



Whitepaper

Mapping the Customer Journey

SilverTech



www.silvertch.com

Though it may go by different names –

customer, user, or buyer's journey - the goal is the same: to better understand the myriad interactions your potential customers and customers have with your brand. We will refer to the customer journey and customer journey mapping throughout this whitepaper, but our intention is to refer to any type of multidimensional map that helps you understand your users' flow as they engage with your product or service.

If you are a higher education institution or a hospital or health system, it's perfectly acceptable to swap customer or buyer for student or patient. However, there is an important distinction to be made between customer, buyer, student, or patient and **user** when we are talking about experience.

In this whitepaper, we will clarify that distinction and introduce you to the concept of customer journey mapping, an essential step in improving the user experience.



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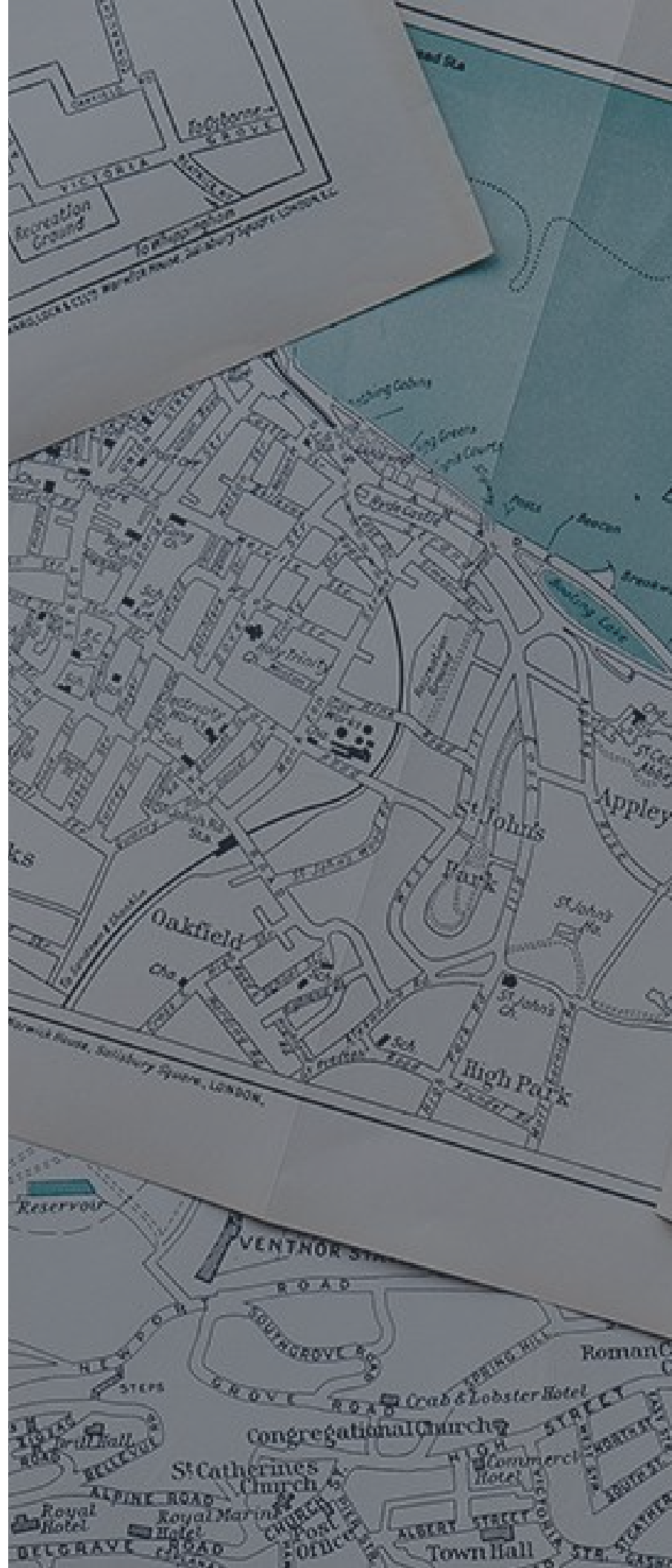


