

WHITEPAPER

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# Customer journey mapping

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# *Getting From Here to There.*

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A

# INTRODUCTION TO CUSTOMER JOURNEY MAPPING.

If you're like most organizations, you're fairly adept at gathering information on your customers. And yes, collecting data is important. Get all you can, slice and dice it as creatively as you can, extract all the business value you can.

But data rarely does an effective job giving you an accurate picture of your company's customer experience – from your customers' point of view. Data, by itself, doesn't give you the insights you need into how customers regard your company emotionally. It doesn't tell you what frustrates your customers, what turns them off at certain points, or what customer-facing processes can be changed to improve their experience, and keep them as customers.

No, for that you need something akin to a summary of the story of their customer journey. You need something much like a narrative, typical of various customers, from their first contact with you – before that, actually, from their first identification of a need that they come to you to fulfill – through all the touchpoints across your various company channels, telling you along the way where you do a good job moving them along the journey to a sale and satisfaction, and where you're not doing that and what you can do to improve.

You need to know your customers' goals when they encounter your products or services, where you're causing customers pain, what customers consider their most significant touchpoints and which ones they really don't care about.

You need a customer journey map.

# YOU NEED A CUSTOMER JOURNEY MAP.

*“You need to know your customers' goals when they encounter your products or services, where you're causing customers pain, what customers consider their most significant touchpoints and which ones they really don't care about. You need a customer journey map.”*

Paul Boag writes in [Smashing](#) that a customer journey map “tells the story of the customer’s experience: from initial contact, through the process of engagement and into a long-term relationship. It may focus on a particular part of the story or give an overview of the entire experience.

What it always does is identify key interactions that the customer has with the organization. It talks about the user’s feelings, motivations and questions for each of these touchpoints.”

*“What it always does is identify key interactions that the customer has with the organization. It talks about the user's feelings, motivations and questions for each of these touchpoints.”*

Customer journey mapping, says British consultancy [Customer Champions](#), is “mapping out the total customer experience across all touch points between the customer and the organization,” giving visible structure to the experience you would like to

provide to the customer, the experience the customer wants to have – and the one the customer actually does, in fact, experience.

Armed with that information you’re in a vastly better position to improve the experience and the journeys customers have with you, retain more customers, obtain a larger share of wallet and generate far more positive word of mouth, social media buzz and higher Net Promoter scores.

If you’re into that sort of thing.

*“Without a customer journey map, you're playing darts in the dark when you invest in process improvement to improve your customer experience.”*

# YOU NEED A CUSTOMER JOURNEY MAP.

Without a customer journey map, you're playing darts in the dark when you invest in process improvement to improve your customer experience. You might be spending a great deal of money to gain only incremental improvement in one area when the same investment, judiciously applied elsewhere, can bring in far more useful results. You might be giving way too much attention and focus on a touchpoint your customers don't really care about. You're relying on past processes, you're simply guessing, really, where to invest to find the greatest customer experience benefits.

The thing you really need to know is your customer's emotional state along the journey, what's motivating him or her to continue the journey. What a customer journey map does, Boag explains, is provide "a sense of the customer's greater motivation. What do they wish to achieve, and what are their expectations of the organization?"

Customer experience consultant Kerry Bodine has said "The goal of the customer journey map is really to get a holistic view of what the customer is going through from their point of view and really what it's like for them on a personal level, that human level."

*"Are you losing your customers in your own internal complexity, or are you giving them the single face they want?"*

Mapping your customers' journey gives you context. It tells you where they come from, what questions they have, what they're feeling along the way, how they move through the sales funnel (or don't), and how you can improve things along their way. Are there gaps, such as when the switch from one device to another, as Boag points out, or gaps between channels, or departments – are you losing your customers in your own internal complexity, or are you giving them the single face they want?

# YOU NEED A CUSTOMER JOURNEY MAP.

“Customer engagement is not simply a series of interactions,” writes Megan Grocki of [UX Mastery](#). “Genuine engagement centers on compatibility, and identifying how and where individuals and organizations can exist harmoniously together. Giving thought to how your organization, product or brand fit into customers’ lives is crucial.”

*Are you causing your customers pain at any point? Is the journey disjointed and frustrating? How much more profitable could your company be if you could answer those questions?*

Only about a third of all companies actually map customer interactions, according to a study titled “Lessons From the Leading Edge of Customer Experience Management” by [Harvard Business Review Analytic Services](#). Which leaves a great competitive advantage for those who do – “Businesses that are able to gain customer insight based on the historical interaction data, stand to gain exponentially. This is possible only through customer journey mapping – a holistic view of the customer experience,” writes BPM consultancy [FirstSource](#).

“Having the right information at the right time to take the right decision is central to ensuring a superior customer experience.”

In this paper we’ll take a look at the major elements of a well-done customer journey map, what a customer journey map tells you, and what it can do for your company when used correctly.

So let’s get started, and it all starts with the Customer Experience.

# *Understanding The Customer Experience.*

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**B**

# UNDERSTANDING THE CUSTOMER EXPERIENCE.

Customer Experience Management, as "Lessons from the Leading Edge of Customer Experience Management" defines it, is "the collection of processes an organization uses to manage customer interactions across the enterprise."

*"To you touchpoints are separate things, separate departments, separate ownership, to you there's a great deal of internal complexity, but the customer doesn't see that. The customer shouldn't need to see that."*

Your customers interact with your company across many touch points, channels and product lines. To you touchpoints are separate things, separate departments, separate ownership, to you there's a great deal of internal complexity, but the customer doesn't see that. To the customer it's all "you," no matter who actually has ownership of the touchpoint or the particular stage of the customer journey they're on.

To your customers, your company offers one Customer Experience, and they're prone to judge your entire company by that experience.

More and more companies are recognizing this, and implementing practices and principles for Customer Experience Management [CEM] – taking a holistic view of how customers experience their company in the contact center, in marketing, in fulfillment, in products and services, in quality, everywhere.

