Journey Driven

Journey mapping for improved products, services, and experiences

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What is Customer Experience?

In order to design and deliver a great experience it is necessary to understand we mean by customer experience.

What customer experience **is not**:

- Customer Experience is not limited to customer support, nor is it customer service.
- Customer experience is not limited to just customers. Employees, partners, and other stakeholders influence the customer experience. In fact, every party involved in the production, delivery, and consumption of a product or service contribute to the overall experience.
- Customer experience is not limited to digital user experience (UX). UX is an important element in the customer experience when interactions are dependent upon technology, but experience is not limited to such interactions.

So, what is Customer Experience?

Customer experience is **the aggregate of every interaction a customer has with your industry, organization, product, and service**.

Although this guide is written primarily using the vernacular of business and refers to the people who consume a product or service as a "customer", it is also applicable to nonprofit and government entities who deliver products and services.

Why Does Experience Matter?

In a world of with an unlimited variety of sameness, we are confronted by a dizzying array of choices that are often undifferentiated in any meaningful way.

The cost to develop new products has plummeted. Barriers to bringing new products to market are incredibly low. New products and services are easily duplicated and market advantages of new technologies or features are short lived. The use of data and marketing technology enables companies to target consumers in ever more granular detail. Companies can create highly customized products or services and target a specific audience, leading to increased product proliferation.

In this environment there is one way to stand out:

Deliver a great experience.

Recent research has confirmed that experience drives loyalty, revenue and increased market share:

- According to the American Express 2012 Global Customer Service Barometer **two-thirds of consumers state that they are willing to spend more** with a company they believe provides excellent customer service. [1]
- The Accenture 2013 Global Consumer Pulse Survey found that although "price still plays an important role in the choice of provider, the **customer experience is equally important**" in a customers decision to switch service providers. [2]
- Avanade found that decision makers buying products and services for their business are paying on **average 30% more** for an improved customer experience. [3]
- Forrester found that a stock portfolio of Forrester's Customer Experience Index leaders had a cumulative 43% gain in performance over a six-year period (2007 to 2012), compared with a 14.5% increase for the S&P 500 Index and a 33.9% decrease for a portfolio of customer experience laggards.[4]

Using a Journey Map to Understand, Communicate, and improve Customer Experience

Creating an effective, enjoyable and differentiated customer experience requires deep empathy for the customer and their experience as they interact with your company. One tool for developing this empathy and understanding is the customer journey map.

A Customer Journey Map is the story of the actions, emotions and motivations of a customer as they interact with your organization, **as told from their perspective.** The journey map visualizes the customer experience as a timeline of high-level **stages** consisting of multiple **steps** with each step involving of one or more **touchpoint**, or interaction.

Journey maps can focus on one segment of an overall journey - like sales or product pick-up - or they can document every touchpoint in the customers end-to-end journey.

Touchpoints are documented in detail and include the following information:

- **Touchpoints** - The interactions a person is having with your company, product, service or industry
- **Channels** - How the touchpoint is delivered (i.e. website, phone, face-to-face, etc.) **Emotions** - How stakeholders (customers and employees or partners) feel at that touchpoint
- **Operations** - Front and back stage people, information, materials and processes necessary to support the touchpoint
- **Questions** - Questions customers ask at each touchpoint
- **Impact Points** - These are touchpoints where decisions are made, impressions are formed and conversions occur.
- **Goals** - what customers are trying to accomplish at each touchpoint

Creating a Customer Journey Map

IMPORTANT!
Although the following steps are presented as a linear process, journey mapping is actually cycles of exploration, analysis, hypothesis creation, and testing. Information gained in one stage can cause you to jump back to an earlier stage to refine your understanding.

Step 1: Define your Objectives

Are you focusing on a specific problem are like poor post-service surveys or low product or service adoption? Are you looking for needs that aren't being met so you can bring new products and services to market?

Defining the objective will put constraints on the scope of the research and journey mapping project. While it is possible to map the end-to-end customer journey, focusing on a specific objective or segment of the overall journey will enable you to research at a more granular level. This will deliver more, and more actionable, insights.

Step 2: Identify the Actors - behavior based personas

In order to understand a journey, you must first identify the people on the journey.

As we mentioned earlier, the key actors can include key stakeholders involved in the creation and consumption of the products or services involved in the journey segment. Actors include those who influence the purchase and consumption of a product or service.