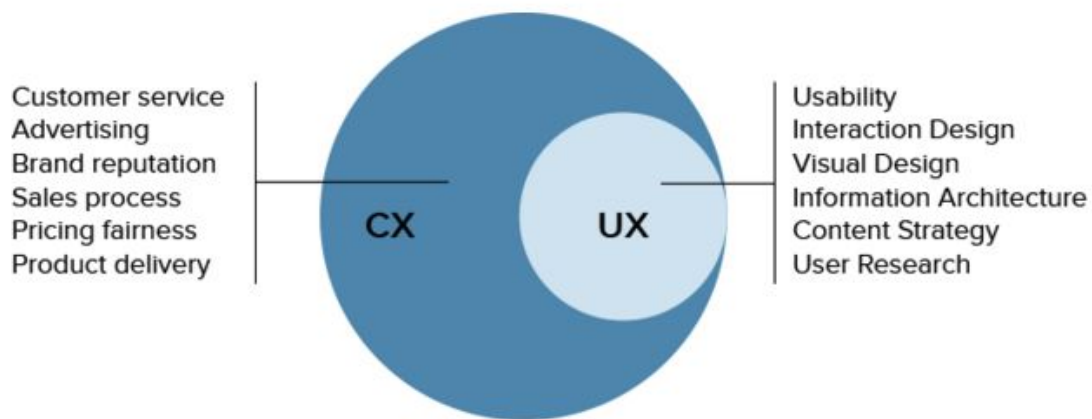


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Customer Experience (CX) vs. User Experience (UX)

In the user experience (UX) world, user experience accounts for only a portion of the customer/buyer/student/patient experience. When our designers at SilverTech are designing a university homepage or a patient portal, they are concerned with the usability and functionality of a piece of the overall experience. As integral as the homepage or portal are to a positive experience, they represent only one of the possible touchpoints where your potential customers will interact with you.



UXPin — The UX Design App (www.uxpin.com)

Source: uxpin.com

Let's illustrate with a couple of examples:

STARBUCKS COFFEE



Bad User Experience (UX) vs. Good Customer Experience (CX)

I enjoy Starbucks coffee. So much so that I use their mobile app to buy coffee everyday. Today, as I approached the drive through window, I realized my balance was low. I go to reload my card but the transaction times out with no clear message stating whether or not my balance has been reloaded. (**Bad user experience**). When I get to the window, I explain to my barista the frustrations that I am having with the app. They empathize, offer me the phone number to call for support, and then say, “hey, today’s coffee is on us.” (**Good customer experience**).