It's the "single face" concept highly prized in theory, but seldom spotted in the wild.

*"When so many products are comparable in the marketplace, it's all about how customer experience with you matches up to their expectations."*

# UNDERSTANDING THE CUSTOMER EXPERIENCE.

The HBR Analytic Service study used findings gained from research on over 400 executives. Companies defined as "leading-edge" by the study are much more likely than those defined as "laggards" to make concerted efforts at CEM. Leaders see CEM as competitive advantage in an increasingly commoditized world – and they're right.

"When so many products are comparable in the marketplace it's all about how customer experience with you matches up to their expectations," the vice president of global pre-sales at a software and services company told the HBR research team.

Close to 70% of all leading-edge companies told the study researchers that CEM is a "significant strategic priority," while only 45% of laggards found it to be so.

Investing in CEM is one of those things that sounds right, but is difficult to put hard numbers to. It requires a significant organizational culture shift in most cases, and the ROI, the benefit to the company for all the blood, sweat and tears, frequently sounds maddeningly nebulous, presented along the lines of "Well, we'll have happier customers if we give them a better experience, and that'll be, uh, good."

One does not walk into a boardroom presentation armed with that.

*"91% of all Laggards found it difficult to tie the customer experience to business outcomes, while 83% of Leaders did."*

But there's a reason that 71% of leading-edge companies told the HBR researchers that CEM provides a competitive advantage and only 35% of laggards did, even though the study found that half of all leading-edge companies found it "somewhat difficult" to tie customer experience to business outcomes, and ten percent found it "extremely difficult." In comparison, almost twice as many laggards, 19%, found it "extremely difficult." Overall, 91% of all laggards found it difficult to tie the customer experience to business outcomes, while 83% of leaders did.

So even if a slew of hard numbers isn't immediately to hand, CEM is something that the best companies know is making a difference, having a positive impact on their bottom line.

# UNDERSTANDING THE CUSTOMER EXPERIENCE.

*“CEM is something that the best companies know is making a difference, having a positive impact on their bottom line.”*

And leaders fund their CEM initiatives. Two-thirds, 67%, of leading-edge companies reported their CEM as being “adequately” funded, while only 22% of laggards did.

Doing CEM right means, as HBR says, that organizations have to figure out how to “assimilate once disconnected channels of engagement. Indeed, nearly four out of ten respondents report that multichannel management is a significant challenge to their organizations.”

Some best practices for actually altering corporate culture to emphasize CEM:

- Incentivizing employees -- and executives-- for customer experience metrics with financial rewards. HBR reported this to be “one of the biggest game changers for customer experience management in the past decade.”
- Having executives take phone calls from customers in the call center.
- Developing a customer experience strategy aligned with overall company strategy, and putting the CEM group in business management and strategy “instead of setting up a customer experience shop in sales.”
- Sharing CEM metrics with all employees, not only targeted users, thereby giving all employees an awareness and a sense of their ownership of the overall Customer Experience.
- Screening candidates for customer-centric values in hiring, which although effective where it’s been tried, weren’t found to be widely used.

Ultimately, of course, you want the organization to take ownership of the Customer Experience, to look for where things can be improved and improvements implemented effectively. You want to use all those analytics you’re collecting to manage each customer personally, “as a one-off,” not with “a broad-brush approach,” as one sales and marketing consultant told the HBR study.

*“You want to use all those analytics you're collecting to manage each customer personally, ‘as a one-off,’ not with ‘a broad-brush’ approach.”*

We now turn to how to actually accomplish that: Customer journey mapping.

# CONNECTING THE CUSTOMER EXPERIENCE TO MAPPING.

How do you achieve operational excellence in the Customer Experience? Let's say you have all the right organization and skills, the right tools and systems for "data-driven customer experience management," as HBR says, with processes "optimized to leverage customer experience support tools." You have all that in place, what do you do to translate it into an improved Customer Experience?

*"Customer journey mapping is how you understand how your current processes impact your customers and their experience across all channels and touchpoints."*

That's where customer journey mapping comes in. Customer journey mapping is how you understand how your current processes impact your customers and their experience across all channels and touchpoints. "You have to start with process," a sales and marketing consultant told the HBR researchers. "You have to map and understand the whole flow of the customer experience so that you have a true understanding of all the touchpoints," instead of relying on "past behaviors and patterns."

First you map, then you establish processes to address problem areas your mapping has identified. This probably means at least responding to customers' feedback about their experience. Mapping allows you to know exactly where to establish the correct processes in the right places to solve pain and improve the overall customer experience for all customers, not just the ones who you hear about.

# CONNECTING THE CUSTOMER EXPERIENCE TO MAPPING.

*“The overarching goal of customer journey mapping, of taking the time and effort to map out all customer touchpoints to correlate customer emotions and goals to each one, is to see your company in its totality, the way the customer does.”*

The overarching goal of customer journey mapping, of taking the time and effort to map out all – all – customer touchpoints to correlate customer emotions and goals to each one, is to see your company in its totality, the way the customer does. This means taking the focus, at least for a while, off internal processes and employee issues, and considering your company from your customers’ perspective.

*“A great customer journey map must represent the experience as your customer sees it.”*

“A great customer journey map must represent the experience as your customer sees it. That means it will often include aspects out of your direct control, such as social media exposure or web searches, as well as steps your customers take before you even enter the picture,” advises [Heart Of The Customer](#), a business process consultancy dealing with the Customer Experience.

Arne van Oosterom, owner and strategic design director at DesignThinkers, a strategic design agency based in Amsterdam, writes in [MyCustomer](#) that what makes customer journey mapping different

from “data that might be gleaned from customer relationship management systems is its equal focus on emotional insights about the citizen’s experience. The goal is to mix quantitative approaches with qualitative, experiential data, providing a dispassionate analysis of the issues.”

