



SPECIAL REPORT:

CUSTOMER JOURNEY MAPPING

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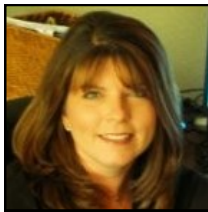


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RAISING THE STANDARDS FOR “CUSTOMER JOURNEYS”



Do not celebrate the adoption of a journey-driven customer experience mindset. Do not applaud your organization for investing in a journey-mapping solution.

Yes, both actions are important and reflect good intentions.

Customer experience strategy is not, however, a game of admirable mindsets. It is not a “Kumbaya” endeavor. It is an exercise in driving meaningful value for customers, businesses, and agents.

That meaningful value comes not from the maps themselves but from how you leverage the maps to create better experiences for customers and agents, and in turn a more successful business.

It is upon attaining those results that your celebration should commence.

This report works to ensure you will not be holding your applause for long. It transforms the “customer journey map” from an appealing concept into an actionable blueprint for better connecting with customers.

It reveals the specific customer-centric and business-centric benefits of journey mapping. It details the challenges that prevent organizations from developing an accurate understanding of their customer journeys. It, finally, provides clear guidance for building actionable journey maps—and then optimizing the experience based on specific customer context and intent.

It, ultimately, helps you leverage journey mapping as a tool to elevate the experience.



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Journey mapping is part of a much larger picture,” emphasizes Randy Carter of Genesys. “Creating the map is a step, but [success is truly about] what you do with the map: the execution and iteration.

”

UNDERSTANDING CUSTOMER JOURNEYS—AND JOURNEY MAPS



Customer interactions – even the most simple, transactional ones – do not occur in isolation. They are part of a larger relationship between the organization and its customers.

They are part of a *journey*.

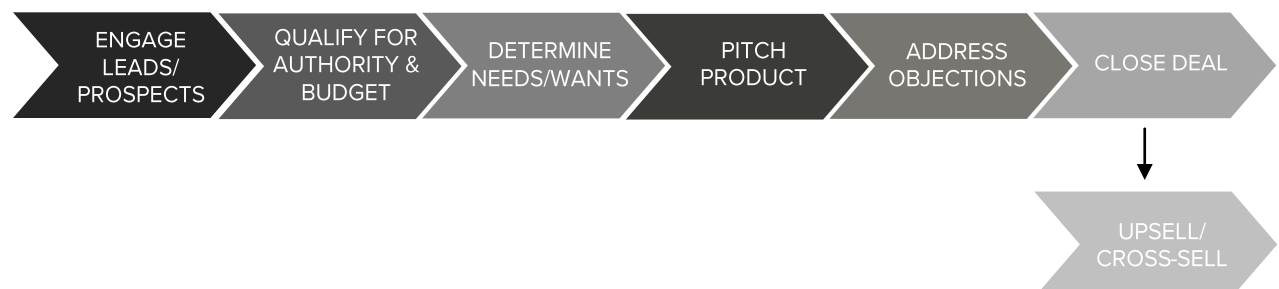
A customer journey, quite simply, refers to the totality of interactions between a business and a customer. This journey encompasses all direct and indirect engagement, in all channels, for all purposes.

That last qualification is of paramount importance. Whereas organizations have historically evaluated journeys at the functional level (the “sales cycle,” as an example), today’s organizations must consider the overarching customer lifecycle. Since every interaction impacts the relationship between brand and customer, every interaction plays a role in the singular, all-encompassing customer journey.

MARKETING JOURNEY (FUNCTIONAL APPROACH)



SALES JOURNEY (FUNCTIONAL APPROACH)



SERVICE JOURNEY (FUNCTIONAL APPROACH)

