Customer Journey Mapping for Better Customer Experiences

Avoid common traps and generate the insights needed to truly leverage Customer Journey Maps to bring your customers closer

Presented by:

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Your Host: Michael Hinshaw

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- Teacher (and student) of customer experience and digital innovation

- Mapping customer journeys and improving customer experiences since 1998

- CMO.com columnist and best-selling author: *Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How To Be One of Them*

- Mentor and Richard H. Holton Teaching Fellow in Entrepreneurship at UC Berkeley's Haas Business School

First: A disclaimer.

Journey mapping is a BIG subject and has LOTS of interest. But it's complex.

✓June 2014: UK
✓Journey Map and CX Training
✓3 Days

✓July 2014: Northwestern US
✓Journey Map and CX Training
✓2 Days

✓Today
✓Journey Map Webinar
✓45 Minutes

✓September 2014: Spain
✓Journey Map Training
✓1.5 Days

Today, we're going to discuss: **What's happening**, How Journey Maps can help and How you should create them.

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Macro trends driving the importance of customer experience

Why 90 percent of executives say customer experience is "critical" to compete...

| 1.
The Era
of Smart
Customers[1] | → Customers are increasingly in control of the relationship
→ Digital devices change the ways customers transact and buy
→ Bring expectations of "the best" to all their customer experiences |
| --- | --- |
| 2.
Customers
Indifferent and
Disloyal[2,3] | → 89% of retail customers will leave after a single bad experience
→ 1% feel expectations are always met
→ 79% will share their complaints with others |
| 3.
CX Drives
Measurable
Value | → 86% of customers likely to purchase more with better experience[3]
→ $Millions in additional revenue even for smaller companies[4]
→ Up to 128% better market return for CX leaders over laggards[5] |

1) *Smart Customers, Stupid Companies*: Hinshaw and Kasanoff, Business Strategy Press, 2012; 2) CapGemini 2013 WRBR; 3) MCorp Consulting Client Research; Oracle and Harris Interactive, 2011 and 2012 Customer Experience Impact Report;
4) MCorp Consulting and Forrester Research, Inc. North American Technographics® 2013 (US) 5) Watermark Consulting Customer Experience Stock Analysis

Customer experience occurs every time a customer interacts with a company's products, services or devices...

The challenge: customer experience is whatever your customers think it is. →

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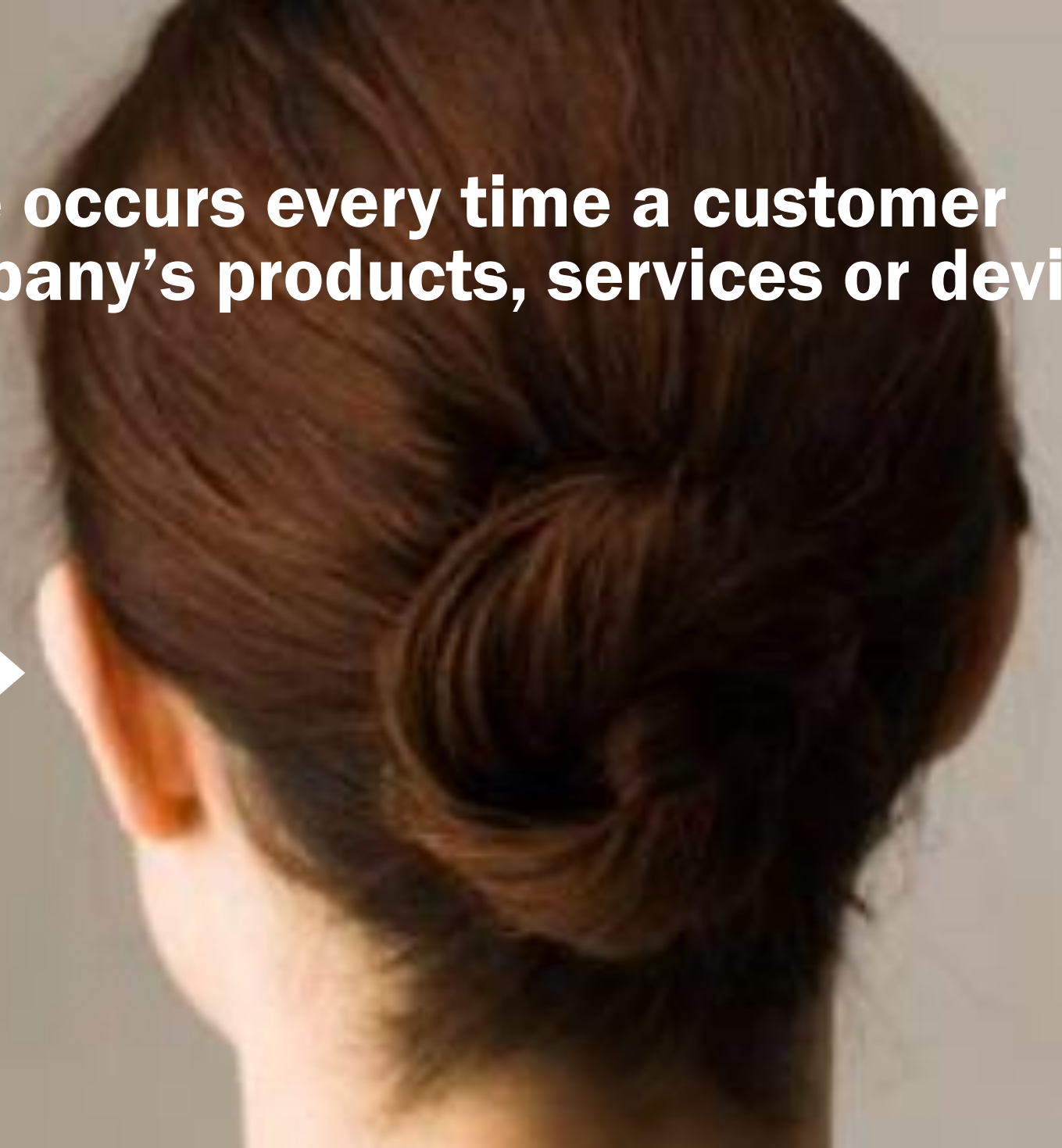
Customers judge the quality of experiences based on how:

