



EBOOK

# Omnichannel Customer Experience

How brands can transform their data, culture, and technology to attract and delight customers

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A woman with long dark hair, wearing a black long-sleeved top and black leggings, is captured in a dynamic, low-to-the-ground pose. She is leaning forward with one leg extended back and her arms outstretched. The background is a vibrant, abstract gradient of blue, purple, and orange. To the right, there is a blurred image of a person walking past a storefront with warm interior lighting and a red patterned display. The overall scene suggests movement and modernity.

01

# The State of Customer Experience Across Industries

# Overview

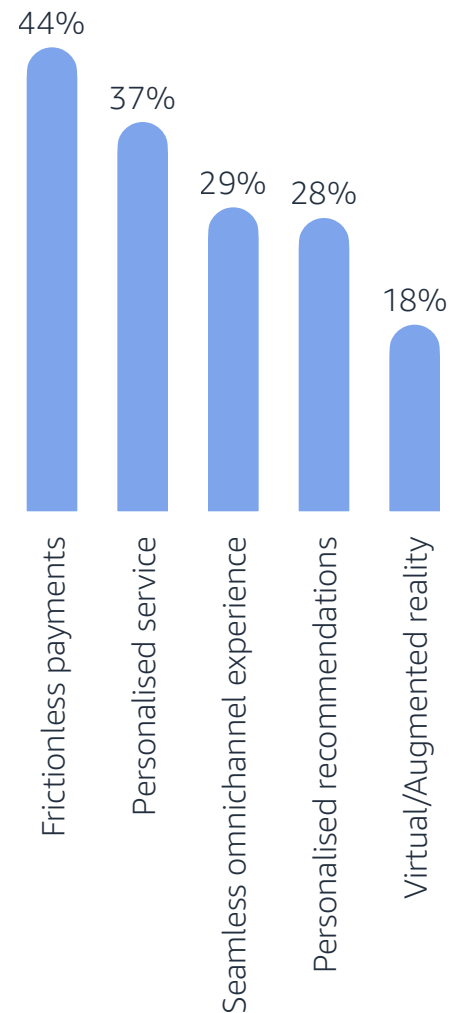
The COVID-19 pandemic accelerated an already changing relationship between customers and how they engaged with brands. Customers today expect a frictionless and tailored experience, regardless of their journey or touchpoint. They prefer interacting with a cohesive brand rather than disjointed departments. This presents businesses with an opportunity to adopt a customer-centric approach and prioritise personalised, omnichannel strategies. In fact, 67% of e-commerce firms in North America and Europe consider omnichannel crucial to their success<sup>1</sup>.

By 2026, the customer experience (CX) and personalization services industry is projected to expand by 40% from 2022, attaining an estimated \$11.6 billion<sup>2</sup>. Cloud technology is a potent catalyst, empowering businesses in more advanced sectors like retail and media to innovate more rapidly and concentrate on adopting a customer-centric approach. Pioneers within these industries have paved the way for others to follow.

## Omnichannel in Retail

In the retail sector, omnichannel shopping has become the standard, with up to 74% of retail consumers utilising online and offline touchpoints to research or purchase products. During the pandemic, retailers devised new methods to connect with their customers, and in the post-pandemic era, shoppers are seeking convenient features that enrich their shopping experience, such as effortless payments, personalised services and recommendations, and a seamless omnichannel experience<sup>3</sup>. Undoubtedly, recent advancements in Generative Artificial Intelligence (AI) will also begin to play a significant role.

### Top 5 innovations shoppers want to see from retailers





## Omnichannel in Financial Services

Consumers also anticipate an omnichannel banking and insurance experience. The disruptions from challenger banks and other fintech services have compelled the industry to shift its focus from transactions and policies to addressing customer needs and predicting future expectations.<sup>4</sup> High street banks and insurers alike are swiftly adapting their legacy infrastructure to prosper in the digital, customer-centric age, while their digitally-native counterparts continue to elevate the bar unencumbered by legacy.

## Omnichannel in Healthcare

The pandemic has prompted healthcare and medtech companies to incorporate more digital aspects into patient and practitioner experiences. By integrating self-service portals, web and mobile apps, they can remotely engage with healthcare professionals (HCPs) and non-clinical stakeholders, such as payers, hospital leaders, and procurement professionals. As a result, the medtech industry is transitioning from a model centered around sales representatives<sup>5</sup> to one based on customer centricity, enabling HCPs to access information whenever necessary, with the potential to deliver better health outcomes.

## Implications for Other Industries

The shift towards personalised and seamless experiences will inevitably influence other industries as well. For instance, in the automotive industry, [McKinsey predicts the future of car buying to be "omnichannel, personalized, and fun."](#) However, senior leaders across various industries acknowledge challenges such as data compliance, team alignment, and legacy technology as key obstacles in delivering a seamless cross-channel experience.<sup>7</sup>

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### Top 5 Challenges Brands Face in Delivering a Seamless Customer Experience

- 1 Data security & protection compliance
  - 2 Aligning teams and touchpoints
  - 3 Legacy tech
  - 4 Holistic view on customer journeys
  - 5 Connecting data across systems and channels
-

# The Challenge for Brands

It is vital to take a moment to acknowledge that CX capabilities encompass more than customer acquisition and engagement. For retailers, they may include customer service, inventory management, order fulfillment, and returns. Industries such as travel and hospitality face a far more intricate landscape with third-party hotel suppliers, price comparison sites, airport restrictions, and independent delivery drivers.

Customers might initiate their journey by responding to sponsored content on social media, compare prices and book with a third-party affiliate website, and follow up with on-the-ground staff for the latest information when complications arise, such as exchanging a defective product or reclaiming lost luggage. These customers will expect the staff to understand their specific context, even though their journey began elsewhere. These hybrid experiences make it more challenging for businesses to consistently engage with customers throughout their journey. With an increasing percentage of touchpoints being digital, businesses are now required to respond in real-time, 24/7. Therefore, marketing, customer service and customer experience teams are presented with a dual challenge. They must create an engaging experience that flows

seamlessly across multiple teams and tools, often with varying maturity levels (see page 7), while coordinating those teams to deliver a consistent customer experience. [More advanced brands have adopted customer journey orchestration \(CJO\) and real-time interaction management tools \(RTIM\) to help manage the complexity](#) but the challenges go beyond technology

To overcome this challenge, organisations need to:

- 01 Go beyond customer 360**
- 02 Align teams to customer journeys, not business functions**
- 03 Adopt mechanisms to drive customer centric outcomes**
- 04 Start small and demonstrate value early and often**

This ebook explores what brands need to establish truly transformative omnichannel capabilities and improve customer experience. It includes a five-stage maturity model to help organisations self-assess their customer experience capability. We will refer to these stages throughout the document.

