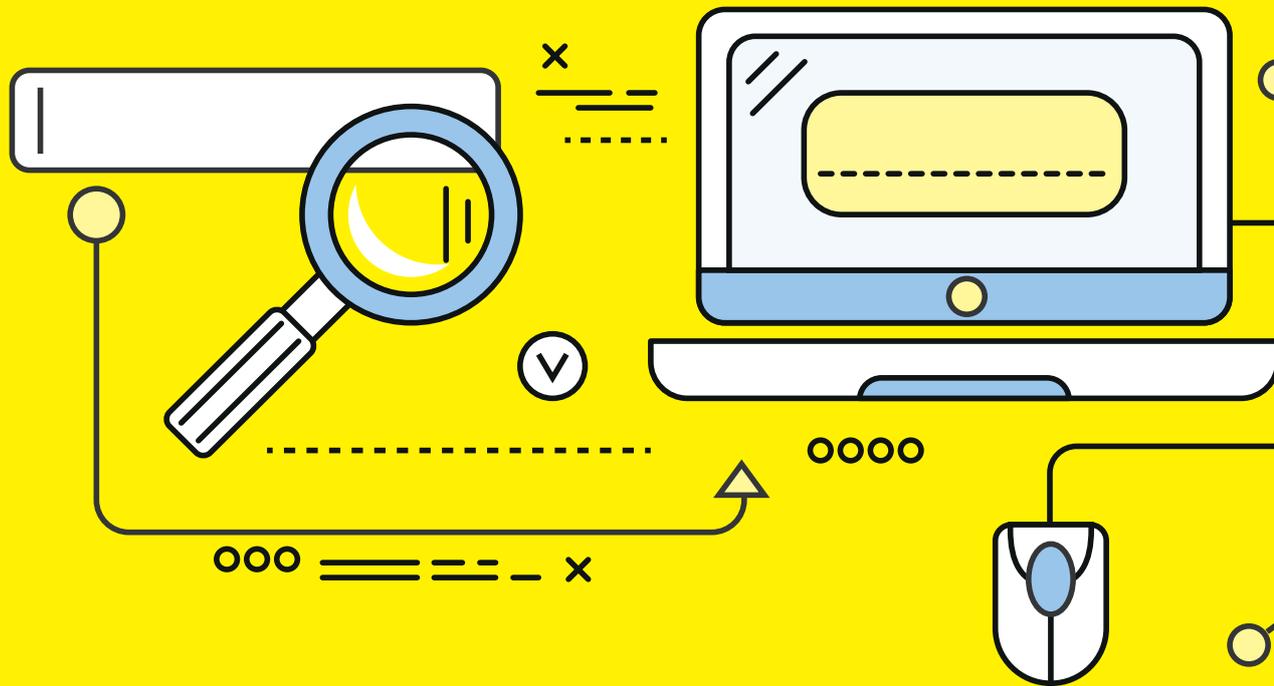


MAPPING THE CUSTOMER JOURNEY

All of a sudden, everyone is Mapping The Customer Journey. It's a concept that has been around in customer research for decades, but its recent rise to prominence may be linked to the success of service design thinking. Why is it so hot right now?



Done well it has the ability to drive quick changes to organisations' processes, culture, and frontline behaviour based on a customer-led view of their experiences. It can be incredibly powerful.

When it comes down to it, customer journey mapping is just a metaphor. Maybe so, but it's a way of looking at customers which has a number of significant benefits:

- CJM forces us to take a horizontal slice through the journey, cutting through vertical silos of departments or touchpoints. This makes us aware of places where the experience sags (often in the gaps between touchpoints).

- The sense of flow also allows us to see the "downstream" impact of events that happen earlier in the journey, which is extremely important when it comes to planning improvements.
- CJM focuses on the customer, and on optimising the experience for their benefit rather than ours. This outside-in view often shocks us when we have been lost in our own processes, but it is a much better basis for planning how experiences should work in the future.
- By creating a common, visual, understanding of the customer experience, a journey map helps the entire organisation

to use a common starting point for action planning.

- CJM should bring the emotional side of the experience to the forefront, so the focus is on how customers feel as much as what happens. This can lead to important insights about the way small details can have a big impact on the customer's experience through the journey.
- As well as learning about the "average" journey, CJM research gives you the in-depth stories of individual customers' experiences. These are gold when it comes to internal communications, particularly if your aim is culture change.

Step 1: making key decisions

If you're sold on the idea of CJM then hopefully you're keen to rush off and start doing it. That's great, but first sit down and pick which journey to map. Journey mapping is in-depth and time-consuming, so you're better off working on one important journey at a time rather than trying to map every journey all at once. Let's have a look at some key decisions you need to think about.

Is everything a journey?

