

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

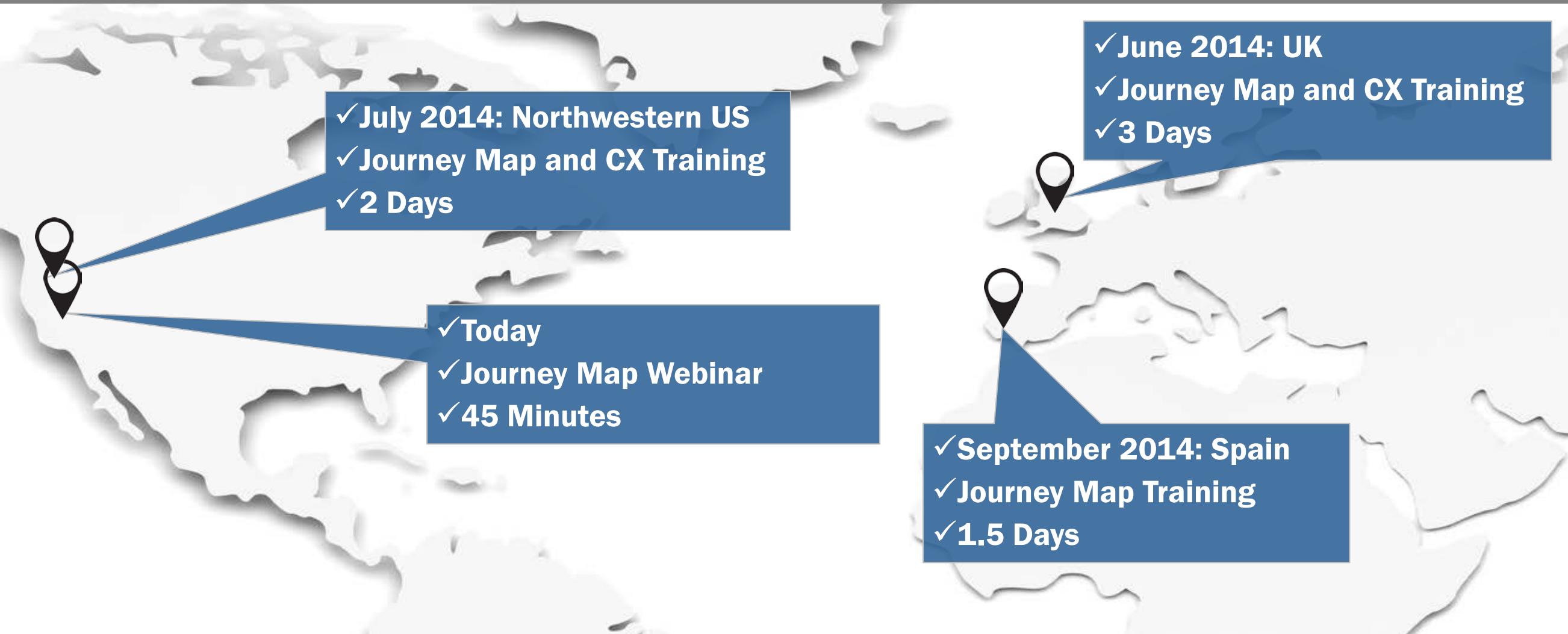


Managing Director, MCorp Consulting

- 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.



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

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 Customers¹

- 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

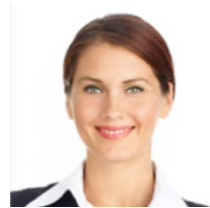
- 86% of customers likely to purchase more with better experience³
- \$Millions in additional revenue even for smaller companies⁴
- Up to 128% better market return for CX leaders over laggards⁵

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.



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%



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

8%

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



Why? Because customers have expectations of experience.

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



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

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

Consumers 79%

Business Customers 95%

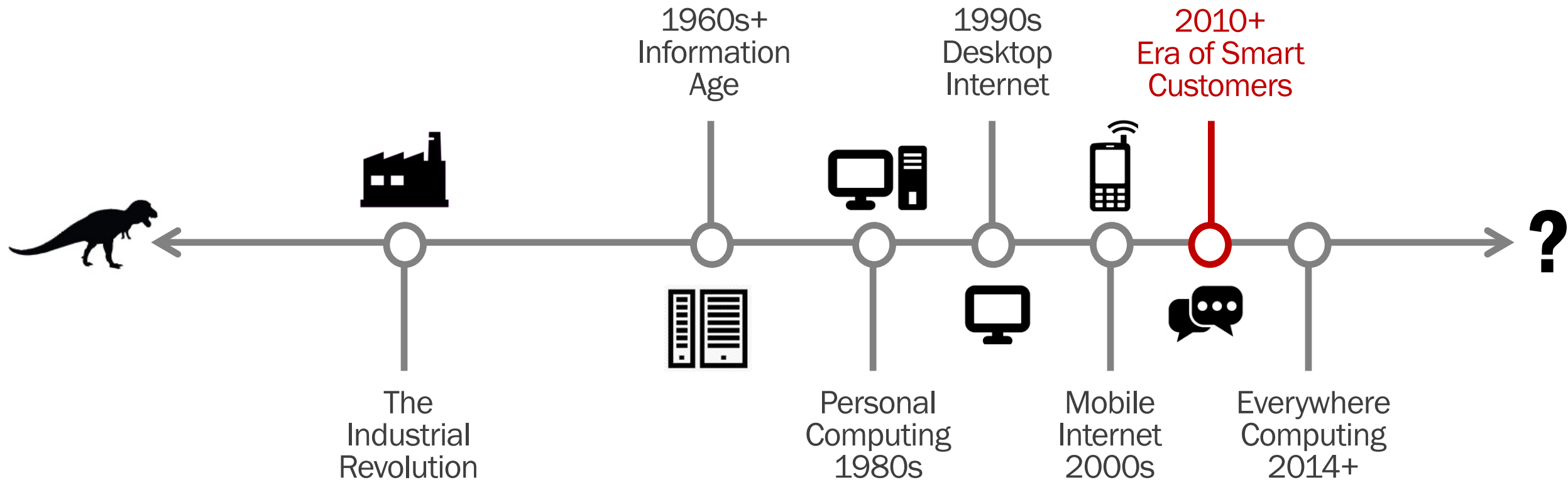
Dissatisfied customers actively share complaints with others.

