

# The customer journey playbook

5 clever ways to keep customers coming back





# Contents

Use data to personalize interactions	4
Leverage generative AI for better engagement	5
Be available on the right channels	6
Build safety nets to prevent customers from being “ghosted”	7
Engage customers at the right time	8

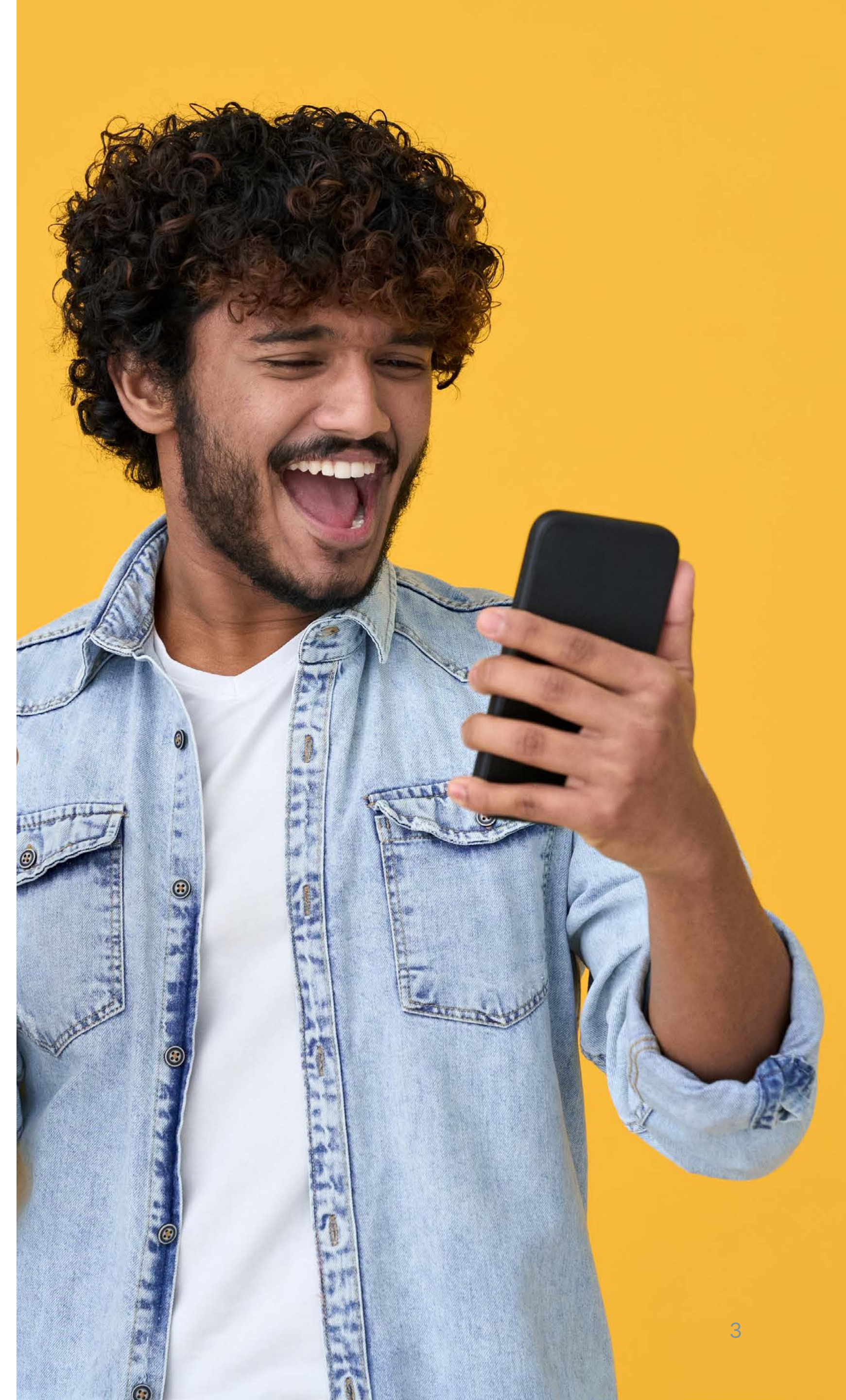


# Why your customer journey matters

Consumers expect seamless, personalized interactions across multiple channels. Companies that fail to deliver risk losing them to competitors that prioritize engagement. Considering that just a five percent increase in customer retention can lead to a profit increase of 25 to 95 percent, it's more important than ever that businesses address customer churn.<sup>1</sup>

AI-powered customer experiences can take your [customer journey from meh to magic](#). With the rise of generative AI, companies can automate interactions, predict behavior, and enhance personalization at scale. This ebook contains five practical tips for optimizing engagement.