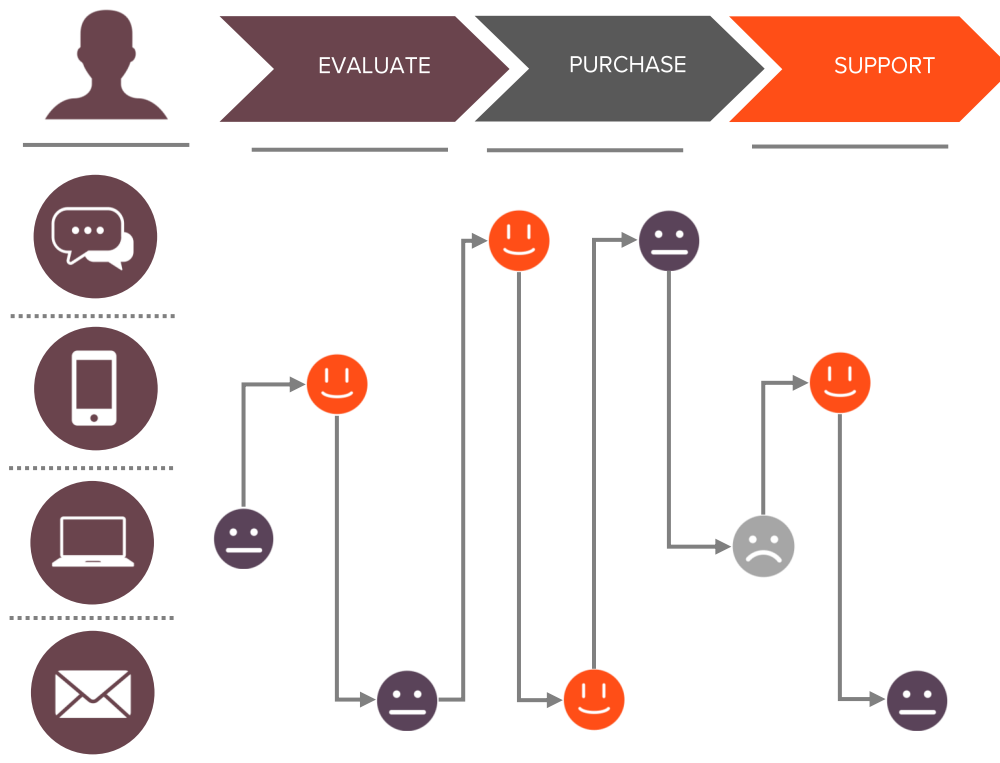


“Sales and marketing journeys don’t represent the whole journey,” explains Wendy Mikkelsen of Genesys. “You need an end-to-end experience, engaging all departments. You need to see and execute a full journey to have a healthy business, managing it from beginning to end.”

Spanning departments, channels, systems and functions, journey maps help organizations understand and analyze these journeys. They provide a complete portrait of customers’ interactions, thus providing context from where they have been, where they are now, and where they are going.

These maps must be designed from an *outside-in* perspective. Instead of viewing interactions from a business mentality, journey maps reveal how the experience looks to customers.

COMPLETE CUSTOMER JOURNEY



Source: [Journey Mapping eBook: An Outside-in Approach to Delivering Great Customer Experiences](#)

Effective maps also account for customer intent, sentiment, and demand.



Mapping is a much easier way to read and understand the context of the customer,” says Carter. “The customer wants you to know them and using journey mapping, you get *CliffsNotes*.

Journey maps are a window into who customers are, where and why they are connecting, and how they feel about the experience they are receiving. By looking through that window, the organization can identify challenges, weaknesses, strengths, and opportunities within the customer experience.

JOURNEY MAPPING: A CUSTOMER-CENTRIC PERSPECTIVE

It is important to remember that customer journeys are a business construct. They are how savvy *organizations* perceive their overall customer experience framework.

Customers do not share that perspective. They do not explicitly focus on the overarching “journey” when interacting with a business. They do not care about the internal costs or metrics associated with those journeys. They do not stress over a company’s specific NPS score.

They do, however, value the benefits of a journey-driven experience. They are hoping for a simple, personalized, proactive, valuable interaction at every single touch point.



The goal is to ensure that every interaction we have with our customers includes a resolution at the first touch and adds value to consumer or company,” explains Ronny Haime of Groupon.

By successfully mapping their journeys, organizations can fulfill those key customer demands.



Quick, frictionless experiences



“Time is money” may be a cliché, but it remains a decidedly accurate statement for the customer experience. Today’s customers are demanding fast, easy experiences that yield a resolution on the first contact. Extensive waiting, undue challenges while accessing a self-service tool, and undesirable difficulty when communicating with a live agent all markedly reduce satisfaction.



1. How Journey Mapping Helps

By chronicling the end-to-end experience for all customer segments and issues, the organization can discover and eliminate all associated “pain points.”