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



In short? The world in which we do business has changed

Because your customers, and their expectations, have changed, too.



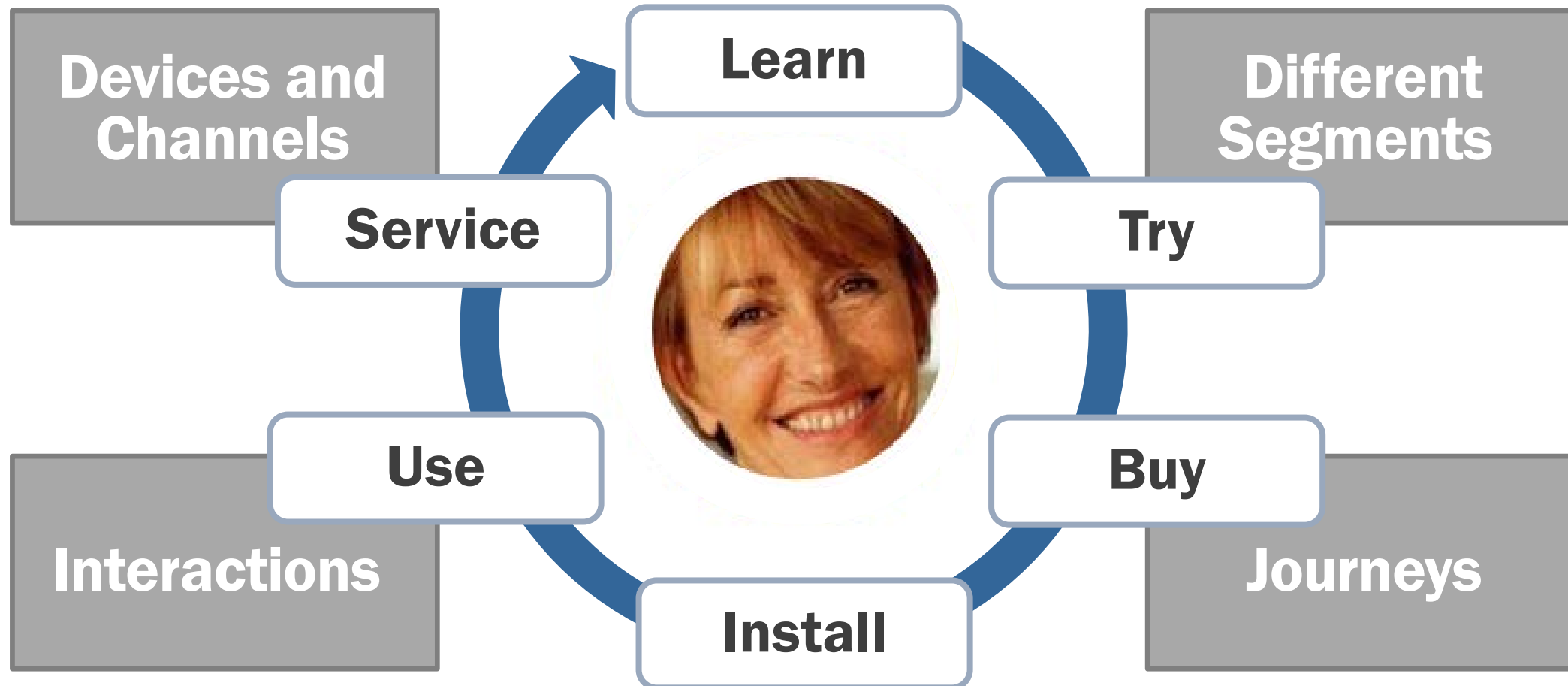
Welcome to the era of smart customers... where there is only one sustainable advantage:



