Journey Maps = Output

Research = Input

Goal: To increase understanding of journey management, with special focus on journey mapping, and next steps to move towards activation

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SOMETIMES YOU NEED TO SLOW DOWN TO GO FASTER…

let's first discuss journey mapping at a high level…

WHAT IS JOURNEY MAPPING?

Creating a customer journey map is the process of forming a visual representation of customers' processes, needs, and perceptions throughout their interactions and relationship with an organization. It helps you understand the steps customers take – the ones you see, and don't – when they interact with your business.

It enables you to assess:

❖ Insights – from your existing customer journey, how to understand it better

❖ Impact – how to optimize budgets and effort for changes we want to make to the customer experiences

❖ Issues/opportunities – Diagnose the existing customer journey

❖ Innovation – where you might want to completely change the existing customer experience

LET'S GET GROUNDED IN SOME DEFINITIONS

Soooo much jargon. Often used interchangeably. Yikes.

Customer Journey
The set of all customer actions and interactions with your product or service and with your company. These actions can be real or possible and go beyond the purchase process, including the pre-sale and post-sale stages.
Simply: The actions that are happening by me or to me

Customer Experience
Is the consequence of a customer's perceptions after interacting rationally, physically, emotionally, and/or psychologically with any part of a business. This perception affects customer behaviors and creates memories that drive loyalty and business value. Customer Experience spans all interactions from engagement to marketing, discovery, purchase, usage, and customer service – regardless of the channel. Its scope is inclusive, uniting the business around the customer's vision.

Journey Map vs Experience Map
A journey map is a tool that helps to visualize certain user's paths and customer interaction with the product. It is a story of communication between the user and the company that considers the customer's thoughts, emotions, goals, and motives.
Similar to the customer journey map, experience mapping depicts the user's path from the product discovery stage to evaluation and purchase (until a person becomes a customer). But the experience map goes wider, it also shows what your competitors and your business are doing in the context of this journey, taking into account reviews, references, referrals, support, and so on.

MONITORING TOUCHPOINTS ISN'T ENOUGH

The focus of experience management has shifted from touchpoint-specific monitoring to creation of a unified view as the customer interacts with the company. The goal is to improve and personalize experiences across channels, locations, and time.

Recent research shows that companies with a journey mindset that provide a positive experience along the entire journey can expect to have significantly higher revenues and better CX than those that don't.

Journey management is the means to enable client experience transformation. It reveals pathways that lead to a satisfying experience, and which prevent high-quality results.

THE CHALLENGE

To provide a truly unified view, traditional analytics must evolve from retrospective and disparate reporting to real-time, continuous, behavior-driven management.

ARE JOURNEY ANALYTICS AND JOURNEY MAPPING THE SAME?

A journey map is a visual illustration of a customer's experience with a business. Journey analytics is so much more.

Customer journey mapping has been growing in popularity over the past decade. But the unfortunate reality is that many companies sink a lot of time into creating beautiful maps—often released with great fanfare—only to see them gather dust as employees go back to work. Oftentimes, when customer-facing employees put themselves in their customer's shoes, it results in an imaginary journey that fails to reflect the variety of real-world paths customers actually take.

Why? The answer may lie in the journey map itself. Journey maps are highly effective at illustrating a macro-level journey (e.g., from initial awareness to long-term relationship), or zooming in on a micro-level journey (e.g., steps taken to make an online purchase). But, they don't cover both. By their very nature, journey maps are static, point-in-time representations. Journey maps tend to assume the same cadence for all customers. They're unable to capture various permutations by customer type, channel, location, and complexity.

Mapping is the underpinning tool that enables the smart coordination of intersections/transitions across both business segments and journey stages – and is brought to life through data-driven delivery.

JOURNEY MANAGEMENT FRAMEWORK

Journey Mapping is a way to visualize and communicate your customer's experience across touchpoints and over time as they seek to achieve a specific goal.

Journey Orchestration is a way to use each customer's entire experience to inform and personalize interactions that will improve customer experience and drive desirable outcomes.