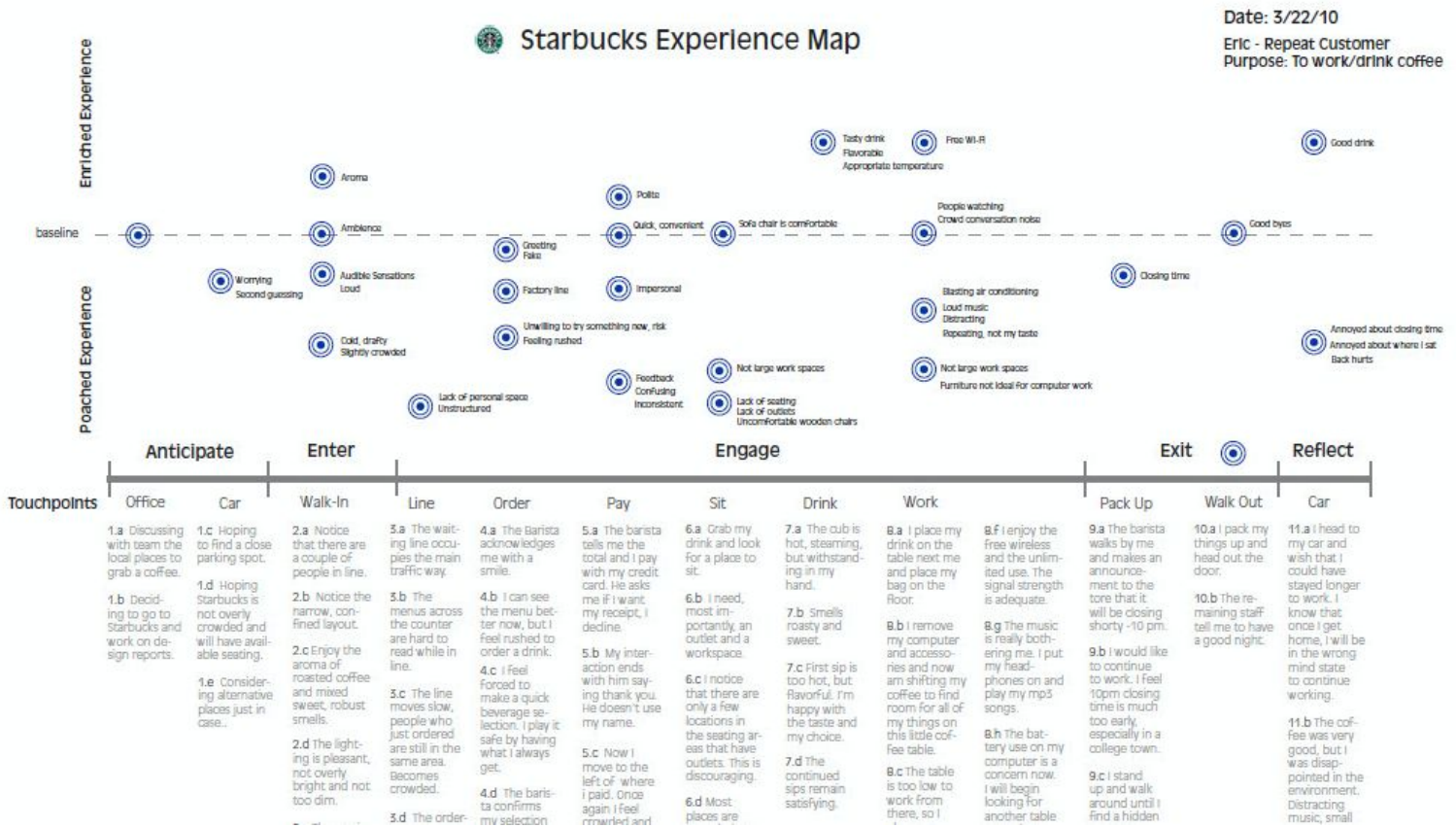


Good User Experience (UX) vs. Bad Customer Experience (CX)

My primary care provider has just unveiled a new website with a mobile responsive patient portal. As the time nears for my annual physical, I log into the portal on my mobile phone and schedule my appointment. **(Good user experience)**. The day of the appointment comes and head to my physician's office. When I get there, they have no record of my appointment and can't take me in until the following week **(Bad customer/patient experience)**.

Why Do I Need a Customer Journey Map?

A customer journey map helps solve problems for our customers at every point that they interact with our brand. It is an invaluable tool in improving the overall customer experience. Here's how Starbucks maps the experience for customers like me:

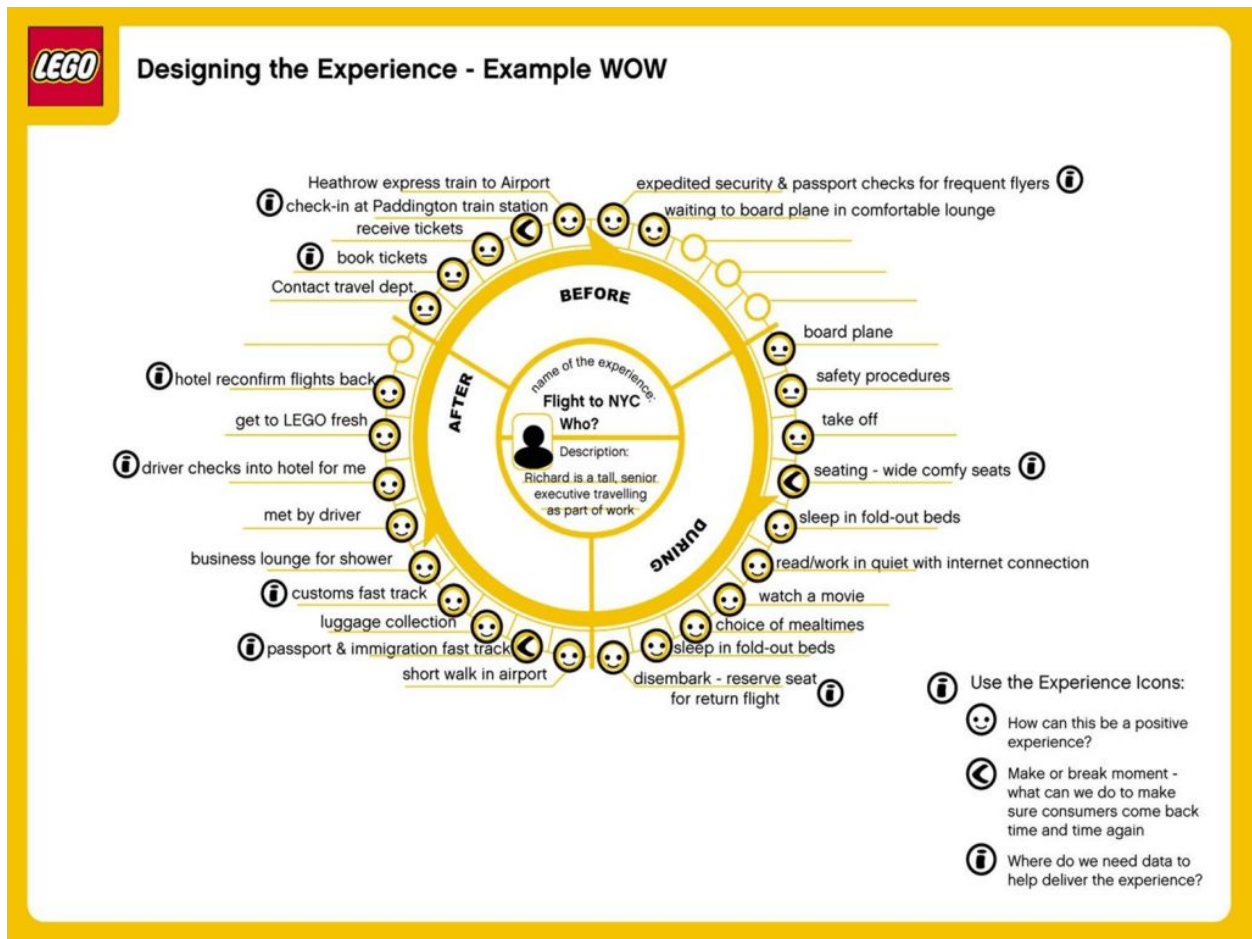


Source: <http://www.ux-lady.com/experience-maps-user-journey-and-more-exp-map-layout/>

Note the multidimensional elements of this map. At the bottom of the map, we describe the literal journey of the customer from their office to the cafe. The bold line represents the customer's state of mind at each point of the journey. Then, above we identify the elements that enrich the experience.

