

# 10 Common Barriers to Understanding the Customer Journey and How to Overcome Them

More than two-thirds of CMOs, including 82 percent of leading “Torchbearer” marketing executives, regard developing deeper, richer customer experiences as their top marketing priority.<sup>1</sup> For many companies, though, understanding the customer journey so they can deliver these improved experiences remains difficult. Nearly 80 percent of consumers feel the average brand doesn’t understand them as individuals.<sup>2</sup>

The barriers to understanding the customer journey include a lack of data and system integrations, breakdowns in process, misguided focus, and inattention to key aspects of the buyer experience. This tip sheet explores 10 of the most common challenges to understanding the customer journey and offers ideas for how you might overcome them.

## **BARRIER #1: Forms, offers and content aren’t working effectively.**

If you want to better understand your prospects and customers, offering a combination of enticing content and easy-to-navigate forms can help encourage them to share key information. However, many companies fall short in these areas, with common mistakes including:

- **Weak offers:** There’s likely a ton of competition for your buyers’ attention. The same old “10 percent off” offer you’ve been touting for years may no longer resonate in today’s environment.
- **Stale content:** Your buyers’ needs and the way they prefer to consume content change regularly. Is your content keeping pace?
- **Long forms:** Asking for too much information can often lead to process abandonment.

## **THE SOLUTION: Employ a combination of tactics to encourage contacts to share data.**

First, make sure your offer is strong. If you want contacts to sign up for your email program, for example, consider offering more than just a basic discount. Think about what might really excite your audience and then invest the necessary funds to advertise and market this offer.

Second, conduct periodic content audits to help ensure your content is current, addresses the challenges your contacts are facing, and is presented in a format that will resonate.

Finally, seek a balance between giving away content for free and asking for more than a few key pieces of information. Use progressive forms, which enable you to set logic-based rules and pose new questions each time contacts visit your website or landing page, to steadily gain deeper insight into their interests without overwhelming them.



## **BARRIER #2: There's not a system in place for tying behaviors together across channels.**

For many businesses, the path to purchase will take customers across channels and devices. It might involve visiting a website, opening a mobile app, dialing a call center, “liking” something on a social channel, reading company-provided content, visiting a physical store location, responding to an SMS message, watching a video and more.

The problem for many marketers is that their departments, processes and technologies aren't integrated in a fashion that enables them to capture these cross-channel behaviors, attribute them to an individual, and then respond with relevant content in the right channels.

## **THE SOLUTION: Build out integrations and break down silos across departments and channels.**

To extend their reach and range, torchbearer CMOs are increasingly experimenting with – or already using – more collaborative business models, such as open and platform variants.<sup>1</sup> Beyond that, taking a multipronged approach that involves the following elements should help you better understand the customer journey:

- **A “single identity” model:** If your data across email, mobile, Web, social and other channels is siloed, it's time to start building out the system integrations required to collect this data and funnel it into a central database that can tie these behaviors to individuals.
- **Intra- and cross-department communication:** Is your organization still doing channel-by-channel marketing? Take steps to start aligning your teams around common goals.
- **Agile workflow:** Use new journey-building technologies to better collaborate across teams and strengthen your focus on the customer experience.

## **BARRIER #3: Buyer persona research is either non-existent or rooted in guesswork.**

Well-thought-out buyer personas help inform a deeper understanding of the customer journey. However, sometimes resource-starved marketers shortcut the process in various ways, including:

- **Creating an “empty icon”:** Based on what the marketer thinks the target buyer looks like, this “persona” includes a short description of a person's title, education and background, along with a stock photo headshot or cartoon drawing. Because it's marketer-centric and based on guesstimates, its utility is limited.
- **Debriefing sales reps:** Since many prospects go through the bulk of the buying process before they interact with sales, reps won't have information on the most important part of the journey you need to know about to impact your marketing efforts.
- **Using another department's personas:** There usually isn't enough in common between the groups and how they decide to buy, evaluate and purchase to warrant sharing personas.

## **THE SOLUTION: Invest the time and resources to develop interview-led, data-driven personas.**

If you really want to embrace customer journey-focused marketing strategies, take the time to build out proper personas of your buyers. Usually, the best way to do this is to conduct thorough qualitative interviews in which your buyers (and people who bought from your competitors) are describing what their buying triggers were, outlining their buying criteria and describing their own purchase journey.