Journey Optimization is a closed loop approach that uses AI and machine learning to improve the experience of each customer, so they can achieve their goal more efficiently.

Journey Analytics is the science of analyzing customer behavior data across touchpoints and over time to measure the impact of customer behavior on business outcomes.

Journey Insights are the quantitative and qualitative information that provides an understanding of the behavior of your customers as they seek to achieve a goal.

Journey Design is the process of defining the experience a customer has as they seek to achieve a goal and the interactions the company will take at each step to promote progress towards the goal.
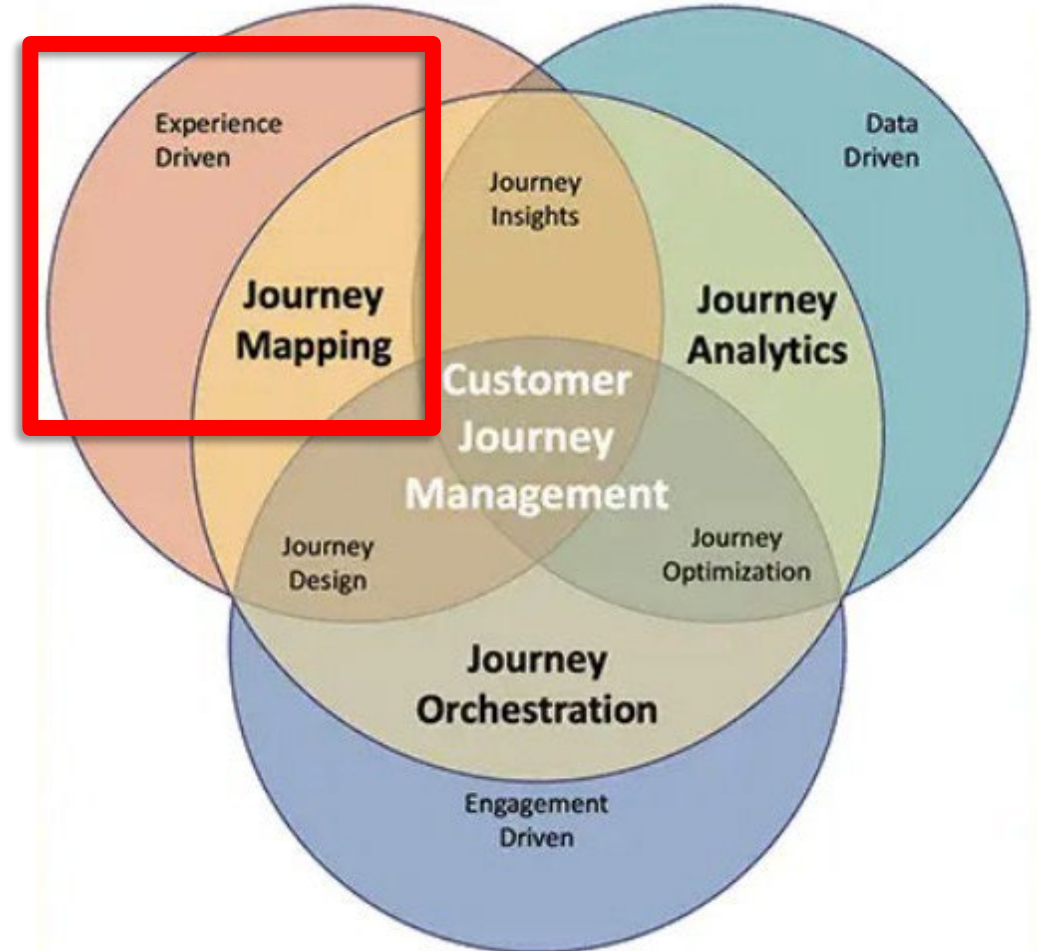
LET'S DIG DEEPER INTO THE JOURNEY MAPPING COMPONENT…

WORK THROUGH THE MAPPING PROCESS

Ask yourself the following:

❖ Who are the people involved in this journey? E.g. if you're in a car dealership, that might be the customer, the sales rep, and front-of-house staff.