Deliver a better quality customer experience across all interactions

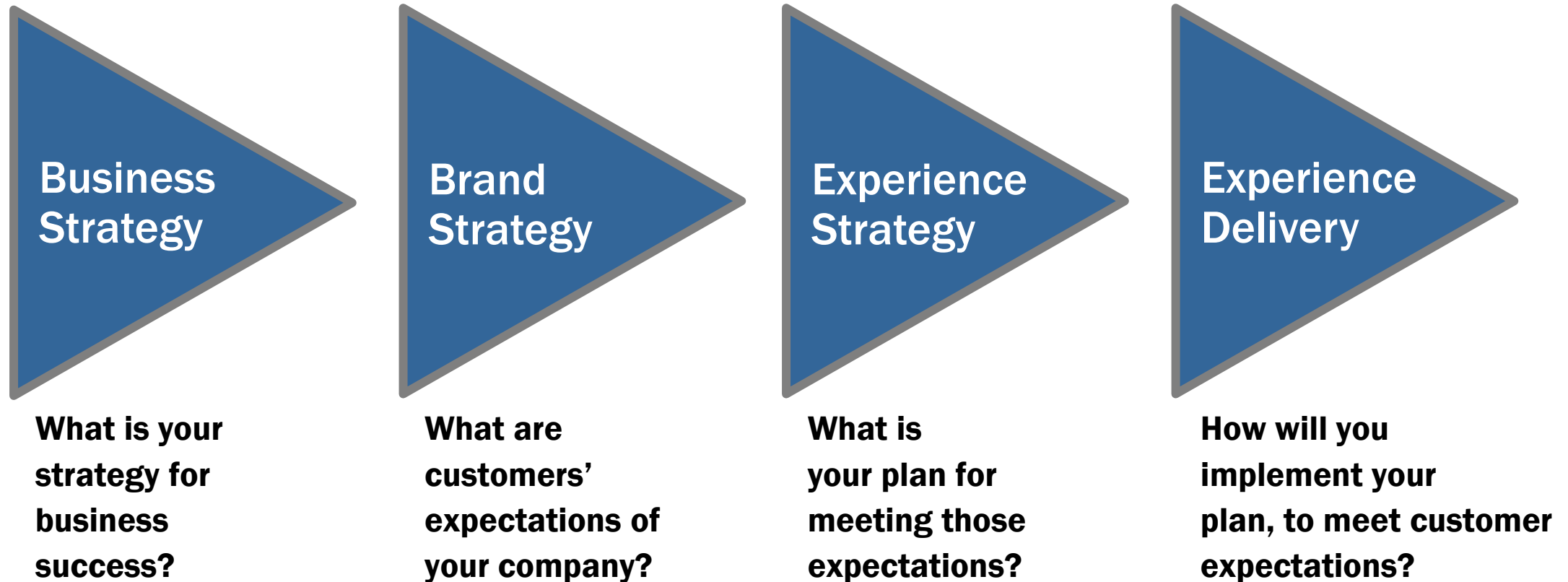


Giving customers the experiences they want requires “seeing” the journey through her eyes, and doing so across...