# Assessing Omnichannel Maturity

To assist brands in evaluating their customer experience capability, we created a five-stage CX maturity model <sup>8</sup>.

STAGES	DISJOINTED 1	CONSISTENT 2	INTEGRATED 3	ORCHESTRATED 4	SEAMLESS 5
CUST. EXPERIENCE	Customers notice <b>consistent branding on multiple channels</b> , but cannot interact between them, like returning online purchases in-store.	Customers see a <b>consistent design language optimized for screen size across channels</b> , but may experience content or capability inconsistencies, like being unable to redeem loyalty points online. Customers see some personalised messaging on web or mobile.	Customers can <b>transition smoothly between channels for certain journeys</b> and can partially resume progress (for example, reserve online, complete order in-store or at home with concierge). When customers speak to customer reps, they are presented with relevant offers.	Customers are proactively engaged and routed across any channel to complete their personalised journey. <b>They can seamlessly resume their experience on any channel based on their current or predicted needs.</b>	Customers can use <b>channels in combination with each other</b> for an enhanced experience (for example, using a smart phone to guide the experience on a smart tv or using their mobile app to scan and go while in store).
PEOPLE & PROCESS	Teams have <b>little to no communication or collaboration</b> between them and may operate more like separate businesses.	Teams <b>meet on an ad-hoc basis to work on projects or to resolve high-profile customer issues</b> . They have established the role of a content or digital planner, or equivalent.	There are <b>dedicated planning or CX delivery roles to help brief and coordinate teams on a per-project or per campaign basis</b> . Feedback from frontline staff is incorporated into feature development.	There are dedicated, cross-functional teams aligned to customer journeys. <b>AI is used to accelerate root cause analysis and enable proactive customer care.</b>	Cross-functional teams collaborate frequently to co-develop deeply integrated experiences. <b>AI is used heavily to identify, predict and alert teams of pain points and instantly surface the insights to any channel.</b>
DATA & TECH	Separate technologies with little to <b>no data sharing or integration</b>	<b>Mostly separate technologies with some data sharing occurring between teams</b> for example, exporting customer contacts from online forms to contact centre team. Digital experimentation tools being used to place tailored content online.	<b>Workflows, journey orchestration, and system integrations between lines of business are partially automated.</b> Microservices, data products, and Machine Learning (ML) models are emerging but not well shared. Data syncing occurs at scheduled intervals.	<b>Microservices are shared across all channels, providing real-time accessibility and automated workflows to orchestration tools.</b> Examples of microservices include customer profile services, product catalogue, credit eligibility, and recommendations.	<b>A unified customer state (See chapter 2) is shared and updated in real-time.</b> Data has two pathways: (1) <b>experience</b> , that directly impacts the customer as it happens, and (2) <b>analytical</b> , which updates models asynchronously in the data supply chain





02  
Go beyond  
Customer 360



## Live Customer State

To achieve a personalised and seamless experience for customers, organisations must move beyond traditional data pipelines and 360 customer profiles. Brands need to strive for a live customer state available at all touchpoints so that every channel is aware of the customer's precise position and context in their journey. Examples of data points in the customer state could include their most recent interactions with contact staff and products, buying patterns for specific products, key friction points, or up-to-date propensity scores.

One way to achieve this is by adopting a microservices approach<sup>9</sup>, where each touchpoint and channel contributes to shared data domains. These domains then provide data in real-time to downstream applications and orchestration tools via microservices.

Data generated from customer interactions, changes in their state, and other factors will take two distinct pathways:

- **The experience pathway**, that directly impacts the customer as it happens. This includes predictive triggers, spending thresholds, responses to in-app events, and other factors that influence the customer experience in real-time.
- **The analytical pathway**, updates models and calculated metrics asynchronously in the more conventional data supply chain.

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**Going beyond customer 360** with dual data pathways, microservices, and a live customer state will enable the shift toward seamless experiences.

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# Data Domains

Establishing data domains is essential to ensure that microservices deliver consistent data to all touchpoints. For instance, creating a product domain using product information management systems (PIM) enables retail organisations to enhance metadata and allocate products correctly across stores and regions, reducing the risk of customers encountering incorrect store pricing, product information, and availability. This approach can also benefit businesses in other industries, especially those that have grown through acquisitions and may have multiple versions of the same customers or products across different brands.

