

2024 Strategic Roadmap for Customer Service Journey Management

13 September 2024 - ID G00809168 - 43 min read

By [Christopher Sladdin](#), [Daniel O'Sullivan](#)

Siloed channel teams and limited focus on end-to-end service journeys result in high customer effort and costs. Customer service and support leaders can install a journey management discipline with this roadmap, driving CX and business outcomes through holistic design and continuous improvement.

Overview

Key Findings

- Attempts to improve the service and support experience while simultaneously driving growth and cost reduction have minimal impact, as they take the form of one-off projects rather than being considered as part of an ongoing discipline of journey management.
- Most organizations lack dedicated staff who can lead cross-channel and cross-functional teams to analyze, map, develop and continuously improve customer service and support journeys, resulting in siloed channel experiences, which are high-effort for customers and expensive to serve.
- Service leaders struggle to make the case for investment in their function and to influence their cross-functional peers; however, both activities are critical to the success of journey management efforts.
- Service leaders often lack the data management and technology maturity they believe is required to successfully undertake journey management. However, most organizations can get started without advanced maturity in these areas.

Recommendations

- Make the case to service teams, your CFO and cross-functional peers for the ongoing improvement of customer service journeys through a management discipline by highlighting the potential to improve business objectives related to growth, cost reduction and CX improvement.
- Recruit customer journey managers to lead cross-channel, cross-functional teams that analyze, map, develop and continuously improve service and support journeys.
- Establish a quarterly review cadence to monitor the impact of the program against your key journey and functional metrics.
- Develop a roadmap for larger transformation by considering two elements: (1) investments in technology, channels and data capabilities, and (2) the potential to scale the journey management discipline to a cross-functional effort spanning the end-to-end customer life cycle.

Strategic Planning Assumption

By 2028, 30% of customer service and support organizations will embed a customer journey management discipline, with a fully staffed journey management office, within the function.

Introduction

Improving the customer experience is the No. 1 priority for service and support leaders in 2024.¹ However, when looking to improve the experience, leaders and their teams often focus on discrete interactions within specific service channels. But from the customer's perspective, their experience is defined by the wider journey they went on. This typically entails multiple channels and steps, from realizing they need support to the issue being resolved.

Poorly designed journeys can have a negative effect on both the customer experience and operational service costs. Increasingly, leaders find that they need to adopt a more holistic approach to managing the customer journey.

Customer journey management refers to the discipline of designing, deploying and continuously improving customer journeys to drive consistent and seamless CX, which supports achieving enterprise objectives around growth and cost management.

Previously, we made the case for why service and support leaders should embed a customer journey management discipline within their organization (see [Take Control of Service Journeys With Customer Journey Management](#)). When you improve the customer's journey, you support your organization's objectives to grow the business, and reduce your costs to serve. Journey management isn't setting out to solve some new problem. Instead, it is about putting in a systematic program to turn the dial on a set of stubborn problems – including reducing customer effort, increasing first contact resolution (FCR) and containment, reducing costs and improving retention.

This strategic roadmap describes the future state of an embedded customer service journey management discipline, and how it differs from the current state. We offer a detailed plan to bridge this gap to improve the customer service experience and reduce operational costs (see Figure 1).

Figure 1: Strategic Roadmap Overview for Customer Service Journey Management



Strategic Roadmap Overview for Customer Service Journey Management

Future state	Current state	
<ul style="list-style-type: none">• Proactive journey design and orchestration.• Coordinated by a journey management office.• Undertaken through continuous improvement cycles.• Enabled by data-driven analysis.	<ul style="list-style-type: none">• Reactive journey analysis and development.• Limited coordination of efforts.• Leverages siloed journey mapping efforts, undertaken at a moment in time.• Reliant on assumption-based insights.	<p>Gap</p> <ul style="list-style-type: none">• Journey improvement is often seen as a series of ad hoc projects and activities.• Nobody takes responsibility for overall journey improvement.• Cross-functional stakeholders aren't involved.• Siloed data sets are challenging to bring together. <p>Migration plan</p> <ul style="list-style-type: none">• Prioritize journeys and set metrics-based objectives for improvement.• Establish a journey management office to drive continuous improvement.• Recruit journey managers and seek cross-functional and D&A involvement.• Identify technologies to optimize journey management and outcomes.

Source: Gartner
809168_C

Gartner

Future State

Service and support organizations that exemplify the future state undertake proactive, data-driven journey management across the entirety of the service journey, not just for discrete interactions or parts of interactions. Enterprise leadership empowers journey management teams with the authority to drive iterative, long-term changes to both customer journeys and supporting processes through continuous improvement cycles. To understand the future state of customer service journey management, envision the following:

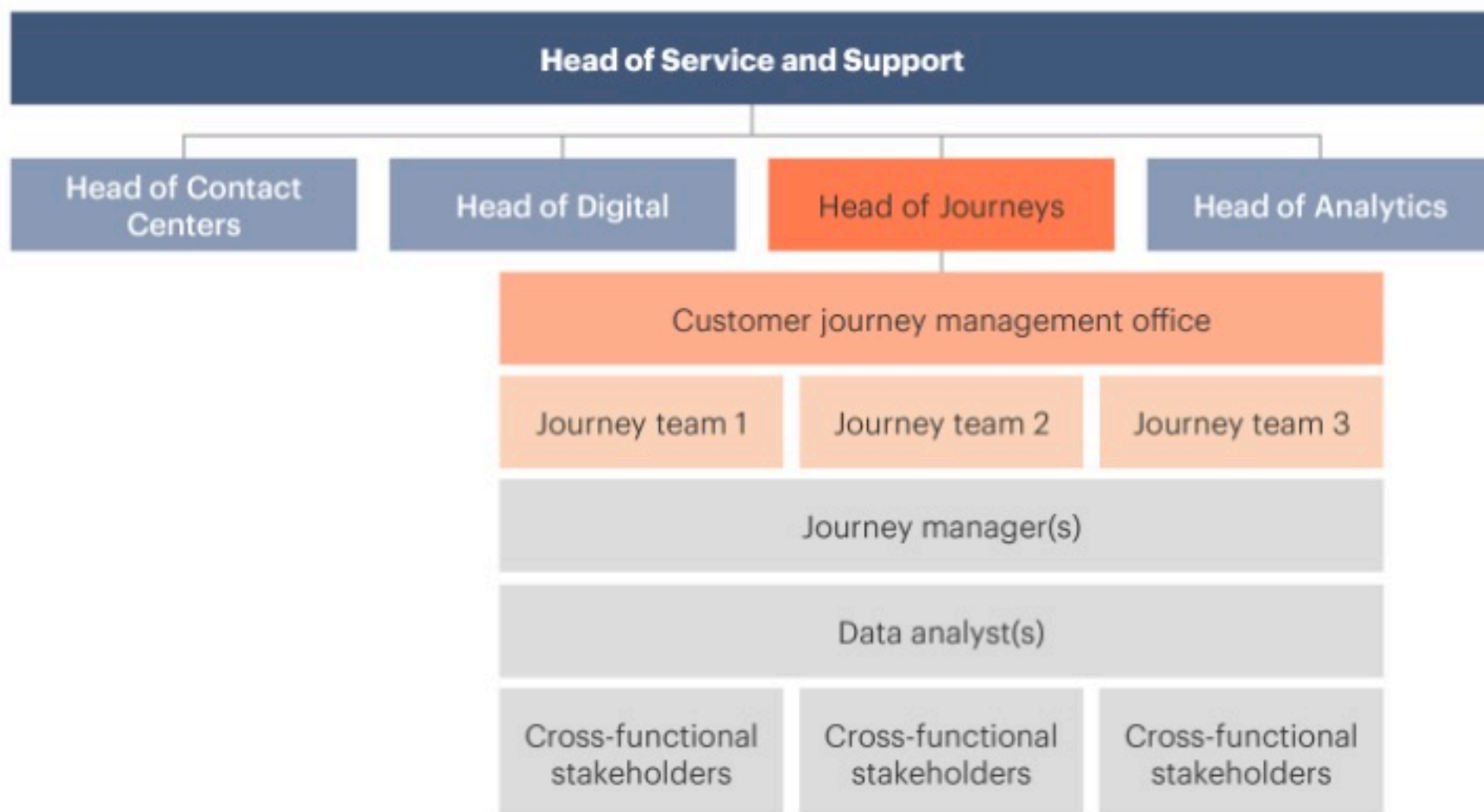
- **What are organizations doing?** Leadership uses data and metrics to select the journeys with the highest potential for improvement. A journey team proactively oversees the journey, optimizing it to drive improved CX and business outcomes (e.g., improved Customer Effort Score for the journey, lower cost per resolution, increased channel containment, higher cross-sell conversion rates). The team utilizes orchestration tools to influence journeys in real time to deliver personalized, seamless customer interactions.
- **Who is doing it?** Efforts are coordinated by a dedicated journey management office (see Figure 2). The office is staffed by full-time journey managers, each of whom is assigned to one or two high-priority journeys to oversee the journey management process and ensure alignment with business objectives. Managers work with a team of data analysts and cross-functional stakeholders who are assigned to each journey, coordinating their efforts through design workshops, ideation sessions and sprints.

Figure 2: The Customer Journey Management Office for Service and Support



The Customer Journey Management Office for Service and Support

Illustrative organizational chart



Source: Gartner
808133_C

Gartner

- **How are they doing it?** A series of continuous improvement cycles focuses on individual journeys, combining journey analytics, mapping, development and orchestration (see [Distinguishing Customer Journey Management, Mapping, Analytics and Orchestration](#)). Improvement cycles allow for iterative enhancements based on real-time data and feedback. Speed is emphasized over deliberation, with teams utilizing agile methodologies and techniques to quickly identify, test and implement changes.
- **What is it enabled by?** Efforts are enabled by robust, data-driven analysis, utilizing integrated customer data from across channel, operational and voice of the customer (VoC) datasets. In addition to identifying changes to the journeys themselves, teams seek ongoing improvements to the supporting processes, systems and data. By iteratively enhancing these back-office processes, teams unlock new opportunities in the customer-facing aspects of the journey.

Current State

Most service and support organizations today do not undertake customer journey management. Instead, they focus on improving individual interactions (e.g., a phone call) or parts of an interaction (e.g., the interactive voice response [IVR] experience).

Where organizations do attempt to improve end-to-end service and support journeys, efforts generally lack long-term momentum and consistency of practice. They also lack broader leadership support and therefore struggle to deliver sustained improvements in CX or business objectives. Today, most organizations' efforts can be summarized as follows:

- **What are organizations doing?** Journeys are identified as needing improvement on a reactive, ad hoc basis, often solely driven by leadership interest, an observed decline in CX metrics or an unacceptable operational cost. Journeys are improved through one-time projects, with limited proactive analysis undertaken, and through channel teams developing solutions that address specific pain points in the journey, rather than considering whether a holistic redesign of the journey would drive greater improvement.
- **Who is doing it?** Most efforts to understand and improve journeys bring together a limited group of stakeholders from within the service function or associated with a specific channel. Coordination of these efforts and driving action – if it takes place at all – often falls to an individual participant, undertaken as a side-of-desk job.
- **How are they doing it?** Journey analysis and design, if conducted at all, typically occur through journey mapping workshops. These workshops produce a static journey map, presenting a snapshot of the journey at a specific moment in time. But journey maps often end up as wall art – they aren't updated on an ongoing basis to reflect subsequent changes to the journey or customer engagement, if any changes take place at all.
- **What is it enabled by?** Due to limited data; challenges in stitching together data across siloed channel, operational and VoC datasets; and/or limited analytics resources, most efforts rely on assumption-based insights provided by participants in the process. As a result, these efforts lack a comprehensive perspective that reflects the majority of customers' journeys, instead focusing on a narrow view based on participants' own experiences or awareness.