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

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



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**

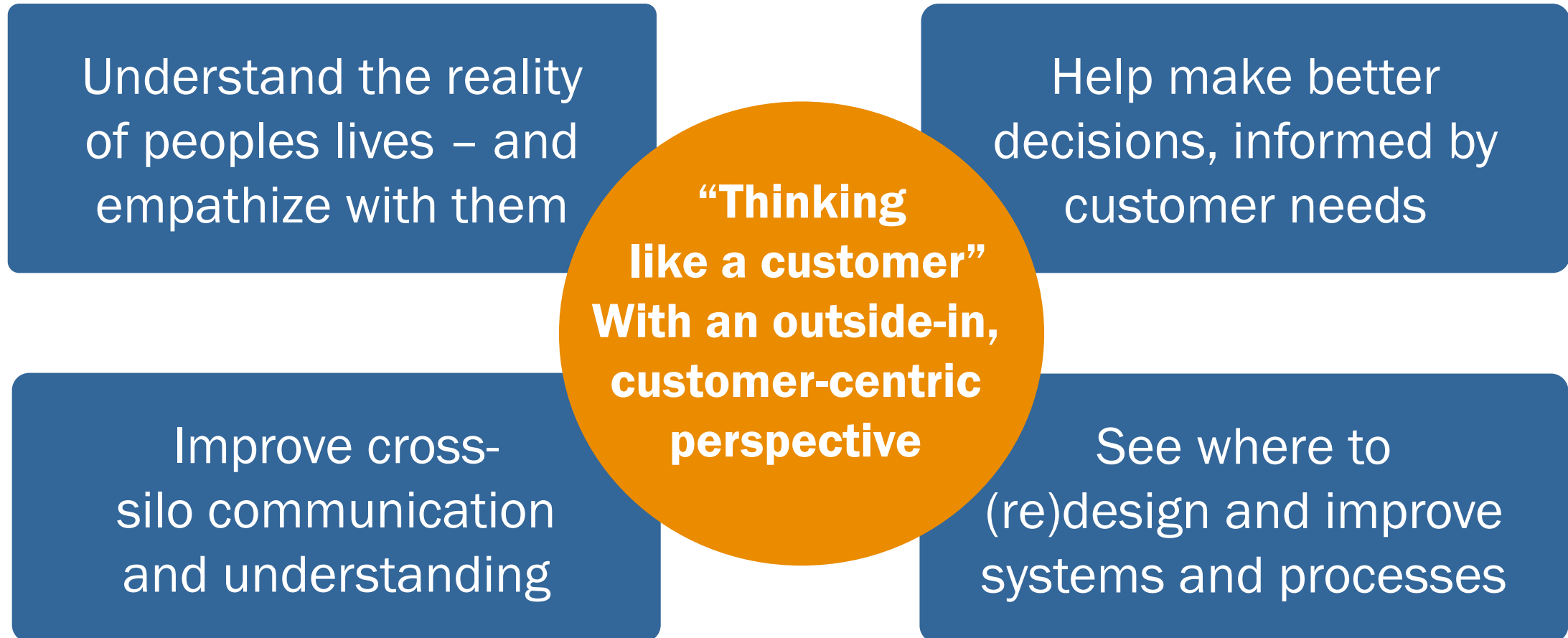
Governance

Measurement

**Organizational
Culture**

Journey Mapping helps us think like customers

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



Helping eliminate the 'silos' which impede customer goals

To deliver seamlessly across devices, services, channels and journeys

Sales

Data

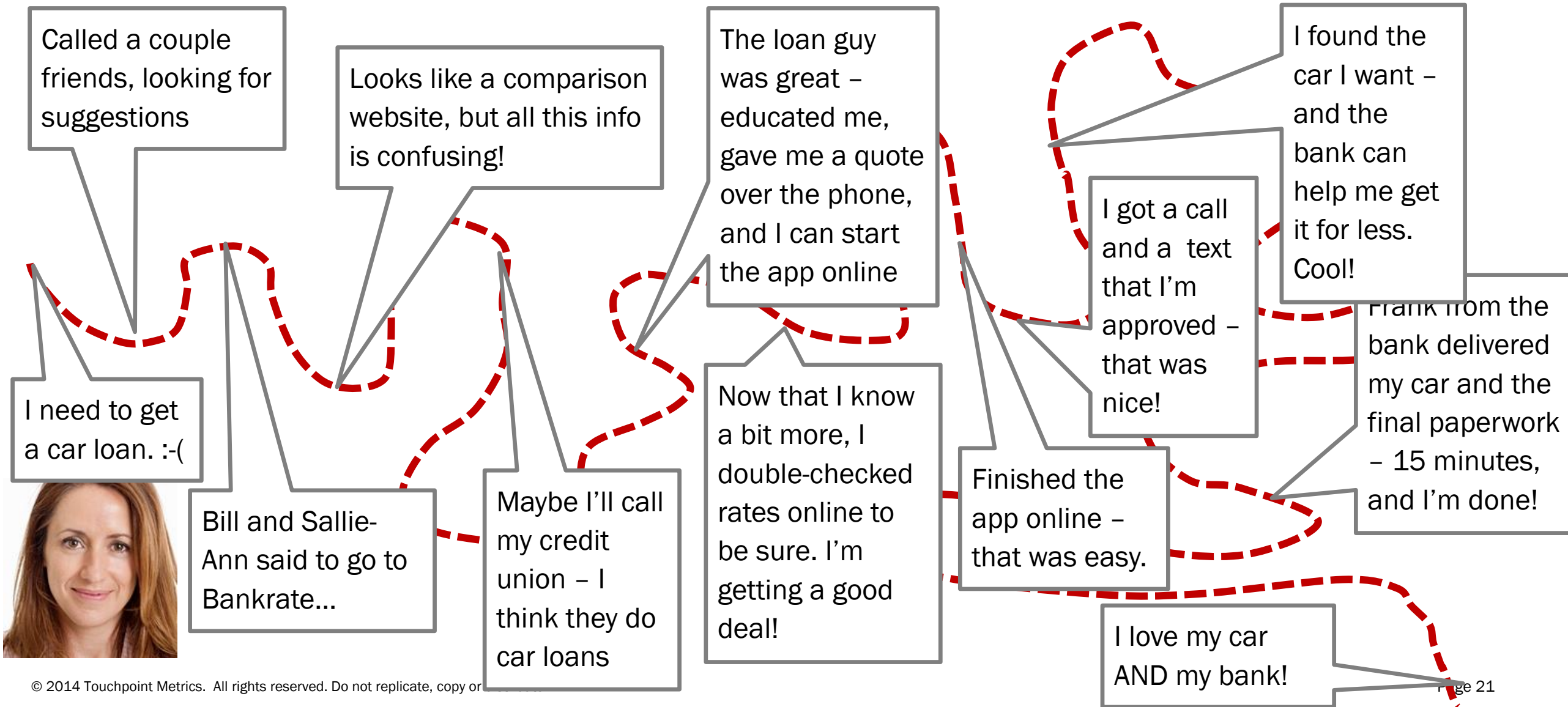
Online

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



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

Business
Processes, Data
and Technology

As well as how to best move customers through the journey

Leveraging interactions and perceptions to improve business performance

Touchpoints

WoM
Web Search
Adverts

Attributes

Pricing
Ease of Use
Selection

Touchpoints

Retail Staff
Digital Device
Self-Help

Attributes

Enjoyable
Simple
Easy

Touchpoints

Answer Desk
Support
Partners

Attributes

Reliability
Accessibility
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

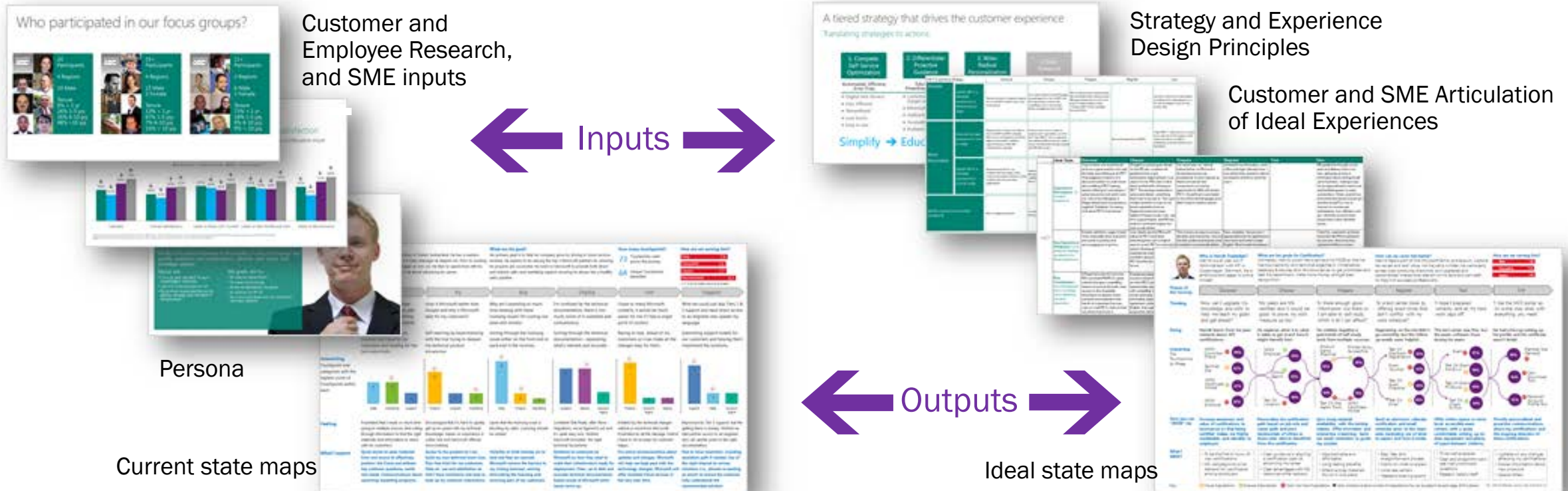
Understanding what “is” today, and what could be tomorrow

Current State Journey Maps (“As Is”)

Identify opportunities for improvement, and boost understanding of the customer journey