Once all the interviews are properly analyzed, consolidated and organized, you'll have valuable, research-driven information you can use to design customer-focused journeys. (For more, please see [“10 Tips for Building Buyer Personas.”](#))

**BARRIER #4: Reviews of the buyer journey are marketing-focused.**

Many companies fall into the trap of taking a marketing-focused approach that centers on what they want to say to their customers. However well-meaning your study of the customer journey, you're less likely to be successful if you're focusing on your products, solutions and other aspects of your offerings.

**THE SOLUTION: View every piece of your marketing plan and programs from your customers' perspective.**

Rather than thinking about what you'll say at each stage, strive for a more customer-centric marketing approach that seeks to understand how your

customers research, buy and maintain post-purchase relations. What are they feeling, thinking and expecting at every step in the process? For example, if they're feeling stressed out, thinking about moving past a tough milestone, and expecting valet service, the way you should communicate with them might be very different than if they are excited to master a new skill and seeking an instant download.

Taking time to answer these types of questions will put you in your buyers' shoes, building empathy toward them: what they're going through and what they'd like to achieve. Your messages can then reflect what you've learned as well as the obstacles that prevent them from moving on to the next step.

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## Customer Journey Success Story: Paper Style

Paper Style, an online retailer that sells customer invitations and stationery, had traditionally sent the same message at the same time to its entire database. Looking to boost engagement, it worked with its agency Whereoware to identify two key personas for nurturing: brides and brides' friends.

Whereoware then developed an innovative campaign focused on mirroring the typical bridal journey. The campaign was comprised of a series of emails using IBM Marketing Cloud's Programs functionality that followed a bride and/or her friends through wedding events, offering Paper Style products to match their needs along the way.

Through a series of customer journey mapping exercises, Whereoware and Paper Style developed a wedding "timeline" for bridal shoppers to follow. For example, the timeline assumes that a bride might buy

Wedding Favors (given at the wedding) before Thank You Cards (usually sent after the wedding). The campaign was laid out following this logic.

Completing specific actions, such as clicking a link in an email, visiting a certain Web page or purchasing an item, triggers a series of targeted emails guiding customers through the wedding timeline. Each email offers content and product suggestions in keeping with the current stage of wedding planning.

These targeted emails have resulted in a 244 percent increase in Paper Style's open rate versus its previous average email rate, a 161 percent increase in click-through rate, and a 330 percent increase in revenue per mailing.

**paper STYLE**  
*celebrate your life*

## **BARRIER #5: Silence isn't recognized as a signal.**

When analyzing the customer journey, it's tempting to zero in on the actions your contacts take along the path to purchase. Often, though, the lack of something happening is an important signal too, as in cart or process abandonment.

The problem is that many companies don't have the processes in place to capture, understand and act on these moments or periods of silence, which can lead to customer frustration, gaps in the buyer journey, and decreased revenue and retention.

## **THE SOLUTION: Scan the customer journey for spots where frequent lulls and inactivity crop up.**

Look for moments of silence, what it signals, and how you can improve the journey at these moments. Where are people stalling or dropping out? Why are they doing so? What kinds of integrations could you put in place to capture this disengagement, trigger related content, and increase the likelihood of the customer completing the desired action?

Instead of greeting customer and prospect silence with silence of your own – or content that shows you don't understand them – put together a plan to help these contacts move past whatever challenges they may be facing.

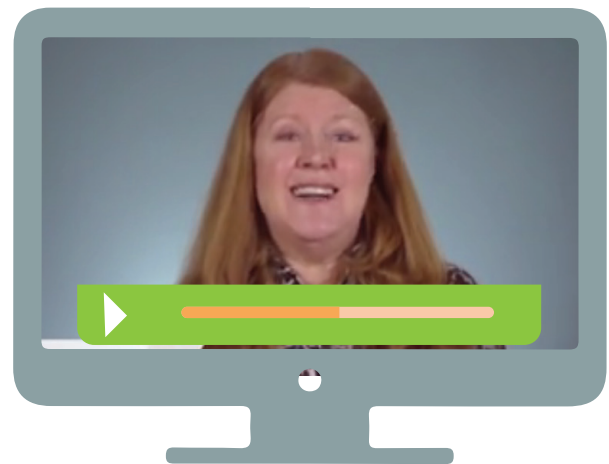
## **BARRIER #6: Only looking at the places your customers come into contact with your company.**

When you're thinking about the buyer journey, it's easy to make the mistake of only considering those moments when contacts interact directly with you. However, if you fail to take into account key moments in the customer experience that take place outside of your business model, you'll likely miss out on important opportunities to understand the customer journey.