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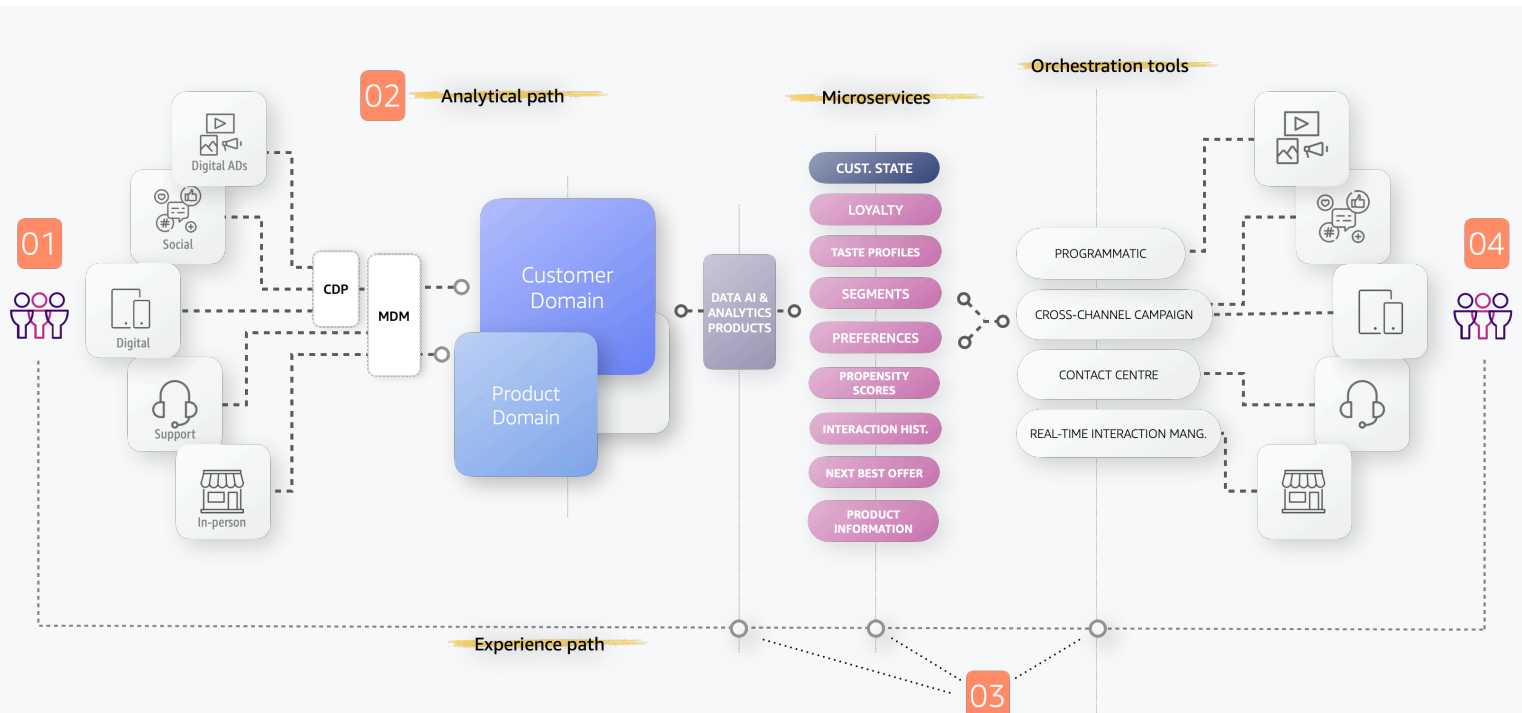
**Cox Automotive Inc.**, a global automotive dealer operating across five continents. They built an identity graph that combines data from millions of car shoppers to enable marketing personalization without third-party cookies. The team at Cox Automotive Inc. use data across household and leads, browsing history, shopper segmentation, and vehicle recommendations, to power their marketing use cases.

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To ensure a seamless omnichannel experience, businesses should consider creating a customer domain using master data management (MDM)<sup>10</sup> tools, where applicable. This involves maintaining a single record for each customer and household, while using identity management technology to accurately identify and link customers to their user accounts, activity data, and preferences. This is particularly important in cases where customers have multiple accounts. By capturing, calculating, and sharing this information in real-time between systems and teams, businesses can lay the foundation for a consistent and personalised experience across channels.

# The Technology Blueprint

A high-level technology blueprint for seamless omnichannel



**01** Customer events (or actions) are generated when customers interact with the business, such as purchasing a policy in-branch, sending a message via live chat, or exceeding a spending threshold.

**02** The data generated from these events is captured and flows through a data value chain, updating models, dashboards, and microservices within minutes, hours, or sometimes days. This is a common practice in many stage 2 and 3 businesses today.

**03** At the same time, these customer actions trigger real-time microservices or orchestration tools, allowing the business to respond immediately to customer needs.

**04** Customers receive instant personalised messages, notifications and content based on their actions in step 1 and triggered actions in step 3.

## Case study

# tapestry

Tapestry is a global luxury fashion house that includes brands like Coach, Kate Spade New York, and Stuart Weitzman. These brands operate 1,500 stores worldwide, with digital sales accounting for a significant portion of Tapestry's yearly revenue. As consumer interest and purchases continue to grow, Tapestry aims to use its data to unlock deeper insights into its customers' behaviours. However, the company faced challenges consolidating historical customer data scattered across its companies in various sources such as point of sale (POS), e-commerce, email interactions, loyalty data, and mobile app engagement. Most systems weren't designed to integrate with each other, and there were inconsistencies in individual customer data.

To overcome this issue, Tapestry built the Tapestry Data Exchange, the data backbone for all its brands. It collects, analyses, and stores data from nearly 100 systems across operations. Tapestry also worked with Amperity to create a first-party data foundation to identify the same customer within and across the company's data sources that contain customer information. This provided an immediate improvement in the automation of data ingestion required from various vendors, especially automated email providers.

With the democratisation of access to data and insights, Tapestry created a 360-degree view of its customers that enabled the delivery of omnichannel experiences. Analysts and data scientists developed near real-time segmentation models and ML models for any use cases. Marketers can use dashboards to share and highlight core KPIs and insights. The automation of end-to-end file delivery and processing, along with the investment in ML, helped Tapestry design high-demand products, optimise product inventory, improve customer experience, and maximise revenue across every transaction. Additionally, the company reinvested in other growth-driving opportunities, such as cross-channel strategies to improve customer engagement and brand loyalty with personalised and consistent communications.



# Take Action

01

## Unlock CX innovation through cloud adoption

For companies at **Stage 1 Data & Technology**

Discover new possibilities for enhancing customer experience by embracing cloud technology. Begin by experimenting with innovative features for your digital platform, such as personalised product recommendations powered by [AWS Personalize](#). Then, build a solid operational foundation by migrating to the cloud and leveraging its capabilities for data integration and sharing.

The [Migration Acceleration Program \(MAP\)](#) offers an expert-led approach that can help you move to the cloud quickly and effectively, empowering your organisation to achieve greater innovation and flexibility sooner. To complement your migration to the cloud and further improve your data capabilities, consider exploring [Database Freedom \(DBF\)](#) services.

By partnering with one of our [Database Freedom partners](#) or [AWS Professional Services](#), you can receive a comprehensive assessment of your database and analytics systems and receive recommendations for a migration path that best suits your business needs.

# Take Action

02

## Use AI/ML and Generative AI to leapfrog omnichannel service interactions

For companies at **Stage 1, 2, 3, or 4 Data & Technology**

Use [Amazon Connect](#) to rapidly advance contact centre interactions over voice, chat, and outbound messaging. With Amazon Connect you can setup a cloud contact centre in minutes with personalised messaging powered by AI and ML.

Ingest customer data from multiple applications into a single unified customer profile for contact centre agents using [Amazon Connect Customer Profiles](#). You can quickly create contact flows to orchestrate services journeys for example handoffs from intelligent chatbots to agents.

