From Journey Maps to Real Experiences: Activation Insights

An McorpCX Thought-Leadership Webinar: Bringing Journey Maps to Life to Drive Change for Customers and Your Business

September 12, 2019

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Your McorpCX Hosts, and Special Guest:

Michael Hinshaw
Founder & President
McorpCX

- CX industry pioneer and thought leader on multiple "Global CX Thought Leaders to Watch" lists
- Best-selling author: *Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How To Be One of Them*
- Mentor and Richard H. Holton Teaching Fellow at U.C. Berkeley's Haas Business School

Stephen Shay
Vice President
McorpCX

- Senior technology and Customer Experience strategist
- Former Microsoft General Manager responsible for building internal Customer Experience practice
- Sales, Operations, and IT background responsible for leading cross-company, transformational initiatives

Vanessa Valore
Assistant Vice President, Strategic Marketing
The Institutes

- Marketing strategy and digital customer experience leader at The Institutes, the leading risk management and property-casualty insurance educator
- Over 15 years as a Marketing and Communications expert
- Adjunct Professor, Integrated Marketing Communications at Rowan University

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For over 17 years, McorpCX has helped leading brands plan for, design, and deliver better customer experiences
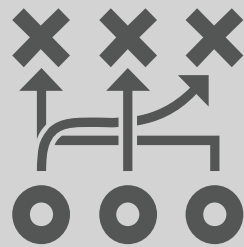
Delivering measurable value and ROI: One example...

Greater top-line revenue
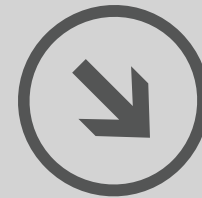~$25.8 million/ 10% annually

Faster time to market
From 90 days to under 7

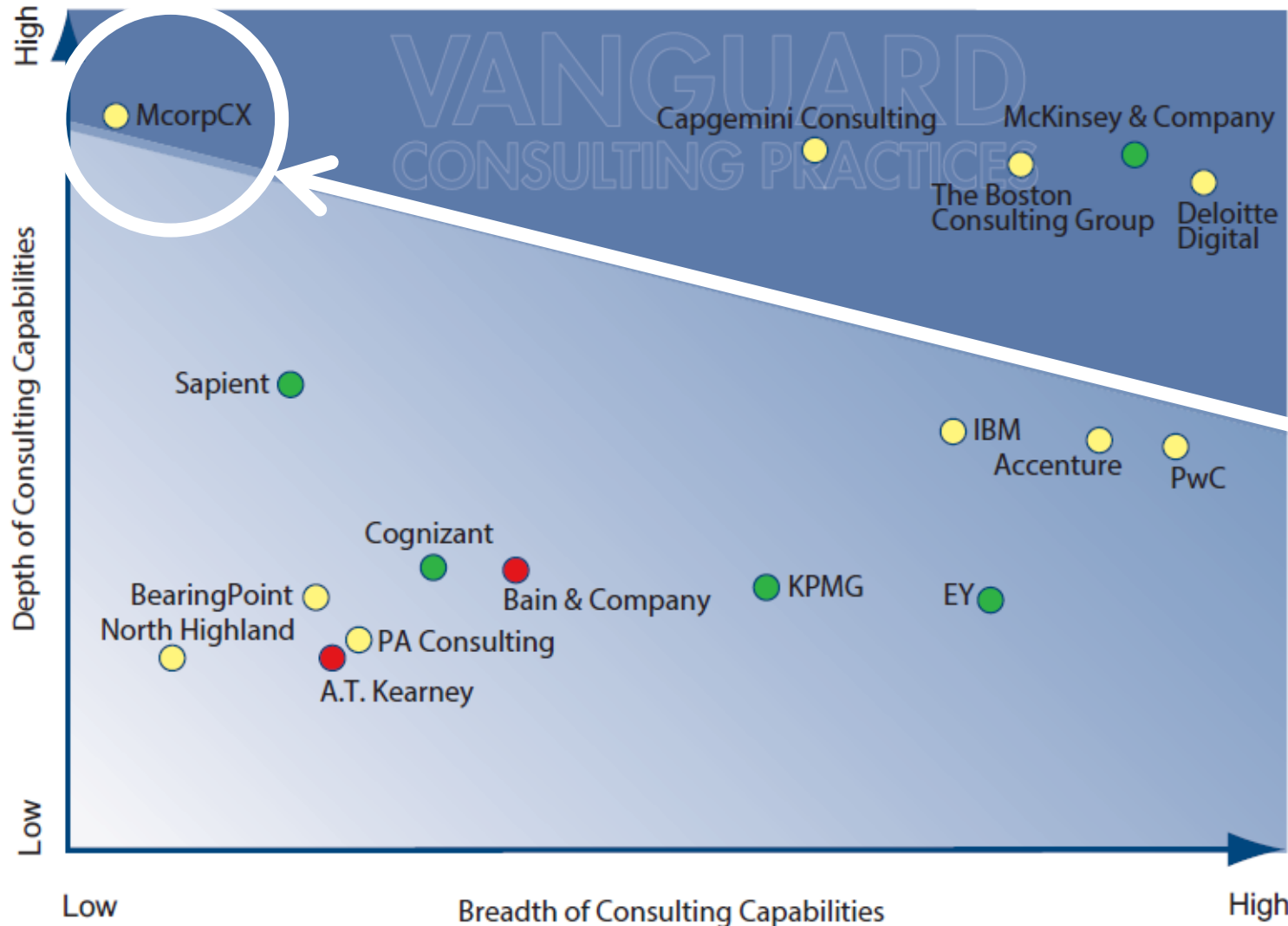**Decreased operating costs**
Saving millions of dollars annually

