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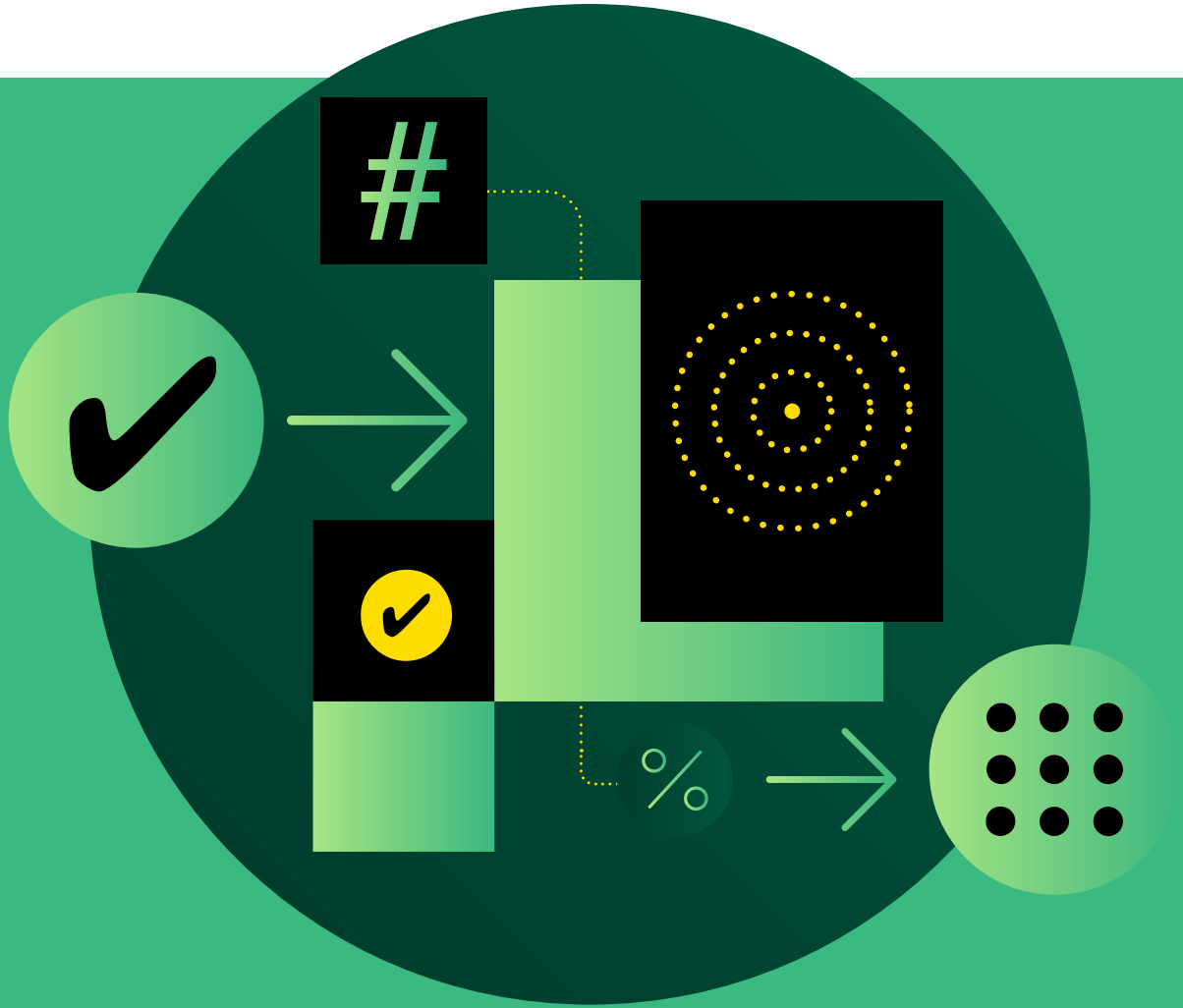
JOURNEY QUICK-START GUIDE 3

Build A Journey-Centric Organization

Use journeys to align teams, investments, and decisions



Introduction

You may already be managing your priority journeys by measuring outcomes, assigning accountability, and routinely identifying and acting on improvement opportunities. But journey management may still operate primarily within CX or through individual journey initiatives, while planning, funding, and delivery decisions continue to happen largely within functional silos.