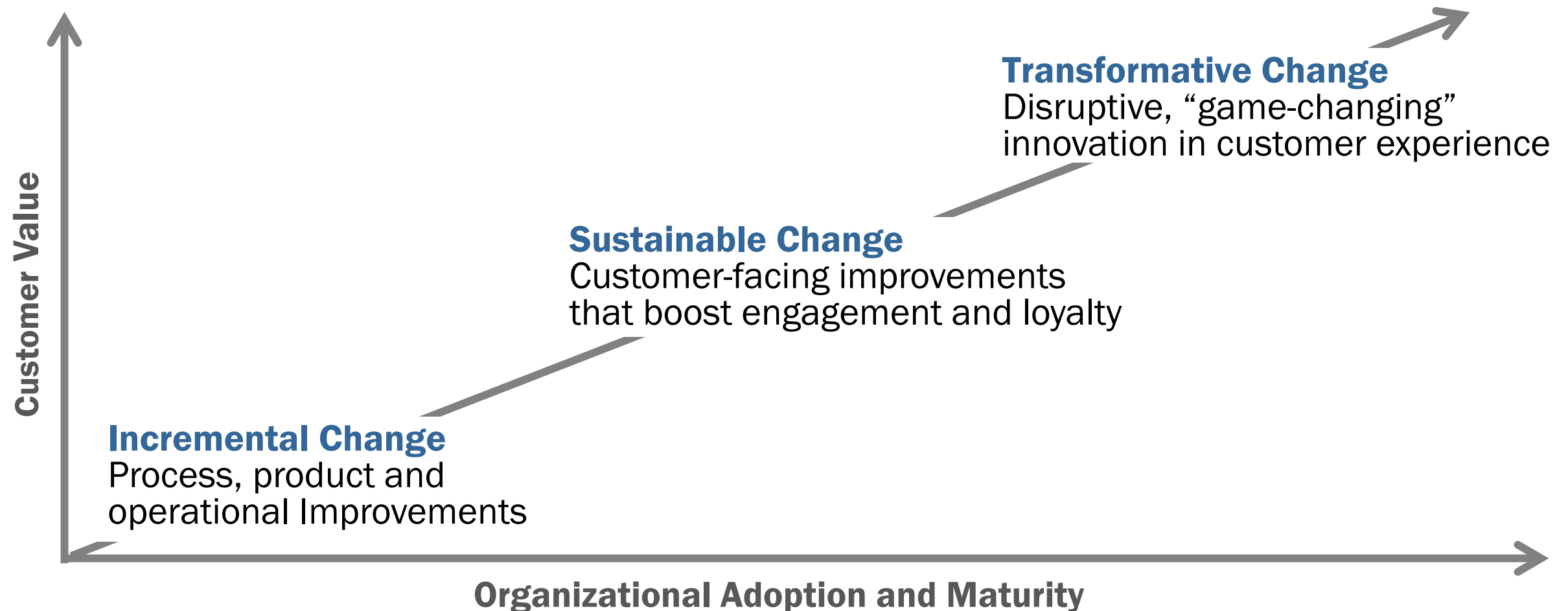
Ideal State Journey Maps (“To Be”)

Tie strategy to experience for an understanding of optimal, future-state customer experiences



Different kinds of maps drive different kinds of results

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



Transformative, game-changing experiences can be driven with the help of future state “to-be” journey maps
Illustrating unmet needs...



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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?



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

"I know I should be planning for the future and start thinking about saving, but I want to enjoy life now."

Hillary 'Young Digerati' Sanderson

"Ideally I'd never have to go the branch – it'd be great if I could do all my banking on my time, from wherever - mobile, or online."

About me:

- I'm a 25 year old young professional, living in New York.
- I work at CBRE, where I'm training to be a commercial real estate broker
- Because I put myself through college, I understand the true value of money.

My goals are:

- Now that I'm making money, I know its time to start paying better attention to it
- I'm starting to make commissions – and smart financial decisions and my plan
- I'm thinking about a school, and getting
- I'd like to start paying so they're not hanging

My financial situation:

- I have a credit card, a checking account and a deposit account with your bank
- I have several credit cards – including yours - that I can juggle quite well.

"Make it easy for me to interact with you, on my terms. If you don't or can't? I've got plenty of options."

I wish your bank:

- Had better online tools
- Would make me feel like my existing business was valued as much as new business.
- Could process all transactions via mobile app
- Had someone readily available any time I have questions

My expectations:

- No fees and no errors
- Great service
- Have my best interests at heart
- Online and mobile banking are simple, smart and easy to use

I'd be a vocal advocate for your bank if you:

- Made banking more convenient
- Treat me like a valued customer
- Offered higher interest rates
- Give me incentives or freebies of some kind for my loyalty
- Prove you're a bank I can trust, and are forthright about fees.

My favorite apps:

My Banking Journey, in my words:

I never really thought about it; yours was the first bank I saw when I got to New York.

The website could be more user friendly, and marketing info was totally full of fluff

I opened my account at the branch, and the advisor couldn't have been more pleasant or helpful.

I wish we spent more time talking about my specific needs, rather than all the products you offer. (I don't care!)

Online and mobile options are horrible. The mobile app is a real pain and force closes all the time. Seems like a basic function.

The three touchpoints I use most, at each lifecycle stage:

- WOM Referral
- Branch Signage
- Direct Mail Promotion
- Website
- Call Center Call
- Website: Promotion
- Branch Officer Meeting
- Branch Officer: Phone Call
- Account Application
- New Account Packets (Paper and Digital)
- In-Person: Branch Officer
- Follow Up Call
- Online banking
- Mobile banking
- Branch visits