Why Do I Need a Customer Journey Map?

Here's another oft-cited example of a multidimensional map from Lego:



Source: <http://www.ux-lady.com/experience-maps-user-journey-and-more-exp-map-layout/>

Customer journey maps can be “cradle-to-grave” where they account for every possible touchpoint in the customer experience. Or, they can map about a specific experience with your brand. The Lego example maps the experience of a visiting executive. Though the format differs greatly from the Starbucks example, it similarly charts a physical journey and the state of mind at each touchpoint.

Partner Insight

“Customer expectations are changing. Customers in 2017 expect brands to deliver service and value in any channel, irrespective of the channel or what kind of industry or product your brand represents. As customer expectations change a new commercial prize is becoming clear. Customer Experience is the battleground for competitive advantage, where customers will be won or lost.”



Why Do I Need a Customer Journey Map?

In the first webinar of our Lead to Loyal™ series, we went through the steps to develop personas, fictitious representations of your audiences. Well thought out personas, we concluded, are the foundation of personalized, one-to-one communication. Customer Journey mapping builds upon that foundation by taking your personas through a hypothetical experience with your brand. A customer journey map can inform everything from the information architecture of your website to the posters you display behind the teller line of a bank branch. The most immediate and actionable benefit of a customer journey map, and the one we will focus on for the remainder of this presentation is a content gap analysis. Using a customer journey map, you can identify what content your personas are looking for at each stage of their journey.

How Many Maps Should I Create?

Of primary importance to the digital marketer is the experience your potential customers and customers have with your website. We recommend that you map the ideal experience on your website for each of your personas. In our last webinar, we determined that 5-7 personas was the right amount for most organizations. So, at a minimum you should have 5-7 maps.

However, the answer to how many maps should you create depends on how many experiences you want to improve. For example, a bank or credit union, in addition to the website journey, may also want to map the in-branch new account opening process.

Customer enters branch > greeted, signed in > waits in lobby > taken in by banker > opens account

When compared with the process to open an account online this can yield valuable insights. Are there too many steps to open in the branch? How long does it take to open an account online vs. in branch?

Partner Insight

“Among high-performing teams, 88% say a customer journey strategy is critical to the success of their overall marketing.”



salesforce

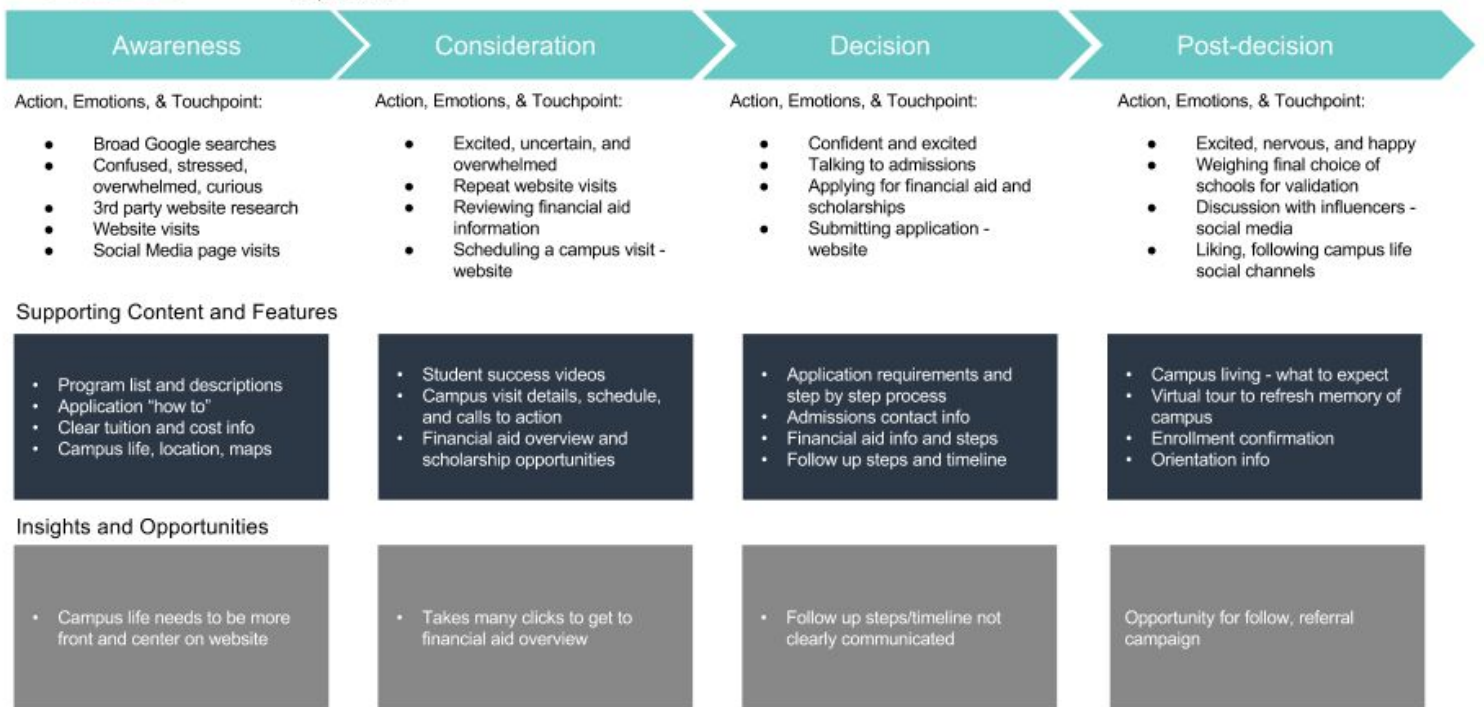
The Essential Elements of a Customer Journey Map