“Everyone is used to talking about things from his or her point of view,” one customer experience director told the HBR study. “But what’s important is what it looks like from the customer standpoint.”

*“Everyone is used to talking about things from his or her point of view. But what's important is what it looks like from the customer standpoint.”*

# THE VALUE OF CUSTOMER JOURNEY MAPPING.

One of the fundamental benefits of the entire customer journey mapping process, in addition to the nifty graphic or video or spreadsheet or whatever presentation format you've decided you want at the end of it all, is simply looking at your company not according to your internal view, which is a bunch of functional silos, but from your customers' point of view, which is one entity, one experience in pursuit of their goals, no matter which touchpoints are used.

British consultancy Customer Champions is correct in saying "a customer wants to experience an organization that provides a single seamless journey across all touchpoints from initial enquiry right through to any required post sales support."

A customer journey map provides just this, a "single cross business unit view of the experience delivered by all customer-facing functions."

*"As far as your customers are concerned you're all one department - the Customer Experience Department."*

They don't want to hear "Oh, that's not my department." As far as they're concerned you're all one department - the "Customer Experience Department." As Megan Grocki says, the process of doing the map has the added benefit of getting employees together in cross-disciplinary teams who never interact with each other. For larger organizations this can be quite valuable in and of itself.

A customer journey map also defines the areas you need to pay more attention to, and the ones that you're already doing pretty well, in addition to areas that are not really valued by the customer, which can be economized.

The mapping process and its results go a long way towards improving your efficiency and removing the inconsistencies in the customer's experience. You can, as Customer Champions points out, construct a much more seamless experience across your entire organization when you see how the customer himself or herself experiences it.

# THE VALUE OF CUSTOMER JOURNEY MAPPING.

*“You can simply design a new customer experience, if you think yours is broken and the mapping confirms that.”*

Or you can simply design a new customer experience, if you think yours is broken and the mapping confirms that.

The customer journey map can be used, Grocki says, “in both current state review and future state visioning to examine the present, highlight pain points and uncover the most significant opportunities for building a better experience for customers.”

A caveat: Customer journey mapping is highly useful for many objectives, but it is not, by itself, The Solution to all customer experience challenges.

It gives you a method of discovering much about your customers’ experience, as well as a framework for where and how to improve it, but to carry it through to implementation, which is, after all, the goal, you need what Customer Champions identifies as “other fundamental building blocks” in place:

**Leadership.** As is true with any major initiative in an organization, a CRM project or anything, implementation will suffer unless there is strong, vocal C-level sponsorship. Their participation in developing the customer journey map itself is a great stamp of leadership’s approval of the project.

**Enablers.** Effective change takes place when consistent policies and procedures are put in place in the organization. Some employees may see it as restrictive, but actually it’s empowering in that it gives them a clear framework.

**Documenting implementation** is crucial, neglecting it is one of the bigger mistakes organizations make who try to implement customer journey mapping.

**Recruitment & Training.** Your employees, especially the customer-facing ones, will make or break the success of the customer journey mapping initiative. Make sure your people have the tools they need to deliver the improvements you find need to be made.

# THE RETURN ON INVESTMENT.

According to the HBR study, leading-edge companies make much greater use of certain metrics than lagging companies do.

So how to measure the success of CEM investments?

*“Once you're pretty good at something, you may not make any more money going from pretty good to excellent. These are complex analyses to do.”*

Executives interviewed by the HBR researchers generally agreed that it's difficult to put precise numbers to CEM initiatives. “Everyone would agree that most of the initiatives add value,” an executive told the study's authors.

But “once you're pretty good at something, you may not make any more money going from pretty good to excellent. These are complex analyses to do.”

Another executive said “I would love it if we could say that we're meeting our sales numbers and customer experience initiatives have contributed to that by this much. But that's difficult to do.”

Still another customer experience director remarked that, in trying something as modest as determining how much customer retention contributes to financial performance, “we need to understand what that is worth to us. This is a financially-driven organization. That's where the power is.”

Customer Champions notes that while implementing change from a customer-centric focus can provide a significant ROI, you need to agree beforehand how you'll measure the ROI. If there are not clear metrics or objectives defined at the outset, then, as they say, “any initial enthusiasm may waver if the investment can't be justified. And a lack of quantifiable success makes supporting customer journey mapping difficult and is a real barrier to its continued successful implementation.”

We now turn to the customer journey map itself.

# *The Elements of a customer journey map.*

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C

# THE ELEMENTS OF A CUSTOMER JOURNEY MAP.

When researching and presenting the customer journey map, "We start above water, with the customer and slowly dive deeper and deeper into the organizational structures and context," Arne van Oosterom writes.

When mapping, he says, what you're doing is "describing all relationships on the map by answering the question: what do we do for them; what do they do for us? This map shows you the landscape or force field you are dealing with. You can discuss how this influences the quality of your work and how a customer benefits or suffers from it."

*That's the overall idea: Determine how each touchpoint along the customer journey affects the customer experience, be it negatively or positively.*

That's the overall idea: Determine how each touchpoint along the customer journey affects the customer experience, be it negatively or positively.

Here are the major elements you want to include in that.

# RESEARCH.

It might seem obvious, but please, we've seen enough companies miss the obvious, so bear with us: Before you can map out your customers' journeys, you have to get to know your customers. Not what your people think your customers are. What they really are.

And that means research. No way around it.

"You can't rely on internal staff to build a true customer journey map," Heart of the Customer says.

"Depending on the scope of the journey, you'll need interviews, ethnographies, focus groups, and/or other types of customer research to figure out what's really going on. We always begin there, then use quantitative surveys to confirm the results."

Some companies bring in customers to work hand in hand with employees to build the map, but Heart of the Customer cautions that "care must be taken in that scenario to avoid the bias that results from a small sample size. This approach typically works best with B2B companies that want to focus on a specific journey, such as customer support. But in most cases, we've found it's better to do customer research first, then build on the information gathered."

