



## Anaplan: Mapping the Customer Journey to Jump-Start Customer-Centricity

**Company:** Anaplan, based in San Francisco, provides cloud-based, highly scalable and flexible modeling technology that is used worldwide for connected planning. This includes financial planning, budgeting and analysis; demand and supply chain planning; sales compensation and territory management; and other enterprise-wide planning needs.

**Challenge:** During a period of hyper-growth, Anaplan's leadership team realized there was a need to improve the company's focus on understanding and meeting customer needs.

**Solution:** Anaplan created a new customer experience function and launched an initiative to understand and map the customer journey for key customer personas. The results were shared throughout the organization, and improvement initiatives were prioritized.

**Results:** The benefits of Anaplan's customer experience improvement efforts include an increase in customer satisfaction, a reduction of support cases during the release process, operational cost savings, increase in advocacy participation and increased engagement.

Mapping the end to end customer journey is a key responsibility and capability of the customer experience function. Stepping into customers' shoes and experiencing what it's like to interact with a company's customer-facing functions and processes at every touchpoint can be transformative. Customer journey mapping also reveals moments of truth and illuminates' issues caused by silos in the business. In this Select Practice, we describe how Anaplan established a successful customer journey mapping program during a period of hyper-growth, which renewed an organization-wide commitment to customer-centricity.

### Client Profile

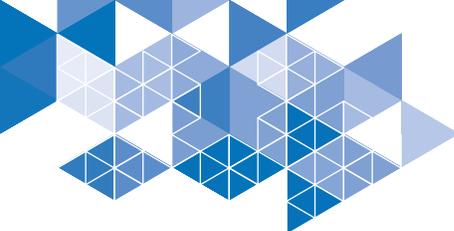
Natalie Wolf, Anaplan's senior director of customer experience, was chosen to oversee the customer journey mapping initiative so that an optimal end-to-end customer lifecycle could be designed. The customer experience group at Anaplan is responsible for curating interactions and providing customers with the best experience at every touch.

### Sustaining Customer Focus During Hyper-Growth

Founded in 2008 and based in San Francisco, Anaplan began its operations with a compelling approach to a business problem and a strong customer focus. However, as the company grew rapidly, its leaders realized there was a need to better understand and prioritize customers' wants and needs. Anaplan's leadership team also felt it was critical to devise a customer experience plan that aligned to growth and ensured stakeholder engagement and cultural consistency. However, Anaplan had no formal customer experience function, and had never pursued an end-to-end deep dive of the customer journey. In 2017, Wolf, a proven leader at Anaplan, was chosen to establish a customer experience team and lead an initiative to better understand the company's customers and partners.

### Mapping the Customer Journey

Wolf began by enlisting a group of people from stakeholder organizations across the company who dedicated 20 percent of their time to act as an extension of the customer experience team and a voice for the customer. This group was tasked on going deep on the end-to-end customer journey; they worked to understand what customers were thinking, feeling and doing at every touchpoint, and shared those findings organization wide.



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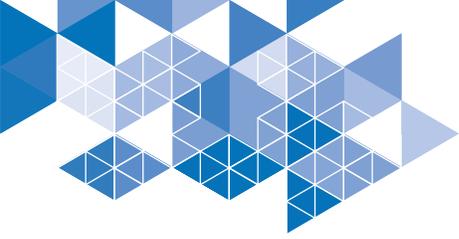
Wolf and her core team then set the scope of the mapping, ensured the right people were on the extended team, defined the customer personas whose journeys would be mapped, and recommended how the maps would be used. The core and extended teams then conducted several workshops across the organization to gain buy-in. This process was instrumental in reinforcing a customer-first mindset in the growing company.

The initial set of journeys leveraged the SiriusDecisions Customer Lifecycle Framework and Customer Experience Design Framework. The maps were documented using SuiteCX, a customer journey mapping platform, and the results were validated with customers, partners and employees. The maps were then used as the basis for socializing decisions about the prioritization of improvement efforts. High-level maps used iconography to describe “Moments That Matter.” These were key touchpoints for Anaplan’s customers and were used as critical components of a new employee onboarding program as well as to see where the organization could make the most impact.

In total, 16 customer experience team members interacted with eight internal functions to gather intelligence, and 32 customers and 116 employees were interviewed to inform the details of the customer journey maps. Thirty-two customer experience improvement initiatives were identified and placed on a quadrant map along the axes of “effort” and “impact” to enable the selection of a manageable set of priorities.

During this time, the new customer experience team was hired and onboarded, and an enduring structure and process to keep the momentum going were established. According to Wolf, Anaplan’s customer journey mapping work generated the following key takeaways from which all customer experience leaders can benefit:

- **Engage leadership.** Keeping the executive leadership team involved and informed maintains its connection to the work and support for allocating people and time to key priorities for customers and partners.
- **Determine the right approach for the organization.** At Anaplan, the existing customer-first culture needed to be maintained as the company grew. As the customer experience team developed its approach, it leveraged the company’s existing culture which included being collaborative and open. The integration of customer-first thinking into new-hire onboarding, ongoing training and culture initiatives was a huge factor in the success of Anaplan’s approach.
- **Start with employees.** Employees, especially customer-facing teams, are an excellent starting point for mapping the customer journey. These employees provide specific examples to each touch, and educates internal teams along the way on where the gaps are. However, although internal resources



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can serve as proxies for customers and inform the initial hypotheses and outline of the journey maps, they should not be the only source.

- **Keep priorities strategic.** The journey mapping team can provide data, insights and a prioritization framework. Functional organizations should retain the freedom and flexibility to implement changes and processes at the tactical level while still remaining true to the most critical “Moments That Matter.”
- **Hire the right customer experience team.** At Anaplan, the team was built entirely from scratch. Wolf was careful to hire team members who were comfortable with ambiguity, bias for action and empathetic. Also, these people are the front lines for identifying customer needs, so a strong cultural fit was key.
- **Drive decisions with data.** Customer journey mapping has an inherent element of emotion, as identifying “moments of truth” is a primary goal. Organizations should use data to facilitate this insight. Relevant data includes survey results, benchmarks, financial and operational data – all of which also can be used to create a baseline and structure for measuring progress.

## Measuring the Results

Anaplan’s customer journey mapping initiative and the prioritized projects proved instrumental in moving the needle to reduce friction for their customers. For example, there

has been a 16 percent reduction in product release support tickets, a 98 percent increase in blog views, an increase in responses to the customer satisfaction survey and an increase in advocacy participation. In addition, the customer experience team also has gathered numerous customer quotes that recognize the improvement in the Anaplan customer experience.

## The Sirius Decision

Anaplan is following best practices to leverage customer journey mapping to renew and expand the company’s commitment to customer-centricity during a period of rapid growth. Instead of treating journey mapping as a one-time event or project, Anaplan continues to develop and apply this capability to understand its customers’ experience and prioritize areas for improvement. Customer journey mapping is best deployed as a shared service where the customer experience team provides the expertise, methodology and framework and the functional organizations (e.g. support, product, marketing) supply the detailed knowledge needed to complete detailed and actionable journey maps. In addition to customer experience, Anaplan continues to develop and staff other functions dedicated to customer value.

## Recommended Research

Customer Journey Mapping for B-to-B Storytelling  
The SiriusDecisions Customer Lifecycle Framework  
The SiriusDecisions Customer Experience Design Framework  
Capturing Feedback Across the Customer Lifecycle