Focused Fran, Customer Journey Map Scenario, Goals, and Experience



- Prospective on campus undergraduate student researching schools to apply to and attend
- Her goals are to find information and answers about admission, costs, financial aid, and campus life
- Research experience includes using search engines and other 3rd party research sites before landing on the university website for more in depth research



Though, as discussed, a customer journey map can take many different forms, we at SilverTech have identified five essential elements of a successful journey map. They are:

- Persona
- Stage
- Action, Emotion, and Touchpoint
- Supporting Content and Features
- Insights and Opportunities

[Personas Webinar >>](#)

Persona



Focused Fran, Customer Journey Map Scenario, Goals, and Experience

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Personas are fictitious representations of your audiences - who they are, what they like, and most important, what they don't like. As we discussed in our personas webinar, you will likely have 5-7 personas to represent your audiences. They will take the form of a 1-2 page document that includes the following five essential elements:

1. Demographics
2. Background
3. Motivations / Influences
4. Frustrations / Barriers
5. Ideal Experience

Stage

In the customer journey map, this is the timeline portion and represents where in the decision making journey your customers are. HubSpot identify three main stages:

1. Awareness

In this stage: “buyers identify their challenge or an opportunity they want to pursue.”

2. Consideration

In this stage: “buyers have clearly defined the goal or challenge and have committed to addressing it.”

3. Decision

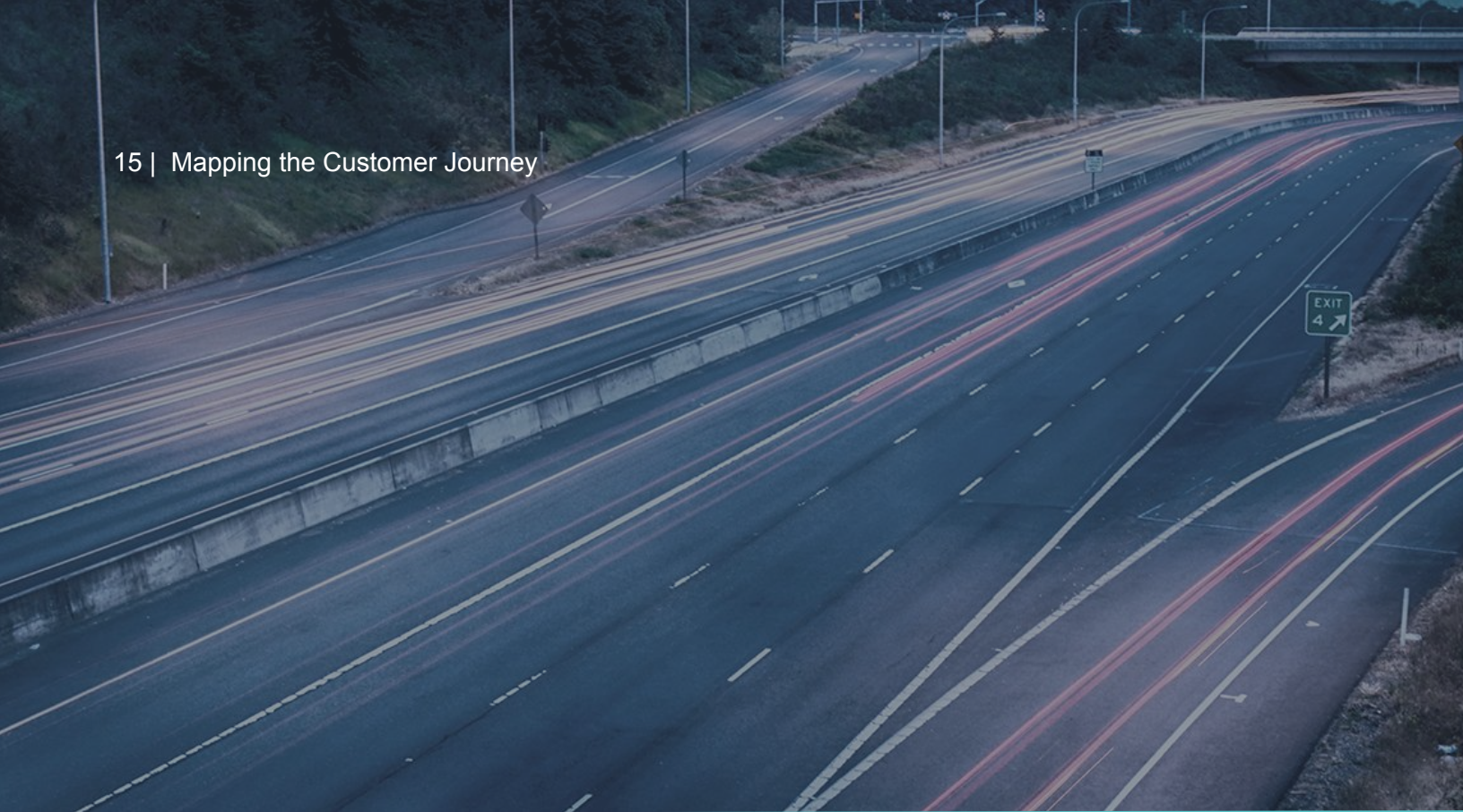
In this stage: “buyers have already decided on a solution category.”