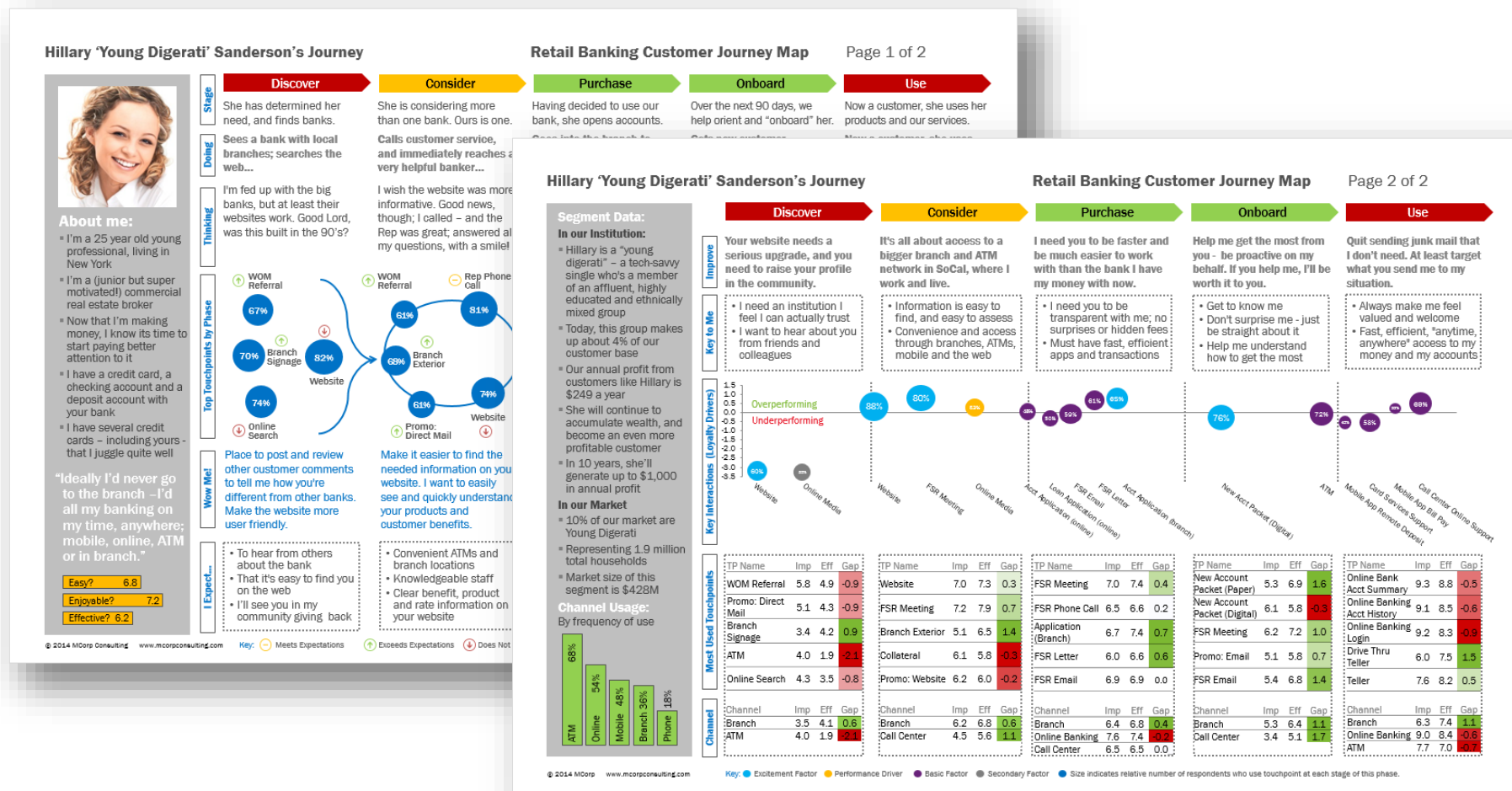
Discover ⓘ **Consider** ⓘ **Purchase** ⓘ **Onboard** ⓘ **Use** ⓘ

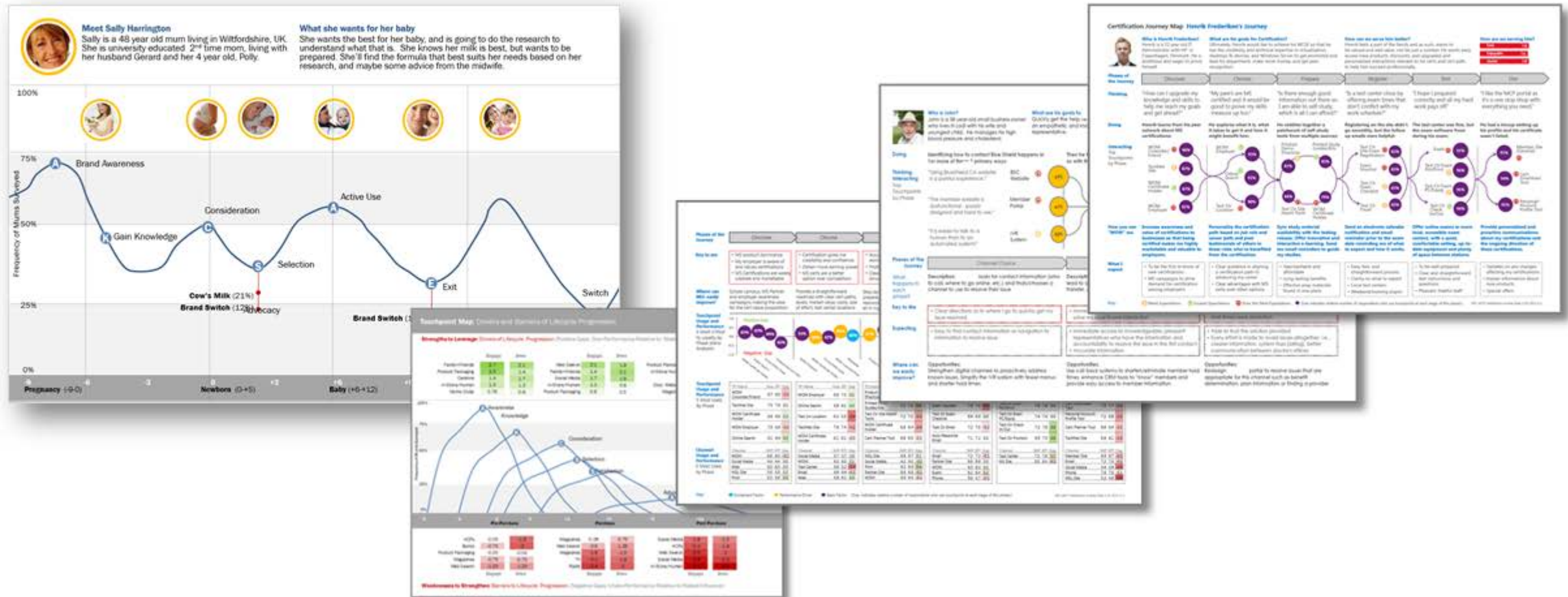
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The map illustrates this “persona” taking the journey

