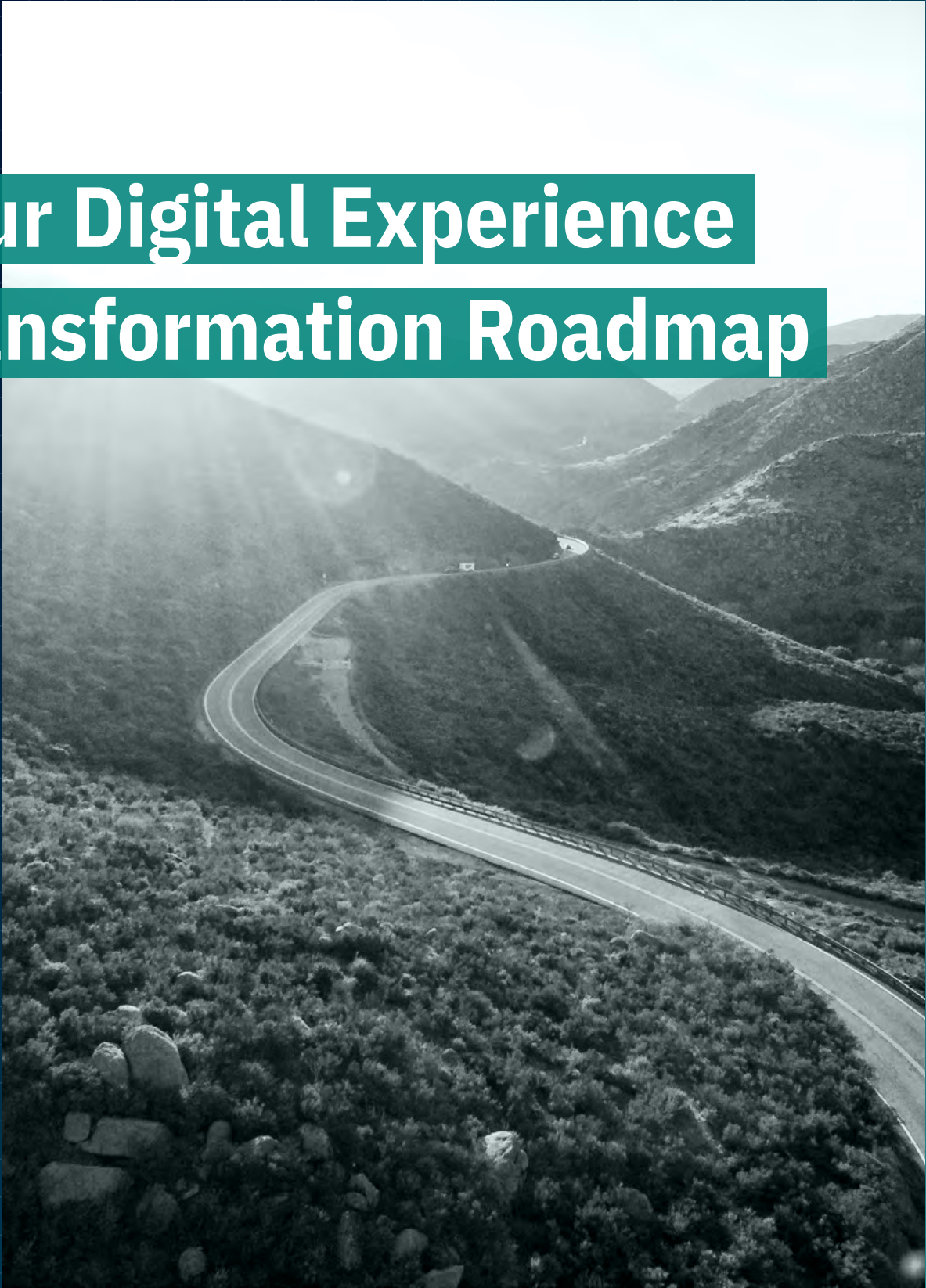


# Your Digital Experience Transformation Roadmap




## Let's Start with the Big Picture

Let's start with the big picture: what does a successful digital experience look like for your brand? There are seemingly endless factors to consider, but digital success should start with the customer. The online experience should be consistent and seamless, and it puts the customer at the centre of your most critical business decisions.