❖ What are the processes or the things that happen during this journey?

❖ What are the customer attitudes? What are they feeling at this time? Go beyond excitement or frustration. Bring these feelings to life. This car is my dream come true!

❖ What is the moment that matters? Identify the greatest moment of emotional load.

❖ What are they getting out of this moment? How do their needs change if this experience goes badly?

❖ How do you measure how effectively you are meeting customer needs throughout the journey? Set KPIs to put benchmarks in place for your customer journey map and customer experience and track your progress.

THE CHALLENGE

Customer journey mapping has grown in popularity over the past few years. But the beautiful journey maps that you release with great fanfare are probably gathering dust, as employees go back to the 'real work' that they're measured by.

JOURNEYS AREN'T CREATED; THEY'RE DISCOVERED THROUGH RESEARCH

To create this framework and level the playing field, first identify all our customer journeys at a high level. This aggregate view of journeys effectively summarizes how our customers interact with your company. From this global perspective, we can see how all the journeys fit together, how they inform the broader experience, and how they fit into our customer experience vision and strategy. This makes it much easier to see the relative importance of each journey and how it shapes the client experience.

THE BENEFIT

Millions or even billions of individual interactions can be captured over time and integrated into a single, unified view of the real client experience.

ALWAYS START WITH RESEARCH

STEP BY STEP

STEP 2: Conduct Qualitative Research

You may be tempted to use existing quantitative data as the basis for your journey map. While quantitative data can give you a high-level understanding of customers' general attitudes and levels of satisfaction for specific interactions (think: NPS), it is less appropriate for understanding emotions, mindsets, and motivations at the level required for effectively depicting the entire journey.

STEP 3: Complement Qual with Quant

Aside from highlighting potential problem areas to help shape qualitative research efforts at the onset of a customer-journey mapping initiative, quantitative data can also add another layer of evidence to your insights to make your narrative even more compelling.

For example, after the qualitative research study has been completed, you may choose to supplement or reinforce findings in the following ways:

•Follow up customer interviews with a **survey** to understand the frequency and magnitude of any of the behaviors you uncovered in your conversations

•Use digital **analytics** (e.g., page views or exit rates for relevant web pages) to add credibility to your claim that certain points in the journey are frustrating to users

•Supplement high or low areas depicted in the journey map with **satisfaction metrics** that align to specific interactions.

STEP 1: Look for Existing Data First

Before beginning research for your journey-mapping initiative, spend some time looking for existing, relevant data within your organization. There is often existing (though disparate) information about the journey buried throughout various past internal efforts. This data, both qualitative (e.g., data from past focus groups, customer-support call logs, etc.) and quantitative (analytics, customer-satisfaction scores, etc.) can give you clues about how to shape and focus the content of your research efforts.

COMPONENTS OF A JOURNEY MAP

To determine your customers' buying process, you'll want to pull data from all relevant sources (prospecting tools, CMS, behavior analytics tools, etc.) to accurately chart your customer's path from first to last contact.
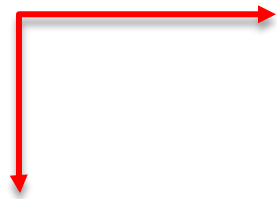
However, you can keep it simple by creating broad categories using the typical buying journey process stages — awareness, consideration, and decision — and mapping them horizontally.