Gap Analysis and Interdependencies

Current journey management efforts in service and support suffer from a collection of people, process and technology shortfalls.

People

Efforts to drive sustained improvements to customer journeys often fail due to a lack of dedicated resources with oversight over the end-to-end experience. Service organizations are typically not structured to support the ongoing management of cross-channel journeys, with domain experts usually working in siloed, channel-focused teams. As a result, coordinating these teams for end-to-end journey analysis and design requires additional effort, inevitably limiting the scope and duration of such initiatives (see [Break Down Channel Silos to Create a Seamless Customer Experience](#)).

These challenges are exacerbated by the limited involvement of stakeholders beyond the service and support function, with occasional input from IT. Failure to involve cross-functional stakeholders (e.g., marketing, finance, product) limits efforts to understanding and managing only the service experience. Consequently, organizations miss opportunities to improve journeys beyond the service interaction, such as understanding what happened before (e.g., unnecessary demand) and after it (e.g., the impact of service interactions on subsequent behavior).

Process

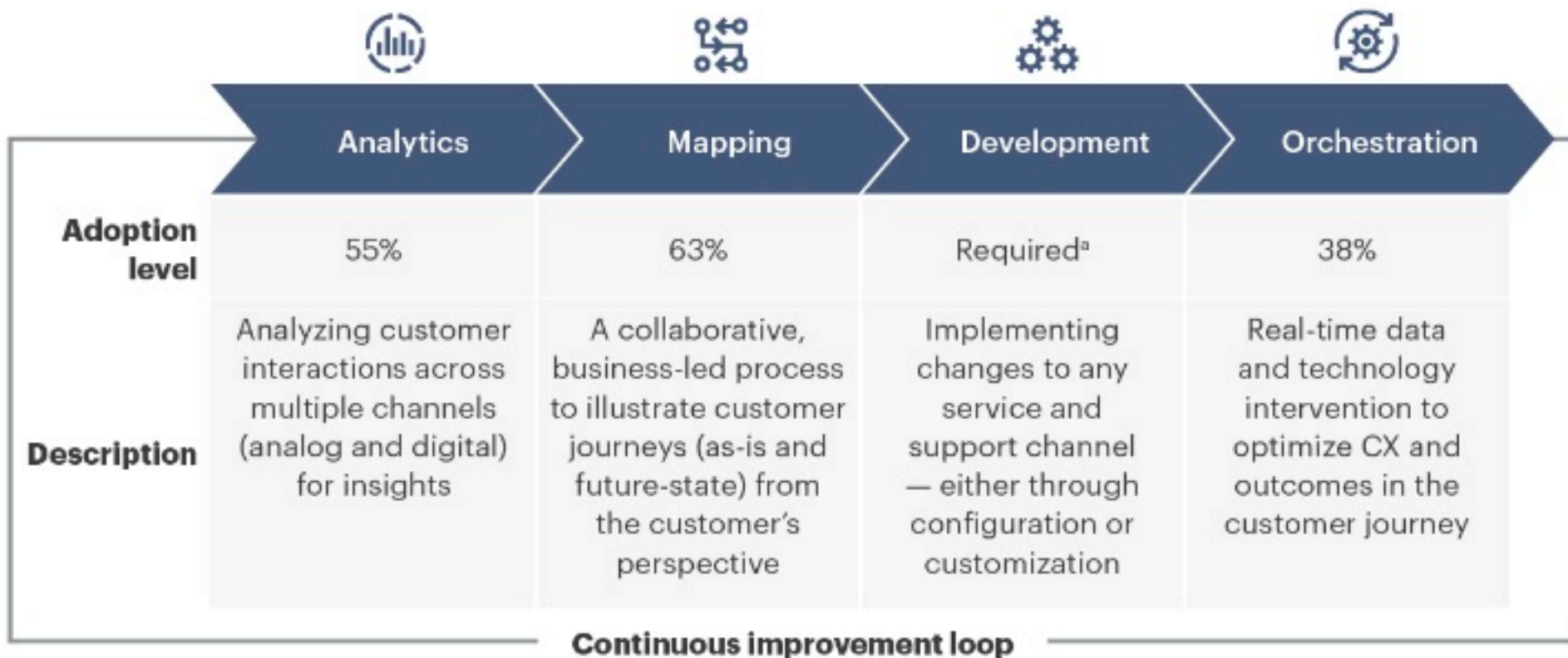
Attempts to improve customer journeys are often short-term, left incomplete and/or poorly scoped.² Efforts typically only leverage a limited set of reactive processes, such as conducting journey mapping workshops or simply skipping straight into journey development without any analysis at all. Figure 3 shows which journey management processes are undertaken in some form by service and support organizations today. This does not, however, imply that these processes are undertaken regularly, or in sequence, and we do not commonly observe continuous improvement cycles related with journey management.

Figure 3: Current Adoption of Customer Service Journey Management Processes



PREVIEW ONLY
REPRINT USE

Current Adoption of Customer Service Journey Management Processes



Source: 2024 Gartner Technology Trends in Service Survey

^a Customer journey development was not asked about in the survey. Journey development is the natural consequence of deploying and managing service channels, which all service and support organizations do by design.

809168_C

Gartner

Furthermore, leaders often focus at too high an altitude (e.g., the end-to-end journey across the “buy, own and advocate” phases) or too low (e.g., the journey to replace a faulty part for model XYZ in the phone channel). Doing so limits the impact of their efforts.