Easy
Enjoyable
Effective

They perceive them to be.

What percentage of executives think the experiences they provide their customers is "excellent"?

80%

Source: Bain & Company Report: *"Closing the delivery gap"*

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What percentage of customers think (overall) the experience they receive is "excellent"?

8%

8% vs 80%
is a 73 point
Experience
Delivery Gap

Source: Bain & Company Report: *"Closing the delivery gap"*

Why? Because customers have expectations of experience.

**If those expectations are
not met, there's a gap.**

expectation

experience

When expectations aren't met, brands get dumped

Consumers   **89%**

Business Customers 66%

Given a choice,
most customers will switch
brands after a single
bad experience.

And over half of all B2B buyers will stay away from a brand for 2+ years

Source: ZenDesk 2013, Oracle (Right Now) Harris Interactive Customer Experience Impact Reports 2006-2012

Then they'll tell others exactly how they feel...

| Consumers | 79% |

| Business Customers | 95% |

Dissatisfied customers actively share complaints with others.

And 88% of B2B buyers have been influenced by an online customer service review when making a buying decision....

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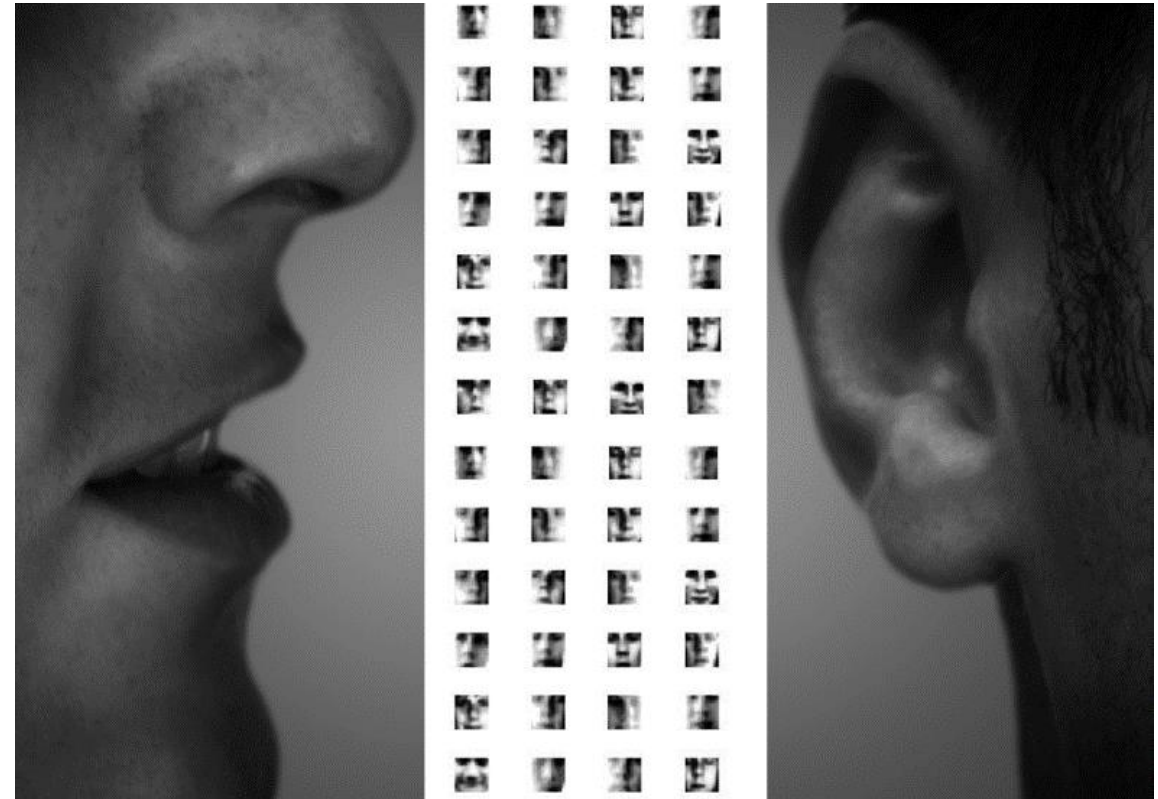
In short? The world in which we do business has changed
Because your customers, and their expectations, have changed, too.