STAGE	AWARENESS	CONSIDERATION	DECISION		DELIVERY & USE			LOYALTY & ADVOCACY	
CUSTOMER ACTIVITIES	Hear from friends, see offline or online ad, read from newspapers	Compare & evaluate alternatives	Add groceries to shopping cart	Make an order	Receive or pick up on order	Contact customer service	Enjoy groceries	Order again and/or order more	Share experience
CUSTOMER GOALS	No goals at this point	Find the best solution to buy food	Find and select products easily, get inspired	Order effortlessly	Receive or pick up an order effortlessly and when needed	Get help if problems appear, request for refund	Have the right and good quality in-gredients	Repeat good customer experience	Share feelings, give feedback
TOUCHPOINTS	Word of mouth, traditional media, social media	Word of mouth, website, brick & mortar store, social media		Website, app, order confirmation email	Delivery service, packing, messages (email, SMS, phone call)	Phone, email, chat	Food products, packages, other materials		Word of mouth, social media
EXPERIENCE	Interested, curious	Requires effort but excited	Excited	"Payment is painful"	Requires effort, happy when received	Frustrated	Satisfied	"This is easy"	"I have to share this"

What is the customer wanting to accomplish and what channel are they using to accomplish that goal

What emotions are the customers experiencing as they navigate the journey phases

What is the business looking to accomplish during this journey phase? What metrics of success for the phase

BUSINESS GOAL	Increase awareness and interest	Increase number of website visitors	Increase shopping cart value & conversion rate	Increase online sales and conversion rate	Deliver on time and minimise the delivery window	Increase customer service satisfaction, minimise waiting time	Make products to match expectations	Increase retention rate and order value and/or frequency	Turn customers into advocates, turn negative experiences into positive
KPIs	Number of people reached	New website visitors	Shopping cart value, conversion rate	Online sales, conversion rate	On time delivery rate, average delivery window	Customer service success rate, waiting time	Product reviews	Retention rate, order value and frequency	Customer satisfaction
ORGANISATIONAL ACTIVITIES	Create marketing campaigns and content both offline and online, PR	Create marketing campaigns and content both offline and online	Optimise grocery shopping experience	Optimise online purchase funnel, order handling	Picking & delivery	Organise customer service	Develop products & product range	Target marketing, make re-ordering easy, upselling and/or cross-selling	Manage feedback and social media, develop sharing / inviting possibilities
RESPONSIBLE	Marketing & Communications	Marketing & Communications	Online development, Customer service	Online development, warehouse, logistics	Warehouse, logistics	Customer service	Product development, purchasing	Marketing, online development	Customer service, online development
TECHNOLOGY SYSTEMS	CRM, analytics, programmatic buying platform, social media	CRM, analytics, CMS, marketing automation	CRM, analytics, CMS, ecommerce platform, PIM	CRM, analytics, CMS, ecommerce platform, PIM, inventory system, marketing automation	CRM, analytics, order & delivery system, marketing automation	CRM, analytics, help desk, ticketing system, chat	CRM, analytics, vendor management system, PIM	CRM, analytics, marketing automation, ecommerce platform	CRM, analytics, marketing automation, ecommerce platform, social media analytics

What are the specific activities, what department is responsible for them, and what systems are working together to deliver these activities during each journey stage

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SCALING JOURNEY MANAGEMENT…

**"When you piecemeal processes, it breaks your ability to scale."**

A COMPLETE VIEW

Each customer takes their own unique journey when interacting with the organization. Journeys may share certain characteristics or differ wildly from the norm. Some customers zig and zag through different paths as they reach a goal, while others use a more streamlined approach.

Customer journeys are interconnected. It's common for customers to "jump" multiple times across online and offline channels, and even intertwine with other journeys.

