Mapping Connected Journeys Across EX, CX, and AIX

Multi-Touch Journey Mapping in the Age of AI

- One customer case
- Six connected lenses
- Before · during · after resolution

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Section

1

The Illusion: The Journey Looks Simple

We follow a single warranty case and ask what it really takes to deliver a resolution end to end — starting with how simple it appears from the outside.

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Session Core Focus

This workshop maps what it takes to deliver resolutions **end-to-end.**

Follow one case

We follow a single customer case from first contact to outcome.

Six journeys, one experience

We examine the customer, employee, AI, workflow, data, and resource-capacity journeys behind the experience.

Leave able to act

Identify where friction occurs, what must stay connected, and how to improve outcomes before, during, and after resolution.

Section 1 — THE ILLUSION

The Case We Will Follow

THE SCENARIO

A customer experiences a disruption and requests a warranty replacement.

- Has not contacted the company in over a year
- Their product has failed
- They need help that cannot be resolved immediately

Resolving it may require:

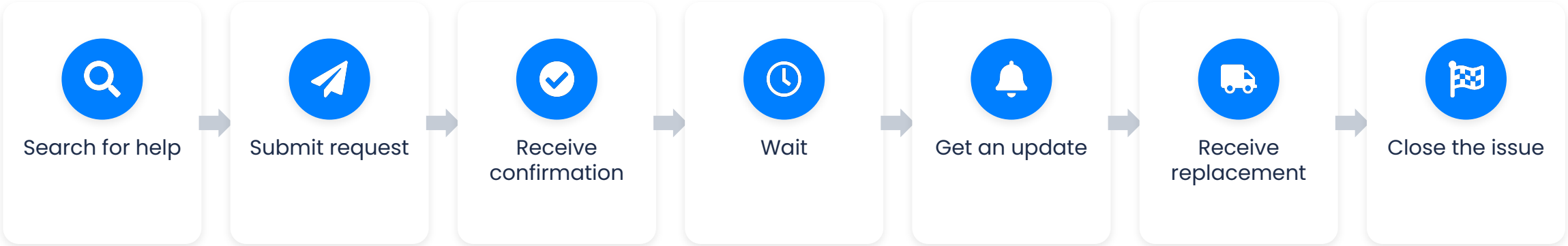
AI triage	Agent support	Warranty validation
Case creation	Specialist review	Inventory / entitlement
Approval	Scheduling / fulfillment	Follow-up

Session question: What has to go right for this customer to receive resolution?

Section 1 — THE ILLUSION

What the Customer Sees

From the customer's perspective, the journey looks simple:



It looks like **one journey.**

Section 1 — THE ILLUSION

What Actually Happened

Behind that simple journey, the organization may be coordinating:

01 Digital intake	02 AI classification	03 Knowledge lookup	04 Agent review
05 Case creation	06 Warranty validation	07 Specialist queue	08 Approval workflow
09 Inventory check	10 Scheduling / fulfillment	11 Customer notification	12 Survey / follow-up

Many complex, interconnected workflows are initiated — **all invisible from the customer's perspective.**

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Section 1 — THE ILLUSION

Visible vs. Invisible Actions

CUSTOMER-VISIBLE

The customer clicks, chats, calls, submits information, waits, and receives updates.

CUSTOMER-INVISIBLE

The organization classifies, routes, escalates, approves, reviews documents, manages queues, assigns capacity, updates systems, and reports status.

Most friction hides in the gaps. The journey map becomes useful when we connect the visible experience to the invisible work required to fulfill it.

Trace the Case

START: A warranty replacement request arrives.

Ask about the flow

- How is it classified, routed, and prioritized?
- How is the SLA assigned?
- What queue receives it? When does escalation occur?
- What reports depend on these states?

Then ask about the requirements

- Who owns it?
- What triggers it?
- What system supports it?
- What data is required, and what exception path exists?

This turns journey mapping into **operational modeling.**

Section 2 — Mapping Beyond the Illusion

The Connected Journey Model

We look at the case through nine steps and six lenses — not six separate topics, but six lenses on the same journey.