Technology

Attempts to understand and tailor journeys for individual customers are hampered by siloed datasets — often split by channel and data type (e.g., operational vs. VoC). These silos, combined with poor customer master data management or a lack of common customer identifiers across systems, challenge leaders attempting to understand individual customers’ journeys across channels and touchpoints.

These data-maturity challenges – combined with cost and cross-functional ownership challenges – prevent most teams from being able to access technology that would otherwise provide them with a greater level of insight and control over customer journeys. Such challenges also hinder their ability to analyze and orchestrate real-time experiences (see [Market Guide for Customer Journey Analytics & Orchestration](#)). Nevertheless, leaders do not need to overcome these technology challenges to make initial progress toward improved customer service journeys.

Migration Plan

Service and support organizations can start to embed a best-practice customer journey management discipline today, but reaching the future state described above is likely to take several years to achieve. This research will explore the path to the future state by considering three key elements (see Figure 4):

1. **Strategic leadership:** These activities involve how you will make the case for journey management and audit the effectiveness of ongoing efforts.
2. **Establishing and evolving the journey management discipline:** This explores how you will staff journey management efforts and optimize journey management processes and technologies over time.
3. **Day-to-day journey team activities:** These tasks will be carried out by individual journey teams, each led by their respective journey managers.

Figure 4: Strategic Roadmap Timeline for Customer Service Journey Management



Strategic Roadmap Timeline for Customer Service Journey Management



Timeline indicates when to begin.

Source: Gartner

809168_C

Gartner

Short-Term

Strategic Leadership

You must first understand the potential of a journey management discipline in your organization, and subsequently make the case to the wider organization for pursuing this discipline.

Understand Potential and Prioritize Initial Journeys for Improvement

Get started by considering the macro impact of improving service journeys today, considering CX, loyalty and costs to serve. This will help you develop change stories, business cases, etc., that show the cost-saving and loyalty-boosting potential if you were to improve all your service journeys over time.

We recommend prioritizing two journeys to work on in the short term, and that at least one be an existing journey (such as a channel that fails to contain customers, or where loyalty or cost outcomes are suboptimal). You may also choose to prioritize a net new journey (such as introducing a new product, service or channel). These two journeys are where you'll start to embed a continuous improvement process.

Initially, you might also choose to scope journeys more narrowly. For example, you could improve a journey across two prioritized channels – rather than all the channels customers might use – to deliver seamless channel handoffs in the most common paths and prove early ROI (see [How to Improve CX in Multichannel Journeys](#)).

For guidance on how to prioritize and scope the two journeys, see the "Getting Started With Journey Management" section of [Take Control of Service Journeys With Customer Journey Management](#).

Set clear objectives for each journey improvement effort (e.g., to reduce customer effort, increase containment rates, improve customer satisfaction, reduce cost or improve conversion rates). Ensure that these objectives are specific, measurable, achievable, relevant and time-bound (SMART).

At this stage, there are three critical stakeholder groups to manage: (1) the service and support team, (2) CFO and leadership and (3) cross-functional peers. Each requires a different strategy.

Educate Service Teams With Change Storytelling

Start with your own team, focusing on individuals who are responsible for the design, development and management of digital, IVR and assisted service channels. Set out why customers' service and support journeys are challenging today, the impact this is having today and how it will be exacerbated in the future, and how embedding a journey management discipline will help to overcome these challenges.

In particular, address the following likely concerns:

- How will we prioritize journeys for improvement?
- Will this mean additional work for already stretched channel teams?
- Who will now have control and influence over channel development priorities?
- What level of commitment will be required from individuals involved in journey teams, and how will their other business-as-usual responsibilities be met given their reduced bandwidth?
- How will the move to cross-channel journey management impact team members' performance objectives and metrics?
- What's the impact/cost of inaction and how will it outweigh the cost of change?
- How will the organization enable teams through the change?

Table 1 presents an example of a high-level change story that you could leverage as an outline for walking your team through this change. Use Gartner's [Tool: Build Stakeholder Buy-in Through Change Storytelling](#) to craft your narrative, incorporating your answers to the questions above in the necessary sections.

Table 1: High-Level Change Story for Customer Service Journey Management

[Enlarge Table](#) 

Current state		What's missing?			Future state
Warmer ^a	Reframe	Rational drowning ^b	Emotional impact	A new way forward	Our solution
<p>Our teams excel in delivering valuable customer interactions despite evolving customer expectations.</p> <p>Our multiple channel offerings are fueling our ability to solve high-volume customer issues, and we</p>	<p>Despite our successes, our service journeys are overly complex, leading to higher costs that don't support customer loyalty.</p> <p>Managing these journeys is reactive and channel-siloed, leading to</p>	<p>Each additional channel customers use increases the cost to resolve their issue by ~\$9, while retention drops by up to 14%.</p> <p>As the company looks to expand, our growth will need</p>	<p>Agents face the daily reality of mitigating customer dissatisfaction after long, fragmented service journeys.</p> <p>This will only increase as we grow, with more customers experiencing poor service journeys.</p> <p>Channel owners</p>	<p>We can avoid this growing challenge — streamlining processes, improving customer satisfaction (CSAT) and decreasing cost to serve.</p> <p>We will deliver seamless, low-effort and personalized service journeys by</p>	<p>We'll do this through a journey management discipline, led by dedicated journey managers to continuously analyze, design and optimize customer journeys.</p> <p>By bridging together our channels, we can ensure smoother transitions</p>

Source: Gartner (September 2024)

Convince Your CFO and Leadership by Building a Business Case

Although organizational circumstances may not require it, in most cases you will need to build a business case for investing in a customer journey management discipline.

A minimum level of investment required to establish a journey management discipline is to recruit one or two journey managers (average compensation range of \$75K to \$134K). ³ You may also choose to incorporate technology investments (e.g., a customer journey mapping technology, or a customer journey analytics and orchestration solution) into your business case now, to ensure you have the funding to evolve the discipline in the medium and long term. However, a technology roadmap isn't essential at this stage.