Greater customer satisfaction
200%+

Proven across multiple markets and industry verticals

Independently ranked Top-20 digital CX & strategy leader

> "[Their] narrow but deep market position enables McorpCX to effectively serve both the SME market and the largest global corporations"[1]
>
> -- ALM Intelligence: The Kennedy Vanguard

1) The Kennedy Vanguard – Digital Customer Strategy & Experience Consulting Providers

Today we're going to: Discuss common journey map activation challenges; see how one firm is using them; share some key enablers; answer your questions.

You've built your Journey Maps. Congratulations!

Journeys that are key to customers and the business

Selected with clear goals for their use in mind

Tied to persona whose experiences we must improve
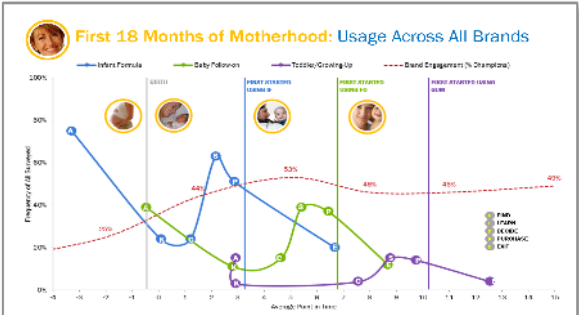
Built with cross-functional teams and stakeholders

Mapping interactions, emotions & gaps
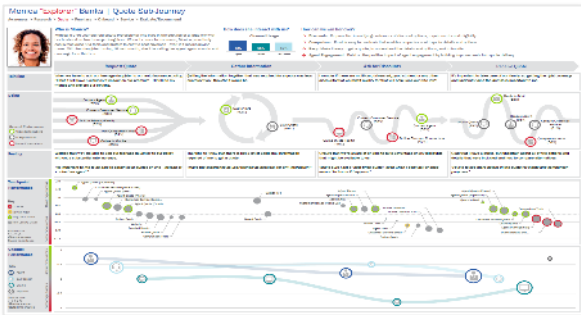
Informed by VoC insights, validated with customers
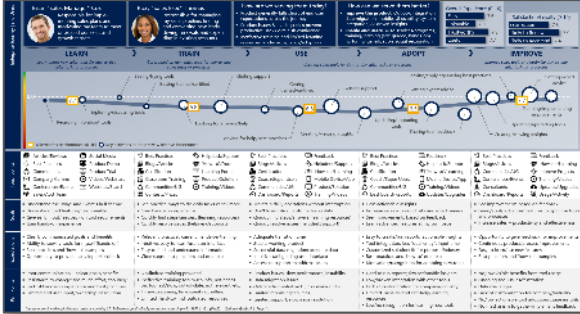
Easy to read and understand

Multiple issues and opportunities identified

So how do you go from Journey Maps to real experiences?

