

## Case study | Customer Experience Services

# Transforming customer experience to drive business performance

## How customer journey mapping helped a logistics company chart a profitable, new direction

**A great customer experience (CX) can turn customers and clients into enthusiastic advocates for your company or firm. But first you need to understand what really matters to them.**

In this case study, a company in transition, Prime360®, partnered with Clarivate to develop a roadmap for delighting their customers –and transforming their business. Clarivate Customer Experience (CX) Services help organizations implement CX and journey mapping programs that drive deeper customer insights, higher revenue, better retention rates and improved margins.

### **A company at a crossroads**

Northwest Pallet was a 40-year-old, privately owned business managing the flow of pallets across the supply chains of

leading retail, grocery and distribution brands nationwide. In 2019, the company merged with a leading competitor, creating the largest shipping pallet network in the U.S. The combined company introduced a new brand – Prime360 – and a bold commitment to transforming the pallet supply chain. They also needed to transform their customer experience, according to Chief Commercial Officer Harmony Merwitz.

"We were at a crossroads. We said we were customer-centric, that we cared and were listening. But I didn't think we were really living it," Merwitz recalls, noting that her past experience with customer journey mapping had proven its value in developing a customer-first culture. She called on Kerri Nelson, Chief Strategy Officer of Clarivate, with whom Merwitz had worked in the past, to guide Prime360's customer journey mapping.

**"We weren't delivering on the basics, from flawless customer onboarding to swift issue to resolution, and communicating on time and following through. We had to fix those basics to then advance."**

Harmony Merwitz, Chief Commercial Officer, Prime360

## What is a customer journey map?

A customer journey map is a visualization of the end-to-end journey that customers experience over time. It captures the outcomes of interactions at each step in the journey. It serves as a framework, providing the insight to help drive business improvement activity. The customer journey is composed of several "outcome stages":



### The "inspire to purchase" stage

This focuses on awareness and interest; what leads the customer to come to you.



### The "early engagement" stage

This includes the decision stage, why they choose you, and the onboarding experience.



### The "deliver the promise" stage

This looks at what you do to deliver on the customer's needs, including customer support and complaint handling.



### The "increase value / commitment" stage

This looks at what you're doing to deepen the customer relationship to drive customer loyalty and referrals.



### The leave/return stage

This focuses on why customers leave or stay.

Within each outcome stage are multiple "journey stages" composed of specific touchpoints – such as invoicing or complaint resolution.

## Pain points and moments of truth

A key objective of the journey mapping process is differentiating between "pain points," interactions that are frustrating or require more effort from the customer, and "moments of truth," interactions that can determine whether a customer stays or leaves. Moments of truth are those touchpoints where the customer is personally invested in the outcome, where their expectations are heightened.

Just focusing on pain points can distract you from what's really important. However, identifying interactions that are both pain points and moments of truth is key to unlocking the greatest value in the journey mapping process.

## The journey mapping process

For Prime360, the process started with interviewing internal stakeholders across functions and engaging key "change agents" in the organization to gather their feedback. They also interviewed and surveyed customers, gathering their input in order to create the customer journey map.

"Even though it was uncomfortable at times, it was the input we needed to then take it to the next chapter. We packaged this all together, validated it with the team again, and then set the framework to drive real actions that mattered most," Merwitz explains, noting that the process took only about two months.

"Everyone has a point of view as to what they think is most important to the customer. But, you need to see trends, and you need to validate it with your best customers first. Then you can focus on two or three or maybe up to five things that really matter to customers."

## Revealing valuable insights

The customer journey mapping exercise revealed three "moments of truth," Merwitz says.

"We learned that we weren't delivering on the basics, from flawless customer onboarding to swift issue to resolution, and communicating on time and following through. We had to fix those basics to then advance," she says. "We also found that we fell short on ease of doing business with us, things like on-time reporting, transparency and sending fewer emails."



Another key insight was a need to be more proactive and to have more productive customer engagements. "We realized that we needed to give our employees the tools to do things easier, better, faster, and at a higher quality than the competition," Merwitz explains.

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With these insights, Merwitz says they were able to put together an action plan, with ownership and accountability that they can track on a monthly basis to drive improvement.

"I review it with leadership at least once a month to see how far we've come and how it's translating into results," Merwitz says. "But more importantly, are there other things we need to consider as we unite the team around the customer? When there are

problems we're solving internally, it's not about who did what. It's about what did that customer need? Did we deliver it? What could we have done better? It's always about the customer, which keeps it neutral and helps us move forward. When you drive teamwork around the customer you unite the culture."

## Measurable business results

Merwitz reports that in less than a year, they were seeing positive business results, including:

- Improved customer retention
- Greater share of wallet for existing customers
- Greater pipeline of prospective customers
- Increased number of major brands as prospects

Prime360 is now able to measure their performance against specific service-level agreements (SLAs) in real time, enhancing their ability to anticipate customer needs and meet them proactively.

Merwitz says customers have noticed the difference.

"Before, they said 'You're not proactive, why am I chasing you down'? Now they're saying, 'This is going really well. Your team is proactive, they're always a step ahead of me.' That is how we're making a change," she says, noting that this is a continuous, ongoing process. "We still have a way to go in the journey, but we're excited about the prospects about continuing to improve our CX. It's a living, breathing plan and it will never stop."

## About Clarivate

Clarivate™ is a global leader in providing solutions to accelerate the lifecycle of innovation. Our bold mission is to help customers solve some of the world's most complex problems by providing actionable information and insights that reduce the time from new ideas to life-changing inventions in the areas of science and intellectual property. We help customers discover, protect and commercialize their inventions using our trusted subscription and technology-based solutions coupled with deep domain expertise. For more information, please visit [clarivate.com](https://clarivate.com).

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