Journey platforms let you connect the dots between interactions and outcomes in seconds, rather than weeks and months.
While CX practitioners are adding technology at a furious pace, many of these technologies remain underutilized. Customer journey platforms can unify and improve the effectiveness of existing technology stacks to maximize the ROI of the technologies.
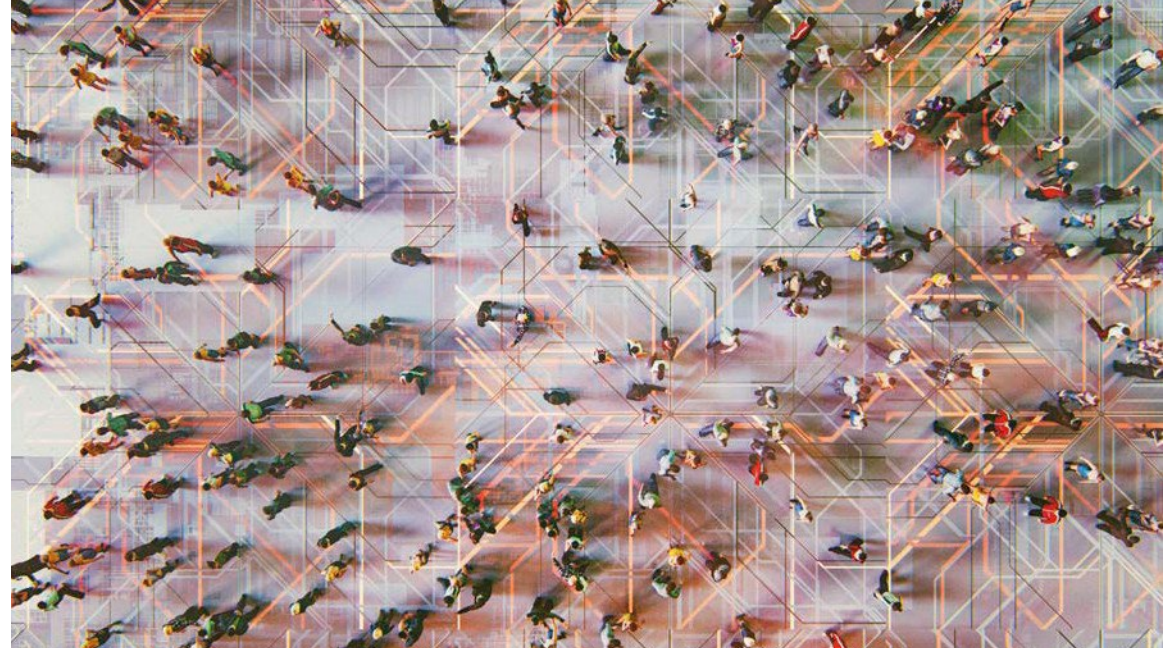
THE BENEFIT

By using a customer journey platform equipped with sophisticated machine learning algorithms, we can quickly discover the most frequent paths from Point A to Point B.

We have the ability to compare and contrast different paths and correlate them with customer and business outcomes. We also have the ability to predict behavior in real time and decide on the most appropriate method of engagement.

TRANFORM CUSTOMER JOURNEYS AT SCALE

1. Collect

Identify customer and interactions across channels.

Website

Voice

Chat

Text

Back office

Mobile app

Social

2. Engage

Analyze in real time to understand customer behavior, intent, engagement profile, opportunities, etc.

Analytics

Actionable insights and next best action predictions

Customer engagement profile

Inbound

Back-office systems

3. Optimize

Drive personalized and proactive engagement based on customer context, business rules and predictive next best actions.