You Don't Need New Technology to Get Started

While you may include technology in your business case now to ensure you are equipped for the future, most organizations already have adequate tools to get started with journey management. For example, you can leverage existing analytics platforms (such as Power BI or Tableau) to gather and analyze data, and VoC tools (such as Medallia or Qualtrics) to collect and understand customer feedback. You can undertake journey mapping using Sticky Notes (physical or digital) or collaborative tools like Google Sheets, Microsoft PowerPoint or Miro Boards.

Table 2 includes key points to include in a journey management business case, along with illustrative benefit and cost figures based on Gartner's research and benchmarking. Undertake your own research and calculations to account for the complexity of your service and support journeys, costs to serve, local salaries and chosen technology platforms. See [Secure More Customer Service Funding by Speaking the Language of Finance](#).

Table 2: Key Points for Journey Management Business Case

[Enlarge Table](#) 

The ask

People ³

- Recruit a journey manager to lead the initiative (\$75K to \$134K annual salary).
- Make available stakeholders from IT, design, marketing and product teams to join specific journey teams.

Technology ⁴

- Make a three-year investment in a journey mapping tool (~\$34,200).
- Invest in a customer journey analytics and orchestration solution (~\$280,000).

Benefits

Revenue growth

- Improved customer journeys can drive increased cross-sell and upsell opportunities, contributing directly to revenue growth.
- Improved customer loyalty can lead to long-term retention and increased wallet share. For example, reducing the number of channels can increase retention rates for customers who need service from 38% (where three channels are used) to 52%, increasing customer lifetime value.

Cost reduction

- Streamlining customer journeys helps us to reduce our cost per resolution and our overall service and support expenditure. Simplifying journeys could save \$16.94 per journey (based on a reduction from three channels to one channel used).
- As a result of reducing channel demand, we'd see operational efficiency benefits.

Source: Gartner (September 2024)

Prepare Cross-Functional Colleagues to Participate

You must use your influence to obtain cross-functional support for and participation in service journey improvement efforts. Start to engage your cross-functional peers and build support for these efforts as early as possible, given the time commitments that are likely to be required.

To do this, focus on how participation in these efforts can support your C-suite peers' objectives and priorities, and enterprise priorities more broadly. For example, don't just focus on how efforts will improve CX in service. Instead, describe how they will also lead to improvements in commercial alignment (a top priority for chief sales officers) or lead to growth and improved customer engagement (top priorities for chief marketing officers). See [Tailor C-Suite Communication to Make Service a Priority](#).

Establish the Discipline

Recruit a Customer Journey Manager

Appoint one or two customer journey managers. These individuals will lead journey teams dedicated to the ongoing improvement of a single prioritized journey. The teams will otherwise be composed of data analysts and cross-functional stakeholders representing different aspects of the journey (see the "Build Out Your Journey Management Office by Establishing Journey Teams" section below). Hiring a full-time journey manager to coordinate your customer journey management efforts can be the difference between success and failure. This must not be seen as a side-of-desk or part-time role.

You must have full confidence and trust in the individual(s) you select. You will need to give the journey managers authority to bring stakeholders together and drive change across your function from day one. You don't have time to question every decision they make.

Consider whether it may be possible to recruit for the journey manager role internally. For example, a business analyst or product owner within the service function or wider organization may possess this skill set.

Table 3 provides an overview of the customer journey manager role and sets out their responsibilities and suggested skills/experience requirements. A downloadable job description template is provided beneath the table.

Table 3: Job Description for Customer Journey Manager

[Enlarge Table](#) 

Role: Customer journey manager

Overview

The customer journey manager is responsible for overseeing and optimizing our customer's service and support journey. This role involves leading cross-functional and cross-channel teams to analyze, map, develop – where appropriate, orchestrate – and continuously improve customer journeys to ensure seamless and personalized customer experiences across channels.

The customer journey manager will collaborate with various departments to align efforts, ultimately delivering business objectives related to improved customer experiences, growth in loyalty and reduced costs to serve.

Responsibilities

Analyze customer journeys:

- Work with business and data analysts to gather and analyze data to understand current customer journeys, pain points and opportunities.
- Prioritize key journeys based on data-driven insights and business objectives. Present cases for journey improvements to senior leadership to secure buy-in.

Develop journey maps:

- Lead journey teams in developing detailed, data-driven

Skills and experience required

Business acumen:

- Good understanding of industry trends, customer issues, and how service and support functions work
- Ability to align journey management efforts with broader business objectives and strategies

Analytical skills:

- Strong ability to gather, analyze and

Source: Gartner (September 2024)

[Download Template Job Description for Customer Journey Manager](#) ↓

In order to give journey managers – and the journey management office they're responsible for leading – sufficient authority and status in the service organization, we recommend that initially journey managers report directly to the head of service and support.

Set Up a Reporting Cadence

While you should empower journey managers to take action without management oversight to maintain the momentum of journey improvement efforts, a reporting cadence is important to ensure you understand in-progress work and can update priorities as functional objectives change.

Consider the following cadence as a starting point:

- **Weekly check-ins:** These should involve you and the journey manager(s) to discuss progress, roadblocks and immediate actions required. The journey manager should prepare a status report to share in advance of these meetings.
- **Monthly steering committee:** This should involve you, the journey manager(s), other members of the service and support management team (e.g., your contact center and digital channel leaders) and key cross-functional stakeholders (e.g., IT, marketing, sales). This meeting should focus on strategic alignment, resource allocation and any escalated roadblocks.

Also critical to these efforts is to establish a feedback loop where stakeholders can provide input and suggestions for improving individual journeys, or the journey management discipline itself. Stakeholders from across the service and support organization and other functions, whether involved in journey teams or not, should be encouraged to participate, fostering a culture of continuous improvement and collaboration.