To the man with a hammer, everything looks like a nail. CJM is a brilliant approach, but it's not always the right tool for the job. For ongoing experiences it simply doesn't make sense to take a journey mapping approach. Take banking as an example. There are lots of journeys you might want to look at (e.g. becoming a customer, applying for a mortgage), but the experience of being a current account customer doesn't lend itself to the journey metaphor.

For journey mapping the experience must have a start and end point; and that means you need a clearly articulated goal that the customer is trying to achieve.

What level?

We could conceptualise the entire customer lifecycle as one long journey, but in practice that's rarely useful. At the other end of the spectrum, it's possible to map out every individual interaction, each phonecall and visit to the website, as a mini journey. That can be very useful from a User Experience research point of view, but for the most part Customer Experience journey mapping is focused in the sweet spot between these extremes.

Pick a journey that lasts days or weeks rather than seconds or years.

Which journey?

Choosing the first journey to map is a question of balancing three priorities: how important is it to the business, how important is it to customers on that journey (i.e. is it a real "moment of truth" for them?), and how many customers go through that journey?

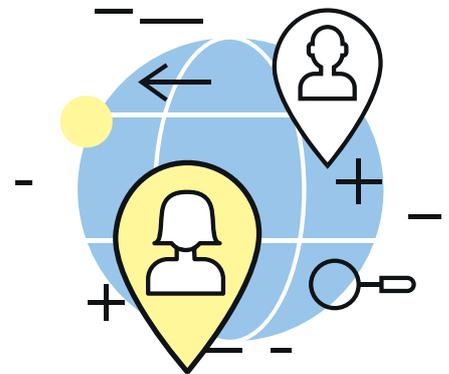
Choose a journey that maximises your

opportunity to make a difference for customers and your board.

What's your goal?

It's a good idea to be clear about why your organisation is interested in optimising this journey. There's no shame in being mercenary about this, and the clearer you are at the outset, the easier it is to factor it into the research. If you're mapping the new customer journey, is it more about improving conversion, or is it about setting customers up to be cheaper to serve in the future?

A clear business goal lets you build business outcomes into the research.



Who owns it?

CJM requires you to break down silos, and that means you must start by getting buy-in from all relevant colleagues. Getting them on board early, and inviting them to help shape the process, is by far the most effective way to guarantee they will be actively involved in taking action as a result.

If you want your colleagues to pay attention to the map, then they have to be involved in drawing it up.

Which customers?

Once you know your journey, and the business question you want to address, choosing which customers to invite should be obvious. It makes a big difference to what you're able to say with the research, so think about it carefully. If you map the new customer journey by only talking to people who sign up, and never ask the ones who drop out along the way, then you're missing a big opportunity to learn.

The choice of which customers to speak to sets boundaries on what you can learn.

Step 2: mapping the landscape with qualitative research

When you map the customer journey you need to do it from the customer's point of view. We all become so focused on our own internal processes that it becomes impossible to remember how it feels to be a customer. You need to forget what you know and go to talk to customers on their own terms.

Qualitative research gives you the ability to understand individual customers in great detail. Depending on the journey you may choose to blend observation and interviewing techniques, but the key thing to remember is that you want to understand:

- **The journey.** What are the steps, from the customer's point of view? Where does the journey begin and end?
- **How it feels.** How do they feel as they go through the journey? What did they want and expect at the beginning? Work hard to understand customer emotions, and the fundamental needs that those point to. For example, if customers talk about how long something takes, it often means that they are worried because they don't know how long it will take or whether it would happen at all. This has important implications when it comes to planning improvements (i.e. we don't necessarily need to make it quicker, but it will feel quicker if customers know what's happening).
- **Context.** In qualitative research we want to understand in detail how our product or service fits into the customer's life. What else are they dealing with at the moment? Have they got time to read the complicated instructions we've sent them? How is the ticking clock on the wall likely to affect their perception of waiting time? The empathy map is a useful tool to help you capture some of these things.

When you finish the qualitative stage you should have a clear understanding of what the key moments of truth are for customers, and how those affect their emotional experience. You will also have a number of detailed individual customer stories.

Step 3: quantifying to prioritise

If you stopped there you would have a useful piece of insight, but without measurement it is very hard to be systematic about improvement and impossible to be

sure that the changes you make have been effective. You need to know exactly what to work on, and understand how much impact it will have on the customer.

The survey should happen as soon after the event as possible or, in the case of very long journeys, at key milestones along the way. It should be short, focused, and wherever possible grounded in concrete perceptions rather than long lists of scores (e.g. "did the delivery driver turn up at the agreed time?") rather than a score out of 10 for timeliness). You should also include open responses so that you can understand customers' feelings, and diagnose what went wrong if they are unhappy. Including both importance and satisfaction scores enables you to understand how customer perceptions of your performance match up to their requirements, and that means you can prioritise accordingly.