CX

Customer experience

Lens 01

AIX

AI experience

Lens 02

EX

Employee experience

Lens 03

Data

Data continuity

Lens 04

Workflow

Workflow visibility

Lens 05

Capacity

Service capacity

Lens 06

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1 Discovery & Demand Reduction

CX LENS

The customer searches for help before contacting support.

Possible self-service paths

- Website
- App
- Search
- FAQ
- Knowledge article
- Community
- Peer-to-peer
- IVA

Demand reduction should not just mean deflection. It means designing the right resolution path before unnecessary customer or employee effort is created.

Question: Should this journey have reached an agent at all?

2 Customer Submits the Request

CX LENS

CUSTOMER ACTION

- Describes the product issue
- Provides order or account information
- Uploads documentation if needed
- Requests a warranty replacement

WHAT CAN BREAK

- Customer cannot find the right path
- Form asks for information the company already has
- Customer receives no clear confirmation
- Customer does not know what happens next

CX lens: Can the customer accomplish the first step without confusion?

CX LENS

CX Juncture: From Transactional to Value-Added Resolution

After submission, the organization faces a choice: treat the customer's request as a single transaction, or use the moment to create a more value-added resolution experience.. ***If your systems are disjointed, this is where they will be exposed.***

TRANSACTIONAL

Customer asks one question.

- The company answers that one question.
- Nothing else moves.

VALUE-ADDED

Customer raises one issue.

- The company resolves it *and uses what it knows to create additional helpful outcomes.*
- The organization is connected enough to act on context, *resulting in more useful value returned from the same interaction.*

Mapping question: When the customer gives us one service signal, how much useful value are we able to return?

3 The AI-Era Shift: Intake & Triage

AIX LENS

AI MAY SUPPORT

- Intent capture & product identification
- Warranty FAQ & eligibility pre-check
- Document request & classification
- Routing & summary generation

WHAT CAN BREAK

- AI misclassifies the issue
- Knowledge is incomplete
- Customer history is unavailable
- Confidence threshold is unclear
- Escalation path is poor

AIX lens: Can AI perform its assigned work with the knowledge, context, tools, permissions, and handoff path it needs?

AI Can Help — But It Is Not Truly Autonomous

The Tamagotchi analogy: AI only operates inside the environment we design for it.

THE EMPLOYEE

- An expansive resource with their own decision-making, skills, and motivations
- Can take initiative to upskill without a coded prompt and handle physical materials
- Functions autonomously and takes accountability, even when the operating environment changes

CURRENT AIX (THE TAMAGOTCHI)

- Depends on memory, tools, context, permissions, and feedback
- No context → it forgets. No tools → it cannot act.
- Poorly structured environment → it behaves poorly

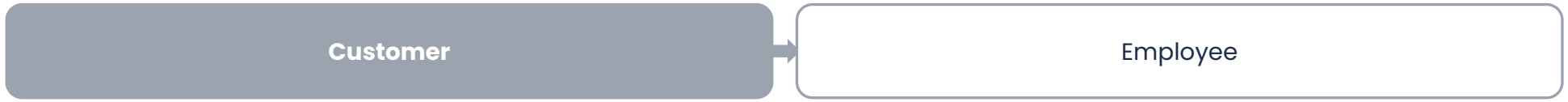
The point: Most AI failures are journey design failures.
Ask of your own journey: is AI failing because the model is weak, or because the environment is incomplete?

AI Twist to Service Designs

AIX LENS

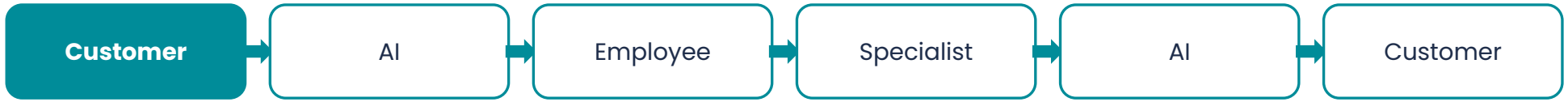
HISTORICALLY

Service designs



TODAY

Service designs



By working its own tasks and assisting employees, AI may now support:

- Intake & triage
- Authentication
- Intent capture
- Classification
- Routing
- Knowledge retrieval
- Summarization
- Next best action
- Follow-up

AIX question: How much knowledge, context, tools, permissions, and rules does AI need to act?