Journey Spotlight

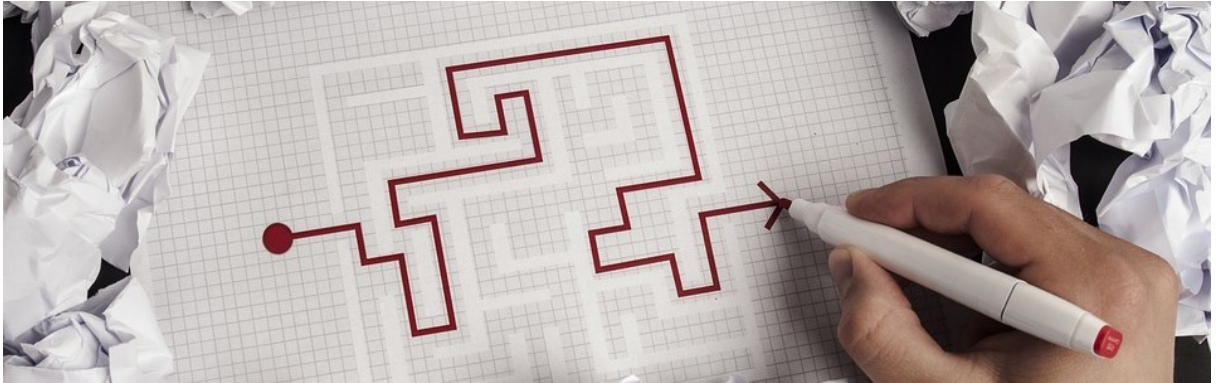
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Every shopping experience is made up of a few journey nodes including discovery, ordering, delivery, returns, refunds and customer support,” explains Ranjith Boyanapalli of Flipkart, who notes that frustration tends to grow for “returns (since it is a negative node where the customer does not like the product) and refunds (since customers want their money back).

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Recognition when moving between channels



Customers may prefer quick, simple experiences, but they still expect a personal touch.

Specifically, they still expect the business to *recognize* them as they move between touch points. The need to repeat information actually ranks as the leading cause of customer complaints.



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Customers want you to know them with high expectations,” says Mikkelson. “[You must know] who they are and what they have done [without waiting] 15 minutes for a report to run. [You must do this while] providing exceptional, cohesive experiences from beginning to end. All too often, customers face disjointed and siloed touch points with organizations, causing frustration or the feeling that they are just a number.

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The “omnichannel” revolution is not simply about connecting channels from a technology standpoint. It is about uniting the *experiences* in each and every touch point. Moving to a new channel should never feel like switching to a new business.



2. How Journey Mapping Helps

With a glimpse into the totality of the experience, the organization will always be able to identify who the customer is, where the customer has been, and what outcome the customer hopes to achieve. As a result, agents and self-service tools can more accurately and rapidly tailor the experience. They can also accommodate the growing preference for asynchronous conversations, in which customers “pause” in the middle of a conversation and then hope to “pick up where they left off” hours or days later.

An experience that gets “smarter” over time



While customers may not view their interactions as part of a “journey,” they do not dismiss them as disparate transactions. They expect interactions to become better – and more personalized – over time.

If customers endure difficulty accessing their account balance via IVR in March, they expect that problem to be remedied in April. If customers consistently order the same sandwich from a corner deli, they eventually expect the cook to remember – and proactively prepare – their “usual” order.



3. How Journey Mapping Helps

Paired with robust analytics, journey mapping helps to illuminate customers’ objectives as well as the organization’s success in providing assistance. Using this intelligence, the organization can eliminate the issues associated with previous interactions, while also coaching agents on the right things to say to specific customers at specific times.

JOURNEY MAPPING: A BUSINESS-CENTRIC PERSPECTIVE

Journey mapping empowers organizations to efficiently and accurately engage on their customers’ terms. It is a direct ticket to customer centricity.

It does not, however, ask organizations to sacrifice *business centricity*.

Embodying the idealistic “good for the customer *and* good for the business” concept, journey mapping can produce substantial, lasting operational wins. There are several mechanisms through which journey mapping establishes itself as a “pro-business” endeavor.

When considering these benefits, it is important to remember that leveraging journey mapping is a “journey” in its own right. Organizations can — and often should — take a methodical approach to ensure their strategy and execution are as effective as possible.

