
Top Journey-based Methods and Approaches Overall

Which of the following methods/approaches is your organization using for understanding and optimizing customer journeys? (Please select all that apply)

Method/Approach	Percentage
Customer journey mapping	55%
Defining journey stages	48%
Analyzing and optimizing each customer touchpoint or channel independently	47%
Defining journey-based metrics, KPIs or milestones	42%
Analyzing connected customer interactions across three or more channels & over time	39%
Customer journey analytics	37%
Customer journey management	29%
Scoring journey performance	25%
Defining behaviors that indicate which customers will reach their goal	24%
Customer journey testing/optimization	24%
Customer journey orchestration	16%
I'm not sure	6%
None of the above	4%

Appendix

Top Types of Journeys Organizations Measure and Optimize

Which of the following does your organization measure and optimize using a journey-based approach? (Please select all that apply)

Journey Type	Percentage
Customer acquisition	49.9%
Customer onboarding	49.3%
Resolving product or service issues	47.0%
Customer lifecycle	36.7%
Billing or payments	30.9%
Subscription or service renewals	27.5%
Account closures or cancellations	27.4%
Account or service upgrades	26.6%
Changing a product or service	24.4%
Account updates	23.0%
Other	8.0%

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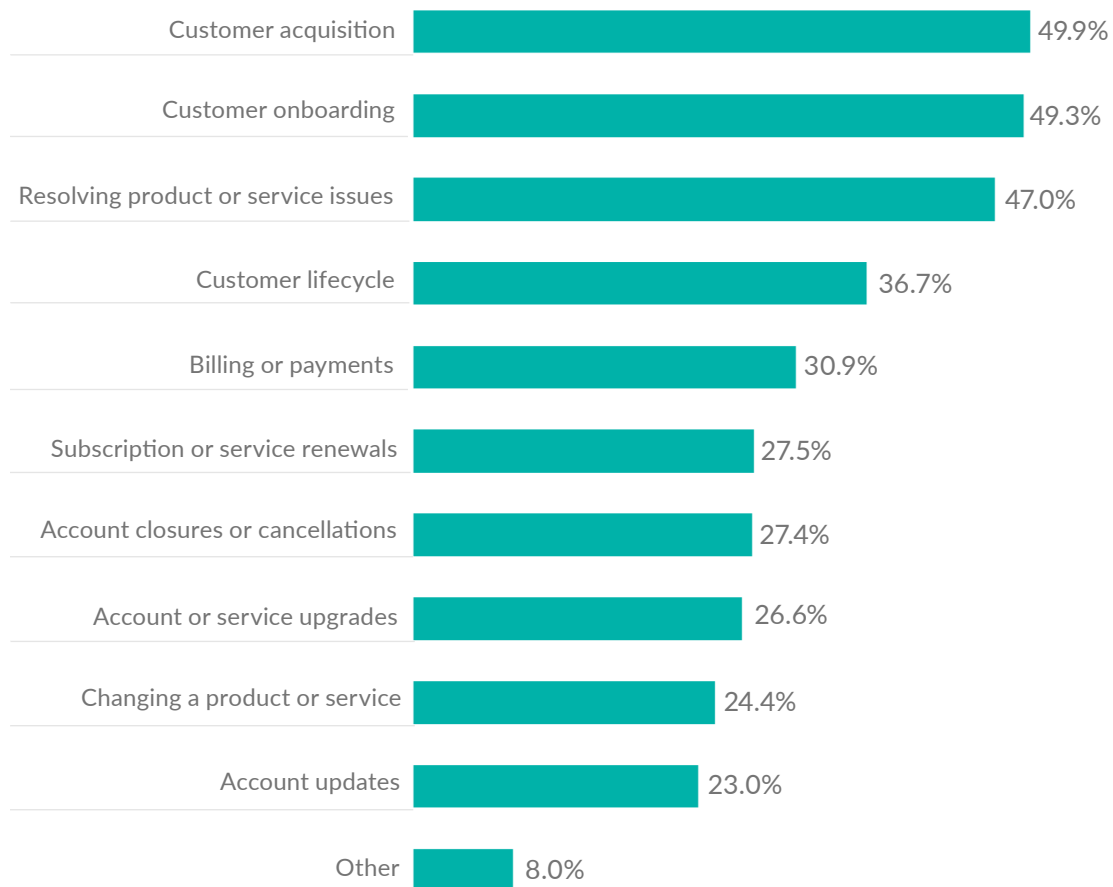
Appendix

Journey Management and CX Measurement Effectiveness Overall

How effective is your organization at each of the following?