4 Front-Office Agent Receives the Case

EX LENS

THE EMPLOYEE NEEDS

- Customer history & product details
- Prior interaction records & warranty rules
- Knowledge guidance & AI summary
- A clear next best action
- Case workflow visibility

WHAT CAN BREAK

- Tab hopping & duplicate entry
- Missing history & no clear ownership
- Customer repeats information
- Agent cannot explain next steps

EX lens: Can the employee efficiently perform the work required to move the case forward?

The Employee Is Also on a Journey

EX LENS

EX is not only the tools on the desktop — it starts before the customer interaction.

WHAT EMPLOYEES EXPERIENCE

- Workload pressure & schedule constraints
- System friction & knowledge gaps
- Escalations
- Emotional fatigue and burnout from difficult interactions

THEY PERFORM BEST WITH

- Unified customer context & embedded knowledge
- Clear workflows and next best actions
- Ownership and visibility across the journey
- AI that reduces effort, not judgment
- Reasonable workload support (TimeFlex, HRIS)

If the employee is unsupported, **the customer feels it.**

5 Case Creation & Data Continuity

Data LENS

The request becomes operational work. To avoid rework at each step, the case will need the right data to travel with it:

Customer ID	Case ID	Interaction ID	Product type	Warranty status	Priority
SLA	Skills tag	Queue assignment	Required documents	Owner	

WHAT CAN BREAK

- Wrong case type or missing data
- Duplicate record / no source of truth
- SLA not assigned
- Reports depend on fields never captured

DATA CONTINUITY ASKS

- What context must survive every handoff?
- What data determines the next action?
- Which system is the source of truth?

Data lens: Can context survive the handoff?

6 Specialist Review

Workflow LENS

WORK MAY INCLUDE

The case moves to a specialist, back office, or approval team:

- Validation
- Classification
- Routing
- Escalation
- Approval
- Fulfillment
- Closure

WHAT CAN BREAK

- Specialist queue backlog
- Manual approval delay
- Missing documentation
- No escalation rule
- No visibility for the agent
- Customer receives no update

Workflow lens: Can work move from one state to the next?

7 Scheduling, Fulfillment, or Replacement

Capacity LENS

RESOLUTION MAY REQUIRE

- Replacement shipment
- Store appointment
- Technician visit
- Vendor review
- Parts / inventory check
- Field service dispatch

WHAT CAN BREAK

- Store / branch / technician lacks case context
- Inventory is unavailable
- Appointment scheduled without the right resource
- Contact center thinks it's resolved — but fulfillment hasn't happened
- Service-level agreement is unmet
- Customer receives conflicting updates

Mapping Question: Do we have the capacity (resources, time slots, and skilled labor) to complete the resolution within the promised SLA?

8 Customer Update

CX LENS

THE CUSTOMER NEEDS

- A case number, status, and expected timeline
- Required action and next step
- A confirmation email or message
- A clear path to follow up

WHAT CAN BREAK

- No proactive communication
- Case status is unclear
- Agent cannot explain the timeline
- AI gives a generic answer
- Customer calls back and starts over

Connected lens: This is CX, EX, AIX, workflow, and data all showing up in one customer-facing moment.

What Had to Stay Connected to Close the Case?

Within this service-resolution operating system, multiple pieces remained integral. One break could have derailed the resolution.

9 Resolution to Post-Resolution Success

Workflow LENS

A closed ticket does not guarantee a successful outcome.

RESOLUTION

The work is complete.

- The ticket is closed and the task is done.

SUCCESS

The customer achieved their goal.

- They continue to realize value from the outcome.

Extend mapping beyond closure: What should we still be measuring one month later? With today's automation and AI, it is easier than ever to act on this.

Mapping Activity: Where Does It Break?

See the mapping canvas and discovery bank at the end of the session deck.
At each step, identify the break:

CX
Is the customer confused?

EX
Is the employee unsupported?

AIX
Is AI unable to act?

Data
Is information disconnected?

Workflow
Is work stuck?

Queue
Is the wrong resource assigned?

Capacity
Enough capacity to meet SLAs?

Knowledge
Is the reference hard to use?