1960s+
Information
Age

1990s
Desktop
Internet

2010+
Era of Smart
Customers

The
Industrial
Revolution

Personal
Computing
1980s

Mobile
Internet
2000s

Everywhere
Computing
2014+

?

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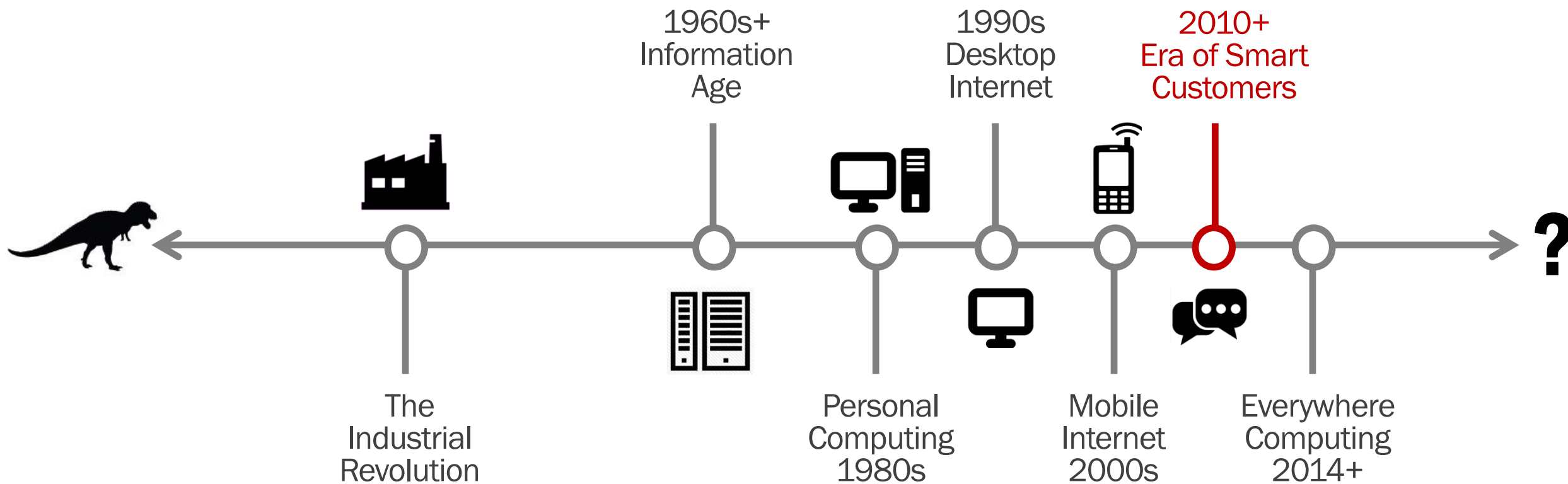
Welcome to the era of smart customers... where there is only one sustainable advantage:
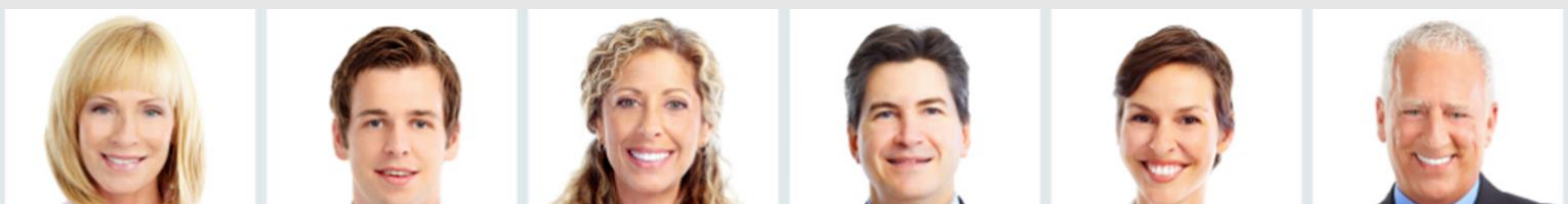
Deliver a better quality customer experience across all interactions