	N/A	Not so effective or not at all effective	Somewhat effective	Very or extremely effective
Integrating data across all tools and sources into a single, unified view of customers' journeys	3.9%	28.6%	31.3%	36.4%
Analyzing multiple customer interactions across channels and over time	4.8%	26.5%	30.5%	38.3%
Engaging customers with the right experiences at the right times through their preferred channels	4.4%	21.5%	35.3%	38.8%
Rapidly generating actionable customer insights	3.6%	22.7%	31.6%	42.2%
Taking action on insights & customer feedback data to make a quantifiable business impact	3.8%	18.2%	31.0%	47.1%
Quantifying the impact of CX on hard metrics like revenue, churn, customer lifetime value etc.	5.4%	30.4%	24.9%	39.5%

Legend:
- N/A
- Not so effective or not at all effective
- Somewhat effective
- Very or extremely effective

Appendix

Most Important metrics/KPIs for CX teams

Metric	Percentage
Net Promoter Score (NPS)	62.7%
Customer Satisfaction (CSAT)	60.6%
Customer Retention or Churn Rate	33.7%
Customer Effort Score (CES)	29.0%
First Call/Contact Resolution (FCR)	22.8%
Return on Investment (ROI)	21.8%
Customer Lifetime Value	20.2%
Revenue or Profit Growth	19.7%
Upsell, Cross-Sell, or Repeat Purchases	10.9%
Journey Scores	7.8%
Cost of Serving Customers	7.3%
Conversion Rates	7.3%
Cost of Customer Acquisition (CAC)	6.7%
Channel Containment Rate	5.7%
None of the Above	1.0%

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Top Ways Organizations Use Artificial Intelligence (AI) or Plan to Use AI in the Next Two Years

Which of the following ways is your organization currently using artificial intelligence (AI) or planning to use AI in the next two years? (Please select all that apply)

Category	Percentage
Chatbots or other interactive automated communication	37%
Delivering personalized cross-channel experiences	32%
Predicting journey or business outcomes	30%
Suggesting next best actions	28%
Improving self-service channels	27%
Detecting potential CX issues faster	26%
Automating internal tasks to boost productivity	25%
Simplifying/streamlining customer interactions	24%
Enhancing customer support capabilities	23%
Rapidly generating customer insights	22%
Supporting decision-making for future	18%
Identifying the root cause(s) of customer behavior	17%
Other	8%

Survey Demographics & Firmographics

Survey Demographics & Firmographics

INDUSTRY

Technology & Software	16.7%
Financial Services - Banking	13.5%
Consulting	10.6%
Telecommunications	9.4%
Financial Services - Insurance	4.9%
Retail & Ecommerce	4.8%
Healthcare	3.6%
Manufacturing	3.6%
Energy	3.0%
Education	2.9%
Advertising & Digital Agencies	2.8%
Media & Entertainment	2.2%
Financial Services - Wealth Mgmt	2.1%
Real Estate & Construction	2.0%
Transportation	1.7%
Consumer Packed Goods	1.6%
Food & Beverage	1.6%
Government	1.5%
Hospitality	1.4%
Non-Profit	1.4%
Agriculture	1.3%
Biotechnology & Pharmaceutical	1.2%
Other	7.1%