Start with scouring all that Big Data you have stored in all those shiny servers. Data doesn't tell all the story, but it does tell some. It's where you start in constructing your customer journey map.

As Paul Boag says, you're going to do two types of research to construct a profitable customer journey map: Analytical and anecdotal.

# ***ANALYTICAL RESEARCH.***

Sometimes called "quantitative research," this is where your data helps with the analytical side of things – how do customers use the website? At what step do they abandon the shopping cart?

You'll want to include such analytics as the length of time of a customer experience interaction – how long is a typical call to your contact center? How long do shoppers think about purchasing your product before buying, ten minutes? A week? Impulse purchasing?

Speech analytics is a crucial component of not only analytical research, but anecdotal research as well.

Social media is another fertile area for analytical research. Check out SocialMention and other tools that track brand mentions on social media, and identify them as positive or negative mentions. Search data, survey results, it's all useful.

# ANECDOTAL RESEARCH.

*“There's no substitute for actually listening to your customers telling you, in their own words, how the steps in their journey are working out for them.”*

Also known as “qualitative research.” Here’s where judicious mining of customer calls using speech analytics pays large dividends. There’s no substitute for actually listening to your customers telling you, in their own words, how the steps in their journey are working out for them.

Set up interviews with customers. Scour social media for mentions and context. Talk to your front-line customer-facing people, such as contact center agents, support and sales personnel and others who deal with customers face to face.

Heart of the Customer advises starting with the more anecdotal, “qualitative” research, since “often your customers’ touch points involve interactions and emotional responses that will be a surprise.” You can then use quantitative surveys to confirm the results.

Ideally you’ll be able to construct detailed customer journeys for all your significant user groups. If time or budget is a problem, focus your research on primary customer groups, Boag advises, adding that when you sit down to chart out the customer journey map itself, it’s key to “make clear what has research behind it and what does not.”

There will be an inevitable amount of educated guesswork here and there, which isn’t wrong, just minimize it, don’t let it stand where research should be, and make it clear when that’s happening.

When performing anecdotal or analytical research, writes Adam Richardson, creative director at global innovation firm frog design, in an article titled “[Using Customer Journey Maps to Improve Customer Experience](#),” it’s important to keep looking for certain things, especially when doing ethnographic-style interviews or in-context observations, since “focus groups tend to gloss over too many details that are critical to really understanding the experience.”

# ANECDOTAL RESEARCH.

Accordingly, Richardson recommends your research look for:

**Actions.** What is the customer doing at each stage, what actions move them to the next stage? This is not what your company or retailers are doing to encourage your customers to move to the next stage, this is focusing on what the customers themselves are doing.

**Motivations.** What motivates the customer to keep going from one stage to the next? What are the emotions - "Why do they care?" The major difference between customer journey mapping and some other forms of customer intelligence, such as Customer Relationship Management, is that mapping takes into account the customer's emotions along the way, since they're a major factor in how customers act.

**Questions.** Do your customers encounter jargon or other frustrating uncertainties during their journey with you, especially ones that keep them from moving to the next step? Are there ways you can simplify their Customer Experience to eliminate questions, to keep the journey flowing smoothly? Richardson gives home theater as an example of how not to structure a customer journey, as the customer is faced with a thicket of jargon and technical questions at almost every step of the journey. As he says, if there's a proliferation of online help boards for your customer journey, you're doing something very, very wrong.

**Barriers.** Have you identified cost, implementation, process, or any structural barriers in the way of customers moving to the next stage?

# THE EMOTIONAL JOURNEY.

*“Every interaction a customer has with an organization has an effect on satisfaction, loyalty, and the bottom line.”*

“Every interaction a customer has with an organization has an effect on satisfaction, loyalty, and the bottom line,” writes Megan Grocki of UX Mastery. “Plotting out a customer’s emotional landscape by way of a customer journey map... along their path sheds light on key opportunities for deepening those relationships.”

When you plot out the emotional journey of your customers, you’ll want to highlight points where customers feel frustrated, anxious, or happy and pleased with the outcomes they’re experiencing at that time.

The objective of the emotional map, or empathy map, is to get a real sense of how it feels to be the customer at that point in the journey – what they’re feeling as they’re interacting at that touch point in that channel.

Don’t overlook the obvious, or seemingly trivial here. Adam Richardson recommends checking out “unboxing” as a YouTube search, or perusing the site [unboxing.com](http://unboxing.com), to get a sense of the emotional impact of people opening up product boxes for the first time: “A great out-of-box experience is like a little piece of theater. Scripting it well helps guide the customer through the first steps of using their new purchase, and gives them a pleasurable emotional experience, and minimizes calls to the help center.”

MyCustomer’s van Oosterom recommends assigning number grades, 1-10: “Give every vertical line a grade for the experience (Actions -> touch point -> who delivers the service -> grade). Don’t grade the functionality, grade the work. For the emotion, how do you think the customer felt at that moment? Use a scale from 0 to 10. The higher the number, the better the experience. This can be visualized (e.g. by a line going up and down), and is very effective as a conversation starter. It can often be a real eye-opener.”

# BRAND PROMISE.

“Done right, journey mapping can reveal how your brand promise aligns with the actual customer experience you’re providing,” Heart of the Customer says. “Do you sell your process as being effortless? Highly personalized? Affordable? A great customer journey map will show whether your customers believe that you’re delivering on that promise – and if they think you’re not, how much disappointment impacts customer behavior and loyalty.”

*“Customer journey mapping can reveal how your brand promise aligns with the actual customer experience you're providing.”*

What you’re doing when you map out your customer journey is holding a mirror up to your organization, asking why you do what you do: “It allows us to take a step back from where we are, away from our internal targets and agendas and lets us be open-minded and put our creative energy to good use. And the beauty of it: there is no lengthy report, which no one actually reads,” Arne van Oosterom writes in MyCustomer.