With [Connect Wisdom](#), you can ingest data from Salesforce and ServiceNow to deliver real-time recommendations to agents. Quickly build human-like chatbot capabilities by combining [Amazon Lex](#) with Generative AI and Large Language Models (LLMs) from [Amazon Bedrock](#).

Lastly, with [Contact Lens](#) and Amazon Bedrock you can automatically identify call drivers, discover new customer issues, categorise calls, and create concise and meaningful summaries to reduce the time spent taking/reviewing notes and transferring customer context between agents.

# Take Action

03

## Use CDPs to accelerate data unification from Digital sources

For companies at **Stage 2 Data & Technology**

Utilise [Customer Data Platforms \(CDPs\)](#) to unify digital customer data from online interactions and digital marketing into a central hub. CDPs make it easier for teams to extract value from large volumes of diverse digital data. AWS partners such as [Amperity](#), [Tealium](#) and [Twillio Segment](#) help fast-track and simplify data unification efforts by providing pre-built connectors to third-party data sources and making it easier to stitch together customer identifiers using either deterministic or probabilistic methods.

04

## Bridge the gap between online and offline

For companies at **Stage 2 Data & Technology**

Create a single view of the customer by unifying digital and enterprise datasets from across the business. Integrate datasets from CDPs such as prospects, online interactions, and campaign interactions and combine them with enterprise data sets such as customer accounts and billing using [AWS Glue](#). AWS Glue makes it easy to connect to both on-premise and AWS data sources and automate data unification, leveraging features such as FindMatches to eliminate duplicate customer data. Use [AWS Master Data Management \(MDM\) ISV partners](#) to scale MDM tasks such as deduplicating and consolidating products from multiple store catalogs.

# Take action

05

## Ramp up journey orchestration with AI/ML and Microservices

For companies at **Stage 3 and 4 Data & Technology**

Use [Amazon Kinesis](#) or [Amazon Managed Apache Kafka \(MSK\)](#) as the foundation for your customer experience pathway. Both services simplify the setup and scaling of real-time streaming processes for customer events and signals. Combine [AWS Lambda](#) with low-latency storage options, such as [Amazon DynamoDB](#), to swiftly establish scalable microservices that integrate with your Real-Time Interaction Management (RTIM), Cross-Channel Campaign (CCCM), or Journey Orchestration Tools (CJO).

Utilise [Amazon SageMaker](#) to develop custom-built ML models, such as propensity scoring, churn predictions, or promoter/detractor predictions, which integrate with orchestration tools, Customer Data Platforms (CDPs), and programmatic tools through microservices or [Amazon Simple Storage Service \(S3\)](#). This allows marketers to access ML-based attributes directly within the tools they already utilise for designing workflows or creating audiences for advertising campaigns. Salesforce and AWS have developed new integrations between the Salesforce Platform and Amazon SageMaker. [Salesforce Genie](#), a real-time customer data platform that powers Salesforce Customer 360, enables these integrations. These connections bring together various assets with the capability to run ML pipelines and power predictions and recommendations.



A woman with dark curly hair, wearing a blue button-down shirt and a brown leather apron, is seated at a wooden workbench. She is holding a black tablet in her left hand and a white pen in her right hand, looking off to the side with a thoughtful expression. On her head, she has a pair of safety glasses. The workbench in front of her is cluttered with various items: a laptop, a container of colorful pens and pencils, a pair of blue safety glasses, and some wooden blocks. The background is a blurred workshop or office environment.

# 03

Align teams to  
customer journeys,  
not business  
functions

# Horizontal Teams

In our [Innovating with data ebook](#), we explored how retailers can take a product-based approach when developing data capabilities, adding new data sets in a structured, repeatable way when needed as a prerequisite to solve priority use cases. Applying this approach to CX use cases is feasible but requires less focus on technology delivery and more on people and processes<sup>11</sup>. This is because your organisational structure drives your system architecture to look the same<sup>12</sup>. Adopting a modern architecture based on microservices as suggested earlier will be undermined if you maintain your existing team structures and ways of communicating.

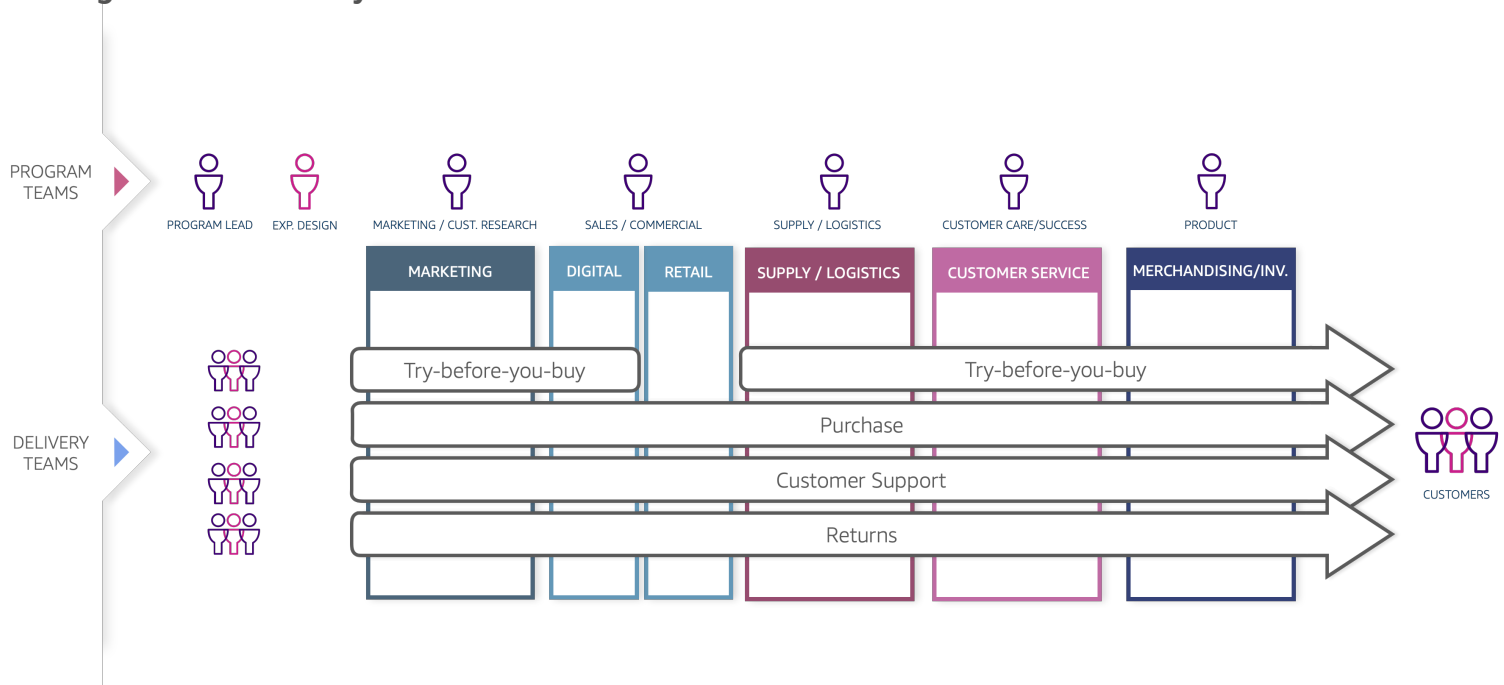
To transform the customer experience, organisations need to strike the balance between maintaining existing operations for customers in the short term and delivering material change behind the scenes, experimenting often and releasing when the time is right<sup>13</sup>. This is achieved by creating cross-functional, “horizontal” teams that work across lines of business, blend design thinking and data-driven techniques (data-driven CX), and are aligned to customer journeys.

