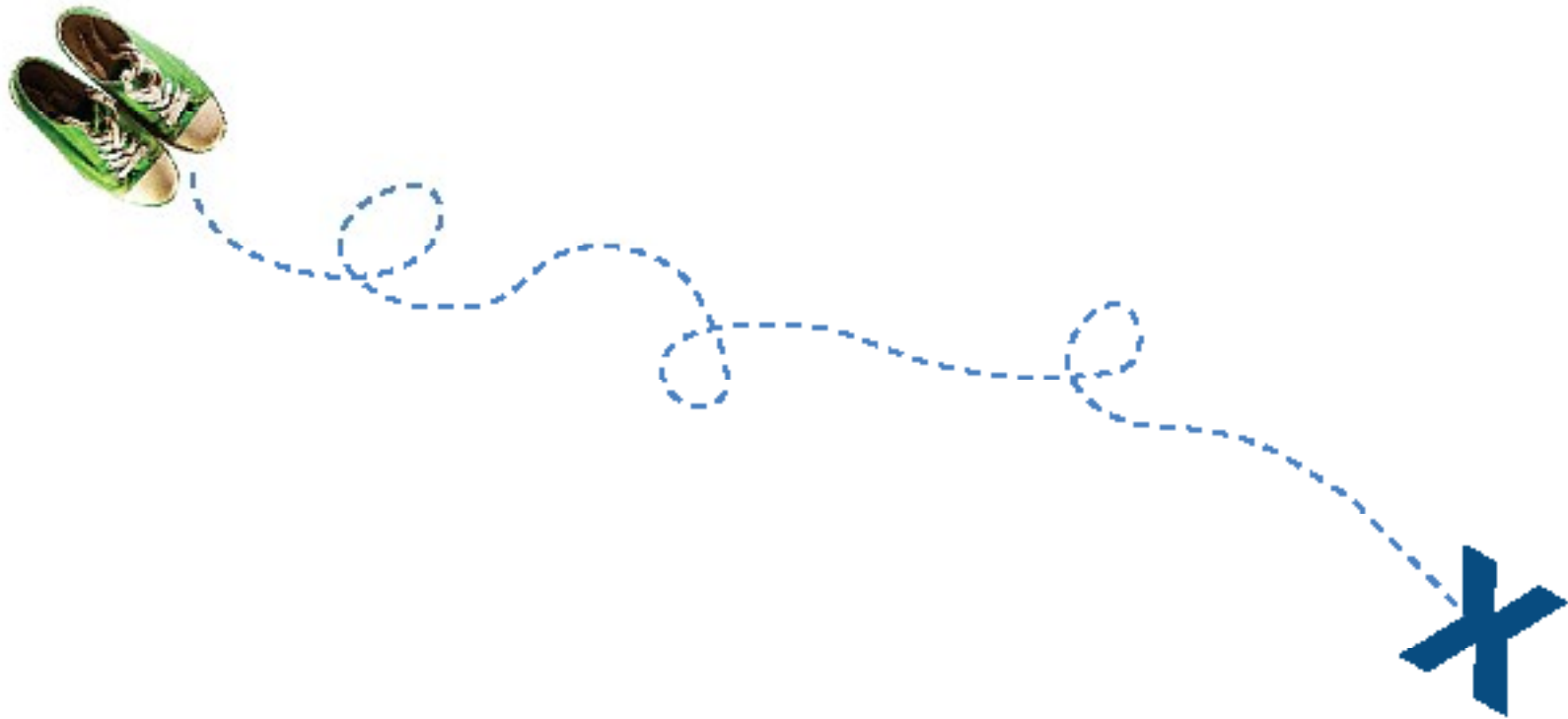


INTRODUCTION TO CUSTOMER JOURNEY MAPPING



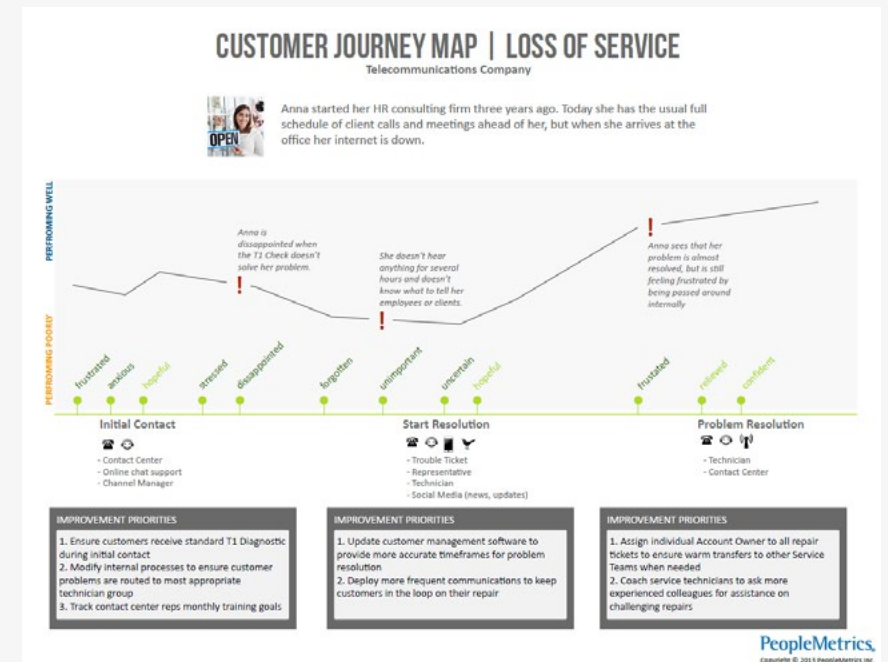
INTRODUCTION

Customer Journey Mapping is growing in popularity in the customer experience space, and it's no surprise. It's a valuable tool in helping companies develop an achievable plan to fix the customer experience.

This eBook will outline:

- The benefits of Customer Journey Mapping
- Choosing what to map
- When to use Customer Journey Mapping
- Who should be involved in Customer Journey Mapping
- How to conduct a Customer Journey Mapping session

WHAT IS A CUSTOMER JOURNEY MAP?



A Customer Journey Map is a diagram that illustrates the physical and emotional steps customers go through when engaging with a company around a particular goal

THE BENEFITS OF CUSTOMER JOURNEY MAPPING

1. Better Understand Your Customers.

Empathy is a powerful human emotion, one that is known to increase helping behaviors. Customer Journey Mapping asks business leaders, normally tasked with thinking primarily about business operations, to “walk in the customer’s shoes” and consider how the customer feels about their interactions with the company. This act of empathizing with the customer makes it easier to shift out of internal process mode and into thinking about how the company could be doing a better job of delivering value to customers.

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82% of people globally are more likely to recommend a simpler brand.

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2. Identifying Operational Inefficiencies

Identifying operational inefficiencies can be a quick win for customer experience leaders. There’s often an assumption that fixing the customer experience will be expensive for the company. Quite often, during the Customer Journey Mapping process, we will identify things the company is doing that are time consuming for employees or expensive for the company, and yet fail to

add meaning to the customer relationship. Removing these inefficiencies not only improves the customer experience, they also save the company money.

3. Silo-Busting

Perhaps nothing is more vital to the success of your customer experience vision than being aligned around a shared vision. Working on the Customer Journey Map together ensures that the individuals most capable of solving customers’ problems will be on the same page about what these problems are and the best approach to fixing them. This “silo-busting” activity encourages the cross-departmental coordination needed to fix the customer experience.

4. Creating a Differentiated Experience