NUMBER OF EMPLOYEES

Small < 100 Employees — 28%

Enterprise > 1,000 Employees — 49%

Medium 100 to 1,000 Employees — 23%
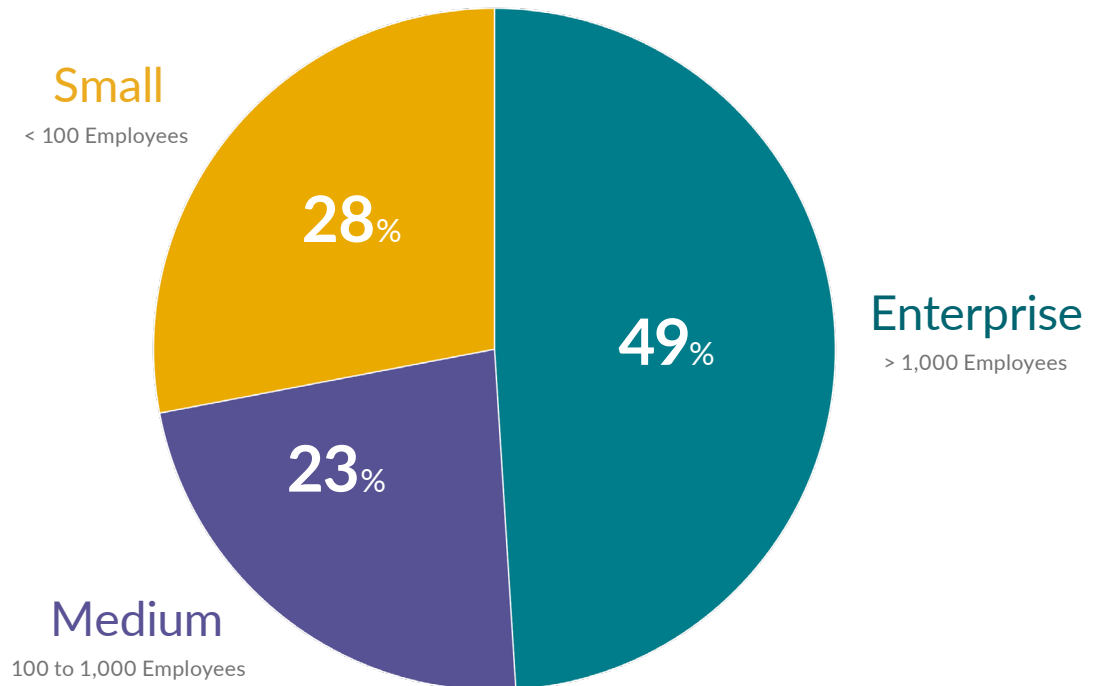
Survey Demographics & Firmographics

JOB FUNCTION OR DEPARTMENT

CX.. 28.1%
Marketing... 11.5%
Customer Service or Support................. 9.9%
Owner/Founder/President/CEO........... 7.1%
Customer Insights.................................. 6.8%
Analytics/BI... 5.7%
Product Management............................. 5.0%
Sales.. 5.3%
Systems/Solutions/Operations.............. 4.0%
IT.. 3.4%
Finance... 1.3%
R&D... 1.1%
Other... 10.1%

CX ROLES AND RESPONSIBILITIES

CX Strategy — 63%
CX Measurement — 59%
CX Programs & Initiatives — 56%
CX Technology or Operations — 38%
Other CX-Related Activities — 32%

SENIORITY LEVEL

Legend: Non-manager | Manager | Senior Manager | Director | VP | C-Level | Partner | Owner | Other