Journey-centric organizations go a step farther: They use journeys to operationalize customer obsession by connecting customer goals with business outcomes and operational realities. Journeys become shared context that helps leaders understand cross-functional dependencies, align investments, and make better-informed choices about what to prioritize, fund, change, or stop.

Read on for three actions that will help you turn journey work into a guide for strategic business decisions.

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Action 1: Create A Shared View Of The Customer

In more advanced organizations, journeys provide a common frame of reference for planning, prioritization, and decision-making. When different teams discuss customer needs, challenges, and opportunities, they work from a common understanding rooted in a shared context.

A journey atlas can serve as the organizing mechanism for this shared context. In the first guide of this series, Build A Journey Practice That Gains Traction, creating a journey atlas helped you understand the journey landscape and decide where to focus. At this stage, the atlas is an enterprise-level tool that helps leaders connect customer needs with operational performance and business value.

Follow the steps below to instill a journey focus among teams.

1. **Socialize your priority journeys.** Ensure that leaders and employees understand the journeys that matter most. Teams should be able to connect their work to those journeys and understand how they contribute to customer and business outcomes. Go back to your journey atlas and add the information leaders need to understand journey performance, operational friction, and impact on customers and the business.
2. **Connect journeys to customer, operational, and business realities.** Go beyond documenting customer goals and pain points. Link journeys to operational dependencies such as handoffs and delays, as well as business outcomes such as growth, efficiency, cost, and risk. This helps teams understand not only what customers are experiencing but also why those experiences occur and why they matter.
3. **Create a shared language across teams.** Encourage teams to discuss priorities, initiatives, and challenges in terms of the journeys they support. Over time, journeys become a common reference point that helps connect the work of different functions to shared outcomes.

   Organizations that successfully create a shared view of the customer and draw from shared context are better equipped to coordinate work across silos, align stakeholders around common goals, and make decisions based on a shared understanding of customer needs and business priorities.

Go Deeper:

Learn how to skillfully use a journey atlas.

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Action 2: Manage Journeys As A Strategic Portfolio

Many organizations treat journey investments as a loose collection of projects. Some try to invest in journeys equally while others allocate resources based on functional priorities, urgent requests, or whichever initiative has the strongest internal advocate. This can spread resources too thin and leave important customer and business needs underfunded.

Journey-centric organizations manage journeys as a strategic portfolio. They make explicit choices about the role each journey plays and the investment it warrants. Forrester distinguishes among *hygiene journeys*, which must work reliably to protect trust; *table-stakes journeys*, which must remain competitive; and *signature journeys*, which warrant disproportionate investment because they can differentiate the brand and drive growth.

Follow the steps below to prioritize journeys strategically.

1. **Define the strategic role of each priority journey.** Determine which journeys must function flawlessly to maintain trust, which must meet evolving customer and competitive expectations, and which have the potential to become distinctive expressions of your brand.
2. **Map initiatives and investments to the journey portfolio.** Review major roadmaps, transformation programs, and budgets to identify which journeys they support. Look for gaps, overlapping efforts, and activity that consumes resources without clearly advancing customer or business outcomes.
3. **Make deliberate investment trade-offs.** Stabilize hygiene journeys, maintain table-stakes journeys without reflexively copying competitors, and reserve outsize investment for a small number of signature journeys. Make clear what the organization will defer or stop so that priority work has the resources to succeed.
4. **Revisit portfolio choices as conditions change.** A journey's strategic role may differ by customer segment or market and might change as competitive dynamics, business priorities, customer expectations, or risks evolve. Treat the portfolio as a living management tool, not an annual classification exercise.

Managing journeys as a portfolio helps leaders align capacity with customer and company value. It also creates a stronger link between journey strategy and the initiatives that teams ultimately fund and deliver.

Go Deeper:

Hear more about journey portfolios.

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Action 3: Use Journeys To Guide Decisions

Many companies have plenty of journey insights, but those hard-won learnings never reach the moments when leaders set priorities and allocate funding and resources. They therefore have little influence on funding choices, product roadmaps, operational capacity, or portfolio decisions.