Helps the organization leverage digital, self-service channels



By empowering customers to solve problems without agent assistance, self-service can dramatically boost operational efficiency.

Low-touch digital channels offer similar potential; since agents can concurrently handle multiple chats or text conversations, they can resolve more issues – and satisfy more customers – during their shifts.

These benefits, however, hinge on the business' ability to successfully leverage self-service and digital technology at the right time. If the tools are complicated, unproductive or applied at the wrong parts of the journey, they will only slow the process and frustrate the customer.



4. How Journey Mapping Helps

With insight into why customers are connecting (and why they choose certain channels), the organization can optimize its touch points, routing strategy, and overall journey. Customers will gain access to effective self-service and digital tools at appropriate times, thus boosting operational efficiency while also growing customer satisfaction.

Maximizes performance

“Fragmentation” is not merely a problem for customers. Disconnected technology also represents the #1 agent complaint. It, moreover, represents the #1 bottleneck on agent performance.

When agents cannot quickly gain insight into the customer's identity, issue, and history of support interactions, they cannot deliver fast, effective support. Call times will rise, and first contact resolution rates will crash.



5. How Journey Mapping Helps

Since agents already have the necessary context, they will not need to ask customers to restate their issues. They can immediately focus on solving problems – and connecting with customers. Genesys finds that companies save an average of 44 seconds per interaction when the context is provided.

Promotes customer “relationships”

While customers may not *explicitly* care about “journeys” or “brand relationships,” they do demonstrate loyalty to organizations that consistently perform.

By yielding new revenue opportunities (without the cost of acquiring customers), that loyalty markedly increases the bottom line. The impact on profit becomes even more significant when particularly loyal customers become *brand advocates*.



6. How Journey Mapping Helps

Customers will sense more appreciation – and thus feel a greater degree of loyalty. Journey mapping additionally helps the organization optimize the experience (based on aggregate insights) and tailor individual communication (based on the customer’s universal profile), thus creating interactions that become more valuable, satisfying and loyalty-inducing over time.

Identify costly “fractures”

Frustrating, impersonal experiences are dissatisfying for customers. That dissatisfaction prompts customers to either reduce their spending or outright take their business elsewhere.

Fractures, moreover, can be costly even if they do not result in customer churn. The issues that produce undue effort for customers often create unwanted costs for the organization.

Consider an IVR that cannot detect (or accommodate) customers’ desire for a quick, intuitive, automated way to pay their utility bills. These customers will need to escalate to a live agent. Costly resources will thus be devoted to an issue that customers would rather serve on their own. The business is, essentially, paying more to make customers less happy.



7. How Journey Mapping Helps

By helping to spot these fracture points, journey mapping helps organizations reduce customer effort and operational inefficiencies.

Unlocks intent, improves communication

The best organizations do not merely focus on what customers are saying. They focus on *why* they are interacting.

Knowledge of “customer intent” fosters more productive engagement. Organizations can route customers to the right channels, quickly provide them with the most useful information, present them with the most relevant offers or pair them with the most suitable agents.



8. How Journey Mapping Helps

With insight into the totality of interactions, the organization increases its ability to chronicle customer intent. More importantly, it can identify opportunities to orchestrate the journey based on that insight.



Empowers proactive engagement

Much like digital communication, proactive engagement can simultaneously reduce customer effort and operational costs.

Much like digital communication, an organization can only realize those benefits if it uses proactive engagement correctly.

Whereas proactive engagement *can* be a source of convenience for customers, it can also produce frustration. If the messages are irrelevant or delivered at the wrong time, the customers will hold it against the organization.



9. How Journey Mapping Helps

With knowledge about what customers value and how they prefer to communicate, the organization can develop a more astute, more resonant proactive engagement strategy.

JOURNEY MAPPING: URGENT ROADBLOCKS



As an instrument for meeting customer demands and strengthening business performance, journey mapping represents an immensely powerful customer experience tool. This potential to drive results explains why **journey mapping represents an investment consideration for 84% of organizations – and an urgent priority for 37%.**

Not all organizations, however, are capable of realizing that potential. Due to fundamental issues with their customer experience frameworks, these organizations will struggle to even generate accurate journey maps, let alone use those maps to shape their experiences.

Before attempting to execute a journey management strategy, organizations must correct for these fundamental issues.

Disintegrated technology

You cannot map what you do not know.