| Non-manager	Manager	Senior Manager	Director	VP	C-Level	Partner	Owner	Other
17.0%	24.6%	16.7%	13.5%	5.2%	4.8%	7.3%	3.2%	7.8%
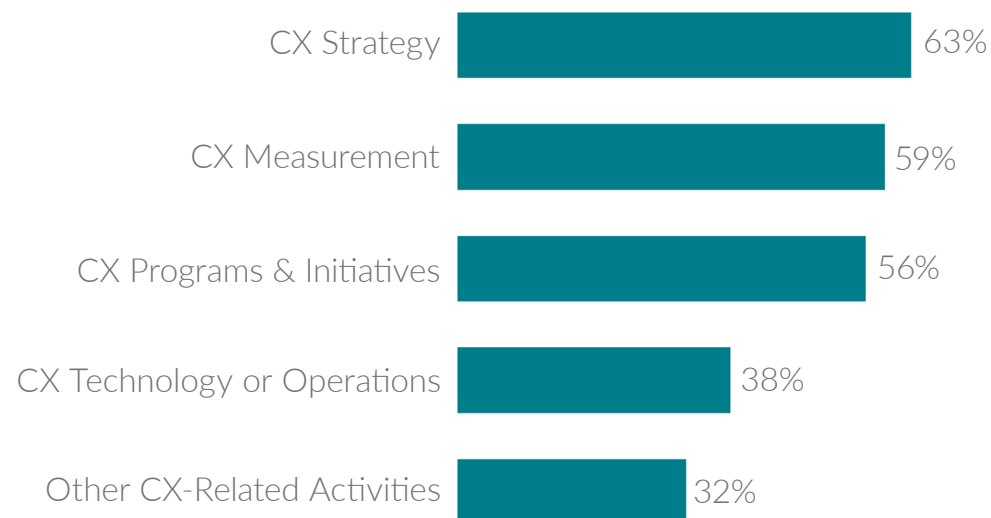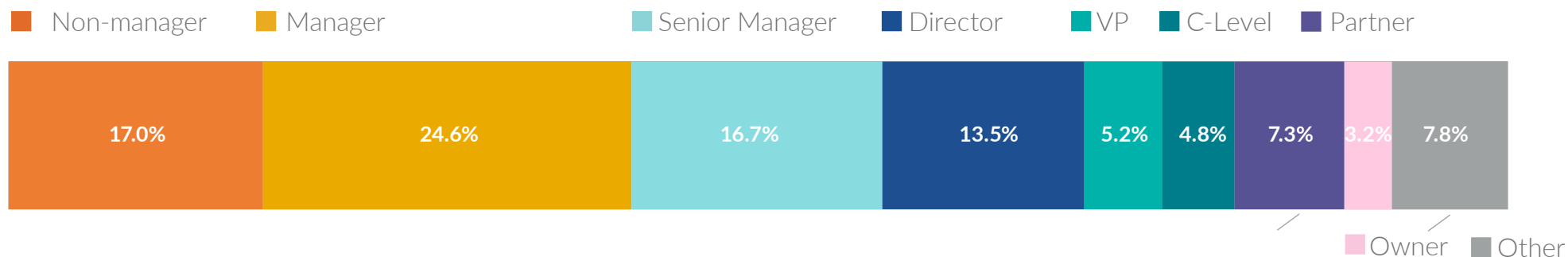
Improve Customer Experience from Data to Insights to Action

The Pointillist Customer Journey Management platform enables CX, analytics and marketing teams to improve customer experience and achieve their desired business goals.

Customer-centric enterprises rely on Pointillist to:

- Aggregate customer data from any source

- Advance from touchpoint analysis to Customer Journey Management

- Analyze journey-based metrics and KPIs

- Identify the root causes of underperforming journeys using AI

- Orchestrate actions that maximize journey success
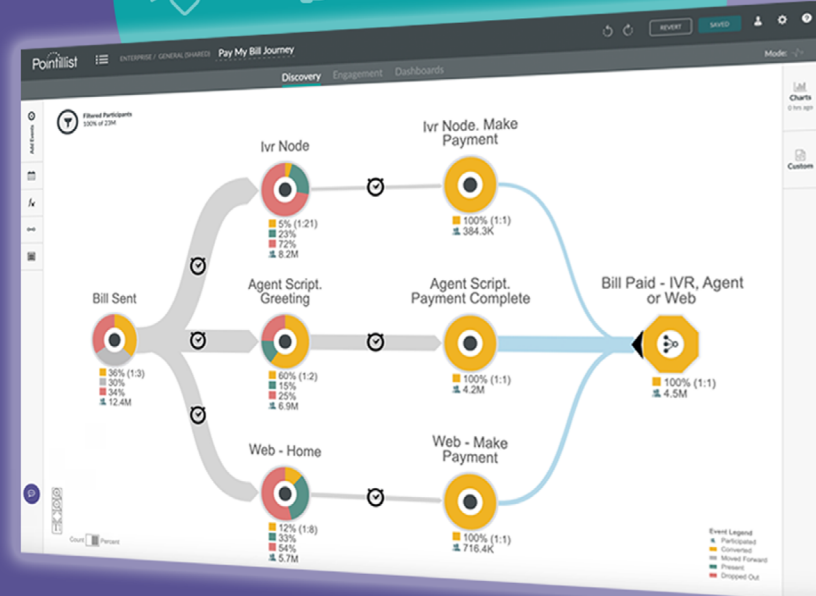
REQUEST A DEMO

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