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At **Amazon**, we organise small, single-threaded teams (often referred to as two-pizza teams) around products and make accountability and empowerment clear by focusing their scope, providing dedicated resources, and establishing clear objectives.

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There are two types of horizontal teams:  
**Program** and **Delivery**.



11. Source: McKinsey, [Six customer experience pitfalls to avoid](#)  
12. Source: Thoughtworks, [Applying Conway's Law to improve your software development](#)  
13. Source: McKinsey, [The three building blocks of successful customer-experience transformations](#)

## Program Teams

The Program team focuses on company-wide CX transformation, including:

1. Setting the vision and operating model,
2. Realising benefits and acquiring ongoing sponsorship,
3. Setting priorities based on a blend of customer and business value and,
4. Driving and managing cultural change.

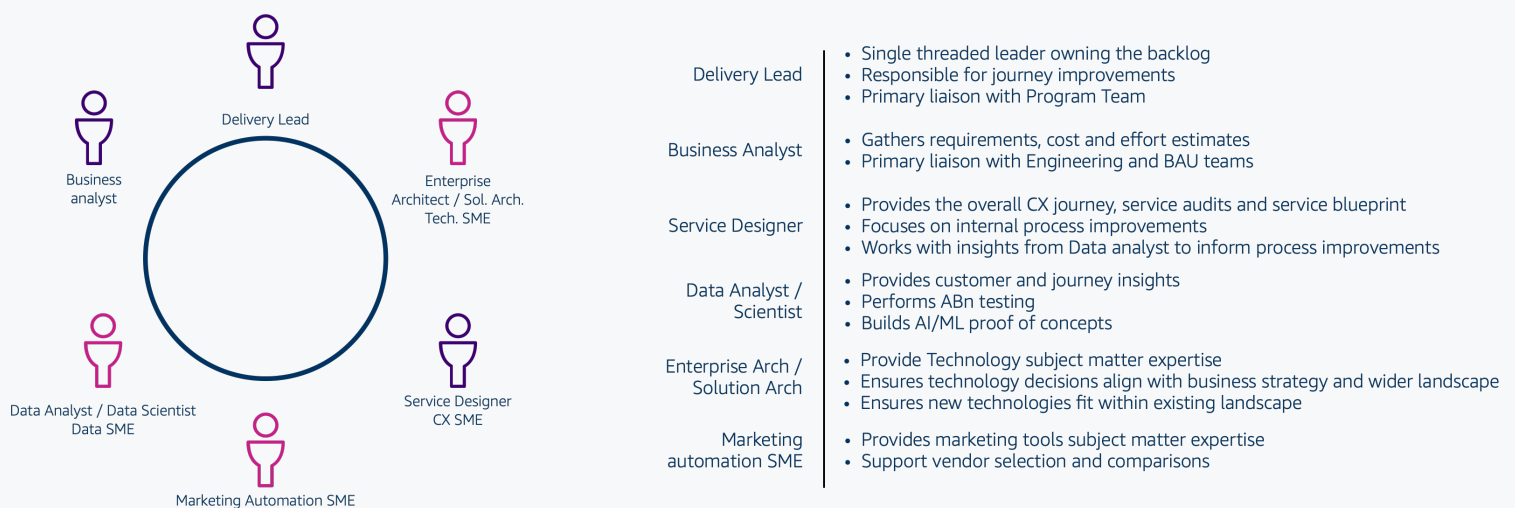
Each Program team member acts as a change agent and a stakeholder for their existing organisation. They help identify dependencies, secure investment based on estimates provided by CX Delivery teams, and influence backlog prioritisation

## CX Delivery Teams

CX delivery teams focus on creating new journeys or improving existing journey, including:

1. Identifying opportunities and pain points,
2. Working backwards from the customer to design solutions and innovate to solve customer challenges and,
3. Building capabilities and enabling features.

CX delivery teams work alongside existing teams focused on delivering business as usual (BAU) changes as they introduce improved journeys.





## Case study



Deliveroo is a food delivery business that works with more than 140,000 restaurants to deliver meals in over 500 cities across Europe and Asia. Deliveroo has to balance the needs and empower the experiences for three sets of marketplace users: diners, delivery drivers, and restaurants. At its core, Deliveroo is in the business of user experience. What it offers is a way for consumers to get the food they love on their tables. But just delivering the order isn't enough. The entire process should be smooth and pleasant, with exceptional service quality and delivery speed.

To do that, Deliveroo has data and analytics at the core of its business. Deliveroo uses data to understand its users' customer journey, for example, identifying popular dishes and customer trends and sharing them with restaurants to help them run their businesses better. It also goes deeper into its data, using ML models and analytics to efficiently deliver orders based on the locations of restaurants, riders, and customers. Deliveroo is able to provide faster, personalised service to diners, improved delivery routes to drivers, and insights for meal availability and preparation times to restaurants.