Influencers for Business-to-business commercial organizations purchasing and implementing software could include the CFO, CTO, project manager, and end user. For a Business-to-consumer organization influencers may include family, friends, and online peer groups. In the nonprofit world, actors can include family members, government organization representatives, and religious leaders.

Once you identify the key actors you need to develop **personas** to help understand and communicate that actors perspective. A persona is an archetype, a representative example of a type of person involved in a journey.

Traditionally personas are developed to represent customer groups that are segmented based on demographic criteria such as age, gender, income, political affiliation, etc. Behavior based personas can be more accurate and are developed based on behavior like attitudes, common actions and emotions.

Step 3: Conduct Research

Getting an understanding for the interactions a customers has with your organization, products, and services requires getting into your customer's shoes. It is important to gather both quantitative and qualitative research to fully understand the actor experience.

Qualitative research seeks to understand WHAT is occurring. Qualitative research typically involves large samples sizes and is used to generate numerical data. Common qualitative data can include survey data, website analytics and census data. Qualitative data is highly structured with an emphasis on statistical significance.

Qualitative research explores WHY behaviors are occurring. Qualitative research digs into underlying attitudes, motivations, thoughts, and opinions regarding behaviors. Some qualitative research methods includes observations, contextual inquiry, storyboarding, and mobile ethnography. The data is usually less structured but very deep and the sample sizes are smaller.

For the purpose of customer experience journey mapping, qualitative research tells you what areas of behavior need to be explored and qualitative data provides the understanding for why actors are behaving in a particular manner.

Example: A school district notifies 4,700 low-income families in a school district that they are eligible to participate in a reduced-price school lunch programs. Only 5% of the families that receive the information register to participate in the program. This is the quantitative data that shows WHAT specific behavior is occurring: low rate of registration.

A team can then interview and observe some of the families as they receive notification and attempt to register for the program. They can interview family members to explore how well they understand the program and how they feel about the program. They can observe the family members as they go through the registration process via various channels (i.e. website, mailing paper forms, and in person at the school district office). The information gathered in the interviews and observation is the qualitative information that can help explain WHY families are not participating in the program.

Step 4: Map the Experience

The customer journey map is not a refined piece of art. It is a messy tool used to visualize and analyze the results of your research. As such, any effort to make it look pretty can hurt the process.

Journey mapping is a team activity. The research team may be driving the bulk of the mapping but customers and service providers should be called on to confirm the map accurately reflects the experience.

Select the persona whose experience you are mapping an post the persona in a prominent place in the room. This will help the team stay focused on that person and their experience.

Start with a whiteboard or large piece of butcher paper taped to a wall. Draw three lines horizontally across the entire whiteboard breaking your vertical space into four equal sections. Data will be plotted across the map using post-it notes so it is fast and easy to make changes.

Section 1.

In section one list the touchpoints or interactions that occur. Use the one post-t note for each interaction. Place the touchpoints on the map in the order they occur.

Section 2.

In the second section list the channel that is used to deliver the touchpoint. Channels can be face-to-face, mobile app, print material, SMS, etc.

Section 3.

In section three list the information you know about each touchpoint. Was the experience positive or negative? What is the recipient's attitude and emotion at that touchpoint? What questions did they have? Was what was delivered what they expected?

Section 4.

Section four is used to list the organization technology, systems, and roles required to deliver that touchpoint.

Step 5: Analyze the Experience

In the analysis phase you are looking for more than just negative experiences. Look for patterns in customer behavior that aren't what you expect. Look for gaps that create confusion or touchpoints that aren't necessary. Look for touchpoints that do not deliver what the customer was expecting at that touch point.

Make a list of the problems and opportunities you found. Score each problem and opportunity based on the following criteria:

1. Cost of making the change
2. Effort required to make a change
3. Impact of making the change
4. Cost and effort to prototype and test the change

Example: One major issue for your customers may be the lack of a mobile application. The cost and effort to develop a mobile application is significant, but so is the potential impact. Prototyping and testing a mobile app is relatively inexpensive

Another issue may be discrepancies between the information required on printed forms versus website forms. The fix for this problem is inexpensive and the potential impact is large, but the effort to get the various teams communicating may be significant. Prototyping and testing this change is hard due to the level of cooperation across the organization that will be required.

In a third scenario you may find that customers are not connecting your software to their existing systems. This may be easily resolved by existing support staff and the customer may be willing to pay for the additional service. This presents an additional revenue opportunity. Prototyping and testing the new service can easily be accomplished by running a pilot program through the support team.