<sup>1</sup> Hubspot: [Here's Why Customer Retention is So Important for ROI, Customer Loyalty, and Growth](#)



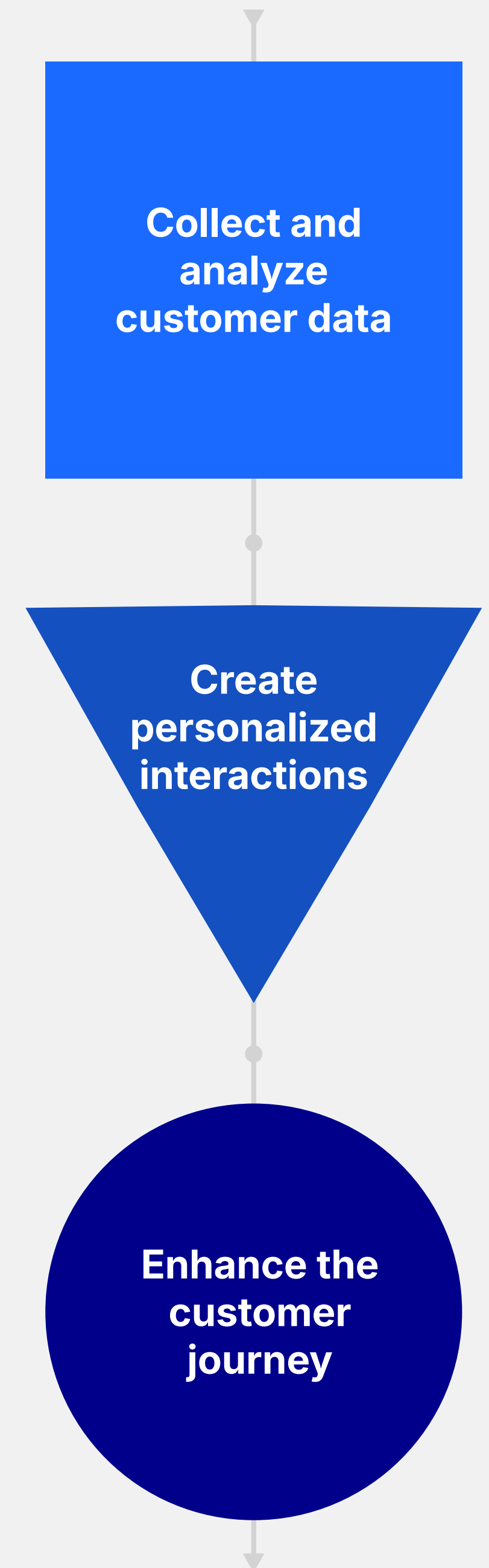


# 1: Use data to personalize interactions

Brands that lead in personalization improve customer loyalty 1.5x more effectively than brands that don't. That's because customers engage more when they receive relevant, personalized communications.

Creating highly personalized interactions isn't magic—it's about really knowing your customers. That means capturing and tracking data from every interaction, across every channel and touchpoint, and then using that data to fine-tune their journey. What do they love? What do they ignore? What makes them click "buy now"? Leveraging customer insights to tailor messages, offers, and support helps you connect the dots and use data to personalize interactions with your customers.

Here's an example: A leading financial institution leverages data analytics to study customer transaction patterns, identifying trends in spending behavior. Using these insights, the institution provides personalized financial tips, helping customers manage budgets and improve savings. Customer engagement and financial well-being improve, enhancing loyalty and trust in the institution's services.





## Anticipate your customers' needs

73% of customers expect brands to read between the lines and understand their needs.<sup>2</sup> GenAI now makes this possible.

## 2: Leverage generative AI (GenAI) for better engagement

Great customer experiences start with great engagement—and thanks to GenAI, the game has completely changed. Augmenting your customer support with chatbots, automation, and predictive customer insights helps businesses proactively resolve issues before customers reach out. Using GenAI for recommendations and messaging means you can automatically craft personalized, timely, and ultra-relevant content effortlessly, making every interaction feel unique.

With GenAI, businesses can now anticipate their customers' needs. A telecom provider implementing AI-powered chatbots can analyze usage patterns and predict common customer issues. By proactively offering solutions before customers reach out, the company can reduce support wait times and improve user satisfaction, which can lead to increased efficiency, lower operational costs, and a better overall customer experience.