# PERSONAS.

*“Your business has different customers who come to you with different priorities, goals and objectives. The main profile groups they can be usefully grouped into are called personas.”*

Your business has different customers who come to you with different priorities, goals and objectives. The main profile groups they can be usefully grouped into are called “personas.”

Personas are “the main characters” among your customers, composites that exemplify the thoughts, expectations, emotional states and pain points common to your customers.

“Different customers have very different experiences,” Heart of the Customer advises. “For instance, while mapping how consumers purchase health insurance, we found that while one segment of customer spent only a couple of hours on research, another invested six weeks and used completely different tools. A great customer journey map can’t lump those two segments together, because the result wouldn’t accurately reflect the experience of either.”

Some businesses already have customers segmented along such lines, which is fine. If that’s you, go with those, conducting your research using those categories. If you don’t, Heart Of the Customer says,

qualitative research will uncover the different personas among your customers.

*“You’re not going to map the journey for all of your customers. In the end, you’ll focus on those that meet your 80/20 rule.”*

“You’re not going to map the journey for all of your customers,” writes [Touchpoint Dashboard](#) of Wichita, Kansas. “In the end, you’ll focus on those that meet your 80/20 rule.”

# PERSONAS.

Incidentally, sprinkling actual customer quotes along the way is a great method for bringing alive what can otherwise be just a set of statistics or conclusions. It reminds users that yes, these are actual people, actual customers we're talking about here. Writing for ConversionXL, Jennifer Havice notes that "Patching together actionable information about your customers with gut feelings, good intentions and some duct tape is not a recipe for conversion success." As she says, personas compiled from actual research are "fictional representations of segments of buyers based on real data reflecting their behaviors. Their purpose is to put the people behind company decision making in the shoes of the customer."

*"Patching together actionable information about your customers with gut feelings, good intentions and some duct tape is not a recipe for conversion success."*

She quotes buyer insights pro Tony Zambito, who said buyer personas are "research-based archetypal (modeled) representations of who buyers are, what they are trying to accomplish, what goals drive their behavior, how they think, how they buy and why they make buying decisions."

The focus is clearly on research, on knowing, not guessing, what drives your customers.

Well-done personas find out what the behavioral drivers for their customers are, their goals, and "their journey to finding your business," Havice writes. They learn the obstacles to purchasing along the way, and their customers' mindset - "Are they shoppers who want the thrill of the bargain, or expect a more refined experience? Selling a weight loss program will be more emotionally charged than, say selling routers."

# PERSONAS.

Havice recommends certain standard methods for researching out useful personas:

**Customer Surveys.** Online or offline with open-ended questions are best. However you get your customers talking is a good way. You want to get inside their heads to make sure that they're actually thinking what you think they're thinking. Havice recommends from seven to ten questions focusing on "their behavioral drivers, obstacles to purchasing, and mindset." Much useful information can be gleaned by using speech analytics to search all the recorded conversations you have from customers as well.

**Phone and In-Person Interviews.** Yes they're expensive and labor-intensive. Done correctly they're worth it.

**Web & Exit Surveys.** The questions here depend on what you want to know - what friction is keeping them from buying at that time? You can put a pop-up question box on the site or offer a chat session.

Once you think you have enough research, Havice says, group the results according to commonalities: "Remember your personas should reflect real people with real motivations, desires, and concerns." Personas will deal with both the customer's present situation, business and personal, and their future ambition.

# TOUCHPOINTS.

For some companies, simply identifying all the touchpoints their customers use alone is worth the cost of producing the map. Relatively few companies can tell you off the top of their collective heads all the instances where they interact with their customers, as Heart of the Customer points out, "including those over which you have little or no control," yet "in fact, these 'external' touchpoints can be the most important parts of the journey, as they are often the key to understanding friction that occurs."

*"External touchpoints, which you have no control over, can be the most important parts of the journey, as they are often the key to understanding friction that occurs."*

The touchpoint is simply what the customer is doing to interact with our company in that instance, such as calling the contact center, or checking a price online, talking with a sales rep or actually using the product or service they purchased.

The more of these touchpoints you have, "the more complicated – but necessary – such a map becomes," writes Adam Richardson, who adds that while some maps focus on all the touchpoints across the entire lifecycle of the customer, others are more focused on specific interactions. If you have identified a particular process as particularly troublesome, you can construct a customer journey map for that by itself.

*"Some maps focus on all the touchpoints across the entire lifecycle of the customer, others are more focused on specific interactions. If you have identified a particular process as particularly troublesome, you can construct a customer journey map for that by itself."*

## TOUCHPOINTS.

And for every touchpoint, van Oosterom says, "write down who delivers the service. Who is directly responsible for it (e.g. 'front office personnel')?"

Writing in CX Journey, Annette Franz, a California-based Customer Experience Optimization consultant and executive, recommends bringing "customer data and feedback into the touchpoints to really accentuate the pain, effort, or highlights of the touchpoint. You can even add metrics, e.g., customer effort score, to a touchpoint." And score touchpoints, she says, "on performance and importance, to prioritize improvements and resource allocation – again, based on customer feedback."

## MOMENTS OF TRUTH.

What's called a "moment of truth" is an interaction of greater impact than most others, and you'll want to denote these as such on your map. Heart of the Customer tells of some recent research for a client showing that "when there were problems checking in to the hospital, it tainted the entire patient experience, even when the patient was otherwise satisfied with the care they subsequently received."

Moments of truth are generally identified as positive interactions at a touch point that generally causes emotions of frustration or anxiety.

# CUSTOMER GOALS.

One primary objective for your customer journey map is to identify what your customers' goals are at every step along their journey. What do they want to achieve here? Are they achieving it? Could you help them achieve it better? Emotionally are they more or less satisfied with you at this step?