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Giving customers the experiences they want requires "seeing" the journey through her eyes, and doing so across…
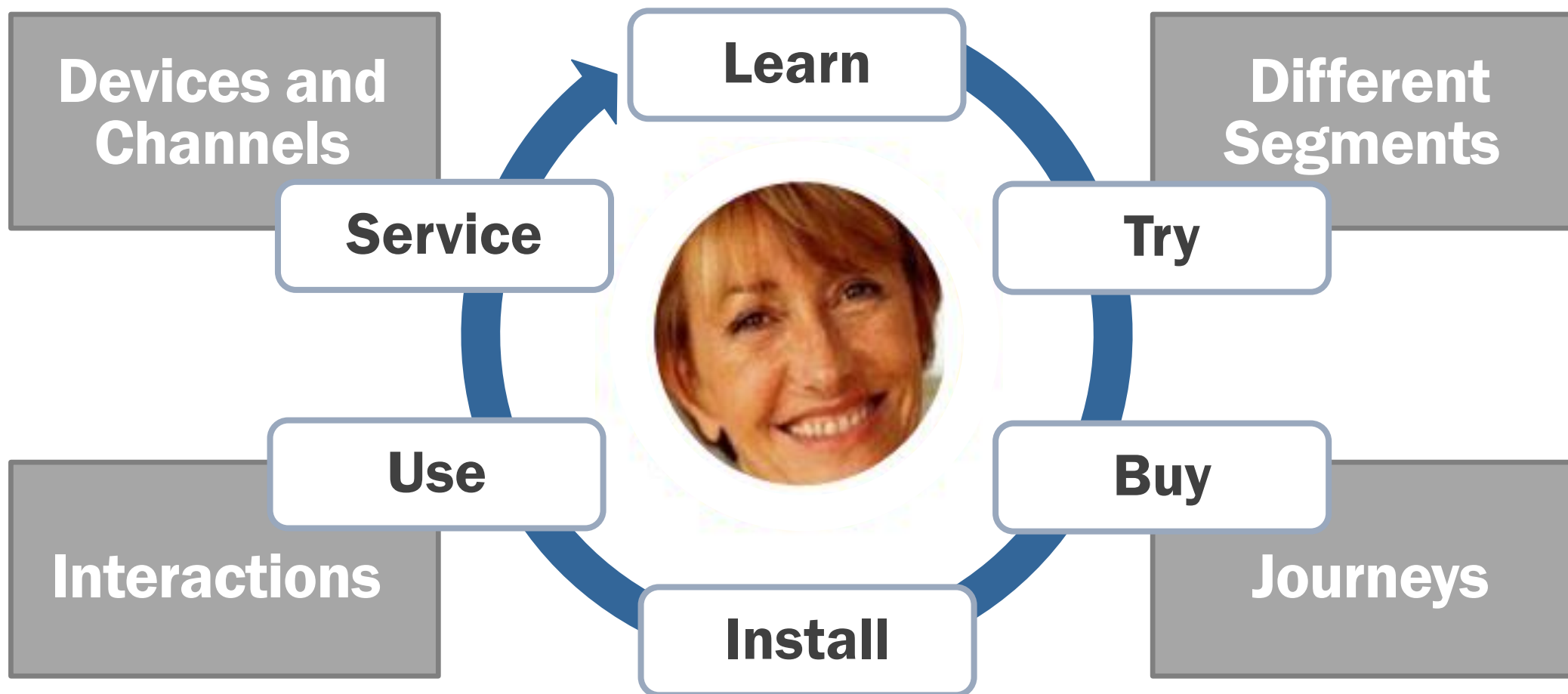
Devices and Channels

Learn

Service

Try

Use

Buy

Install

Interactions

Different Segments

Journeys

Today, we're going to discuss: What's happening, **How Journey Maps can help** and How you should create them.

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Journey Mapping is just one aspect – an artifact – in the discipline of Customer Experience Management.

Business Strategy

Brand Strategy

Experience Strategy

Experience Delivery

What is your strategy for business success?

What are customers' expectations of your company?

What is your plan for meeting those expectations?

How will you implement your plan, to meet customer expectations?

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And is a tool to help inform the creation and delivery of better customer experiences.

Creating better customer experiences requires:

Experience Strategy	Customer Insights	Experience Design

Journey Mapping fits (primarily) in here

Delivering better customer experiences requires:

Processes and Systems	Governance	Measurement	Organizational Culture

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Journey Mapping helps us think like customers

Which means we can serve them better, where and how it matters most.

Understand the reality of peoples lives – and empathize with them

Help make better decisions, informed by customer needs

"Thinking like a customer" With an outside-in, customer-centric perspective

Improve cross-silo communication and understanding

See where to (re)design and improve systems and processes

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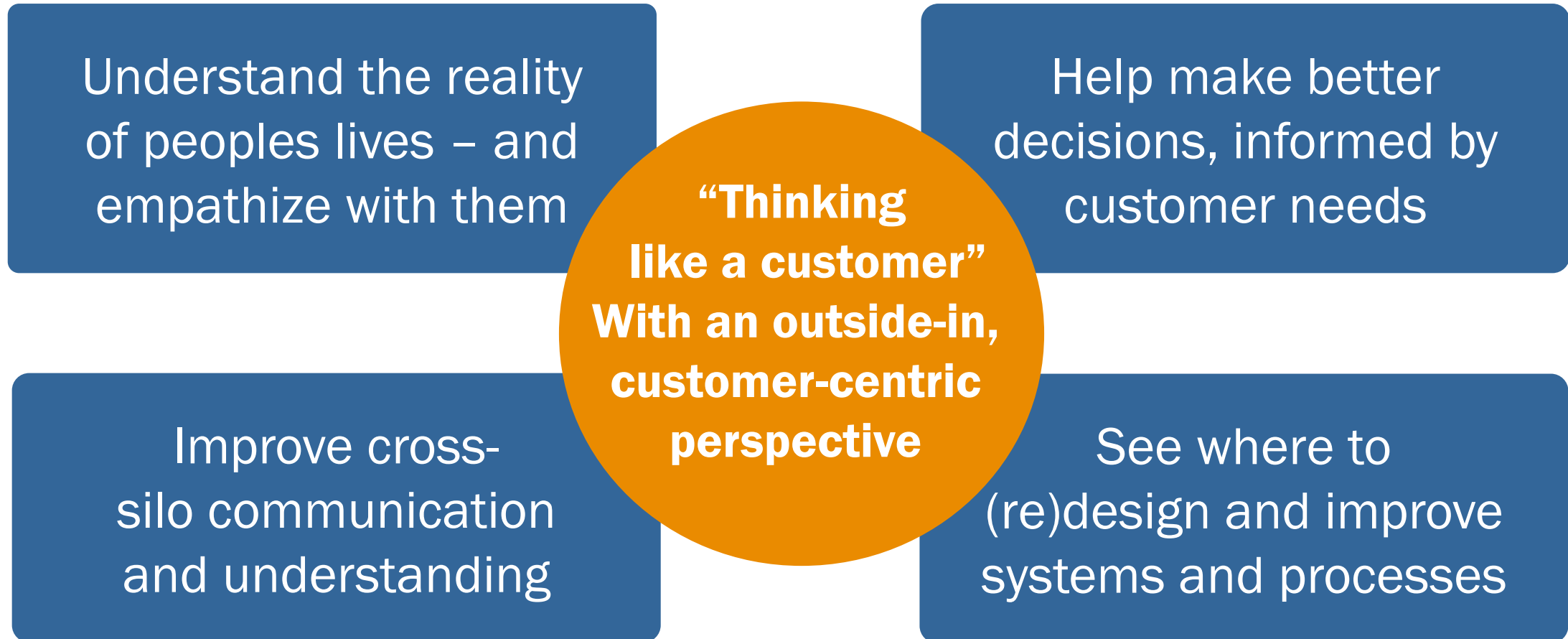
Helping eliminate the 'silos' which impede customer goals
To deliver seamlessly across devices, services, channels and journeys