Companies with the highest level of journey maturity integrate journey thinking into their decision-making. Forrester defines a journey decision system as an operating model that embeds customer journey context into how organizations set priorities, allocate resources, and govern delivery across functions to create customer and company value.

Encourage this in your own organization by following the steps below.

1. **Identify the decisions that shape priority journeys.** Determine where choices about funding, roadmaps, products, service delivery, policies, and capacity are made. Examples may include roadmap reviews, quarterly business reviews, portfolio planning sessions, and budgeting discussions. These are the decisions that ultimately shape customer experiences.
2. **Determine the journey context that decision-makers need.** Provide decision-makers with the customer, operational, and business evidence relevant to the choice in front of them. Don't rely on a generic journey presentation; instead, show the customer goal at stake, the friction or unmet need, the underlying handoffs or constraints, and the criteria for success.

   Depending on the decision, it can be helpful to frame it as a business problem — for example, lost revenue, avoidable cost, or risk — that needs to be solved. Use journey evidence to reveal the causes and possible trade-offs. This positions journeys as vital decision context rather than another discipline stakeholders must adopt.
3. **Bring journey context into existing planning and governance processes.** Instead of creating new forums, integrate journey insights into the processes leaders already use. For example, roadmap discussions might include journey outcomes, while investment reviews could consider journey health and customer impact alongside financial measures.
4. **Maintain customer context through execution.** As initiatives move from planning into delivery, be sure that the original customer need, intended journey outcome, and success measures remain visible. Periodically revisit these factors during roadmap reviews or steering discussions. That helps prevent customer priorities from becoming disconnected from day-to-day implementation decisions.

   When journey context appears consistently at the right decision moments, stakeholders no longer depend on the CX team to interpret every insight for them. They can use customer context alongside operational constraints and business objectives to make decisions that improve journeys and create value.

Go Deeper:

Learn how to elevate journeys into decision systems.



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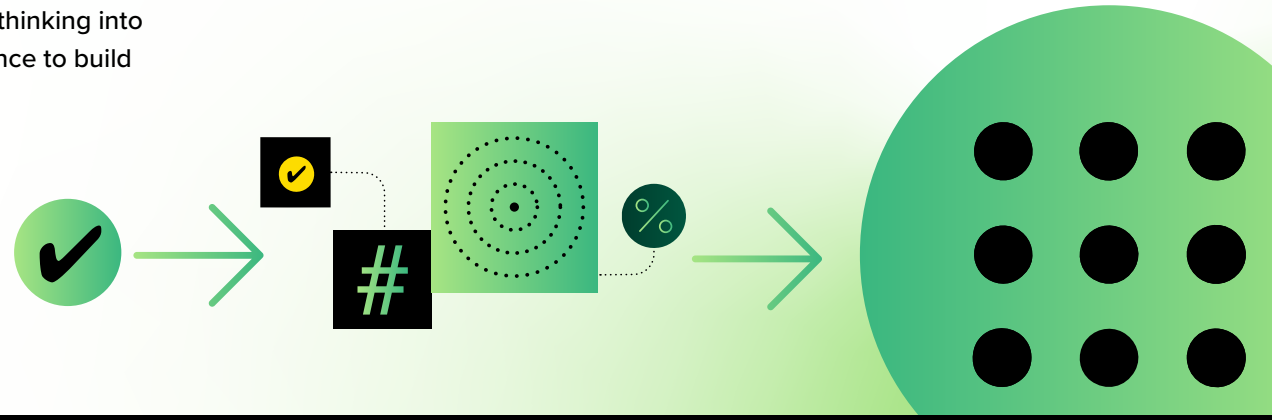
Take The Next Step

Organizations become journey-centric when journeys influence more than CX projects. Journeys are no longer merely artifacts or management tools but decision infrastructure that helps the organization understand cross-functional trade-offs and what to fund, build, change, or stop.

Forrester helps organizations across industries embed journey thinking into their operations and decisions. If you need more tailored guidance to build your path, reach out to us.



CONTACT US

Americas: +1 615.395.3401
Australia: +61 2 9159 4925
EMEA: +44 (0)207 323 7741
Singapore: +65 6426 7071
India: +91 1142840027

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