Category

Digital Transformation

Customer Experience & Omnichannel Transformation Playbook

A journey-mapping and channel-integration method for turning disconnected customer touchpoints into a consistent, measurable end-to-end experience.

- Practitioner
- Intermediate
- Template Included
- Workshop Ready

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- 7 minute(s)

Overview

Map real customer journeys, find the moments that actually drive loyalty or churn, and redesign channels around those moments instead of funding every channel equally.

How do we pick which journey to map first if we have dozens of candidates?

Start with the highest-volume journey that also has a known pain signal — elevated complaint volume, churn, or contact center volume relative to its size. A journey with both high volume and a visible pain signal gives the clearest before/after story once redesigned.

Do we need a customer research team to do the journey interviews?

No — a small cross-functional team (CX, operations, one channel product owner) can run 5-8 structured customer interviews and a set of frontline staff interviews without a dedicated research function, though a research partner helps if the interviews need to scale past the first journey.

How is a "moment that matters" different from just a low-CSAT touchpoint?

A moment that matters is statistically correlated with an outcome that matters — churn, complaint escalation, or advocacy — not just rated poorly in isolation. A touchpoint can have mediocre satisfaction scores but low correlation to churn, in which case it's a lower priority than the data alone might suggest.

What if two channels disagree on ownership of a moment that matters?

Assign single-threaded ownership of the moment itself, spanning whichever channels are involved, rather than splitting ownership by channel — the Coastal example only worked because one team owned the status-check moment end-to-end, including the contact center piece it didn't originally own.

How long until we see the loyalty or retention number move?

Typically one full quarter after a redesigned moment launches, assuming the journey has enough volume to generate a statistically meaningful before/after comparison. Lower-volume journeys may need two quarters before the trend is reliable.

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