As the amount of online interactions accelerates—whether it be customers ordering or browsing on your webpage or

leaving a review—customer demands for the quality of that experience are getting higher and higher. Customers now expect their favourite brands to “know” them—the products they use, their preferences, history, and behaviours—no matter where they interact.

Now is the time for brands to meet this moment and transform their digital experiences to develop longer-lasting customer relationships and to stand out against competitors. The secret is in the strategy, and this roadmap will walk you through creating winning digital experiences in your business from beginning to end!



“We have vaulted five years forward in consumer & business digital adoption in a matter of around eight weeks.”

MCKINSEY COVID-19 US DIGITAL SENTIMENT SURVEY

# Three Tips for Developing a Successful Digital Strategy

We realise many brands have started down the path of digital transformation, with some initiatives stretching years back and others more recent, but all businesses are feeling the effects of recent changes in consumer behaviour. To define these changes, many brands are looking at their feedback data, but with siloed data and employee communications, brands are struggling to understand how to deliver a consistent digital experience. Outlined below are three tips to help you design and accelerate your digital roadmap even in the midst of these challenges:

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## TIP #1

### Define a Strategy

If you don't know what you're trying to accomplish, it is difficult to be successful. Brands need to take the time to identify which digital channels are most important to its customers and business, and to map them to the company's business drivers around growth, retention, or acquisition (whatever they might be) to ensure the digital strategy aligns with overall business goals.

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## TIP #2

### Develop a Personalised Experience

To ensure your digital strategy is successful, brands need to spend time identifying their brand voice. Customers expect that every brand contact they receive shares a similar voice, supported by a consistent value proposition and brand personality. To deliver on that expectation, brands must define a unique brand focus, integrate and provide a steady voice for key communication channels across organisations, shift focus from looking at customers in the aggregate or by segment, and begin crafting experiences and interventions at a truly personal level. Additionally, they need to give every employee the intelligence and training they need to help deliver brand consistency throughout your digital channels.

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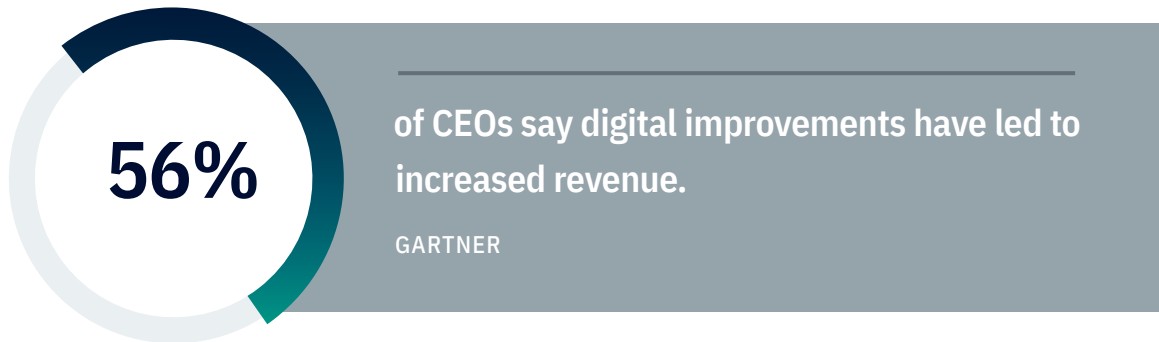
## TIP #3

### Streamline Technology & Processes

Providing a seamless view of a customer's relationship and experiences across channels, products, and business units requires the organisation to have access to a single view of the customers' digital journey. This often requires breaking down the silos of well-established infrastructure and technology across departments by integrating systems so they can communicate with each other instantaneously, and defining an effective way to control and manage processes. The right kind of governance will make sure every individual effort stays connected to your broader strategic goals.