Business rules

Routing and orchestration

Customer experience optimization
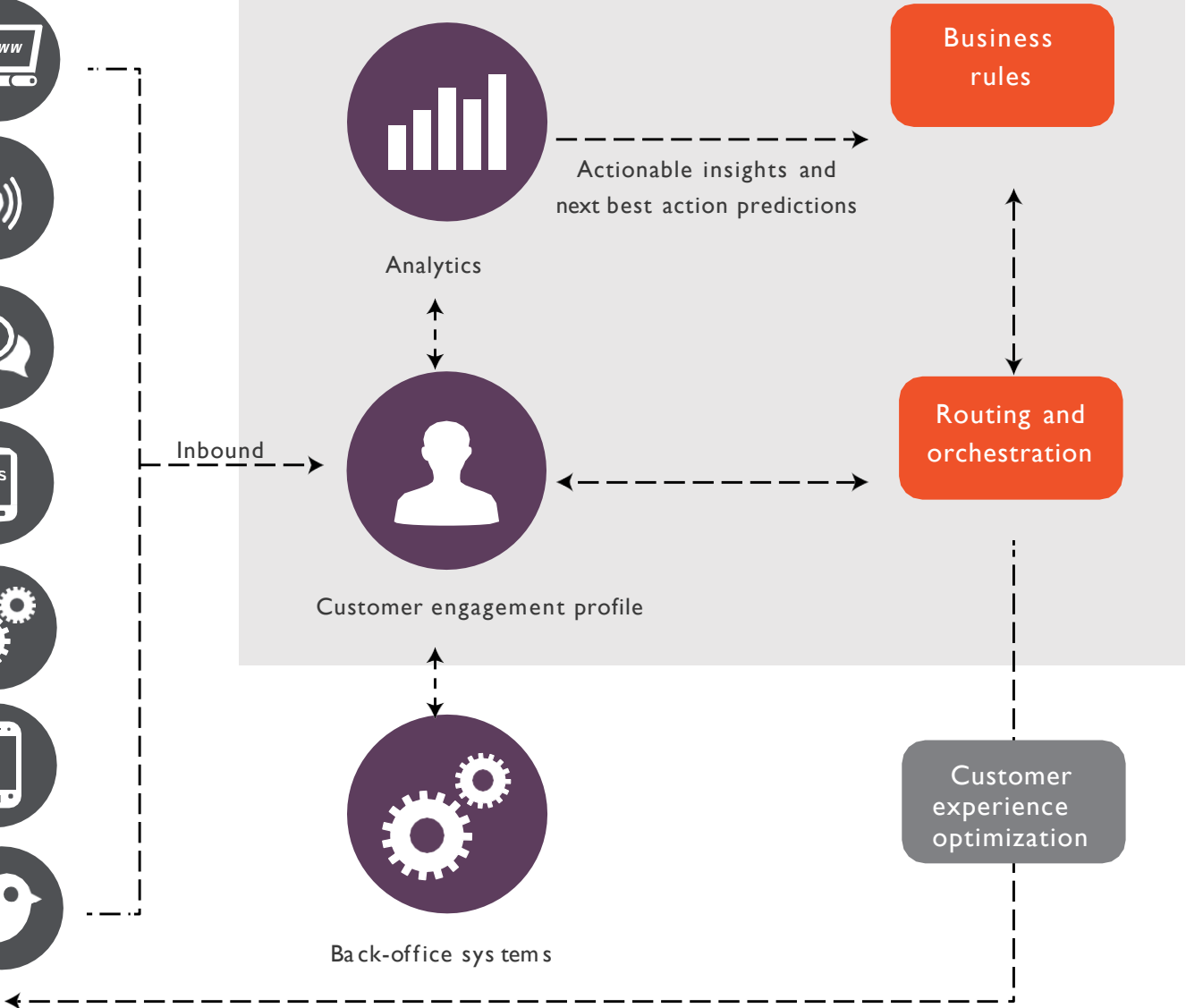
Outbound communication

THANK YOU!!

ABOUT THE AUTHOR

"Providing thought-leadership in a way that delivers outcomes is my jam."

Dr. Nikki Smith is passionate about all things people and creating unique and unmatched experiences. Bringing forward client-centricity that elevates strategy and delivers business outcomes is her speciliaty. Serving in diverse roles in the innovation space, Nikki is a confident leader who is adamant about bringing the voice of the customer into the board room and ensuring the experiences we deliver are inclusive, accessible, and equitable. "As I reflect on how the world around us is changing and has changed, I concluded that one mantra has remained the same throughout my career; People. First. Always. My work centers around much of what Jeff Bezos and Steve Jobs has taught us, that you start with the client experience first and work backward towards the technology and business processes. "A native St. Louisan, Nikki is an experienced researcher, strategic designer, and people leader. Receiving her BA in Strategic Communications from the University of North Texas, MBA-Market Research from Webster University, she is most proud of recently receiving her Ph.D - Business Management with a concentration in business model innovation and experience design from Capella University.