But Customer Journey Mapping is more than identifying breakpoints and rallying the troops, it’s also a valuable tool to identify areas in which you can differentiate your customer experience. *Siegal & Gale’s 2011 Global Brand Simplicity Index* found that 82% of people globally are more likely to recommend a simpler brand. Customer Journey Mapping ensures that you are giving the extra time, thought, and effort so your customers don’t have to.

CHOOSING WHAT TO MAP

You've done your research. You know there are numerous benefits to using Customer Journey Mapping as part of your customer experience transformation toolbox; you're just not quite sure when is the best time to use it. Mapping the entire customer journey may be too big, mapping a single touchpoint may be too small, but focusing on a single Moment of Truth is just right.

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A Moment of Truth represents a turning point in the customer relationship.

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A Moment of Truth represents a turning point in the customer relationship. Perhaps the customer has filled out a loan application, or they are waiting in line to purchase a sweater, or it's the first time they are calling your customer service center. A Moment of Truth isn't so big that it will overwhelm your customer experience team, but it matters enough to enough of your customers to have meaningful business impact. Focusing on a particular Moment of Truth is the best way to either fix something that is terribly broken or create something boldly unique for your industry.

WHEN TO USE CUSTOMER JOURNEY MAPPING

Address priorities outlined in your Cx plan

Customer Journey Mapping can help you deliberately design an experience that delivers the emotional benefits that are central to your customer experience strategy and/or make the necessary improvements to the basics to free you up to move to market leadership

On an as-needed basis

When customer feedback alerts you to a problem area

When creating a differentiated experience

If you have already fixed the basics of your customer experience, Customer Journey Mapping can be used to identify how you can create a differentiated experience

There are four ways to select the best Moment of Truth to give your attention to:

Existing Customer Feedback

If you are currently collecting Voice of the Customer feedback you already have access to a valuable pool of customer data. Analyzing this data will reveal the “key drivers” – the things that matter most to your customers. Low-performing, high-impact drivers present an opportunity for that quick win.