## A Digital Experience Strategy is Absolutely Vital

In our [Post-Pandemic CX Trends Playbook](#) based on our proprietary CX Standards research, we outlined customer experience trends and what brands need to do differently to succeed in the future. Our research shows that one of the top three CX trends throughout and following the pandemic is that a digital experience strategy is even more vital to the future success of a brand than ever before.



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A major financial services banking client noticed that there was a huge opportunity to not only understand what keeps their website browsers from buying, but also how they could convince them to become customers. How? By exploring a previously untapped source of feedback: live chat transcriptions.

By scraping non-buyer commentary from their chat feature, they were able to understand what was causing the drop off and empowering their agents on the other side of the conversation to turn those situations around.



# Do You Know Where Your Digital Customers Are?

After designing a business and digital experience program strategy, the next phase of your roadmap is to use the right methods to listen, understand, transform, and realise the positive and negatives within your digital experiences.

## IN-THE-MOMENT



### Digital Web Intercepts

Utilise intercepts at targeted points in the online experience—from browsing to order completion—to gain understanding at key points in the customer journey.



### Chatbots

Gather feedback and commentary between web visitors and live agents into one system to drive deeper intelligence about experiences.



### Mobile App

Many customers today are engaging with your brand via your app, so you need to make sure you are optimising their journey in-app as well. Request feedback on ease-of-use, functionality, and more so your app stays in their phone.



### Inferred Data

Integrating CRM, clickstream, and Google analytics data with your feedback data can be a game changer. It provides an additional layer of context about the customer that helps you to create informed, personalised interactions.



### Social Monitoring

Today's customers (especially younger generations) practically live on social media—and so do their opinions of a brand. A social listening system allows you to tap into popular online reviews and social sites where customers tell meaningful stories about their experiences with brands.



### Email Surveys

There's a harsh truth brands need to recognise: most consumers will not enter the printed code on a receipt to take a survey—even if they have valuable feedback. So meet them where they are: send an email survey invitation optimised for mobile to their phones!

# Unlock Digital Data Intelligence

Acknowledging that customer journeys are nonlinear and unpredictable is the first step in building a strong technology foundation and strategy for your digital success. The next step in your roadmap is to identify the technology and tools you need to replace those tedious, manual processes so you can reap the full benefits and intelligence your digital experiences can deliver for you and your brand.



## ASSESS YOUR INFRASTRUCTURE

Every successful digital program starts with a centralised technology platform that's capable of collecting, normalising, analysing, searching for valuable context, and easily showcasing data from a complete range of digital and traditional touchpoints. This technology core needs to be built on a highly scalable architecture, incorporate the latest big data and cloud-based technology, and provide all the tools and integration points you need to meet your most ambitious digital experience program and business objectives.

## USE AN INDUSTRY-SPECIFIC TEXT ANALYTICS MODEL

With text analytics, there is a balance between time, expense, and accuracy. Different models and methodologies will have varying impacts on your business, so it's important to determine which approach best fits your priorities. We've built a text analytics engine to simply work from the day you turn it on—with intelligence that gets smarter over time—so you can feel confident when you take action.

## DECIPHER AND DECODE EMOTION, SENTIMENT, AND INTENT

When you understand the difference between a minor nuisance and a major issue that puts customer loyalty and revenue at risk, you can identify—and replicate—the types of experiences that elicit unbridled joy and increase customer retention and spend.

## CLOSE THE LOOP WITH ACTIVE CASE MANAGEMENT

You can quickly turn feedback into active cases, assign them to the right people, and track their progress. By extending efficient, centralised case management out to social media and other digital channels, you gain the ability to impact and improve digital experiences—and resolve potentially damaging situations quickly.

# Expose the Most Valuable Customer Intelligence

## Uncover Hidden Opportunities

Business is changing rapidly, but companies are still running the same experience programs they implemented three, five, or even ten years ago. And in today's environment, a historical approach is no longer going to work. Many times brands are trying to solve problems that can't be solved by technology alone. True innovation often requires a human touch.

Yes, we're experts in customer, employee and market experience, but more importantly—we're experts in human behaviour. Our data scientist and PhD-led Strategic Insights team goes beyond technology to help companies recognise and prove the power and value of experience initiatives.