And different personas, types of customers, will have different goals. Heart of the Customer notes that "when studying a health care journey for a hospital, we found that in the early stages, one persona focused extensively on understanding everything involved with the journey, whereas a different persona was just focused on getting through the process as quickly as possible."

*"Different personas, different types of customers, will have different goals."*

Keep a clear understanding of what it is your customers are actually trying to accomplish – their story, from their point of view. As Arne van Oosterom writes in [MyCustomer](#), "I don't want to own a coffee maker – I need to wake up early with a little help from a cup of coffee. I don't want to use a train – I want to get home to my wife and children. I don't want to go to a store and buy a stereo set – I just want to listen to my favorite rock music when I'm home, it makes me unwind after work."

*"I don't want to own a coffee maker – I need to wake up early with a little help from a cup of coffee. I don't want to use a train – I want to get home to my wife and children."*

That's your customer's journey – the wake-up help, the family, the unwinding. You are simply how they get there.

# *Creating the customer journey map.*

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# THE VALUE OF CUSTOMER JOURNEY MAPPING.

As far as the format your customer journey map will take, it's up to you, but the most popular form is an infographic.

Have a professional designer produce the actual map for maximum clarity and simplicity, both of which are paramount virtues in a customer journey map – overly complex maps are of little value and are generally a waste of time and effort.

As Paul Boag says, "The graphic is not meant to map every aspect of the customer's experience. Rather, it should tell a simple story to focus people's attention on the customer's needs. Think of the customer journey map as a poster pinned to the office wall. At a glance, people should be able to see the key touchpoints that a user passes through".

*"The journey for each of your customers will be different, of course. Some make decisions quickly, some dither forever, demanding more and more research and information."*

The journey for each of your customers will be different, of course. Some make decisions quickly, some dither forever, demanding more and more research and information. Mapping your customers' journey means assessing "how the customer experience changes as they move through the funnel," FirstSource says. "Developing a map design that focuses on all possible scenarios for the customer is crucial to success of the mapping strategy."

After you do your homework and burn a little shoe leather doing research the right way, the next step is to organize that knowledge into the customer journey map itself.

"Just knowing who you're talking to isn't enough. Being able to align what they want to accomplish when they come to your website is the key," ConversionXL says.

Here's a rough guide to how to do it. It's not carved in stone, it's simply to help stir your thinking:

# STEP 1: DEFINING STAGES.

Mark off the different stages that customers pass through. If you've done your research correctly you'll be able to see the successive stages your customers experience along their journey from need to awareness to first contact to purchase and subsequent interactions, as ConversionXL notes.

Your stages might be "Discovery," "Research," "Choose" and "Purchase," for example. Or they might be more detailed – Customer Champions lists such possibilities as "Aware," "Query/PoS," "Pricing," "Purchase," "Post-Sales Support," "Complaint," "Upgrade," "Renewal" and others.

Touchpoint Dashboard lists them as:

- **Awareness.** When the customer is first aware of you as a possible fulfillment option for a need he or she's identifies.
- **Information-gathering.** When they learn about you and what you offer.
- **Selection.** Congratulations -- they've decided you make the most sense for their customer journey and have decided to do business with you.
- **Purchase.** The transaction is completed.
- **Satisfaction.** The customer is satisfied with the product or service. While customer satisfaction is part of the Customer Experience, it's not the whole story -- the journey might have been harder than it needed to be.
- **Loyalty.** If the Customer Experience was good enough, they will remain loyal customers.
- **Advocacy.** They tell others to do business with you.
- **Churn.** Or they leave.

# STEP 1: DEFINING STAGES.

Some companies define their customer journeys by a length of time – how their customers progress in one week, one year, whatever, instead of separate stages.

This isn't the difficult part, the stages should be fairly evident. Try not to get too bogged down in parsing out fine distinctions in stages here, keeping things general is fine.

The point is to have a roughed-out chronological idea of the stages your customers go through to which you will assign the touchpoints the customer experiences along the way.

Stage definitions will function primarily as a place to group touchpoints, which is what you're really interested in. As long as no touchpoints are being left out of the discussion, be as general as is useful with the staging process.

## STEP 2: PUT CUSTOMER GOALS IN STAGES.

Some experts say the process of aligning your customers' goals with the various stages they go through is the most critical and difficult step – mainly because they're still getting used to the idea that their customer goals should even be a priority.

*“The process of aligning your customers' goals with the various stages they go through is the most critical and difficult step for some companies – mainly because they're still getting used to the idea that their customer goals should even be a priority.”*

What you want to do here is determine what it is your customers want to achieve in each stage, as they progress through the journey, because the next thing you're going to do is to isolate the various touchpoints they use to accomplish those goals, and determine if you can improve their customer experience on those touchpoints.

You'll also want to identify the channels the customer encounters in each stage, be they yours directly such as the website, your advertising, marketing and other PR, customer service, finance and billing departments or other channels out of your control, such as retailers or resellers, dealers or brokers.

## STEP 3: THE TOUCHPOINTS.

Touchpoints are the places your customers interact with you – on your website, in live chat, via emailed interactions, on Facebook or Twitter, on your actual physical site such as a store or showroom, in the contact center, on a sales call, anywhere customers have the opportunity to progress in their journey – or end it.

Remember that there will be times when you don't have control over the touchpoints, such as retail outlets. Include these in your customer journey as well.

For each channel you have identified, list the touchpoints associated with each channel – if you listed "Digital" as a channel, as Touchpoint Dashboard notes, your touchpoints will probably include Facebook, Twitter, your own site, microsites, web ads, searches, apps and any number of others.

*"Some of the most critical touchpoints, in fact, many not even be within your complete control. Your products may be available in a retail outlet you don't operate, or they may encounter you in some other third-party medium."*

Some of the most critical touchpoints, in fact, many not even be within your complete control. Your products may be available in a retail outlet you don't operate, or they may encounter you in some other third-party medium.