Sales

Data

Online

Call Center

Customer Service

Partners

Literally "mapping" the journeys your customers take...
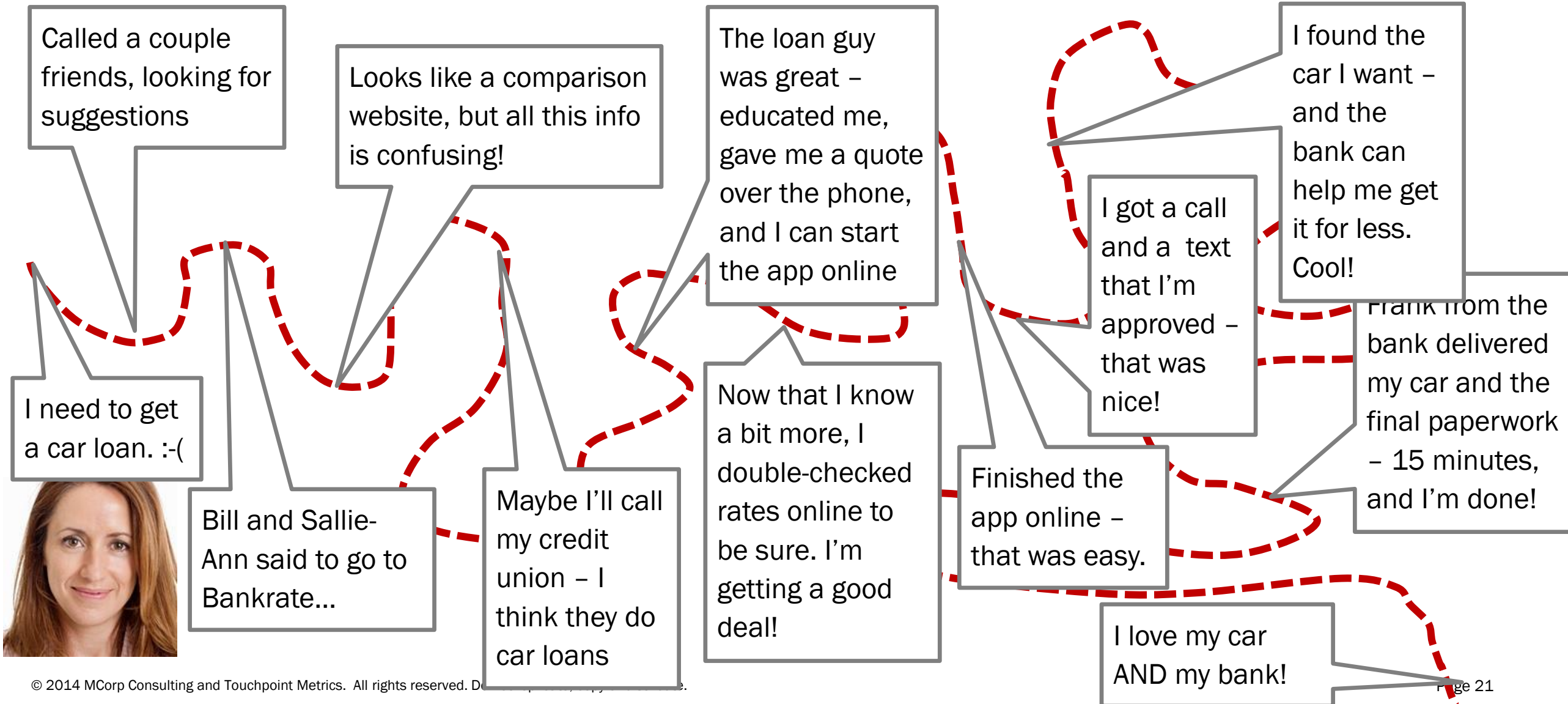
Journey mapping shows what's happening at each stage, and what "moves" customers from one stage to the next.