Discussion question: What needs to be connected next?

Final Takeaway

1. Most organizations **map experiences.**

2. Mature organizations **map work.**

3. AI-ready organizations **map the connected work required for customers, employees, and AI to succeed together — before, during, and after a case.**

Leadership question: *What must stay connected across customers, employees, AI, workflows, data, and capacity so each issue can reach better resolutions — before, during, and after a case?*

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Thank you.

Let's map the connected work behind your customers' resolutions.

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Connected Resolution Journey Canvas

Map the trigger, hidden work, and handoffs behind one customer issue

Organization / Team: _____ **Customer issue or scenario:** _____

Customer goal: _____ **Promised resolution / SLA:** _____

Stage	Customer Does	Customer Needs	AI Role	Employee Role	Data Needed	Workflow / Owner	Capacity Needed	What Can Break?
Trigger								
Research / Validation								
Request Submitted								
Intake / Triage								
Case Created								
Specialist Review								
Fulfillment / Scheduling								
Customer Update								
Resolution								
Post-Resolution Success								

What must stay connected?

Customer context: _____ AI context: _____

Employee knowledge: _____ Case data: _____

Workflow states: _____ Capacity signals: _____

System integration: _____

Most important break

_____

Next connection to fix

_____

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Discovery Bank for Your Organization's Connected Journey

Foundations for Smarter CX

Journey Stage	Trigger	Research / Validation	First Request	AI Intake / Triage	Employee / Case Work	Fulfillment / Resource Capacity	Customer Update	Resolution	Post-Resolution Success
Customer action	What happened?	Where do they look?	What do they submit?	What does AI ask or answer?	What does the customer expect?	What are they waiting for?	What update do they need?	What closes the issue?	What happens one month later?
Customer emotion / question	Confused? urgent? frustrated?	"Am I alone in this issue?"	"Did you get my request?"	"Is this helping?"	"Does anyone understand?"	"Why is this taking so long?"	"What happens next?"	"Is this fixed?"	"Did this actually solve my problem?"
Touchpoint / channel	App, product, bill, outage, failure, etc.	Search, FAQ, community, peer, app, web	Form, chat, email, call, store, branch	Bot, IVA, knowledge, self-service	Agent, desktop, CRM, case system	Appointment, store, technician, vendor, inventory	SMS, email, portal, call, chat	Shipment, repair, approval, replacement	Survey, usage, adoption, repeat contact, health score
CX lens	What does the customer experience?	Can they find help?	Can they submit easily?	Can they avoid repeating themselves?	Do they feel known?	Do they understand timing?	Are they reassured?	Was the goal met?	Did value continue after closure?
AIX lens	Should AI detect or predict this?	Can AI answer or guide?	Can AI capture intent?	Can AI classify, route, summarize?	Can AI assist the employee?	Can AI check status or inventory?	Can AI generate useful updates?	Can AI trigger follow-up?	Can AI monitor signals over time?
EX lens	What will employees inherit later?	Can customer self-educate first?	Does the employee receive clean context?	Is AI summary useful?	Can employee act without tab hopping?	Can employee see fulfillment status?	Can employee explain next steps?	Can employee close confidently?	Can employee avoid repeat work?
Data continuity	What data is created?	What search / behavior data matters?	What IDs are captured?	What classification or intent data is created?	What case, customer, product, SLA, and queue data must travel?	What inventory, appointment, skill, or capacity data is needed?	What status data must be visible?	What closure data is recorded?	What success, sentiment, adoption, or repeat-contact data is tracked?
Workflow visibility	What process starts?	Should this be deflected or escalated?	What workflow is triggered?	What rule determines routing?	Who owns the next step?	What approval, scheduling, or fulfillment workflow is active?	What notification workflow runs?	What marks the work complete?	What workflow monitors post-resolution success?
Capacity lens	Is demand predictable?	Could demand be reduced?	Is intake capacity enough?	Is AI containment enough?	Are agents / specialists available?	Are slots, inventory, field teams, branches, or technicians available?	Can updates be sent before SLA risk?	Was SLA met?	Is there capacity to handle follow-up or repeat contact?

Your service design perspective: **What can break?** **What must stay connected?**