Deliveroo also revamped its customer service strategy to offer an omnichannel contact centre that allows each side of its marketplace to reach the company via their preferred channel. They unite voice and chat channels and fully harness customer interaction data, which is available to agents through an integrated interface. Agents have a full picture of customers' profiles and journeys, resulting in reduced average handle times and improved service experience.

Deliveroo also uses data-driven decisions in other aspects of its business, from entering new markets and designing app features to coming up with PR pitches for journalists.



# Take action

06

## **Establish cross-team alignment**

For companies at **Stage 1,2, or 3 People & Process**

Form a cross-functional team to spearhead organisational change and align different departments towards a common goal of improving customer experience. The team will be responsible for prioritising and coordinating CX initiatives across the organisation, with a focus on maximising synergies and avoiding redundant efforts. A dedicated program lead will be responsible for coordinating delivery teams and establishing a regular cadence of meetings with department representatives. To establish this capability, you can leverage the expertise of [AWS Digital Customer Experience Competency Partners](#). They can guide you in setting up a cross-functional team and driving your CX transformation initiatives forward.

07

## **Create experience-led teams to focus on delivering customer outcomes**

For companies at **Stage 1,2,3, or 4 People & Process**

To drive innovation and solve customer issues, create CX delivery teams that use data analysis, research, and customer feedback to identify pain points and conduct service design audits. These teams should work closely with technology and customer service teams to implement solutions and collaborate with experimentation teams to test and learn. A customer-centric approach can be ensured by using customer journey maps and service blueprints to identify gaps in the customer journey and focus on areas where innovation can bring the most value to customers.



04

Adopt  
mechanisms to  
drive customer  
centric outcomes

To drive the desired experience across customer journeys, horizontal teams are better positioned to break silos and create a cohesive approach across lines of business. While it may be challenging at first, with incumbent teams scrambling to reshuffle existing priorities and establish hand-offs, this shift requires a significant change in mindset. To facilitate this change, it is crucial to have mechanisms in place that promote collaboration and enable informed decision-making with customer success as the focal point

## Using Tenets

At Amazon, we use tenets to guide teams and align them towards creating a seamless customer experience. Tenets are principles or beliefs that help our teams make decisions on behalf of the company and our customers. For example, by using a tenet like “We earn customer trust by minimising support calls and aim for first-time resolution,” support teams can take ownership, implement features such as customer call back and collaborate with other departments to resolve customer issues. This approach can help prevent customers from being transferred to different departments, decrease the likelihood of dropped calls, and enhance overall customer satisfaction.

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### Example Tenets

Tenets help teams make decisions autonomously and deliver value quickly. See examples below

- Every interaction with our healthcare services is an opportunity to delight our clients, enhance their wellbeing, and build trust.
  - Our self-service solutions will be better for our customers and better for our business. We will provide personalised and immediate assistance, preferably before the customer needs to ask.
  - Our claims process should be straightforward over easy; easy can lead to inconsistency, which leads to confusion, erodes trust, and causes frustration.
-

# Feedback Loops

To establish a seamless customer experience, brands must implement detailed feedback mechanisms for continuous improvement. These mechanisms ensure that customer interactions are consistently logged at the granular level, allowing systems to accurately pinpoint customer position in their journey, their previous interactions, and touchpoints they've engaged with.

This data is used as context to present the most relevant messages to customers, improve recommendations, and surface the most relevant insights to customer-facing teams to enhance their conversations with customers. For instance, feedback mechanisms such as adding tracking pixels to mobile apps, changing the status of onscreen offers on assisted channels, adding mini-feedback buttons to applications, or sending follow-up surveys when customers complete a specific journey or action can be helpful.

Some departments will need to train their staff to log interactions, while others will need to ensure they've tagged specific user interactions with the correct metadata. Departments should also establish and maintain standard data definitions such as "active customers" or "at-risk customers." This

action will make hand-offs between teams easier to achieve.

To create a truly customer-centric organisation, teams must not only collect feedback and insights but also be empowered to action them. While small experimentation teams are a good starting point for incremental changes, they often lack the influence to address customer issues that span multiple channels. To bridge this gap, organisations should use customer journey maps and service blueprints to identify pain points and drill down to back-office process gaps that may be causing them. This approach enables cross-functional teams to collaborate and take ownership of customer issues, resulting in more impactful improvements to the overall customer experience.



# Linking CX and Value

Many businesses struggle to gain executive interest and sponsorship for large-scale CX transformation because they fail to make a compelling case for its value<sup>14 15</sup>. To turn this around, brands need to clearly demonstrate the link between customer satisfaction and value to convince senior leadership to invest in CX transformation. This means quantifying how journey improvements generate value to create a strong business case.

Organisations can start by adopting techniques such as creating promoter and detractor customer cohorts to understand the impact of customer satisfaction on revenue, customer lifetime value, and return frequency. This helps highlight the opportunity cost of failing to address customer issues that drive down satisfaction scores, which is also the unrealised benefit of CX transformation.

Once leadership is fully bought into the value case, they should set a customer-focused, data-driven agenda and create incentives that encourage teams to prioritise customer centricity. This is critical to enforcing the behaviours and ways of working needed to deliver a successful CX transformation.

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## Calculating benefit

**Reclaim techniques can help quantify the benefit of journey improvement. These techniques include:**

### 1. Recover lost revenue from drop-outs

- Determine the **average order value (AOV)** for completed orders in the journey and **number of lost orders**
- Determine the **target uplift**, meaning the percentage of lost orders to be converted to successful orders
- Quantify the lost revenue from dropouts using AOV, target uplift and number of lost orders

### 2. Convert detractors to promoters

- Determine the **net customer lifetime value (CLV)**, which is the CLV of promoters minus the CLV of detractors
  - Determine the **conversion target**, specifying the number of detractors to be converted with the initiative
  - Quantify the uplift using net customer lifetime value and the conversion target
-



## Case study



NatWest  
Group

NatWest Group, a financial institution with 19 million customers, needed to deliver personalised and premium services to remain competitive in the financial services industry. The bank's legacy processes were slow and inconsistent, and it wanted to accelerate its time to business value with machine learning (ML) solutions.