That, sadly, represents a very real predicament for many organizations. Their contact center systems and channels are disconnected, leaving them with a limited window into the overall experience.

They consequently have no insight into how customers move between channels and are thus left with a severely limited view of the customer's history. They cannot properly assess, let alone optimize, the true end-to-end experience. They cannot develop a singular journey map.



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Understanding the customer's context is important and often missed,” stresses Carter. “Organizations don't know what customers are doing or why they are doing it. The before and after are extremely important to understand. There is potential to misidentify patterns by jumping in the middle of the journey.

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Functional fragmentation

Channels are not the only source of fragmentation for today's organizations. Many also have barriers between their individual business functions, further restricting their ability to develop an overarching journey map.

A customer's experience receiving customer support for a particular issue absolutely *will* impact their sentiment when interacting with a sales representative. The representative cannot access that context, however, if the support and sales teams exist in isolation. The representative will only know about the customer's sales journey and thus deliver messaging and offers based on a crippling limited view of the customer's sentiment, history and preferences.

Intent blind spots

An organization that understands its customers' intentions can deliver far more relevant, personalized, productive and proactive communication. The ability to illuminate “intent,” accordingly, represents one of the greatest benefits of journey mapping.

Some experiences, however, may provide the business with inaccurate information about customer intentions and preferences.

Suppose a bank's customer support website only advertises the 800 number. Customers will naturally call for most issues, including routine matters like making payments and checking their account balances. The organization will be left with a false impression that customers *prefer* calling for transactional matters, when many would actually choose self-service or live chat if given the opportunity.

When mapping journeys, organizations must identify (and remedy) these blind spots. They must be able to distinguish between organic customer behavior, preferences, and intentions and those that are a product of the (flawed) existing framework.

No emphasis on sentiment

Many organizations mistake customer interactions for *transactions*. They focus on the objective outcome (did the customer receive the correct resolution) rather than the customer's emotional sentiment (was the customer happy with the journey to that resolution).

If organizations do not have tools capable of measuring customer sentiment, they will be unable to develop worthwhile journey maps. They may be able to trace how they interacted with that customer, but they will have no insight into how those interactions made the customer feel. They, accordingly, will struggle to meaningfully optimize interactions moving forward.



Lack of storytelling

A journey map is a great tool for understanding the health of the experience – and the personalities, behaviors, preferences and intentions of the customers who participate in that experience.

That insight is worthless, however, if the organization's agents and systems cannot make use of the data. Many organizations face that challenge.

Their systems provide agents with raw data, but they do not tell stories. They do not provide agents with the specific insight needed to connect with customers in a given circumstance.

The true goal of journey mapping, as a reminder, is not to score the existing experience. It is to uncover opportunities for creating more relevant, more valuable experiences at each and every touch point.

What is the use in identifying those opportunities if systemic limitations prevent the organization from seizing them?

JOURNEY MAPPING: ELEVATING THE JOURNEY

Mapping the customer journey and elevating the customer journey are two decidedly different concepts.

While the former is an important step on the road to customer centricity, it does not guarantee results for the organization and its customers. It simply reveals the state of the experience – and the opportunities that exist within.

The real goal for “journey management” is an elevated experience. It is the real reason “journey mapping” is even a point of discussion.

By repairing fundamental contact center challenges and leveraging an accurate journey map, the organization can markedly improve its experience. It can eliminate sources of strife. It can more meaningfully communicate and connect with customers. It can more successfully evolve to meet – and pre-empt – changes in the overall marketplace.

There are several best practices for parlaying a journey-oriented mindset into a better customer experience.



Implement an integrated, omnichannel contact center

An organization cannot begin to map its journey, let alone act on the resulting insights, if its systems are not connected. In order to orchestrate the best possible journeys, an organization must implement an omnichannel contact center solution.

Not simply a statement on the importance of integrating contact center systems, this directive is a call to fully become an *omnichannel organization*. Agents should have access to unified desktops that provide them with insight into all customer issues across all channels. The organization should be able to meaningfully engage customers wherever they want to connect. The CRM tool should capture and report insights at all conceivable touch points.

With this degree of integration, the organization will gain full context into the overall experience. It will also be able to ensure that any changes it makes impact all facets of the journey.