Once all issues and opportunities have been scored they can be managed just like any investment portfolio.

Step 7: Design and Run Experiments

At this point we are still making some assumptions (albeit very educated assumptions based on our research) about how changes will affect the organization and customers. It is important to prototype potential solutions to test your assumptions.

It is important to define how you will measure success as you begin the experimentation phase. A website that is supposed to decrease support calls may be a success by one metric but if it leads to higher customer turnover then it is a failure by that metric. Define the metrics for success and be aware of unintended consequences.

Prototyping should start as simple, low fidelity approximations of a product or service. Paper sketches can be used to communicate apps and websites, cardboard boxes can be used to build a patient admitting area, and Lego's can be used as product prototypes. The faster you can get customers and employees engaging with a prototype the faster you can start challenging your assumptions.

Step 9: Revisit and Refine

The customer journey map is a living document. Customer preferences, society values, and technology evolve at a rapid rate. Create a schedule for conducting customer research and updating your map on a regular basis.

A Sample Mapping Scenario: The Gym Experience

This example of The gym Experience is a high level exploration of the gym journey. We'll look at the creation of a journey map using going to the gym as an example customer experience.

Stages

A common mistake is to limit the stages to include on those actions only directly involved in the delivery of the core product or service. For example, a gym may consider the customer experience to include the arrival at the gym, the workout and the post-workout shower. However, the gym experience could be broken into the following stages:

1. Planning
2. Arrival
3. Check-in
4. Workout
5. Showering
6. Returning

Steps

Once the stages of the experience are defined you can now start exploring the steps involved in each stage. Each stage may consist of myriad steps and touchpoints, any of which could produce a negative or positive experience:

1. Planning - The planning stage takes place in the customers home the night before. The customer packs their gym bag with workout clothes, snacks and their favorite magazine for reading while on the treadmill.

2. Arrival - Arrival could include transportation to the gym, parking in the parking lot and the walk into the gym.

3. Check-in - The Check-in stage consists entering the gym, scanning the check-in application at the front desk, going to the locker room, finding an open locker, changing clothes, locking the locker, then going out into the workout area.

4. Workout - The workout consists of the actual workout and could includes getting a towel, filling a water bottle, locating an available treadmill, finding the right music mix on the phone, setting up a magazine on the magazine rack, selecting a workout scenario and

5. Showering - The showering stage could be very complex and include steps such as locating the locker, entering a code to unlock the locker, locating towels, showering (including finding and using soap, shampoo and washrags), dressing, the application of makeup, etc.

6. Returning - Once the showering process is complete the customer will prepare to return to some other activity. Again, this process may not be as simple as it originally seems and may include buying and consuming coffee or snacks, warming or cooling the car, and commuting to the eventual destination.

Touchpoints

For each step within each stage the following information is documented:

- Touchpoints - The interactions the customer is having with the company
- Channels - How the touchpoint is delivered (i.e. website, phone, face-to-face, etc.)
- Emotions - How stakeholders (customers and employees or partners) feel at that touchpoint
- Operations - Front and back stage people, information, materials and processes necessary to support the touchpoint
- Questions - The information customers are looking for at each touchpoint

- Goals - what customers are trying to accomplish at each touchpoint

Analysis

Once the journey map has been created it is time to look for insights into customer behavior and identify positive and negative experiences. Obviously any time the customer has a negative experience should be explored further and if possible the touchpoint should be fixed. The opportunities for delivering new products and services require a bit more work to identify. Looks for behaviors such as workarounds or interactions where the customer acts in an unexpected manner.

Some examples of observations that may be opportunities:

- The customer uses the cup holder to hold their cell phone so they can listen to music while running on the treadmill.
- The customer always uses the same pieces of exercise equipment.
- The customer goes home to shower rather than showering at the gym.
- The customer uses a publicly available workout tracking app to record each workout.
- The customer comes to the gym with a group of coworkers.

These are very basic observations, in a real scenario the depth of research can lead to many more insights into how and why people use the gym.

Planning

After the analysis of the journey map it is necessary to create a plan for taking advantage of the insights. Typically there are more insights gained than can be acted on. The customer experience team needs to rank each opportunity based on the potential impact on the organization and the cost of implementing the solution. Customer experience initiatives should then be managed as a portfolio of projects based on their alignment with overall strategic objectives of the company.

JW Fellows is a customer experience consulting firm helping organizations understand **WHY** their customers do what they do so they can deliver better products, services, and experiences.

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