## **THE SOLUTION: Expand your view to include the external touch points that matter to your customers.**

Consider where your contacts interact with partners, review sites, communities, the competition and more. Should you be monitoring any of these places more carefully? How about engaging contacts where appropriate? Is there content, existing or new, that might enhance whatever experience your customers are having in these places? If they interact in or visit any of these places, how might your messaging need to change to best enhance the customer journey?

You might cede some control over the interactions in these places, but you also might be surprised at how these strategic engagements can build relationships. In time, these relationships can lead contacts back to your website, mobile app and more – where you can better direct the conversation.



**“Overcoming Obstacles to Incorporating Customer Journeys into Your Marketing Plans”**

## **BARRIER #7: Looking at mobile in the wrong ways.**

If you're like most marketers, you've been focused on making your emails and website mobile-friendly and responsive. While ensuring that these emails and Web pages render correctly is an integral part of delivering a strong customer experience, understanding how mobile fits into the buyer journey is much more complex.

### **THE SOLUTION: Think beyond devices and consider mobile channels and context.**

Other variables are often just as important to the mobile experience, if not more, than design and layout: viewing context, mobility, product selection, purchase and payment processes, and the mobile app experience. Consider, for example, that the same customer viewing the same email on different devices might interact with the content differently, perhaps because that individual is literally in motion — scanning emails while walking through a parking lot, for example.

With that in mind, consider how you might enhance the experience based on mobile context. For example, short-cuts like pre-registration, wish lists, “favorites” features and an “email my cart” option encourage customers to start the purchase process on one device and finish it later on another, tactics which might be wise to implement if you find the buyer journey is bogging down when contacts try to complete an action on smartphones.

In addition, look for touch points where mobile apps, push notifications and SMS can help deliver timely content, tell a story, answer questions or create excitement. You might, for example, find:

- **Gaps in messaging:** Could a location-relevant push notification fill these more effectively than an email or straight Web copy?
- **Places where contacts stall:** Perhaps a strategically timed SMS might help nudge them along more effectively than your existing touch point?
- **Excess service calls or returns:** Would an app help you push out relevant product content that could help reduce these?

## **BARRIER #8: Marketing focus subsides after the sale is made.**

Depending on their company and industry, many marketers are pressured to focus on list growth, acquisition and/or new sales. As a result, the resources dedicated to building loyalty and repeat business pale in comparison to those allotted for acquiring customers.

The reality, though, is that delivering a better buying experience to existing customers to drive incremental revenue is often less expensive (and risky) than trying to double your list or new sales every 12 months.

### **THE SOLUTION: Pay as much attention to the journey post-purchase as you do pre-sale.**

By developing a full customer journey map that's as detailed after the sale as before, you'll likely gain new insights into the ways customers continue to interact – or fail to interact – with your business following a purchase of your product or service. Then, you can consider what marketing tactics or customer experience plays you can make to give you the best chance of turning buyers into repeat customers and strong brand advocates.

Tactics to consider include:

- **Incorporating a post-purchase onboarding program** to further introduce support or helpful how-to's
- **Delivering cross-sell recommendations** to drive a better experience – and perhaps more revenue
- **Implementing a formal brand evangelist program** among your strongest customers to help new clients learn the ropes
- **Developing a loyalty program** to encourage more purchases
- **Encouraging customers to connect with you via other channels** to make their experience better
- **Creating a private membership site or support portal** where customers can help each other
- **Building a scoring model** to identify when contacts become inactive after a purchase

**BARRIER #9: A lack of data on the assets and channel mixes that are most effective.**

Given the proliferation of marketing channels and devices, buyers have more choices than ever for how they interact with your company. When you factor in the multiple touch points that may occur in different chronological orders, it's easy to see why the complexity of the buyer journey is growing exponentially.