**Customer Perspectives
of the Experience
(Outside-in view of journey)**

Human, Digital
and Static
Touchpoints

Functional and
Emotional
Attributes

| Learn | Try | Buy | Install | Use | Service |

Business
Processes, Data
and Technology

**Internal Perspective
of Data and Systems
(Aligned to customer journey)**

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As well as how to best move customers through the journey

Leveraging interactions and perceptions to improve business performance

Touchpoints	**Attributes**		**Touchpoints**	**Attributes**		**Touchpoints**	**Attributes**
WoM	Pricing		Retail Staff	Enjoyable		Answer Desk	Reliability
Web Search	Ease of Use		Digital Device	Simple		Support	Accessibility
Adverts	Selection		Self-Help	Easy		Partners	Speed

Learn → **Try** → **Buy** → **Install** → **Use** → **Service**
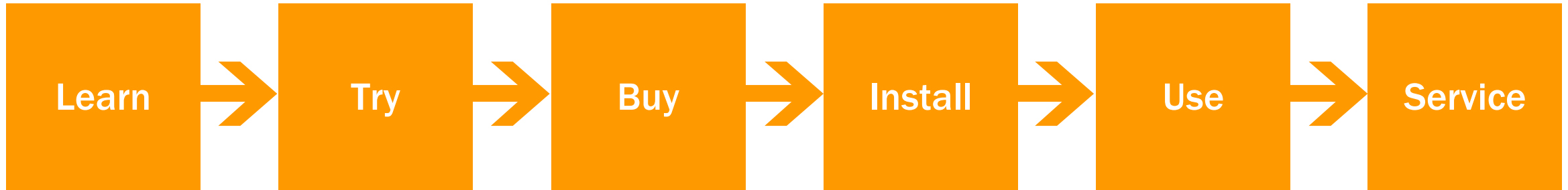
Which **touchpoints** most effectively drive customer movement through the lifecycle?

How do **emotional attributes** influence customer decision making and perception?

What combination of touchpoints and emotional responses **boost engagement and advocacy** – and across which journeys?

There are many different ways to look at journey maps

Dependent on the issues you want to understand and resolve. For example:

Types of journeys	Descriptions
Relationship	A high-level view of an entire relationship with the company, over the "end to end" lifecycle
Transactional	An actual transaction, like an online purchase or the experience of calling customer service to resolve an issue
Physical	An actual physical journey, e.g. walking through a mall to a retail store, then walking through the store itself
Emotional	An entirely "mental" journey, for example the follow-on effects of hiring (or firing) an employee, or how a promotion affects co-workers
Personal	A view of an entire personal relationship, for example a BDO or Financial Advisor working with a business owner or high-net-worth client over time

Understanding what "is" today, and what could be tomorrow

Current State Journey Maps ("As Is")
Identify opportunities for improvement, and boost understanding of the customer journey

Ideal State Journey Maps ("To Be")
Tie strategy to experience for an understanding of optimal, future-state customer experiences

Customer and Employee Research, and SME inputs

Strategy and Experience Design Principles

Customer and SME Articulation of Ideal Experiences

← Inputs →

Persona

Current state maps

← Outputs →

Ideal state maps

Different kinds of maps drive different kinds of results

"As is" maps tend to support incremental change, identifying gaps to close

Customer Value

Transformative Change
Disruptive, "game-changing" innovation in customer experience

Sustainable Change
Customer-facing improvements that boost engagement and loyalty

Incremental Change
Process, product and operational Improvements

Organizational Adoption and Maturity
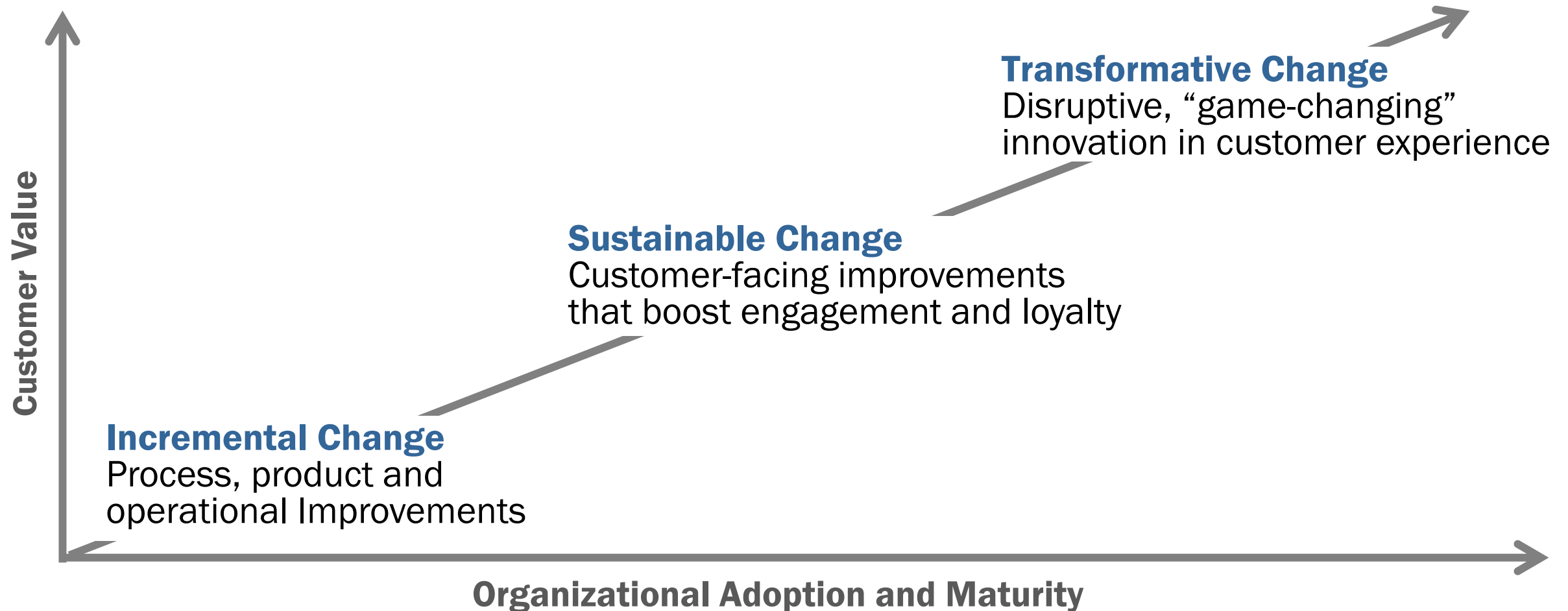
Transformative, game-changing experiences can be driven with the help of future state "to-be" journey maps