Unify the different customer-facing functions

Beyond connecting systems, journey-minded organizations establish philosophical alignment between different departments. When the sales, product development, marketing and service teams all have the same fundamental goals for the experience, they can evaluate the journey from the same perspective. They can understand the broader ramifications of a bad customer service encounter or the lasting impact of aggressive email marketing.

Cognizant that every interaction affects the totality of the relationship, the key stakeholders will make customer centricity the overarching priority.

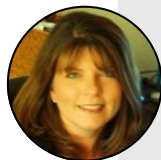
Build the right journey maps

All journey maps are not created equal. Some provide worthwhile, actionable insight into the customer experience, while others simply sketch the different venues in which interactions can take place.

The former journey maps are the ones that actually spur improvement. Whether creating the maps internally or with a third-party solution, organizations must focus on the outside-in perspective. They must create maps that answer key questions regarding how the experience looks and feels to customers.

Those answers are the springboard to more satisfying service and more fruitful marketing.

“



Map the touch points through the customer lifecycle of acquisition to purchase to services to renewal,” details Mikkelson. “This step-by-step visualization needs to be a clearly define the path of from the initial sale to providing service with continued support leading to the opportunity to cross sell and/or upsell. Identifying the touch points during the mapping exercise leads you to find ways to optimize the experience of your customers’ journey by looking at the optimal journey and current journey and seeing how the journey is deviating.

”

Rethink channel preferences

In theory, the idea of “honoring customer channel preference” is an appealing principle.

In practice, it may result in a suboptimal experience. Channel preferences are often borne out of inadequate information; customers do not always know the best channel for a particular issue.

Journey-oriented organizations overcome this challenge. They routinely evaluate how well they serve specific issues and customers in certain channels. With that insight, the organization can either make improvements to the experience within a channel or condition customers to switch to a different one.

Focus on dynamic context, not static segments

Customer-facing organizations have, historically, relied on static segments when building their experiences. They know that certain types of people generally like certain messages and experiences.

Journey-driven organizations do not ignore segmentation, but they do go one step further. They consider the impact of dynamic factors like context and sentiment. Two very different customers may react similarly to a frustrating IVR. Two very similar customers may react very differently to an experience depending on the urgency of their request.

Use intent to orchestrate the journey

Tolerable experiences provide customers with what they request. Customer-centric ones deliver what they really want.

To fall into the latter camp, an organization must understand customer intent. It must understand a customer's true motivation for not only engaging but follow a particular path on the journey.

By mentally embracing the idea of customer intent and using artificial intelligence technology to analyze engagements (and the overall journey), the organization can gain access to this crucial perspective. It will have a more meaningful, profound understanding of what customers are hoping to achieve.

The applications of that understanding are endless. The organization can route customers to channels (or agents) best-suited for the particular goal. It can complement its existing "segmentation" data to better predict customer behavior. It can provide recommendations and guidance as a customer navigates a particular issue or storefront. It can bring a live sales representative into the mix when the customer is most likely to buy (or about to abandon an order). It can send proactive offers or alerts where and when the customer is most receptive.



“

Intent helps predict behavior, which Carter says “stops businesses from contacting the wrong people, in the wrong channels at the wrong time and instead increases lead contact and conversion rates, increases staff productivity to drive increased revenue, reduces costs of sale and increases NPS.

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Identify and assess innovation opportunities

Thanks to analytics and journey maps, organizations can identify “pain points” they must urgently remedy.

Journey-minded organizations are not, however, strictly focused on quick wins. They are also exploring opportunities for long-term innovation.

Using knowledge of customer intentions and competitive experiences, these organizations are identifying opportunities for new products, new technologies (such as AI or virtual reality), new experiences (proactive alerts, concierge care, custom storefronts, etc). As they are relying on legitimate journey maps rather than theories and assumptions, their innovation efforts are more likely to resonate with customers.



“

The technology aspect is something that we are tapping into, just to give our patients and all of our callers that extra avenue in which they can receive the help that they need," says Marques Burgess of Urban Health Plan regarding his company's approach to innovation. "Providing a patient portal - everything we can do to put customer needs at their fingertips - we really want to engage in that. Not only for keeping up with the industry but also breaking ground and providing new processes and technologies that some may not have, allowing us to be a step above [the competition]."

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JOURNEY TO FUTURE EXCELLENCE



Today's organizations exist in an "era of customer centricity." They are "competing on the customer experience." The stakes of the experience are quite simply too high for guesswork.