## MAP THE CUSTOMER JOURNEY

You can't know what you need to change until you can map out the entire digital customer experience. Doing so will help you identify different touchpoints that need to be influenced.

## FIND THE MOMENTS THAT MATTER

It's impossible to make every digital experience perfect, and that's okay. What's important is understanding the moments that matter to your customers and employees—and ensuring they hit the mark. Our proprietary True Driver Analysis helps you understand what elements of the experience have the greatest impact on the outcomes you care about and how to prioritise those strategic areas that need focus.

## GIVE STRUCTURE TO GOVERN YOUR PROGRAM

Putting an experience strategy in place is a great first step, but without the proper alignment, expectations, and processes in place, impact will be limited. From executive oversight to standardised processes to frontline coaching, our governance best practices give structure to your program by helping everyone understand their specific role in the experience delivery.

## DRIVE A CUSTOMER-CENTRIC CULTURE WITH EMPLOYEES

The employees' perspective on improving delivery of customer experience—known

as voice of employee—provides brands with a unique look into customers' experiences, emotions, delights, and struggles. VoE listening posts can be implemented at established touchpoints and intervals, leveraged through ad hoc invites and "always open" portals, or built into your closed loop process for real-time understanding of issue resolution and root cause. We can help you develop a listening strategy, analyse the results, and craft action plans to improve customer retention, reduce costs, and drive revenue.



# Does Transforming Digital Experiences Power Your Success?

(THE ANSWER IS, YES!)



## C-Suite

For senior executives, your combined digital and nondigital feedback becomes an indispensable tool for crafting the brand's strategic vision. Deeply understanding customers' needs and journeys allows a brand to identify a path that positions the brand to personalise according to needs and new buying preferences by more clearly seeing both the future and present state of experiences.



## Sales

Understanding the drivers and the leading indicators of changes in customers' perception of the company allows sales management to proactively detect (and enable corrective action against) trends in business outcomes. An experience program allows sales professionals to see beyond "what happened" to "what might happen"—and, to understand the reasons why.



## Customer Care

Today, for many businesses, the primary interaction point between the brand and the customer occurs when service is needed: a question to be answered, a problem to be solved, or a confusion to be clarified. Getting it right is a golden

opportunity to strengthen the relationship, and an experience program allows a brand to understand "what works" in successful digital brand/customer interactions and to monitor customers' perceived satisfaction with those interactions.



## Marketing

For marketing to work well, it must be relevant to its audience. An experience program facilitates the development of online marketing assets and helps develop an interaction awareness to help brands to effectively position and message by incorporating the vocabulary and viewpoints of customers into the many customer-facing digital assets managed within the marketing organisation.



## Every Employee

Every employee and organisation can benefit from what you learn from delivering a singular voice across all digital channels: from understanding if the client onboarding process went smoothly and efficiently to understanding if your employee hiring and onboarding process leaves a lasting positive impression (or a negative one).



DON'T WAIT.

# Now is the Time to Transform!

Whether you're just starting out or you've been working on your digital transformation for years, InMoment is here to help. We realise it may feel like an overwhelming and a prohibitively expensive prospect—but modern digital technology and expert services can open the door to a wealth of valuable customer intelligence based on what matters most to your business and your customers.

With a smart, calculated approach, capable partners, and the right technology and services, any organisation can move confidently toward a more effective digital transformation that's designed to inform your most critical business decisions based on customer intelligence—all in an effort to help you meet your businesses objectives of retention, growth, or new customer acquisition.



## To demo a product or to contact us call:

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## About InMoment

Improving experiences is why InMoment exists. Our mission is to help our clients improve experiences at the intersection of value—where customer, employee, and business needs come together. The heart of what we do is connect our clients with what matters most through a unique combination of data, technology, and human expertise. With our hyper-modern technology platform, decades of domain authority, and global teams of experts, we uniquely deliver a focus on Experience Improvement™ (XI) to help our clients own the moments that matter. Take a moment and learn more at [inmoment.com](https://inmoment.com)