Illustrating unmet needs...

Today, we're going to discuss: What's happening, How Journey Maps can help and **How you should create them.**

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A journey map is the story of a customers' experience

It explains what happens along the way, to whom, and how it happens

Wanting
What is she doing, and why is she doing it?
What does she want or need to accomplish?

Thinking
What are her expectations and perceptions across the journey?
Are we meeting her needs?

Doing
What is she doing at each stage of the journey?
What are the touchpoints she encounters?

Feeling
What is she feeling? Does she feel great? Is she unhappy?
Are we causing her "pain" or anger?

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To tell the story, you need to know who is taking the journey

Persona represent the customers taking the journey we're mapping…

- Represents an important segment

- Serves as a stand-in for all customers who share these traits

- "Personified" to create understanding and empathy

The map illustrates this "persona" taking the journey

Tells her story, in her words, in ways that show what does (and doesn't) work

- Journey mapping starts with data gathering and assessment

- Data assembly and storytelling follow

- Forming a clear picture of her journey

There is no one way to create a journey map

They can look different, and be simple or complex depending on their goals

A 6-step process to "as is" Journey Map creation...

Know how you hope to – and reasonably can - drive action, before you begin...

1	2	3	4	5	6
What's the problem?	**Who are you solving for?**	**What's happening today?**	**Visualize the Journey**	**Socialize and share**	**Take Action**
Be clear on what you want to accomplish; define the problem you're trying to solve	Know whose journey you're mapping, and the journey you wish to improve	Do the research: Talk to your people and to your customers – an outside-in view is critical	Design your maps so they're complete, look good, and are easy to understand	Widely share and socialize your maps across your organization	Get at the root cause of the issues, and prioritize improvement opportunities

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Must Haves: While customer journey maps can "look" different, these five elements are critical to include:

One: Always include the journey you're mapping, and who you're mapping it for.

Two: Be clear about what your customers are trying accomplish

A picture of your customer

A brief description of them

Journey Outside-in View

Learn → Try → Buy → Install → Service

Goals and

What are customers trying to accomplish at each stage? What is their goal?

Four: What are their expectations? What do they think the experience should be?

...ons are they having, and when?

...touchpoints are they most likely to inter...

Three: What are they doing? What touchpoints do they encounter and which are most important to them? Are any causing them pain...?

...these interactions pain points (not meeting...

Expectations What are customers hoping for as they interact? What do they want or expect to happen?

Five: How does the experience make them feel? Good, bad? Indifferent? (Angry...?)

...customers think and feel as a result of each interaction? Satisfied, easy, enjoyable, etc.

...their needs are being met?

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Nice to Haves: Deepen the insights and utility of your maps with these six elements and how they re

One: What do customers say is most important to them?

A picture of your customer

Two: What are specific opportunities to improve the experience?

Buy

Ins

Three: Which groups or people "own" key interactions in each journey stage?

A brief description of them

Four: Which interactions can correlate to business outcomes, such as customer loyalty, positive Word-of-Mouth and loyalty?

t? What do they say to get right?

e experience h er?

Owners Who "owns" different aspects o erience? Marketing, call center, sales, etc.

Five: Show how important a touchpoint is, vs. how well it's meeting customer expectations

interactions are most critical to driving customer loyalty?

pecific interactions performing against cust

Six: Customer-related business metrics that show exactly how well things are (or are not) working

Customer Metrics How well is each stage and the overall journey performing

To better understand what drives experience, you can also connect your processes to the customer view

Outside-in Journey maps are driven by customer perceptions

| Touchpoints | Drivers | Overall | Emotions | Lifecycle |

| **Learn** | **Try** | **Buy** | **Install** | **Use** | **Service** |

| Data | Systems | Processes | Technology | Capabilities |

Inside-out Journey Maps are driven by processes, data and systems

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Connecting inside-out and outside-in perspectives at a fairly high level, or as deep as you want (or need) to go

One: Business processes, data, systems and technologies that support delivery of the experience

Try

Buy

Install

Use

Service

A brief description

Business Processes

Data: What data supports which interaction

Systems: What systems are responsible for

Two: Is anyone – partners, vendors - outside your company responsible for the systems that support the experience?