Build Out Your Journey Management Office by Establishing Journey Teams

For each of your selected journeys, establish a journey team, consisting of:

- **A journey manager** – Acts as product owner for the journeys, facilitating the journey management cycle and coordinating stakeholders.
- **Data analysts** – Support the team by maintaining data-driven journey maps, conducting required analysis, testing hypotheses and working across functions to prepare data, etc.
- **Cross-functional stakeholders** – Provide perspectives on the current-state journey, and work with the team to collaboratively develop improvement ideas. Depending on their role, they may also be responsible for delivering some of the improvements within their channel or functional teams.

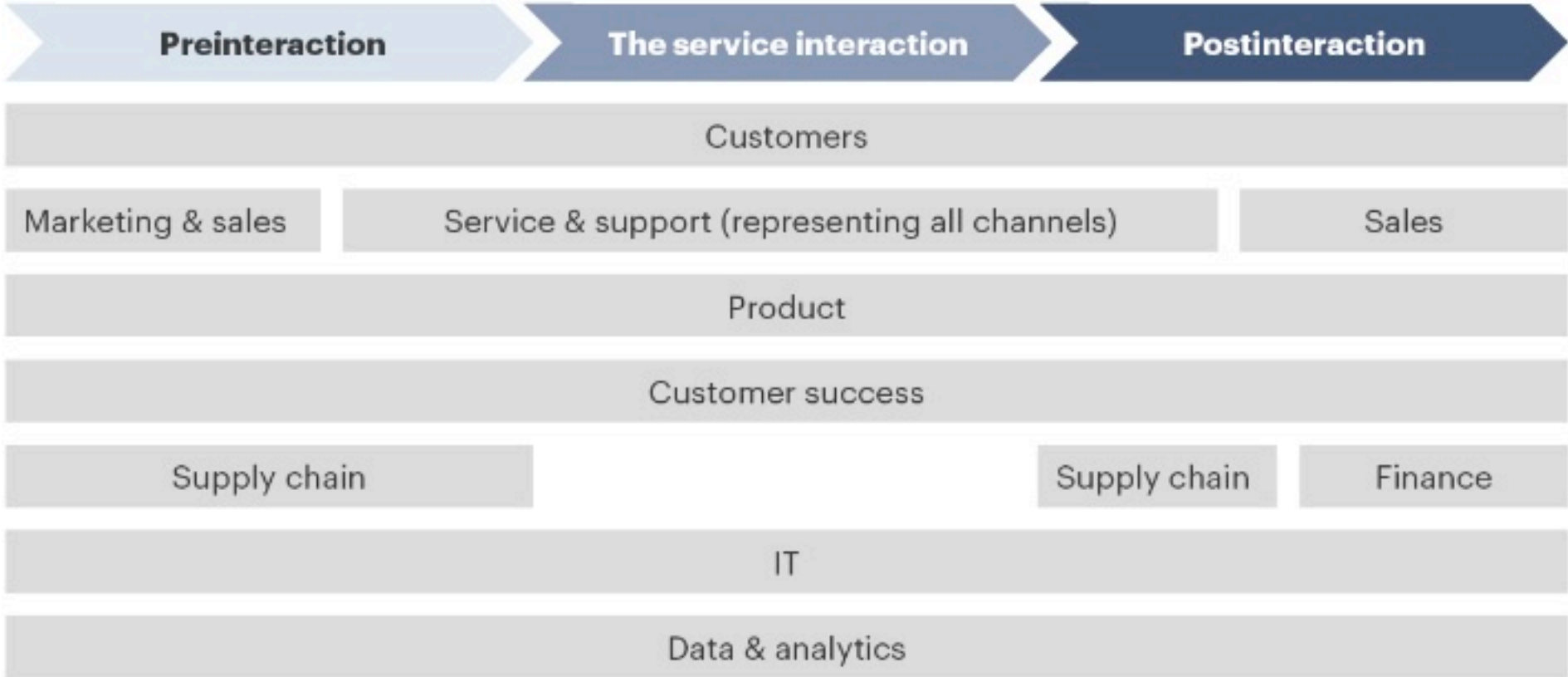
The cross-functional stakeholders you involve will vary depending on the journey selected. But they will likely come from each of your channel teams and from other functions that play a role before the service interaction, in the interaction itself or postinteraction (see Figure 5).

Figure 5: Potential Stakeholders Involved in Journey Teams



Potential Stakeholders Involved in Journey Teams

Reach out beyond the service and support function



Source: Gartner
809168_C



Try to limit journey teams to **no more than 10 people** to avoid challenges in reaching a consensus, and try to avoid stakeholders being involved in multiple journey teams simultaneously. You will need to work with your cross-functional peers and channel leaders to ensure that stakeholders are able to put time aside from their other business-as-usual activities to support these efforts.

You should also consider how to assess these teams' performance – and that of their colleagues not involved but impacted by these efforts – in light of a move to more cross-channel, journey-based measures of success. For example, leaders assessing CX should focus more on the customer's satisfaction with the end-to-end service experience, rather than just the finishing phone call, impacting rep scorecards (see [It's Time to Reevaluate Your Customer Service and Support Metrics – Here's How](#)).

Journey Team Activities

Journey teams will focus on developing or updating journey maps for the prioritized customer journeys. This involves gathering and analyzing data to create detailed current-state journey maps that highlight key touchpoints, pain points and opportunities for improvement. By taking a comprehensive view of the customer journey, from preinteraction stages to postinteraction outcomes, the teams will ensure that the maps provide a holistic understanding of the customer experience. These maps will serve as a foundational tool for identifying areas that require immediate attention and for planning future enhancements (see [Lead Customer Service Journey Mapping Efforts That Drive Action](#)).