More usual touchpoints would be product description pages, contact forms, brochures, or the contact center. By using Google Analytics you can uncover information about the touchpoints on your website.

One way to organize the information is to write the stages across the top as columns, and then the touchpoints as rows.

## STEP 3: THE TOUCHPOINTS.

User testing feedback is critical here, as are customer support transcripts. Using speech analytics to drill down into customer feedback for problem touchpoints is highly recommended.

Analyze "What's the business reason for this touchpoint? From the customer's perspective why does it exist - to educate, support, receive payment? Does it build loyalty? Set us apart from our competitors? Facilitate sales?"

This is what you want to know for each touchpoint:

- Who owns it? What department or title is responsible for it?
- How actively is it used?
- What impact does it have on the customer experience? Why does the customer think it exists?
- What's the gap between the current and desired performance?

This is what lets you know what's important to the customer, where the customer experience needs to be smoothed out, the moments of truth that are costing you business, and what your priorities for improvement are.

Defining the customer touchpoints is a team exercise. Get as much input as you can on what the touchpoints are and in which channels they occur. Then, as Megan Grocki recommends, "brainstorm additional touchpoints and/or channels that can be incorporated in the future journeys you will be mapping." If the touchpoint is "pay a bill," the channels could be "pay by mail" or "pay in person" and the brainstorm idea "pay online."

Next, Touchpoint Dashboard suggests, "define the various interactions that might occur at each touchpoint. So, if we think about your website as a touchpoint, the interactions that might occur there include a purchase, a product/information search, a customer support request, downloads, etc."

In other words, what is the customer doing on that touchpoint and what is he or she hoping to accomplish to move along to the next stage in the customer journey?

## STEP 3: THE TOUCHPOINTS.

*“What is the customer doing on that touchpoint and what is he or she hoping to accomplish to move along to the next stage in the customer journey?”*

Here’s where you really need to talk to some customers to find out first-hand what their experiences are along the way. “To get the conversation started,” according to Touchpoint Dashboard, “roughly plot the journey based on what you know; then let them do the talking.” Find out why they used that particular touchpoint, how well it went and what pain points there were.

Are any touchpoints redundant? Did they meet the customer’s expectations? Which ones are most and least effective? Did they contribute to or detract from the customer experience?

Find out if the customer feels the way you want them to feel at each touchpoint. Then rank all touchpoints in terms of value and effectiveness – touchpoints with high value and low effectiveness move to the top of the priority list.

## STEP 4: ARE CUSTOMERS ACHIEVING GOALS?

If you've constructed your map accurately to this point, it's time to start evaluating how well you're doing enabling your customers along the journey you have mapped out.

By this time you have a pretty good handle on the goals for their interactions with you held by the different customer personas, how they interact with you at the various touch points and during the various stages of their journey.

So: According to the research data you've amassed, how are you doing? ConversionXL lists some questions you'll want to ask yourself in this part:

- Where are the roadblocks appearing?
- Are large numbers of people abandoning their shopping carts on the checkout page?
- When people click on the download opt-in page, are they not actually opting in for the download?

Google Analytics will be helpful in identifying precisely where you have issues, and qualitative research will shed light on why the problems are happening.

## STEP 4: ARE CUSTOMERS ACHIEVING GOALS?

*“Does each touch point enhance or weaken a customer's experience? What does a customer expect at each point, and are those expectations met?”*

Another approach Grocki recommends at this stage is “lensed brainstorming.” It involves looking at a scenario in a different way using “lenses,” words for certain concepts, brand attributes or mindsets, such as “accessible,” “social,” or “comforting.”

Set the clock for two minutes, she says, and “each person individually writes down as many ideas as they can think of in that time” for each word. Every person is listened to, and you have a wealth of ideas.

Here’s another place where speech analytics can be of tremendous value. Syncing the voice of the customer to the various stages of the customer journey is “one of the most important, yet most challenging, steps in the mapping process,” as Touchpoint Dashboard writes, noting that speech analytics can answer such questions as:

- .What do your customers have to say about their experiences during each lifecycle phase?
- Does each touch point enhance or weaken a customer’s experience?
- What does a customer expect at each point, and are those expectations met?
- Are there any redundancies or unnecessary touchpoints?
- Which touchpoints are most and least effective from a customer and employee perspective?

## STEP 5: SKETCH THE JOURNEY.

You have all your touchpoints, channels, emotional maps, moments of truth, personas, brand promises and whatever else assembled, now you start sketching out what they tell you.

We hasten to add that you will, of course, have a professional designer produce what actually gets shown around to your organization – to the people who need to use it. Trust us, whatever it costs will be well worth it in clarity, impact and usefulness. But for now, sketch it out.

What you'll actually have at this point is pretty close to an organizational blueprint -- a list of all the touchpoints for all the products and services you offer, who supports the people delivering the services, in the back office and elsewhere, the stakeholders supporting them, pretty much "a complete picture of the working of an organization and emotional journey, from the outside in," Arne van Oosterom writes.

## STEP 5: SKETCH THE JOURNEY.

*“What you’ll actually have at this point is pretty close to an organizational blueprint, a complete picture of the working of an organization and emotional journey, from the outside in.”*

Use a standard linear sketch, use a circle, use a pyramid, sticky notes on a wall, use whatever you think works best for the information you have. Embed video along the way if it’s helpful. As Grocki says, “There are no templates, and there are infinite possibilities.”

Touchpoint Dashboard adds a few pointers on what the finished product should look like:

- It needs to be developed from your customers’ perspective, not the organization’s. The map is in your customer’s words, not in the company’s words.
- It’s actionable and prescriptive -- everything you do aligns with the customer journey.
- It engages cross-functional teams and is, or can be, used and acted on by the entire organization.
- It’s updated as the organization evolves.

What you’ll actually find is that you have a multi-faceted map, as Touchpoint Dashboard notes -- “There isn’t just one map, there will be many. While you may map all of your touchpoints in the master customer journey map, identify the most important ones and focus on those for the mini maps.”