Three: What internal metrics do you use to track systems performance? How do they map to different stages?

at processes control the way

nt systems support customers acro es, channels, etc.?
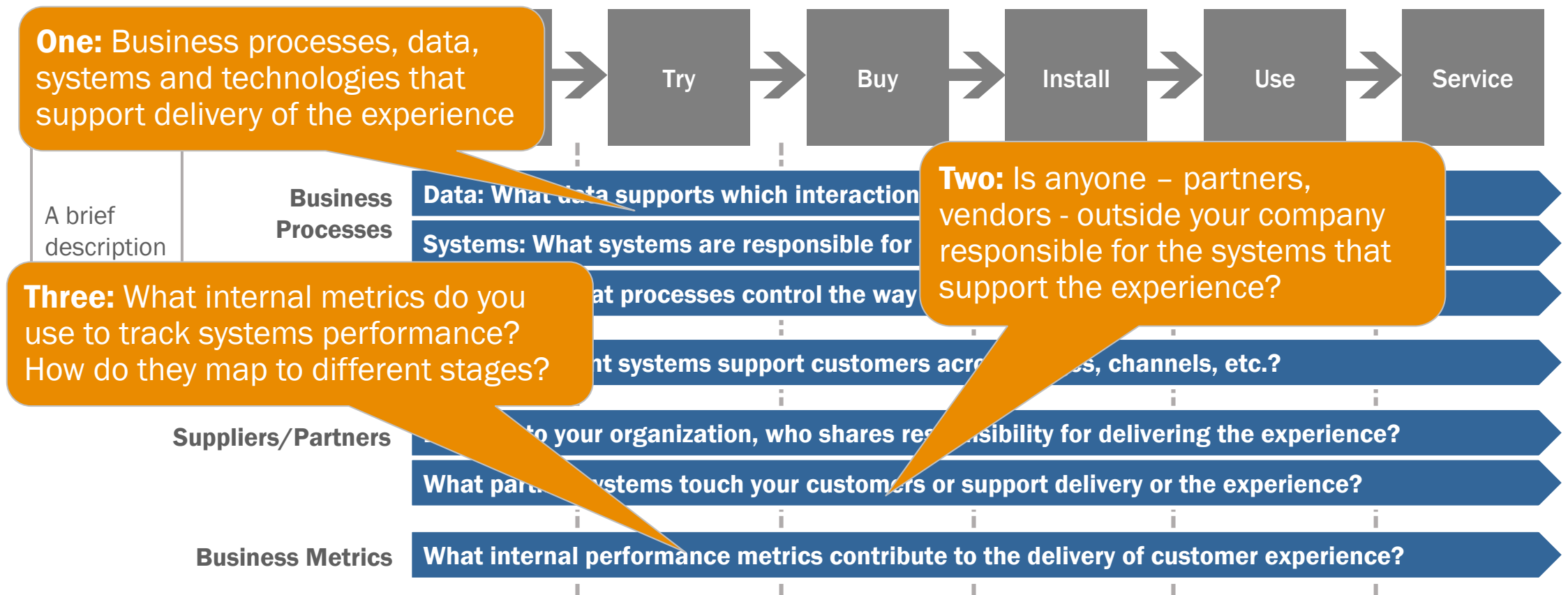
Suppliers/Partners

to your organization, who shares res sibility for delivering the experience?

What part stems touch your customers or support delivery or the experience?

Business Metrics

What internal performance metrics contribute to the delivery of customer experience?

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While persona and journey maps must be research driven, you can't always get the data you want (or need). So…

First: VoB/Voice of Business	Second: Qualitative	Third: Quantitative
Limited resources and/or commitment, and/or lower priority	Driving some decisions around investment and prioritization	High value segments, initiatives; potential significant investment
Customer-facing, SME-driven workshops provide data	Add customer Interviews, social listening, focus groups: smaller sample size	Add web surveys, data mining, multiple interviews: Large sample size
Informative	Highly directional	Confidence to drive significant investment
Little or no ability to monitor results	Limited ability to monitor results	Ability to measure results (Monitor over time)

In Closing: Six key journey map success factors

1. Be clear on what you want to accomplish

2. Know whose journey you are mapping

3. Do the research: talk to your people, and your customers

4. Design matters: Persona and journey maps must look good, make sense and be easy to understand

5. Socialize and widely share across your business, involving key stakeholders early and consulting them often.

6. Take action; avoid "analysis paralysis." Attack low-hanging fruit first – there are nearly always a few quick fixes

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In Closing: And six (of the many) obstacles to avoid...

1. Failure to include stakeholders <u>across</u> the business (including those front-line employees who "live" the journey)

2. Not getting a true understanding of the customer perspective

3. Focusing too much on statistically significant data

4. Not focusing enough on statistically significant data

5. Failure to track results and monitor customer feedback

6. Not updating your maps as markets and customers change

Any questions? Let's talk...

Thank you!

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