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

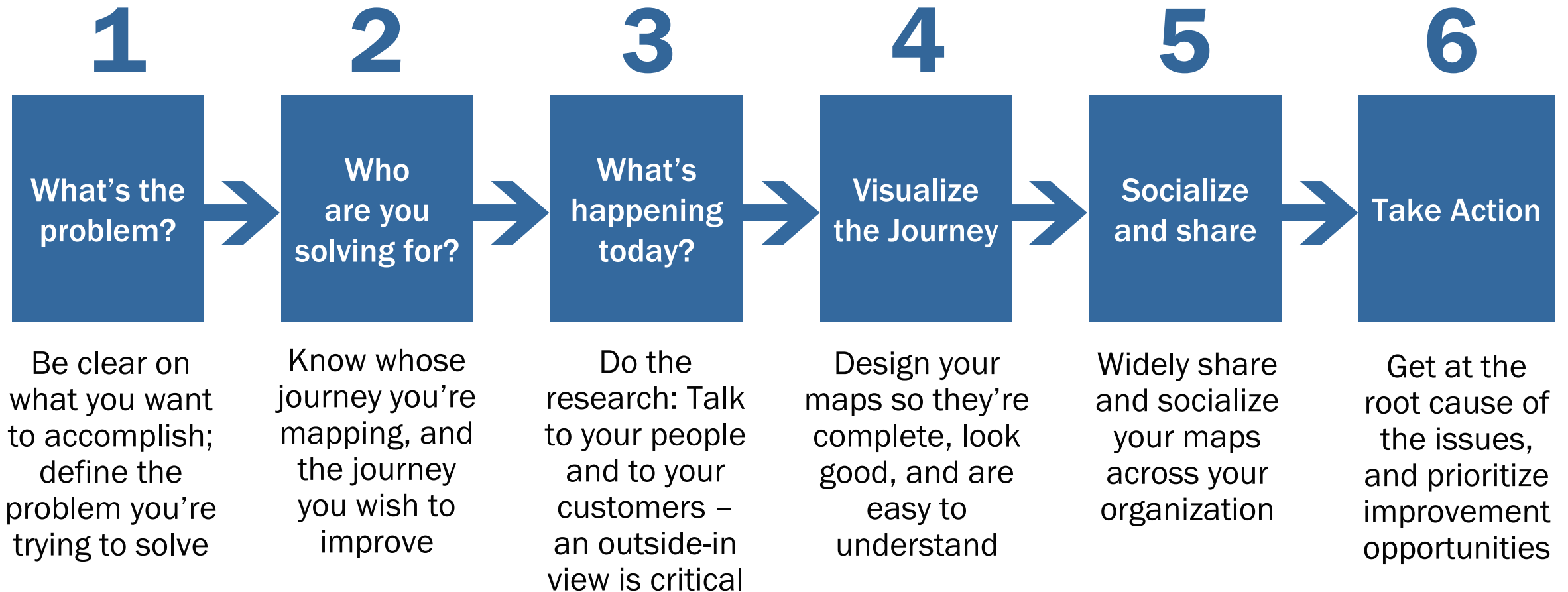
- Journey mapping starts with data gathering and assessment
- Data assembly and storytelling follow
- Forming a clear picture of her journey



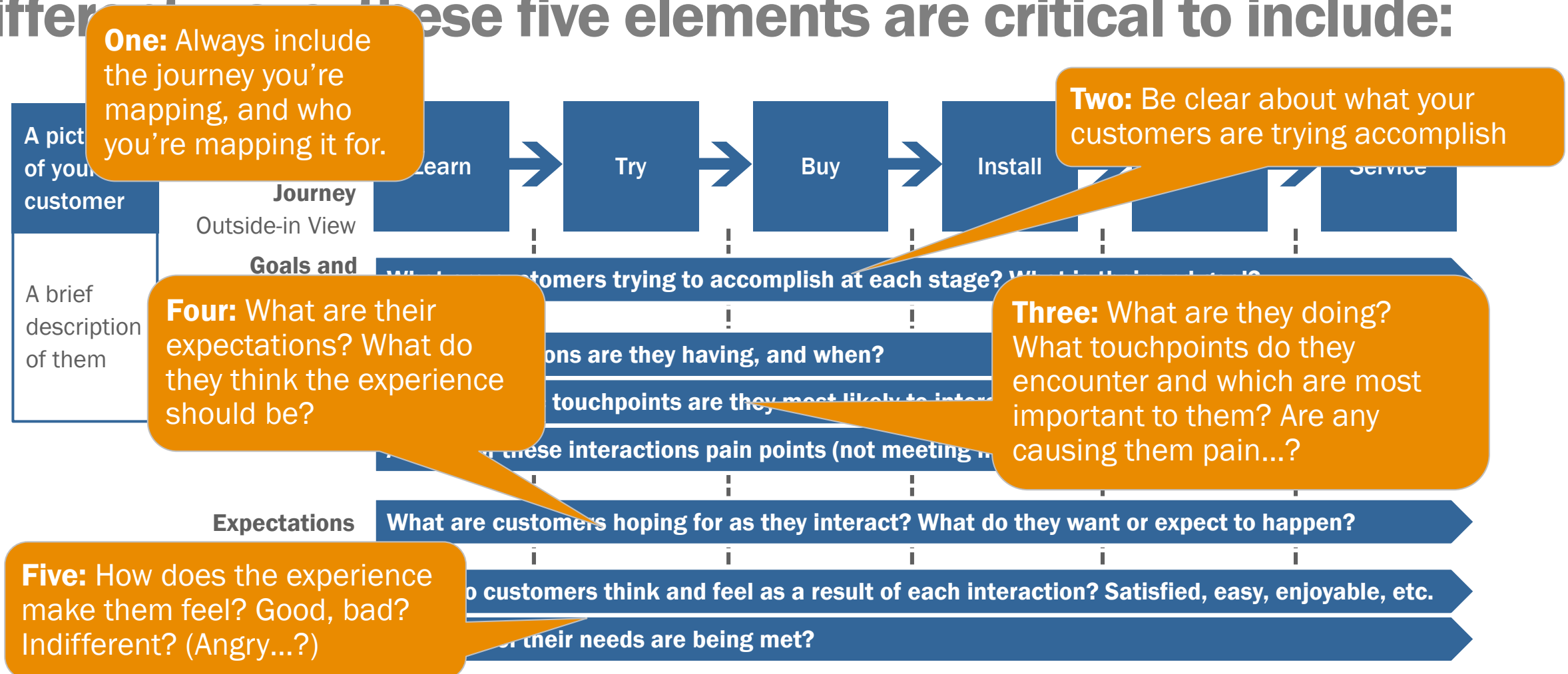


A 6-step process to “as is” Journey Map creation...