By leveraging journey maps and adopting journey-driven mindsets, organizations eliminate that uncertainty. They are not simply designing the experiences they think their customers want. They are not simply looking at scores and speculating about which parts of the experience are contributing most heavily.

They are instead putting themselves in the shoes of their customers and chronicling exactly what happens when attempting to renew a subscription, make a purchase, cancel an account, receive technical support or partake in any other form of brand engagement.

Not simply a window into what customers are experiencing, journey maps provide insight into customer intentions and mindsets. That information is pivotal as organizations work to continuously improve their operations. It truly can -- and should -- drive all customer experience investments.

Leading e-commerce organizations have already started to tailor marketing and sales messages to the intentions and behaviors of individual customers. Organizations will double down on these efforts moving forward, while also paying attention to other opportunities.

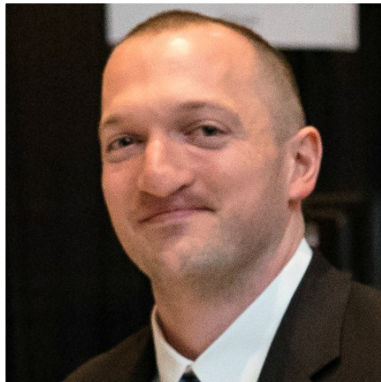
They will use journey insights to make hiring and training decisions. Certain employees, after all, are better suited for managing certain issues, interacting in certain channels or supporting certain customers. Journeys will illuminate that dynamic.

With insight into where customers become particularly happy or angry, they can more accurately identify and amplify key advantages (and disadvantages) over competitors. With awareness of how they affect the agent and user experiences, organizations can more meaningfully evaluate and optimize technology investments.

Thought leaders routinely caution organizations about "imposing" an experience on customers. By viewing their experiences as customer-centric journeys, organizations can finally ditch that bad habit.

* Puzzle by Cuby Design from the Noun Project; Speaker by Hare Krishna from the Noun Project; frown by Kero from the Noun Project; happy face by alerma from the Noun Project; Neutral Face by Kero from the Noun Project; Mail by Barracuda from the Noun Project; chat by Adrien Coquet from the Noun Project; Mobile by Mello from the Noun Project; Laptop by Stefan Traistaru from the Noun Project

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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital’s series of reports. CCW Digital’s articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

2018 Special Reports Calendar

Special Reports Calendar is subject to change.
Updated as of 5/15/18

Publish Date	Report Topic	Sponsorship Deadline
Jan. 2	2018 Predictions	Dec. 15, 2017 SOLD
Jan. 16	Retail CX	Dec. 20, 2017 SOLD
Feb. 1	Omnichannel	Jan. 18, 2018 SOLD
Feb. 15	Messaging	Feb. 1, 2018 SOLD
Mar. 1	CX Automation	Feb. 15, 2018 SOLD
Mar. 15	Customer Intent	Mar. 1, 2018 SOLD
Apr. 2	Brand Reputation	Mar. 16, 2018 SOLD
Apr. 17	Outsourcing	Mar. 30, 2018 SOLD
May 1	Customer Contact Executives	Apr. 13, 2018 SOLD
May 15	Customer Journey Mapping	Apr. 27, 2018 SOLD
Jun. 1	Agent Performance	May 18, 2018
Jun. 15	Self-Service	Jun. 1, 2018
Jul. 1	FP3 Experience	Jun. 15, 2018
Jul. 15	Outbound & Proactive Engagement	Jul. 2, 2018

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Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	Jul. 19, 2018
Aug. 15	Contact Center Security & Fraud Prevention	Aug. 1, 2018
Sep. 4	The Digital CX	Aug. 21, 2018
Sep. 17	Chatbots	Sep. 3, 2018
Oct. 1	Learning & Development	Sep. 18, 2018
Oct. 15	Remote Agents	Oct. 2, 2018
Nov. 1	Future Workspaces	Oct. 18, 2018
Nov. 15	Knowledge Management	Nov. 2, 2018
Dec. 3	Live Chat	Nov. 16, 2018
Dec. 17	CX Automation Pt. 2	Dec. 3, 2018

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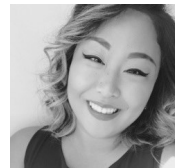
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