As you make changes you should repeat the quantitative survey. You will see rapid improvements to customer satisfaction, and knock on benefits in terms of reduced costs and improved retention etc. Eventually you may need to repeat the qualitative stage, particularly if you introduce any radical changes, but by then there will be significant belief within your organisation about the power of CJM to deliver change.

Quantitative research is essential to prioritise and track improvements.



Personas and segments

Most organisations will have groups of customers with very different needs going through each journey. Personas are a useful tool to capture the different needs and expectations that different customer groups have, but be careful not to lapse into lazy stereotypes. Good personas are driven from the research, not decided by the organisation.

They should be used as a way to increase flexibility, not decrease it. That means that they should be used to stress-test ideas we have about improvements ("how would this work for Mary?") rather than as closed service options.

In business to business markets, it's essential to understand the role of the entire "decision making unit" in their experiences through the journey. That typically means representing the views of senior decision makers and key influencers as well as the people you deal with day to day.

Every customer journey is individual. Personas help you plan journeys that will work well for everyone.

Step 4: linking back to the internal view

A quantitative journey map shows you exactly how your customers feel in their experience, and highlights the points of pain that are causing most problems at the moment. When you first map a journey, it's often the case that there are some real "no-brainer" opportunities—places where you're creating problems for customers that can be quickly solved with little or no cost to the business.

Beyond the very easiest of pain points, though, you will need to involve your colleagues in drawing up a detailed action plan. Powerful though they are, journey maps can be frustrating for people who are not used to dealing with customer data. They reflect the customer view, and that means that they are thin on detail in terms of the internal processes that create the pain points. We end up with a gap between the idealised internal process view, describing what's supposed to happen, and the customer view which describes the experience we create. What we don't always know is why and how things go wrong.

In order to bridge this gap we need to take the customer view to colleagues so that they can help us map out what causes the customer experience to be the way it is. The service blueprint is a useful tool for this, but it's not the only way. The important thing is that you treat the customer journey map as the starting point for planning actions to address the things we know are important to customers, and those events and behaviours that have the biggest impact.

It can be helpful to link the customer journey back to internal metrics. This is an effective way to give the organisation a feeling of control over the customer experience, but be wary of the trap of prioritising the internal metric over the customer view. When it comes down to it, the customer is the one who gets to judge whether your performance is improving or not.

Involve your colleagues to understand why the customer experience is as it is, and plan actions to address the root causes.

Step 5: drawing the map

Whether or not you can draw, it's usually best to start on paper until you have a good sense of the best way to visualise your customer journey. Resist the urge to rush to box and arrow models, which tend to turn into spaghetti very quickly.

Two good starting points are the wheel, which reflects the essentially cyclical nature of some journeys, and the timeline. Of course you may end up using a combination of both if your journey involves stages that loop.

Keep the journey as visual as you can. Icons capture attention more quickly, are quicker to process, and aid recall more than words.

Colour is an effective way to communicate, and red is particularly powerful. Use it to direct attention to key points of pain.

Less is more. The point of your map is to focus your organisation on a common view of where to improve the customer experience. You may have a lot of detail, but this is best handled as layers you can overlay for particular audiences, rather than trying to cram everything into one visual.

A good journey map should be clear, focused, and visual.

Internal communications

If there was no other benefit to CJM, it

would be worth doing purely for the impact it can have on your internal communications around customer experience. Effective internal communication is about getting the right balance of clarity and emotional impact.

When using maps to communicate with frontline staff you need to address two key questions:

- **What do I need to do differently?**
- **How does it feel to customers?**

which you can think of as the “what” and the “why” of making change. The more concrete you can make the recommendations, the easier it is for staff to keep what you’re asking them to do in mind (and the easier it is for you to assess if they’re doing it). Make those recommendations specific to each person’s role and they will be much more likely to see the relevance of the map to them.

Building empathy for customers is essential to creating an environment in which great customer experiences happen. Journey mapping, particularly the qualitative outputs, gives you a brilliant tool for bringing customers into the business.

Those individual journey maps are also a great way to shape your culture. Using real stories to showcase the types of frontline decisions and behaviour you want to see is by far the most effective way of helping staff to understand the values you want to express.

Journey mapping research and internal comms go hand in hand to shape culture change.

A powerful metaphor

Customer Journey Mapping is just a metaphor, but it's a metaphor that has the power to transform the way you understand and communicate the customer experience within your business.

CJM blends qualitative and quantitative research to give you insight that builds empathy and links customer feelings to concrete frontline events and behaviours. It

provides a common, visual, understanding of the customer experience so that everyone in the business can see their role in creating a happy customer, and it demonstrates the value to the business of getting that experience right.





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