<sup>2</sup> Forbes, 100 Customer Experience Stats for 2023



# 3: Be available on the right channels

Customers all have their go-to ways of reaching out, and being available on the right channels is essential for delivering a seamless customer experience. Customers today expect to communicate with brands across email, chat, SMS, and social media—whichever channel they prefer the most. Brands must be available on the right channels with a consistent, accessible experience across all touchpoints.

No matter how your customers reach you, your team needs to be ready to deliver the same seamless customer experience. This applies not only to newer communication channels such as chat and social media, but to in-person interactions, too. If a customer has low digital literacy, pushing them to online banking will only result in frustration and poor customer experience. Businesses must adapt their services to customer needs, not force changes without consideration.

Being available on the right channels is essential for delivering a seamless customer experience. A business that integrates customer support across WhatsApp, email, and web chat enables customers to switch between channels without losing context, creating a frictionless and efficient interaction. By adopting a unified approach to communication, businesses can enhance customer satisfaction, build loyalty, and improve overall engagement.





## 4: Build safety nets to prevent customers from being “ghosted”

Customers should never feel abandoned due to a lack of follow-up. By adding safety nets into your communication strategy—like mobile messaging alongside email—you can help prevent your customers from being ghosted.

Implementing automated reminders, proactive outreach, and escalation workflows can mean the difference between making your customers feel cared for and leaving them looking for another provider.

Let’s take the healthcare industry as an example. If a patient misses an appointment, a healthcare provider should automatically follow up. By doing so, the provider not only makes the customer feel special, they ensure continuity of care.