Quantitative data sources can also be substantiated with qualitative sources. Consumer focus groups or Client Advisory Boards (CABs) can provide a valuable pool of insights to guide your efforts. Talk to your customers about problems and issues they are facing, interview your best customers, ask them about things that matter most to them and you’ll start to uncover areas of your business in need of a closer look.

Employee Feedback

If you are not currently collecting customer feedback or are unsure about the quality of the data you do have, remember you always have a wealth of customer insights at your fingertips – from your employees. A poor customer

experience will translate into more customer problems, these customer problems inevitably become employee problems when frustrated customers come looking for help. In-depth interviews with front-line employees are one way to mine employee insight on the customer experience.

If you are not currently collecting customer feedback or are unsure about the quality of the data you do have, remember you always have a wealth of customer insights at your fingertips - from your employees.

Another approach is to talk to the people who are experts at delighting your customers. We know that every organization has Brand Ambassadors, those internal employees who regularly go above and beyond for customers. Brand Ambassadors are often acutely aware of internal barriers hurting the customer experience (and how to overcome them). They genuinely care about helping customers and are personally invested in making your customers successful.

If you can find these individuals they will be a valuable resource in better understanding the needs of your customers.

Customer Immersion

Finally, you can always go *Undercover Boss* style and spend some time on the front lines. CEOs in that popular reality tv show are always astounded at the obvious things destroying the customer experience. You will likely find similar opportunities in your own organization that, with a little extra thought and attention, can dramatically improve the customer experience.

As you progress on your journey, Customer Journey Mapping becomes a valuable tool to create a differentiated experience.

Your Customer Experience Strategy

Any work that you have done to define your customer experience strategy should have included an element of the above three methods. If so, then you will want to leverage the work you have already done around your strategy to identify

what you should be mapping.

If you are early on in your customer experience transformation journey your focus should be on fixing the breakpoints that consistently destroy the customer experience. Then, as you progress on your journey, Customer Journey Mapping becomes a valuable tool to create a differentiated experience. Because the goal of transformation is never to be “ok,” the goal is to be consistently great.

WHO SHOULD BE INVOLVED IN CUSTOMER JOURNEY MAPPING

Customer Journey Mapping should always be conducted with your cross-functional customer experience team. If you don't already have this team in place, here are several considerations as you develop your team:

Seniority

You want to include people who are senior enough to have deep expertise in their area of the business, but not so senior

THE POLITICS OF CUSTOMER EXPERIENCE

In Oracle's white paper, *Seven Power Lessons for Customer Experience Leaders*, lesson number one is, "Customer experience is political." The book states, "A key aspect of your mission as a customer experience leader is therefore to act as the political champion for customer experience."

Choosing your cross-functional team is the first step in giving customer experience the political clout it needs to create lasting change across the organization.

that they will be too busy, or have thinking that is so high-level that they won't be able to dig into the details. They need to understand all of the in's-and-out's of their department, but also see how their department connects into the bigger customer experience vision.

Customer Experience View

You want to avoid looking at seniority alone, however. It's important to seek out the people who innately understand the importance of the customer experience. Otherwise you could waste valuable time trying to constantly establish the importance of what you are doing. You need a team who understands and believes in what you are trying to accomplish, and is excited to be a part of it so you can start building momentum.

Organizational Role

Your cross-functional team needs to represent the interests and challenges of the entire organization. You will want to include functional representatives (e.g., Marketing, Finance, IT, HR) as well as business representatives (e.g., regions, practices). While you may find more people in Marketing who are excited about using customer feedback to drive change,

they may not be able to help you down the road when you need to secure budget or change training policies. It's going to take a representative team to carry the torch throughout your company.

In addition, be sure to secure support from your colleagues responsible for the brand. The brand makes the promise and the experience is responsible for delivering on it. For this reason, you must ensure that the brand team is onboard and connected with the customer experience work. Some companies are even beginning to create Brand and Experience councils with this very purpose in mind.

Take time to build a team that possesses the passion, clout, and commitment to get things done in spite of the resistance you will inevitably face.

Personal Clout

Seek out individuals who are strongly networked across the company. While this may be a person who has a track record of big projects under their belt, don't limit yourself by seeking

out the big stars. You want people who have demonstrated success at managing change outside of big budgets and spotlights. These people tend to rely on a network of relationships to get things done, and these characteristics will help your team build support for the changes ahead.

Size of the Team

The optimal number of people you should have on this team is 12. More than 20 and you'll start feeling some "death by committee," but fewer than 9 and you likely won't have the representation you need.

In *Switch: How to Change Things When Change Is Hard*, Dan and Chip Heath examine how reformers are vital in "rallying the herd" to change their behaviors. "The lessons are clear," they write, "if you want to change the culture of your organization, you've got to get the reformers together. They need a free space. They need time to coordinate outside the gaze of the resisters." Your cross-functional team will be your band of reformers. Take time to build a team that possesses the passion, clout, and commitment to get things done in spite of the resistance you will inevitably face.