Source: HubSpot Buyers Journey

We go a stage further than HubSpot to include a Post-Purchase stage. This is where your customers are engaging with your product and service and there is a huge opportunity within this stage to “surprise and delight” and ultimately build loyalty.

Though we represent the stages in a linear fashion, it is important to note that your customers are not necessarily on a linear journey. They may skip stages, or even restart the journey many times over. The linear representation is more for ease of use more than anything else.



Action, Emotion, & Touchpoint

Action, Emotions, & Touchpoint:

- Broad Google searches
- Confused, stressed, overwhelmed, curious
- 3rd party website research
- Website visits
- Social Media page visits

Action, Emotions, & Touchpoint:

- Excited, uncertain, and overwhelmed
- Repeat website visits
- Reviewing financial aid information
- Scheduling a campus visit - website

Action, Emotions, & Touchpoint:

- Confident and excited
- Talking to admissions
- Applying for financial aid and scholarships
- Submitting application - website

Action, Emotions, & Touchpoint:

- Excited, nervous, and happy
- Weighing final choice of schools for validation
- Discussion with influencers - social media
- Liking, following campus life social channels

In this area of your customer journey map, you are looking to describe the action - entering a branch, researching on their mobile phone - and their state of mind as they interact with a particular touchpoint, your website, mobile app, or physical location.

Emotion is a critical piece of this step but one that is often overlooked. We know that when we engage with people in a one-to-one situation in real life that emotion affects our tone of voice and physical posture. By including the emotional state, say frustrated or nervous, you can tailor the message at that particular touchpoint so that it is better received by your customer.



Supporting Content & Features

Supporting Content and Features			
<ul style="list-style-type: none">• Program list and descriptions• Application "how to"• Clear tuition and cost info• Campus life, location, maps	<ul style="list-style-type: none">• Student success videos• Campus visit details, schedule, and calls to action• Financial aid overview and scholarship opportunities	<ul style="list-style-type: none">• Application requirements and step by step process• Admissions contact info• Financial aid info and steps• Follow up steps and timeline	<ul style="list-style-type: none">• Campus living - what to expect• Virtual tour to refresh memory of campus• Enrollment confirmation• Orientation info

What content works best at this point in the map and what features should it have. Awareness content typically takes the form of a whitepaper, checklist, or how-to video that answers and educates. Consideration content takes the form of a webinar, case study, or FAQ that show how your company can help with their problem. Decision content takes a trial, demo, or consultation that will help them make a purchase decision. Then, post-purchase content can take the form of a satisfaction survey, special offer, or referral bonus.

With the added dimension of the "action, emotion, and touchpoint," you can ensure that tone and presentation of your content is appropriate.