Making sense of patterns within these vast scores of behavioral data can be overwhelming. However, without insights into the different paths to purchase, it can be difficult to know how to best focus your efforts.

**THE SOLUTION: Tap the power of analytics tools to visualize and quantify the journeys customers are taking.**

More sophisticated marketing platforms can provide detailed insights on how your customers interact with you and purchase your product/service. These analytics tools can reveal data on the most effective

interactions across channels throughout the entire buying cycle and enable you to:

- **Change your content strategy:** Understand what assets are resonating during the customer journey, and tweak your approach to reflect these findings
- **Eliminate communication gaps:** Learn where customers are exiting interactions and address these problem areas
- **Get the messaging mix right:** See how your marketing channels are working together, and discover new possibilities for engagement
- **Drive more revenue:** Determine what paths are the shortest or most profitable, and ramp up your efforts in these areas

By integrating these analytical capabilities into your journey mapping and content planning processes, you'll help ensure you have the data and knowledge to engage with customers at the right place and in the right fashion.

## Customer Journey Success Story: Georgia Aquarium

Georgia Aquarium is one of the world's largest aquariums, and its marketing team was ready to get to know its customers better in order to retain loyal fans, provide consistent value and drive more revenue. However, its data was stuck in silos and the team was small.

Hired to act as an extension of the Georgia Aquarium marketing team, IBM Marketing Cloud Professional Services supported the Aquarium's efforts by helping to identify the Aquarium's key personas. Then, it matched these with the Aquarium's primary goals — Acquisition/Welcome, Loyalty, Renewal and Reactivation — and brainstormed nurture campaigns to target each "bucket" of subscribers and improve the customer journey at these points.

After mapping and strategizing for months, the Aquarium began using automated programs, preference centers and reporting to help launch

and execute three different campaigns: Pre-Visit Experience, Post-Visit Follow-Up and Welcome Series.

Not only is the journey improving for Georgia Aquarium's different personas, but the digital marketing team is seeing success as well. The results include a 60 percent unique open rate for all expanded campaigns and a 32 percent lift in revenue from the email channel.

"Working closely with various departments throughout IBM, including the Professional Services team, we have been able to increase our customer touch points 3X over the last year, leading to a more engaged and loyal customer base," says Rosie Judd, director of digital media, Georgia Aquarium.



GEORGIA AQUARIUM

## **BARRIER #10: Forgetting about the customer journey when it comes time to plan marketing.**

Some marketers do the hard work of completing customer journey maps and creating related content, but then relegate these critical strategic assets to annual planning notebooks and seldom-used PowerPoints once they get caught up in the rush to complete day-to-day tasks.

## **THE SOLUTION: Make it a habit to think about each new initiative in the context of the buyer journey.**

Each time you're working on messaging, updating content or building out campaign strategy, make an effort to use the customer findings you have developed (buyer persona documents, customer journey maps, etc.). At each planning meeting, ask yourself and your coworkers, "What would our buyer want?" or "What does our research indicate we should do?"

Periodically conduct more interviews to refine what you've developed and keep customer focus at the

forefront. Consider performing annual content audits to help ensure you have current materials to engage contacts at the different points in the customer journey – and via the channels through which your contacts prefer to interact with you at these moments. Finally, monitor your analytics tools for changes in the customer journey that may arise over time.

Changing your approach to one that's more customer-centric isn't easy. With a few strategic shifts, though, you should be able to push through the common barriers to understanding the buyer journey and start architecting a superior experience for your customers.

### **Footnotes**

1-IBM, "[Redefining Markets: The CMO Point of View](#)," Feb. '16

2- IBM and Econsultancy, "[The Consumer Conversation: the experience void between brands and their customers](#)," 2015

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## **About IBM Marketing Cloud**

IBM Marketing Cloud, part of the IBM Marketing Solutions portfolio, powers the delivery of exceptional experiences for customers across the buyer journey by leveraging customer data and behaviors, providing analytical insights and automating relevant cross-channel interactions. The cloud-based digital marketing platform provides email marketing, lead management and mobile engagement functionality to inform and drive personalized interactions in real time. To find out more, please contact us at 1-866-745-8767 or +44 20 7202 5930 and visit [ibmmarketingcloud.com/contact](http://ibmmarketingcloud.com/contact).

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