Additionally, the journey teams will work on identifying and implementing quick wins and improvements. By leveraging the insights gained from the journey maps and customer feedback, the teams will pinpoint specific changes that can be made swiftly to enhance the customer experience. These may include tweaks to communication strategies or process optimizations, or minor technology adjustments that reduce customer effort and improve satisfaction. The focus will be on delivering tangible results quickly, demonstrating the value of the journey management discipline and building momentum for more extensive improvements in the future.

Medium-Term

Strategic Leadership

Although you might not be involved in every decision, it is crucial to continue supporting the program, monitoring outputs and ensuring that journey management teams are empowered to implement changes. Your role is critical in maintaining the program's long-term momentum.

Establish Quarterly Reviews

On a quarterly basis, assess the program's progress against the initial objectives and address areas of concern. Ask your journey managers and key stakeholders to present and discuss the following topics:

- **Journey improvements:** What improvements have been observed against the key journey metrics? What primary changes led to these improvements? What has worked well?

- **Journey opportunities:** Beyond smaller iterative changes, what larger opportunities has your team identified? These might include technologies, channel capabilities, data improvements, etc.
- **Journey challenges/risks:** What challenges are preventing the team from being more successful in improving journeys? These might include process, budgetary or organizational concerns.

Utilize the output of this ongoing assessment to communicate progress with your cross-functional peers, develop a plan to address areas of potential concern and build a roadmap for larger innovations.

Consider Changes to the Program

As your program develops over the course of the first year, you may determine that you have reached the optimal time to scale it further. Or, you may reflect that issues need remediating to improve the program's impact at its current scale.

Scaling the Program

Consider adding new journeys: Create new teams focused on additional journeys. To support this work, you may need to hire additional journey managers and analytics resources. Leverage your success so far to make the case to senior leadership if necessary.

Consider retiring journey teams: If you are satisfied with the progress made on one or more of the initial journeys, you might decide to reallocate your resources to a new journey, forming a new journey team. This should only be considered in situations where resources are tight and opportunities to bring in new journey managers are unlikely.

Remediating Issues

Revise the makeup of your journey teams: If one or more of the journey teams has failed to make sufficient progress, you might need to shake up the team's membership. You could consider moving individuals from one journey team to another, removing people from the teams entirely, or bringing in new stakeholders to provide a fresh perspective.

Revisit cross-functional support: If your team has struggled to make headway in implementing changes within journeys, consider whether bottlenecks elsewhere in the organization could be slowing them down. Revisit cross-functional support mechanisms to ensure they are effective.

Evolve the Discipline

Develop a Roadmap to Larger Transformation

Your journey teams' work has likely focused on identifying and delivering smaller iterative changes to your customer journeys and the supporting processes and data up until now. However, this work is expected to also identify larger opportunities for transformation.

These larger transformations will likely require more radical innovation through technologies that support back-office processes, new channel investments, AI, automation, etc. This inevitably comes with budgetary and resource requirements, necessitating careful prioritization and planning.

As the program develops, you, in partnership with your journey managers, will need to remain on the lookout for these opportunities and decide when it is the right time to invest in these larger innovations. Utilizing the output of your quarterly reviews, consider each opportunity presented and start to populate a roadmap to larger innovation.

Use Table 4 below to consider areas for investment.

Table 4: Opportunities for Investment

[Enlarge Table](#) 

Investment area	Potential value	When to consider
Technology		
Journey mapping tools	<ul style="list-style-type: none"> • Produce digitized journey maps, enabling ongoing management and maintenance. • Integrate VoC and other operational data. • Manage and prioritize tasks in a backlog. 	<ul style="list-style-type: none"> • You are struggling to maintain/update journey maps. • You need to integrate various data sources for a comprehensive view. • Task management and prioritization are becoming challenging. • You want to involve stakeholders who are based remotely.
Journey analytics and orchestration	<ul style="list-style-type: none"> • Provide end-to-end data-driven insights. • Enable real-time orchestration of customer journeys. • Deliver highly personalized recommendations and actions. 	<ul style="list-style-type: none"> • You have the data available to provide a complete end-to-end view of the journeys but struggle to piece it together. • You feel you have exhausted ways to improve journeys for everyone and see opportunities for individual personalization.

Source: Gartner (September 2024)

Journey Team Activities

Journey teams will establish a backlog of actions and prioritize improvements across the selected journeys (both those identified in the short term and any additional journeys prioritized in the medium term). This involves creating a comprehensive list of potential enhancements based on data analysis, customer feedback and initial journey mapping efforts. The teams will then prioritize these actions, determining which improvements to implement first based on their expected impact on key objectives, such as increasing customer satisfaction or effort scores, reducing costs, etc.

Once the prioritized actions are selected, the teams will engage in a series of design sprints, prototyping and testing solutions to validate their potential impact on the customer journey and associated processes. Techniques such as A/B and multivariate testing may be employed to assess the effectiveness of the changes. After validating the improvements, the journey teams will pass the business and technical requirements to the relevant channel teams for scaled implementation.

As changes to the journeys are made, the teams will be responsible for updating and maintaining the original journey maps to ensure they always reflect the current status of the journey. This includes documenting the journey steps as well as the latest operational and VoC data revealing the health of the journey. By doing so, they maintain a platform for ongoing ideation and discussion, supporting subsequent and ongoing cycles of continuous improvement.

Journey managers will play a crucial role in coordinating this work – ensuring that tasks are completed on time, channel teams liaise with one another where integration or handoff requirements exist, stakeholders remain engaged, and any issues are promptly addressed.

Long-Term

Strategic Leadership

The strategic leadership activities you'll undertake in the medium term will continue to be required in the long term. But as you continue to scale and improve the discipline within the service and support function, you should also consider how you could further its impact on CX and business outcomes more widely in the organization.

Scale the Discipline Across Functions

While the format of a cross-functional journey management discipline will vary by organization (depending on its operating model and organizational structure), a typical "home" for this discipline is within a CX function (see Figure 6). By scaling the discipline across functions, journey management efforts can drive even greater CX improvements across the end-to-end customer life cycle and have a more significant impact on the organization's business objectives.