Insights & Opportunities

Insights and Opportunities			
<ul style="list-style-type: none">• Campus life needs to be more front and center on website	<ul style="list-style-type: none">• Takes many clicks to get to financial aid overview	<ul style="list-style-type: none">• Follow up steps/timeline not clearly communicated	Opportunity for follow, referral campaign

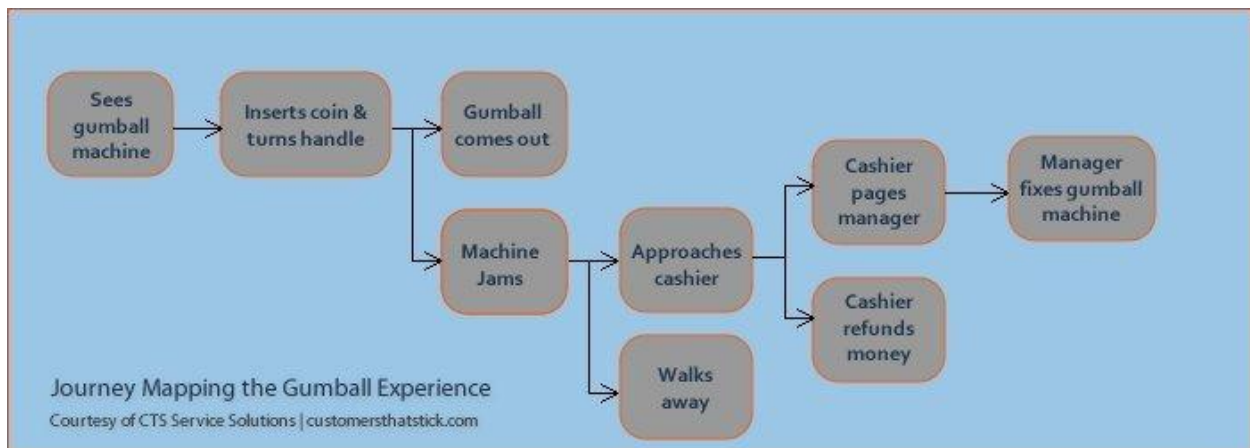
What can you do to really win over your customer? This is also where you can identify whether the interaction has any offstage elements. An onstage interaction is one that takes place in front of your customers. An offstage interaction is what goes on behind the scenes.

For example, a customer reads a blog post and then signs up for your newsletter (**onstage**). That form fill triggers enrollment in your newsletter list so that your customer can receive an email when the next blog post is published (**offstage**). It is useful to identify offstage interactions as you may be able to automate many of them, as in this example.

How to Implement a Customer Journey Strategy

Believe in the Value of Customer Journey Mapping

Customer journey mapping is imperfect as it is nearly impossible to map every interaction your customers have with your brand. Take, for example, the seemingly simple customer journey of “the Gumball Experience.” At first thought, you may be inclined to map this journey as 2 steps - customer inserts coin, machine gives gumball. But, what happens if the machine breaks? Where does the customer go? Do you have a process in place?



Source: <http://www.convinceandconvert.com/community-management/customer-journey-mapping/>

Just as personas are used to represent a segment of your audience and cannot, nor should they, fully represent every single member of your audience, a customer journey map is used to represent the main flows that your users can take. It is not necessary to get to the quantum level and map every possible scenario. In the gumball experience, for example, there is no need to map the scenario of every gumball spilling out of the machine, rolling across the floor and tripping customers as they enter the store. As long as you become aware of the main flows, touchpoints, and emotions at each stop, there will be value in the exercise.



Include Your Team

Just as when you create your personas, you want to include your team, it is critical you do the same with your customer journey map. One of the main purposes of personas and customer journey mapping is to avoid self-referential design or content creation. By interviewing your sales team and your customer service teams to get their input into the user's flow and state of mind, you will avoid focusing too heavily on your own expectations and biases. They are the ones interacting with the customers onstage and off and will likely have the most input into what happens at a particular touchpoint.

Further, just as we recommended a company-wide rollout of your personas, we recommend the same for your customer journey maps. There is great value in having everyone understand the journey and where they fit in.

Make it a big deal. Don't just email your company, have a special roll-out at a company-wide event.



Use Your Map

A customer journey map can take many different forms. The template that we provide may not be a perfect fit for your organization, but our hope is that it will alert you to the main elements of a customer journey map and it will be flexible enough for you to customize to your specific needs.

Don't be intimidated by customer journey mapping. Though there are myriad ways to do it and it can be infinitely complex, a simple map can quickly improve your marketing. The goal is to improve the customer experience. By identifying the ideal experience at each touchpoint and identifying what touchpoint comes next, you already have taken great leaps to improve the experience.



Screenshot: Google image search for "Customer Journey Map"

Content Gap Analysis

One of the greatest benefits of a customer journey map is a content gap analysis. Of all the maps that you create, we recommend that digital marketers start first and foremost with their website. By mapping the ideal experience for each of your personas online, you will gain insight into what they are looking for when they visit your website.