**Automated reminders, proactive outreach, and escalation workflows can prevent your customers from being ghosted.**



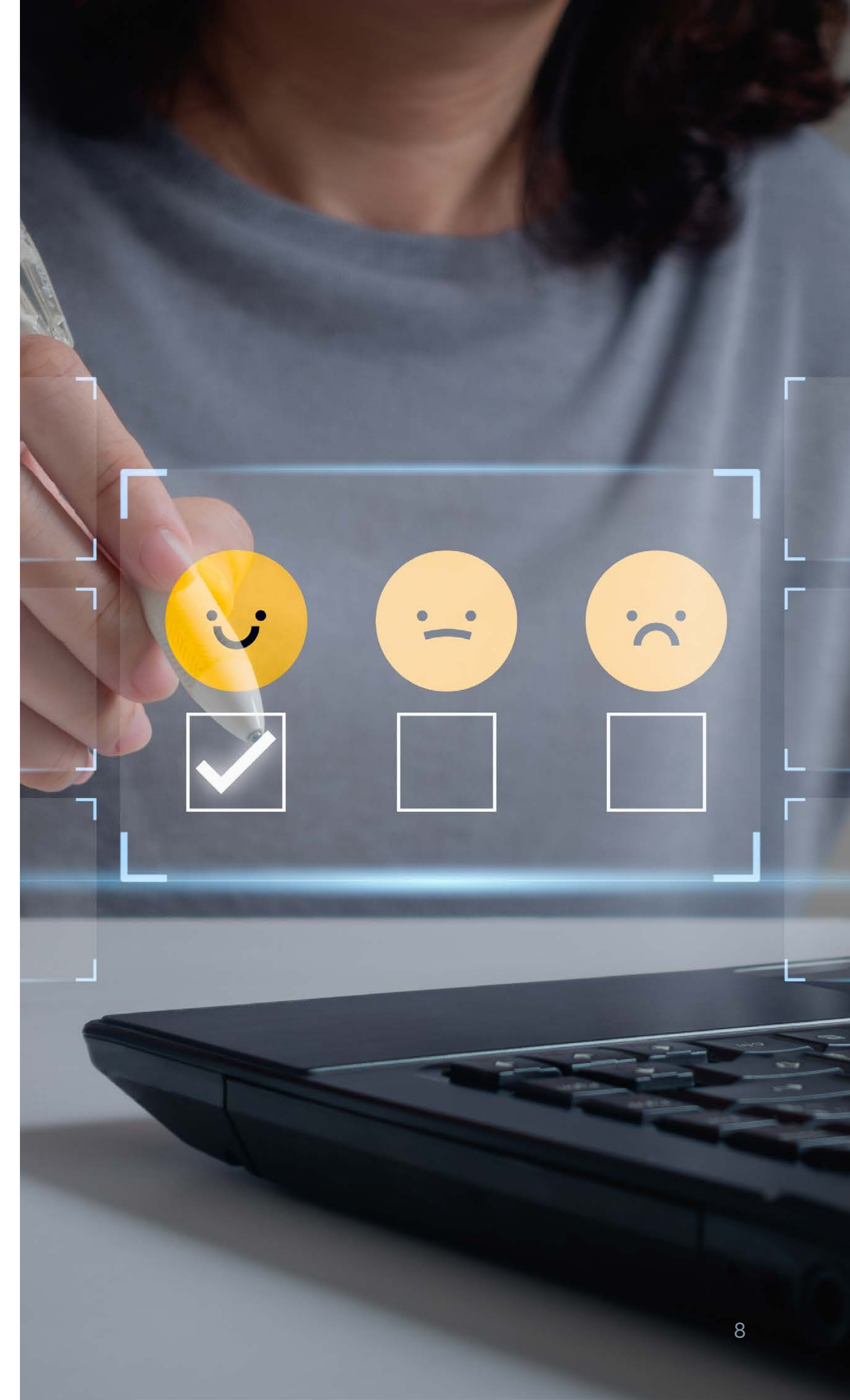
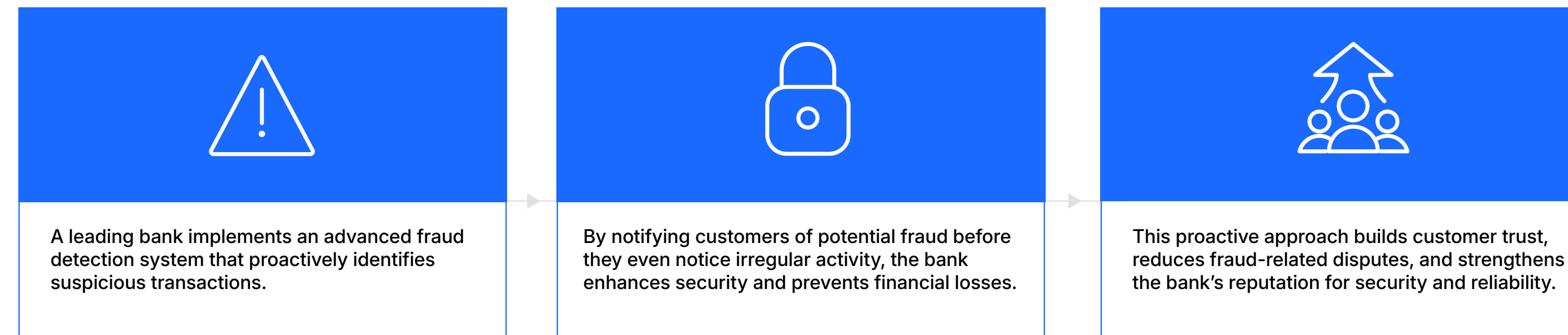


# 5: Engage customers at the right time

Engaging customers at the right time is crucial to improving the customer journey. By leveraging data-driven insights, businesses can anticipate customer needs and proactively offer support, recommendations, or solutions at exactly the right time. Fine-tuning the customer journey with data-driven, well-timed offers not only enhances customer satisfaction, it also fosters brand loyalty.

Proactive engagement builds trust and prevents customer churn. Eighty percent of consumers are more likely to buy from brands that offer more personalized experiences.<sup>3</sup> Whether through automated chat support, personalized email campaigns, or AI-powered recommendations, timely engagement creates a seamless experience that drives conversions and builds lasting relationships.

<sup>3</sup> [Forbes, 100 Customer Experience Stats for 2023](#)