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



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

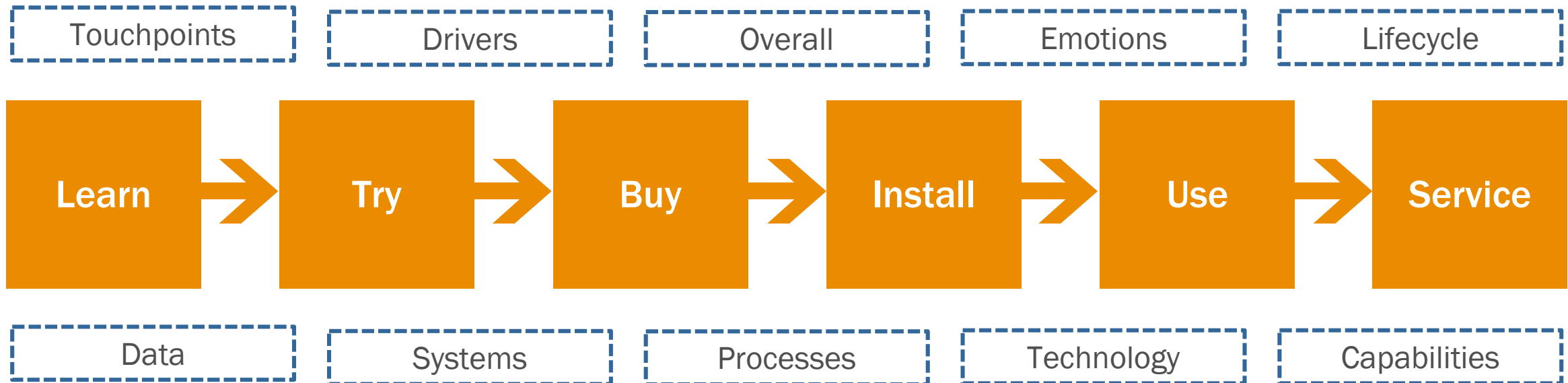


Nice to Haves: Deepen the insights and utility of your maps with these six elements and how they relate

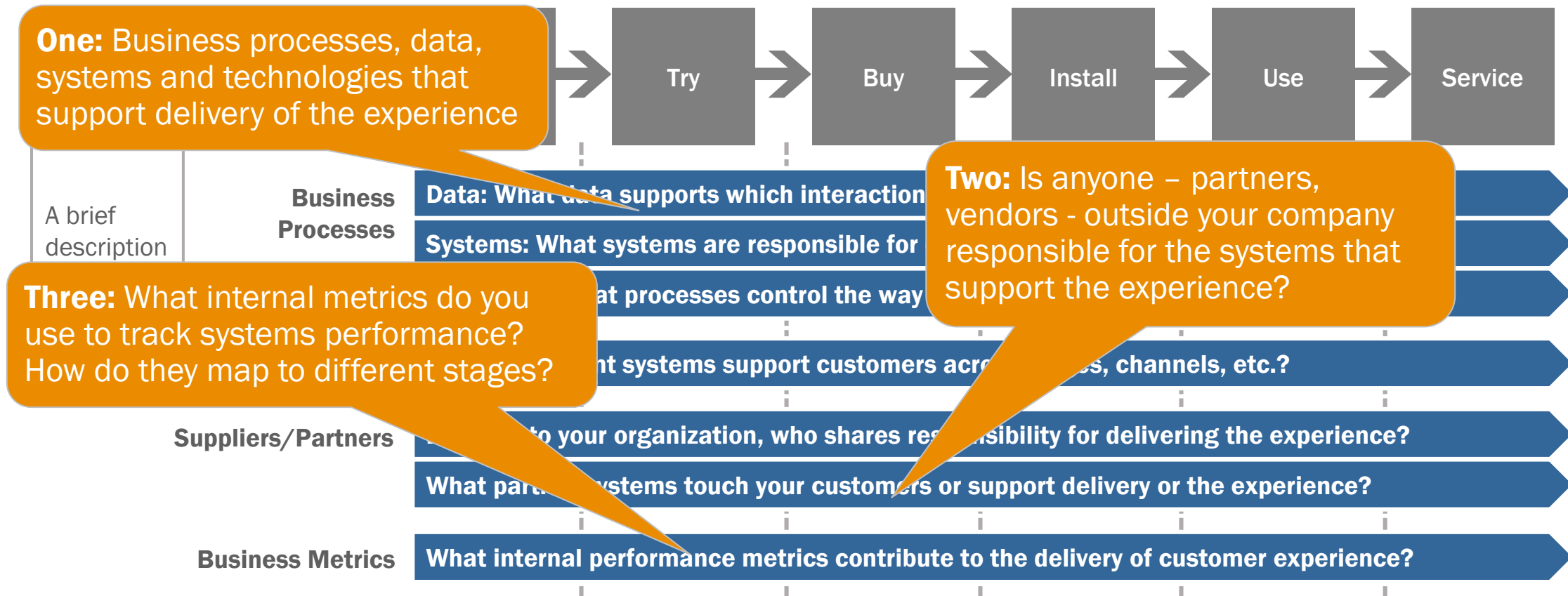


To better understand what drives experience, you can also connect your processes to the customer view

Outside-in Journey maps are driven by customer perceptions



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



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

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

1. Failure to include stakeholders across 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...