NatWest Group cultivated a more agile culture among its data science teams by adopting Amazon SageMaker, a fully managed service on Amazon Web Services (AWS) that data scientists and engineers use to build, train, and deploy machine learning models for virtually any use case. By centralising its machine learning processes on AWS, NatWest Group reduced the time it takes to launch new products and services by several months' worth and ensured fast and simple access to the data and tools its employees need to build and train machine learning models. In the first four months of deployment, NatWest Group launched over 30 machine learning use cases on Amazon SageMaker. Its data science teams can now quickly launch personalised products and services to meet customer demands, anticipate future needs, and achieve a 3-month time to value.

# Take Action

08

## **Simplify customer journey analysis by improving metadata**

For companies at **Stage 1 or 2 Data & Technology**

Structure and capture customer interactions to allow them to be aggregated to the channel and journey level. AWS Partners such as [Tealium](#) or [Snowplow Analytics](#) can help accelerate event tracking on digital estates. This tracking activity must coincide with employee training and incentives to encourage teams to capture the correct feedback where appropriate. Adding metadata such as content groups and hierarchies allows analysts to quickly aggregate customer interactions to spot trends and friction points. Analysts can also adjust the data to the right level of granularity to facilitate their investigations.

09

## **Create mechanisms to detect and alert teams about future customer issues**

For companies at **Stage 3 or 4 Data & Technology**

Use [Amazon Lookout for Metrics](#) to monitor first-party data sets in near real-time. It automatically detects outliers and alerts product and service teams about customer issues before they escalate. Amazon Lookout for Metrics can be combined with [Amazon AppFlow](#) to extend this capability to third-party cloud applications such as Salesforce, Adobe Marketo, Dynatrace, Zendesk, ServiceNow, Google Analytics, SAP and more.

A woman with dark hair tied back, wearing a red scarf and a dark jacket, is looking down at a smartphone in her hands. She is smiling slightly. The background is a blurred city street at night with warm lights.

05

Start small and  
demonstrate value early  
and often

After securing sponsorship, organisations should promptly mobilise one or more delivery teams. Once formed, these teams must act swiftly to build momentum and deliver tangible value. Achieving this objective requires the following three essential ingredients:

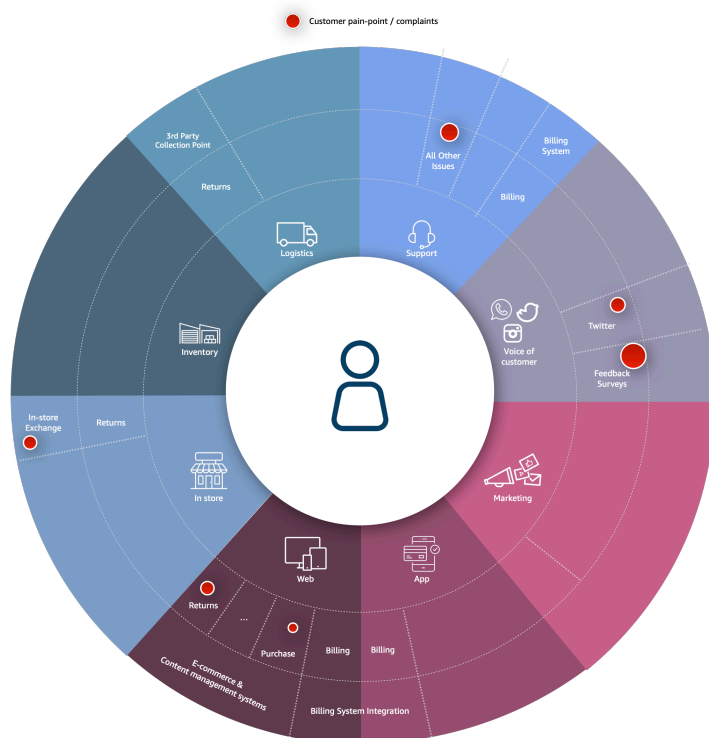
1. AI/ML-driven insights that accelerate time-to-value
2. Customer journey analytics
3. Company-wide demonstrations that show value and results

## Accelerating Insights with AI/ML

To effectively guide CX delivery teams towards impactful journey improvements, it is important for analysts to leverage AI/ML to extract insights from a variety of customer feedback channels, including online feedback, call recordings, and complaints. By combining these insights with existing customer research, analysts can quickly identify topics, categorise verbatims and map pain points along the customer journey. From there, CX delivery teams can prioritise initiatives based on three key criteria: customer impact, cost of delivery, and ease of delivery. Metrics such as the number of complaints can be used to quantify impact and prioritise efforts towards

fixing the most friction-inducing journeys. By using these insights, CX delivery teams can create a roadmap of prioritised features or initiatives. Features that are easier to deliver, simplify journeys, reduce costs, or unlock multiple use cases should be given higher priority and delivered earlier to provide quick wins. This approach not only helps build momentum and confidence in the CX transformation efforts but also maximises the impact of the improvements on customer experience and business outcomes.

The illustration below shows how incidents or complaints can be **mapped** to channels or journeys to aid with root cause analysis.



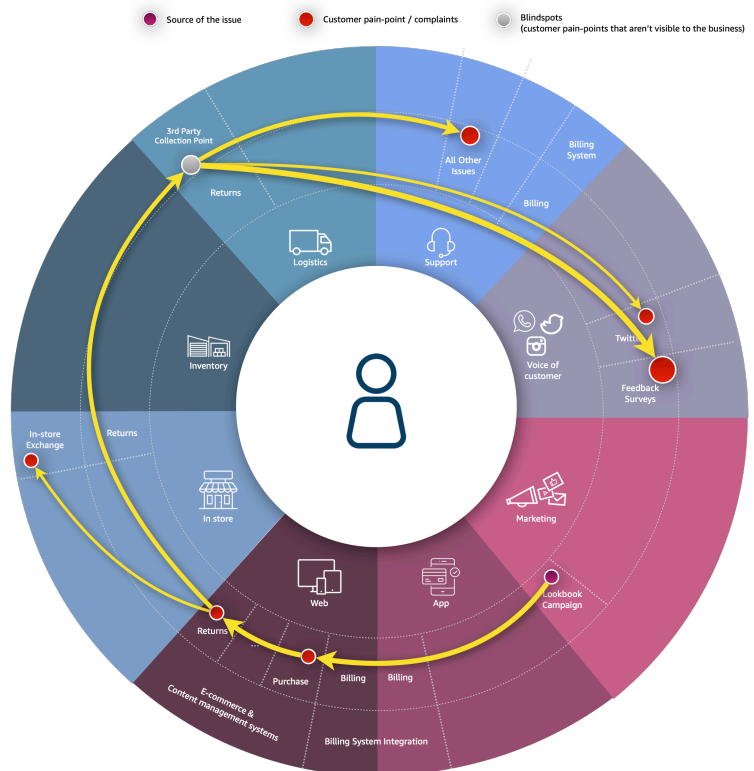


# Customer Journey Analytics

To efficiently investigate customer issues, analysts must have the ability to visualise customer journeys and drill down to the lowest interaction levels. However, starting with too much granularity can slow down the root cause analysis process and create a bottleneck for the project. Analysts can obtain quicker insights by joining different data sets, sequencing customer events, and visually following customer journeys. Pinpointing issues at an aggregated journey level and then drilling down to specific drop-off points or key interactions provides detailed evidence to expedite fixes.