Figure 6: A Cross-Functional Customer Journey Management Office



A Cross-Functional Customer Journey Management Office

Illustrative organizational chart



Source: Gartner
808133_C

Gartner.

You have a role to play in influencing this expansion in journey management, and you should also consider its impact on your function and priorities.

Influencing the Organization

Take an active role in advocating for the benefits of a cross-functional journey management discipline, undertaking the following activities:

- Highlight the successes achieved within the service function, emphasizing how cross-functional stakeholders have contributed to these successes and how they have benefited from the improvements.

- Regularly share case studies and success stories with cross-functional peers and company leadership to demonstrate the tangible benefits of journey management efforts, using data and metrics to illustrate the financial return on investment and the positive impact on customer experience.
- Facilitate knowledge-sharing sessions and workshops to disseminate best practices and lessons learned, encouraging cross-functional stakeholders to participate and understand the value of journey management.

Considering the Likely Impact of Cross-Functional Integration on Service

As the journey management discipline moves to a cross-functional team, you will relinquish operational control of the journey management office's priorities.

As such, you will need to consider how to continue to secure prioritization of service journeys for improvement by demonstrating their potential financial return and strategic importance. To do this, work with journey managers or data analysts to develop business cases highlighting the expected benefits for the service function while also aligning them with the broader organization's goals.

Additionally, anticipate and encourage service and support stakeholders to participate in journey teams focused on other functions' journeys. Doing so can benefit the service and support function by addressing "upstream" challenges that drive unnecessary service and support volume (see [Reimagine Service by Permanently Removing Avoidable Interactions](#)).

Consider the Opportunity for Career Growth

Sixty-eight percent of service and support leaders are interested in assuming responsibility for enterprisewide CX.⁵ Service and support leaders should consider whether they wish to grow their career outside of the function by leading the cross-functional rollout of journey management efforts. You can do this either as a head of journeys (see below) or within a head of CX or chief customer experience officer role.

Evolve the Discipline

Recruit a Head of Journeys

Regardless of whether journey management evolves into a cross-functional discipline, within three to five years you are likely to have prioritized and made significant improvement to several journeys. At that point, you may be considering more journeys, establishing teams to engage in continuous improvement efforts. As a result, journey teams will likely have identified a large number of improvement opportunities and associated requirements for development, all of which will compete for limited development capacity.

Recruiting a head of journeys to run the now expanded journey management office can help oversee the teams' efforts, ensure continued alignment with business objectives and manage the inevitable prioritization challenges. With a head of journeys in place, journey managers would cease to report directly to the head of service and would instead report to the head of journeys, who in turn reports to the head of service.

Consider whether the head of journeys role may be a career promotion opportunity for one of your existing journey managers.

Table 5 sets out some of the key responsibilities for this role.

Table 5: Overview of Head of Journeys Role

[Enlarge Table](#) 

Role: Head of journeys

Overview

The head of journeys is a senior leadership role responsible for overseeing the expanded journey management office and ensuring that all journey management initiatives are aligned with the organization's strategic business objectives.

This role involves setting the vision, strategy and roadmap for journey management; coordinating cross-functional efforts; and driving continuous improvement in customer journeys.

The head of journeys will also play a crucial role in integrating journey management practices across other functions, fostering collaboration and ensuring that the organization delivers exceptional customer experiences.

Responsibilities

Strategic oversight:

- Set the vision, strategy and roadmap for journey management.
- Align journey management initiatives with the organization's long-term goals.

Cross-functional coordination:

- Coordinate efforts across various functions, including IT, marketing, sales and customer support.
- Facilitate cross-functional collaboration and resolve any conflicts or roadblocks.

Source: Gartner (September 2024)

Deploy Real-Time Journey Orchestration

As journey management efforts mature, organizations should consider moving beyond the initial improvement discipline to also deploy real-time journey orchestration. This capability allows journeys to be tailored for individual customers in the moment, presenting proactive and personalized messages that enhance the customer experience and support greater achievement of business outcomes from the customer's journey.

To deliver journey orchestration, you may need to invest in – assuming other functions have not already procured, or capabilities are not present within existing tools (e.g., your CCaaS solution) – a customer journey orchestration platform (see [Market Guide for Customer Journey Analytics & Orchestration](#)). Critical to these efforts is maturing the organization’s data management infrastructure, including maintaining high-quality, integrated customer data across all touchpoints and channels.

Consider starting with small-scale pilots to test and refine real-time journey orchestration capabilities. Select specific customer journeys to focus on, and gradually expand the scope as the organization – and the journey managers and data analysts involved in the delivery of these efforts – gains more experience and confidence.

As with journey improvements that are designed for the masses, journey teams should continuously monitor and optimize real-time journey orchestration efforts. Use data and feedback to identify areas for improvement and make necessary adjustments to enhance the effectiveness of the orchestration.

Journey Team Activities

In the long term, new journey teams will be established in response to leaders and the journey management office prioritizing additional customer journeys to focus on. By continuously adding new journeys to their scope, organizations will systematically work toward optimizing the entire customer experience across touchpoints and interactions. This can happen both within service and support and across the wider customer life cycle, should the discipline move to a cross-functional CX focus.

For each newly prioritized journey, teams will run through the comprehensive journey management cycle:

- Analyzing data to understand current-state journeys
- Mapping these journeys to visualize customer interactions and pain points
- Developing and implementing improvements
- Orchestrating personalized and proactive customer interactions
- Engaging in continuous improvement

This iterative process ensures that each journey is refined and optimized over time, leveraging feedback and performance metrics to drive ongoing enhancements. The ultimate goal is to achieve a seamless, low-effort and highly personalized customer experience that aligns with the organization's growth and cost management objectives.