# Elevate customer journeys with OpenText

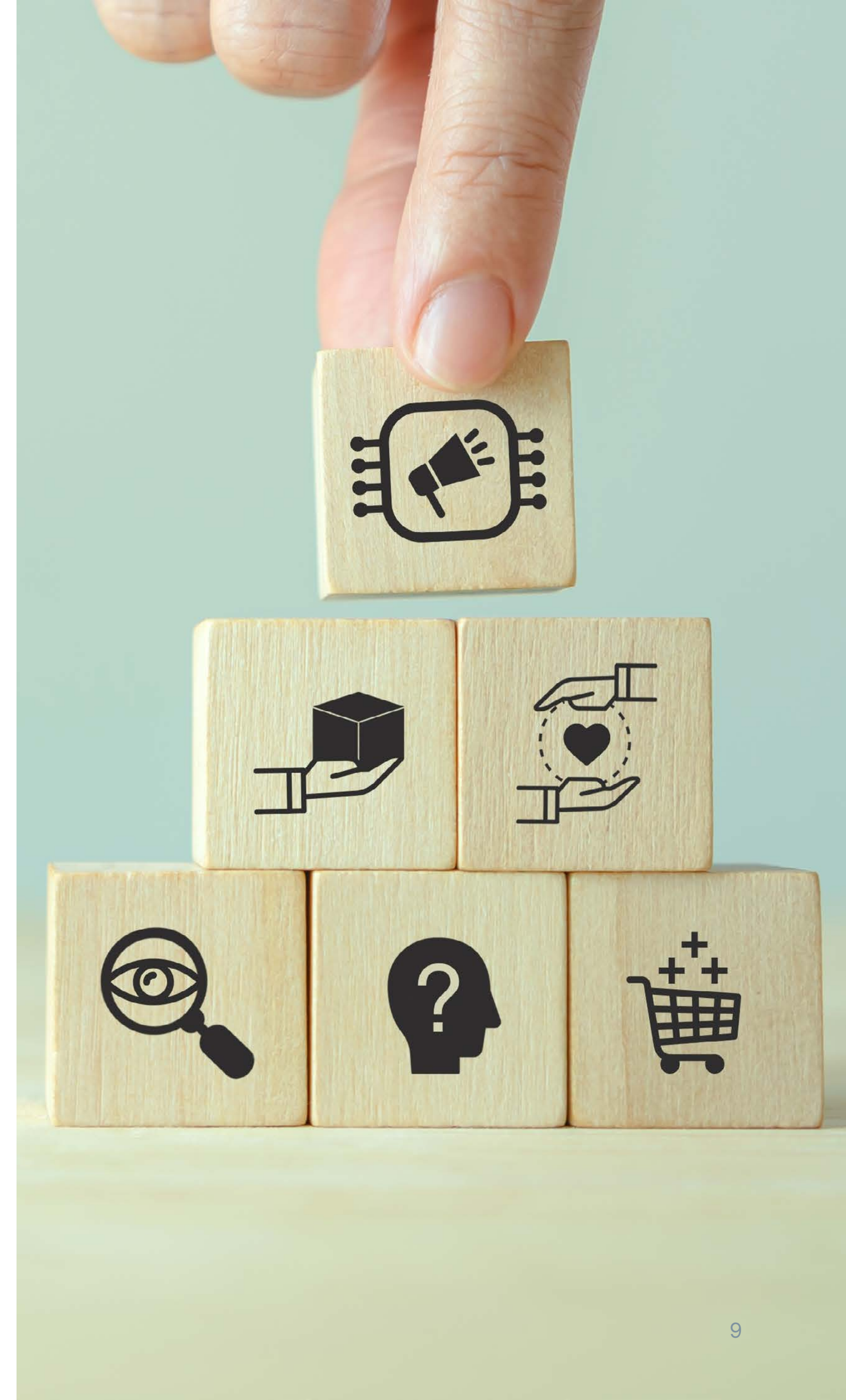
OpenText empowers businesses to seamlessly orchestrate customer journeys, ensuring proactive engagement, data-driven personalization, and omnichannel communication.

Our solutions enable:

- AI-powered automation to streamline customer interactions.
- Omnichannel communication for seamless engagement.
- Customer journey analytics to optimize experiences in real-time.

## Solutions for delivering a better customer journey

Solution	Description
<a href="#">OpenText™ Communications</a>	Centralizes communications, self-service, and omnichannel messaging.
<a href="#">OpenText Experience Aviator</a>	Uses AI-driven analytics to personalize interactions and anticipate needs.
<a href="#">OpenText Core Journey</a>	Ensures customers receive timely updates and personalized recommendations.
<a href="#">OpenText Customer Data</a>	Personalizes experiences and communications to drive customer loyalty
<a href="#">OpenText Core Messaging</a>	Provides seamless engagement across email, SMS, WhatsApp, RCS, push, voice, and fax.





# Conclusion

Optimizing the customer journey requires a blend of data, AI, omnichannel presence, and proactive engagement. Implementing these five strategies will help businesses:

- Enhance customer retention.
- Boost engagement and satisfaction across customer journeys.
- Drive long-term loyalty and revenue growth.

By prioritizing customer-first strategies, businesses can stand out in the experience-driven economy.

## Learn more

For more insights, visit [OpenText Core Journey](#).





## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://opentext.com).

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