Moreover, CX delivery teams can pilot new ways of working or potential fixes with smaller departments and observe the results using a visual journey tool to see if they improve customer outcomes before rolling them out to other departments. This approach enables CX delivery teams to iterate and test improvements quickly, ensuring that the changes are effective and scalable across the organisation.

**Sequencing** aggregated customer interactions can help highlight blind spots. The illustration below shows how granular customer interactions can be sequenced before being visualised at an aggregated channel or journey level.





# Spreading the Word

To ensure that the value created by CX delivery teams is recognised and appreciated, they must proactively communicate their achievements and progress. This requires a deliberate effort to showcase the results, share learnings, and celebrate wins. Here are a few ways in which CX delivery teams can effectively communicate their value:

**1. Broad stakeholder involvement:**

CX delivery teams should involve a wide range of stakeholders from across the business in their sprint demonstrations. This collaboration helps ensure that all relevant parties understand and appreciate the value delivered. Additionally, teams can host dedicated playback sessions for key stakeholders, allowing them to dive deeper into the specifics of the value created.

**2. Showcasing finished results:** To build momentum and demonstrate progress, CX delivery teams should showcase finished results, including quick wins and "big hitters". By doing so, they can encourage a snowball effect that draws more attendees

and generates excitement around their efforts.

**3. Learning from experiments:** CX delivery teams should not shy away from sharing learnings from experiments and failed pilots. By being transparent about what didn't work and why, teams can help others avoid similar pitfalls and improve overall performance.

**4. Regular communication:** CX delivery teams can supplement their playback sessions with monthly newsletters and "win" emails. This helps keep stakeholders informed and engaged, while also highlighting the ongoing value being delivered.

## Case study



Schuh operates in 120 stores in the United Kingdom and Republic of Ireland. The company's core product selection consists of a broad range of branded casual and sport footwear complemented by Schuh's own branded products.

Schuh wanted to differentiate from their competitors by delivering a superior customer experience, aiming to improve the speed and quality of their responses to customer contacts. Customer complaints can be hard to handle, with the resolution being a lengthy and painful process that can permanently affect a customer's relationship with a brand.

Schuh is using Machine Learning (ML) and Natural Language Processing (NLP) capabilities in their support centre to analyze and identify incoming customer communications' sentiment automatically. The support tickets are categorized based on criticality and issue and allocated to customer care agents who can best deal with them based on experience and area of expertise. Outgoing agent communications are also assessed for quality assurance, and when negative sentiment is identified, managers are alerted to intervene.

The automated assessment and intelligent distribution of customer inquiries resulted in better customer satisfaction and created space for Schuh's teams to focus on innovative Research and Development (R&D) opportunities.

# Take Action

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## Leverage AI-powered analytics to quickly identify customer pain points

For companies at **Stage 1, 2, or 3 Customer Experience**

There are a variety of AI-powered tools and AWS services that allow you to quickly pinpoint, analyse and action customer issues. [AWS Intelligent document processing](#) services such as [Amazon Comprehend](#) can extract key topics from customer feedback and surveys. It is a natural-language processing (NLP) service that uses machine learning to uncover valuable insights and connections in text.

[Amazon Transcribe](#) takes audio recordings from Interactive Voice Recording (IVR) systems. It is an automatic speech recognition (ASR) service that allows audio files to be transcribed into text transcripts.

The [Discovering Hot Topics Using Machine Learning](#) is a one-click accelerator to quickly spin up a solution to ingest, analyse, and visualise the common voice of customer datasets such as Twitter feeds and comment feeds. The solution can be easily extended to support feedback captured via surveys

# Take Action

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### **Run experiments and pilots to test and learn before scaling**

For companies at **Stage 1, 2, 3, or 4 Customer Experience**

Position CX teams to experiment in two ways. First, they should test new ways of working by running pilots on small groups or selected customers. Second, they should use evidence from the pilot to decide whether to scale and how (for example, new changes could have a staggered release). To test user experience (UX) changes, use AWS Partners such as [Amplitude Analytics](#) to run AB and multivariate experiments and improve conversion. Programs within [AWS for Data](#) and [Digital Innovation](#) help accelerate initiatives.

# How AWS can help

Our workshops are designed to foster innovation by leveraging proven Amazonian approaches that bring together business and technology teams. Working together, we'll uncover, reimagine, and solve the customer challenges that matter most and provide expert guidance throughout your customer experience transformation journey.

## Contact AWS today

Contact AWS Data Strategy today to discuss your Customer Experience transformation needs

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Learn more about Digital Customer Experience and Customer Experience Transformation

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# About AWS

For over 15 years, Amazon Web Services has been the world's most comprehensive and broadly adopted cloud offering. AWS has been continually expanding its services to support virtually any cloud workload, and it now has more than 200 fully featured services for compute, storage, databases, networking, analytics, machine learning and artificial intelligence (AI), Internet of Things (IoT), mobile, security, hybrid, virtual and augmented reality (VR and AR), media, and application development, deployment, and management from 81 Availability Zones within 25 geographic regions, with announced plans for 21 more Availability Zones and seven more AWS Regions in Australia, India, Indonesia, Israel, Spain, Switzerland, and the United Arab Emirates. Millions of customers—including the fastest-growing startups, largest enterprises, and leading government agencies—trust AWS to power their infrastructure, become more agile, and lower costs. To learn more about AWS, visit [aws.amazon.com](https://aws.amazon.com).

## About the Authors



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