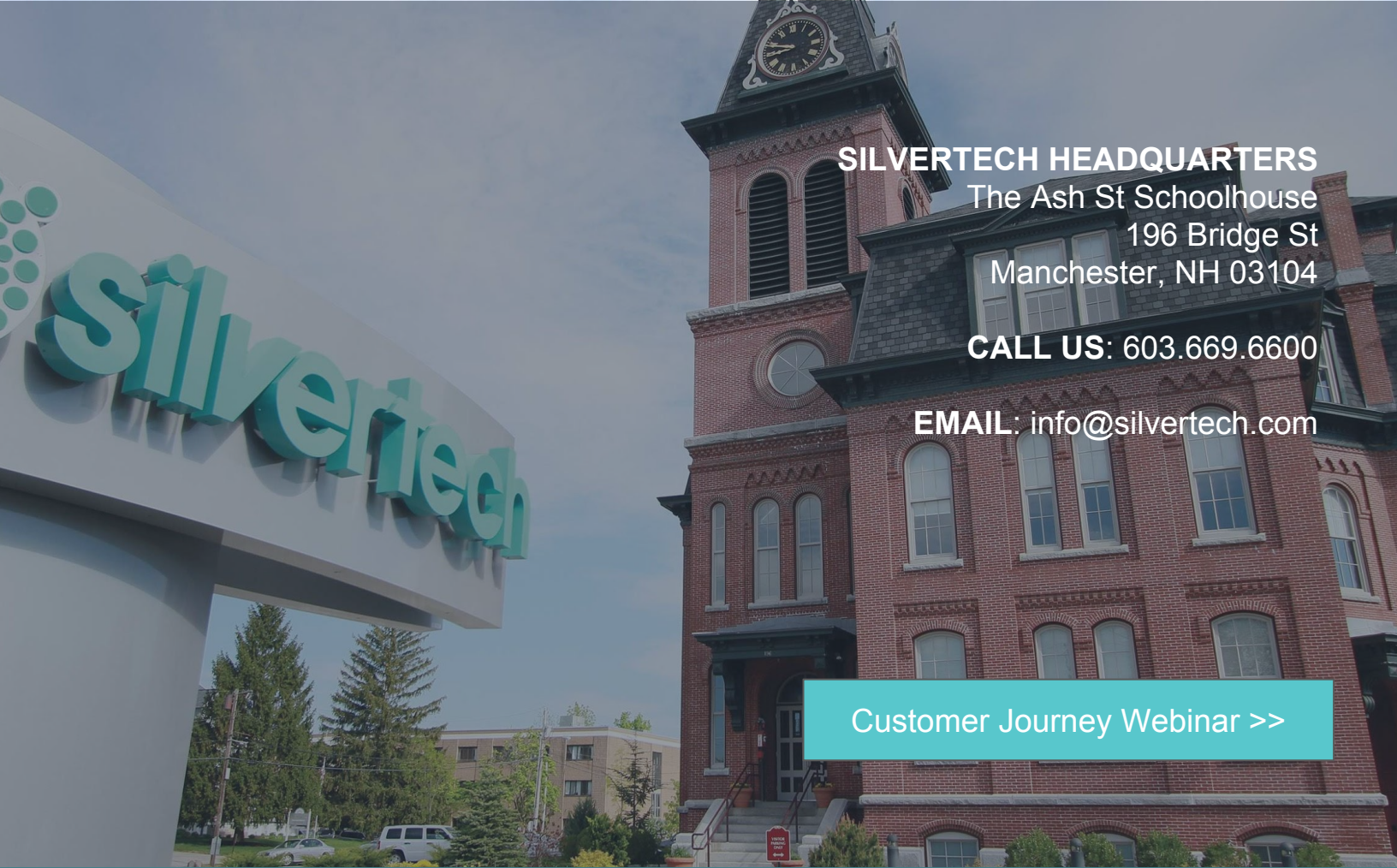
Then, you can identify if you are meeting their needs. Do you have the right whitepapers, blog posts, or FAQs for each of your personas? A customer journey map is an invaluable tool for content planning.

Introduction to Customer Journey Technology

Many advanced content management systems, Sitecore, Episerver, Kentico, are incorporating customer journey tools into their dashboards. We expect to see more of this in coming releases. At SilverTech, we have also partnered with Thunderhead and their listening platform the ONE Engagement Hub.

“ONE is an engagement layer allowing you to build a fully functioning Customer Operating System™. ONE unifies the end-to-end customer experience providing a seamless, consistent and personal customer journey every time.”





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[Customer Journey Webinar >>](#)

“...Through their approach, SilverTech has proven they understand that the best marketing strategies are those that enhance experiences throughout the entire customer journey.”

Brian Halligan, CEO HubSpot



WEB & MOBILE



DIGITAL
MARKETING,
MARKETING
AUTOMATION &
STRATEGY



SALESFORCE
INTEGRATION &
DEVELOPMENT



USER EXPERIENCE
(UX) DESIGN



APPLICATION
DEVELOPMENT