HOW TO CONDUCT A CUSTOMER JOURNEY MAPPING SESSION

Customer Journey Mapping is fun. It's also really hard work that requires participants to think about their work in new ways. Be prepared for some moments of tension and spirited exchanges. Because of the nature of the work, however, we recommend spreading the session over two days.

DAY 1 - AFTERNOON

Day 1 is designed to focus exclusively on the customer. Backstage solutions happen on Day 2.

Step 1: Warm-up and Educate

Plan to spend some time doing introductions and warm-up. You want everyone to be on the same page regarding the customer experience and common terms that you use.

Recommended Exercise: Get your participants in the customer's mind-set by giving them all a pair of shoes along with a story about the person who wears them and their recent interaction with your company.

Step 2: Identify Moment(s) of Truth

Specificity will be critical in keeping your team focused while

avoiding the tendency to try to map everything. You want to start out with a specific Moment of Truth in mind and a specific customer persona. Taking the time to get your team invested at this point will keep you moving quickly through the other phases.

Step 3: Confirm the Journey Steps

Every customer journey has “big bucket” steps. For example, if you are evaluating the sales process, the stages will likely be something like: awareness, consideration, close, service and support. Don't spend too much time deliberating these big buckets. In fact, it's good to have these already mapped in advance so you can simply review them and discuss the “make or break” points that you know to exist.

Step 4: Emotional Journey Mapping

A critical part of Customer Journey Mapping is understanding how your current journey makes the customer feel. Develop exercises that will help your team take on the outside in perspective needed to walk in the customers' shoes.

Recommended Exercise: Quote's to Earn represent the ideal customer feedback you would receive after an interaction. Identifying the Quote to Earn at each point of the journey helps your team understand, not only what should happen, but also how that interaction should make the customer feel.

Step 5: Cataloge the Frontstage Touchpoints

At this stage you want everyone to start think about the touchpoints the customer is using to interact with your company. Map these out against your big bucket stages. Common touchpoints will include things like: Call Center, frontline employee, website, word-of-mouth, etc.

Recommended Exercise: Smaller organizations, or those experienced with Customer Journey Mapping, may have a greater awareness of their customer touchpoints. If this is the case, you can save some time by preparing a touchpoint inventory worksheet for participants to complete in advance of the session.

Step 6: Performance Assessment

Now it's time to get tough on yourself. Looking at the customer emotions you have identified at each stage evaluate

how well you are currently performing in the eyes of the customer. At the end of this discussion ask team members to vote on what they think are the most critical breakpoints.

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The final step is to establish a clear plan of action and determine who will be accountable for each item.

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DAY 2 - MORNING

Day 2 is designed to dig into the internal factors creating the current customer experience. At that point you will be ready to start planning for action.

Stage 7: Map Backstage Influencers

There are frontstage touchpoints and backstage touchpoints. Now is the time to looking inside the company to find out what is causing the current customer experience.

Recommended Exercise: The theory is that by asking “Why?” five times you can get to the root cause of any issue. Use this approach to drill into the causes of your critical breakpoints identified in Step 6.

Step 8: Determine Priorities

Now everyone should be clear on what needs to be fixed, and you're ready to examine how to do that.

Recommended Exercise: Looking at the previous exercise you will find that at the end of the chain of "Why?" is an improvement idea. Lay these ideas out on an Impact & Effort Matrix along with other improvement ideas that have emerged over the course of the session.

Impact & Effort Matrix



Step 9: Build the Action Plan

The final step is to establish a clear plan of action and determine who will be accountable for each item. You can use the Action Planning Template on the following page to structure these responsibilities.

Action Plan Worksheet

Use the worksheet below to outline the Who, What, and When's of Fixing a Critical Aspect of the Customer Journey

Moment of Truth:				
Suggested Action:				
Key Steps	Person(s) Responsible	Additional Resources Needed	Success Measures	Milestones/Dates

KEY TERMS

Backstage: Internal processes or groups/departments that the customer cannot see, but impacts their experience directly or indirectly

Breakpoint: Critical times when you are failing the customer

Emotional Journey Mapping: An exercise to evaluate how the customer feels at each part of the journey

Frontstage Touchpoint: Ways in which a customer interacts with the company that the client can see (e.g., website, contact center)

Influencers: Internal groups or people who influence, or own, a piece of the experience – either above or below the line of visibility

Journey Step: Major stage a customer must go through to reach their goal

Moment of Truth: “Make or break” moment in the journey where a customer will either continue or stop their journey

Persona: Fictional character representing a customer type

Root Cause: The beginning of a casual chain leading to an outcome

Any questions?



Email us at info@peoplemetrics.com

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