## STEP 6: RECOMMEND IMPROVEMENTS.

“The purpose of any customer journey mapping is to understand what customers go through in each interaction, and to improve the quality of the experience for them,” FirstSource notes. When it comes time to distill the map and the process that put it together into recommendations, “focus on how to simplify processes and reduce customer effort.”

*“The purpose of any customer journey mapping is to understand what customers go through in each interaction, and to improve the quality of the experience for them.”*

It really works best if you’re intentional and proactive about how you use the map. Grocki recommends setting a time regularly, each quarter or year, to haul it out and “evaluate how your current customer experience matches your documented vision journeys. If your organization tracks quantitative KPIs, you can integrate these into a journey benchmarking process.”

In other words, this is the point of the whole exercise.

Prioritize the touch points to be addressed first, considering, as ConversionXL says, both the ease and cost of adjustments. Benchmark, change and test. Pay close attention to the moments of truth you’ve identified as needing improvement.

# *Customer journey mapping best practices.*

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# CUSTOMER JOURNEY MAPPING BEST PRACTICES.

## 1 *Convey emotion.*

"Emotions are critical to any customer experience, whether B2B or B2C, and a great customer journey map sheds light on these emotions," Heart of the Customer says. Whether that's smiley or frowny faces or something more creative, "the information does need to be conveyed somehow" to "help put the reader in your customer's shoes, to understand how they feel throughout the journey."

## 2 *No Power Point.*

Please. Give it a rest. The whole point of the customer journey map is to get away from PowerPoint's itemized, bullet-pointed approach to customers, and to get back to a flowing story, a continuous narrative taken in, beginning to end, in a glance.

## 3 *Segment the journey.*

"In longer journeys, customers are trying to accomplish different things, at different times, and in different ways," Heart of the Customer cautions, adding that you need to "document their mindset throughout, so you can tailor your customer experience to meet your customers' needs at each and every stage. For example, it's typical for preliminary shopping steps to revolve around finding out what questions to ask, but later steps in the journey are more transactional."

# CUSTOMER JOURNEY MAPPING BEST PRACTICES.

## 4 *Allow plenty of time.*

Megan Grocki says in her experience, "you can document a current state journey in about 3 hours, and a future state journey in about 5 hours. This makes for a full day to do both for one persona."

## 5 *Be flexible.*

"Note that the journey is often non-linear," Adam Richardson says. "Someone may jump straight from awareness to purchase if they are not inclined to do research," or have strong recommendations from friends or family. Or they may spend an inordinate amount of time on one step - going back to competing vendors multiple times to try to play them off each other for a better price.

## 6 *Focus on clear goals.*

"A lot can be done with mapping," FirstSource says. "All of it may or may not be relevant to the business goals." Focus on what you want to accomplish with customer journey mapping, and follow that.

# CUSTOMER JOURNEY MAPPING BEST PRACTICES.

## 7 *KISS.*

"Simplicity," says FirstSource, "is the ultimate sophistication. Customer analytics can throw up a lot of information... Don't try to include all of it in the customer journey mapping."

## 8 *Think big, start small.*

Touchpoint Dashboard recommends finding "a few quick fixes you can make that will boost the customer experience at one or two key touchpoints and start fixing. Document successes and show how the results support your company's key metrics. Build excitement."

## 9 *Validate the map.*

After you have created your customer journey map you will validate it. What you want is both the "inside looking out" and the "outside looking in" views. Annette Franz of CX Journey says the ultimate importance of having customer validate the map by saying "so many companies create an assumptive map and then leave it at that... a map that we build with internal stakeholders and is based on what we assume to be the steps customers go through to achieve some task with the organization.

This is fine to do, but we must then take that map and bring the customer perspective into it. We think we know the steps, but customers are best equipped to tell us their journeys. Often, the most important parts of the journey happen between the touchpoints, and customers are the ones who can and need to tell us about those parts."

# *Conclusion: Following the map*

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# CONCLUSION: FOLLOWING THE MAP

*You're not done when your map is. You're beginning.*

When you map you will identify problem areas. This is a good thing. Embrace them as opportunities, not bad grades on a test. "People used to hide customer issues," a former director of customer satisfaction and quality told the HBR Analytic Services study authors. "Now they know the problem is not that there is a customer issue, the problem is if we don't solve it as quickly as possible. They see customer issues as an opportunity for improvement."

Touchpoint Dashboard recommends three approaches for implementing what you've learned from the customer journey mapping process and the map itself:

- **Find quick fixes** that noticeably improve the customer experience at one or two key touchpoints, nail those, document your successes – according to predetermined goals and metrics established at the beginning of the project, as discussed earlier – to show how the results support your project: "Build excitement.
- **Share information**, because you'll need large-scale buy-in and collaboration from employees, managers, and executives from all over your organization, Touchpoint Dashboard notes correctly, so "resist the urge to share the findings with some of your internal stakeholders versus all of them. Sure, it will require more time up front, but it will eliminate a lot of headaches down the road." Share generously and widely, it will pay off in the future.

# CONCLUSION: FOLLOWING THE MAP

- **Remember it's a marathon**, not a sprint. To prevent your customer journey map from becoming a dust collector, have a long-term plan in mind. Where do you want the organization to be one, three, and five years from now and beyond? Document goals and benchmarks. Establish a timeline and stick to it. Be sure during the mapping process to clearly identify and appoint journey map owners and a support team who are committed to keeping projects on track. And, don't forget to check-in regularly with your customers. Their feedback will let you know if you're on track.

*“Where do you want the organization to be one, three, and five years from now and beyond? Document goals and benchmarks. Establish a timeline and stick to it.”*

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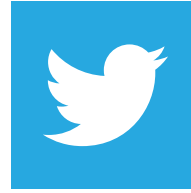
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