Creating your journey maps is the first step.
Enabling real experience improvements from them requires significant effort.

1
Start with 'Best Practice' Journey Maps

2
Prioritize and Activate Initiatives

3
Codify Impact and Measure Value

4
Be Aware of and Avoid Common Challenges

Which Brings Us To....

Some common activation challenges, and how to resolve

Move From...	Move Towards...
One-Off Efforts	'Business as Usual'
Identified Problems	Prioritized Solutions
Used in Functional Silos	Used Across the Organization
Socialization	Accountability
Results	Value
Static	Living

Reuse, extend and maximize your investments
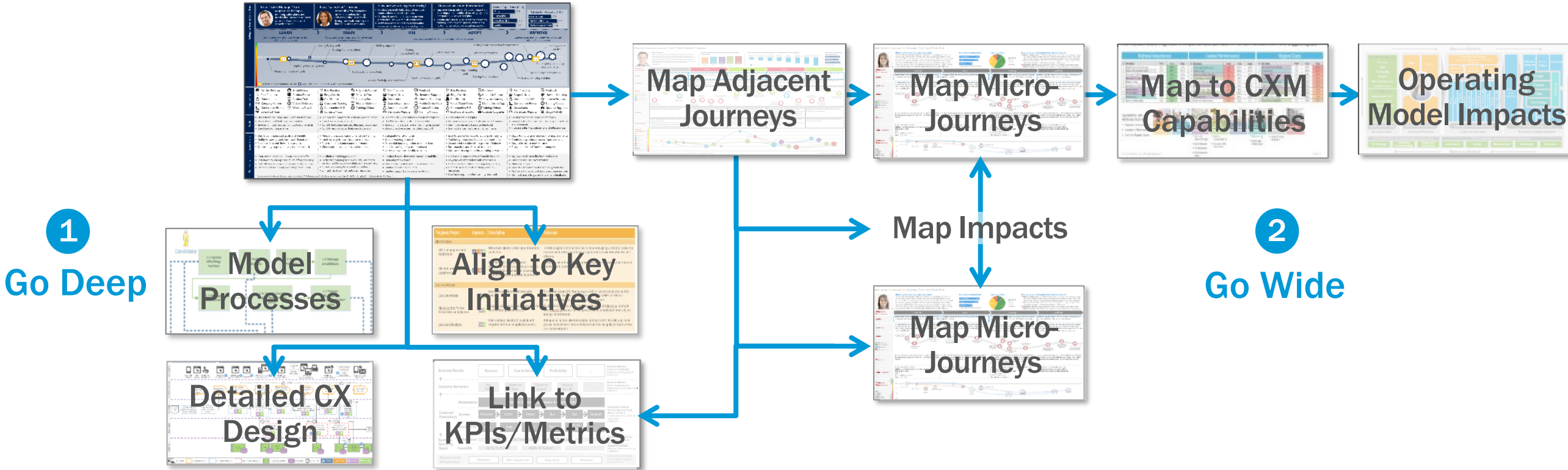
Identify quick-wins and drive longer-term improvements

| Identified Problems | Prioritized Solutions |

1. Speed connection to customer support

2. Improve online self-service

3. Billing/Statement clarity

4. Real-time payment processing

5. 360º view of customer

6. Internal knowledge management

Low Value/ High Effort

High Value/ High Effort

Low Value/ Low Effort

High Value/ Low Effort

Customer Desirability (Bigger=More)

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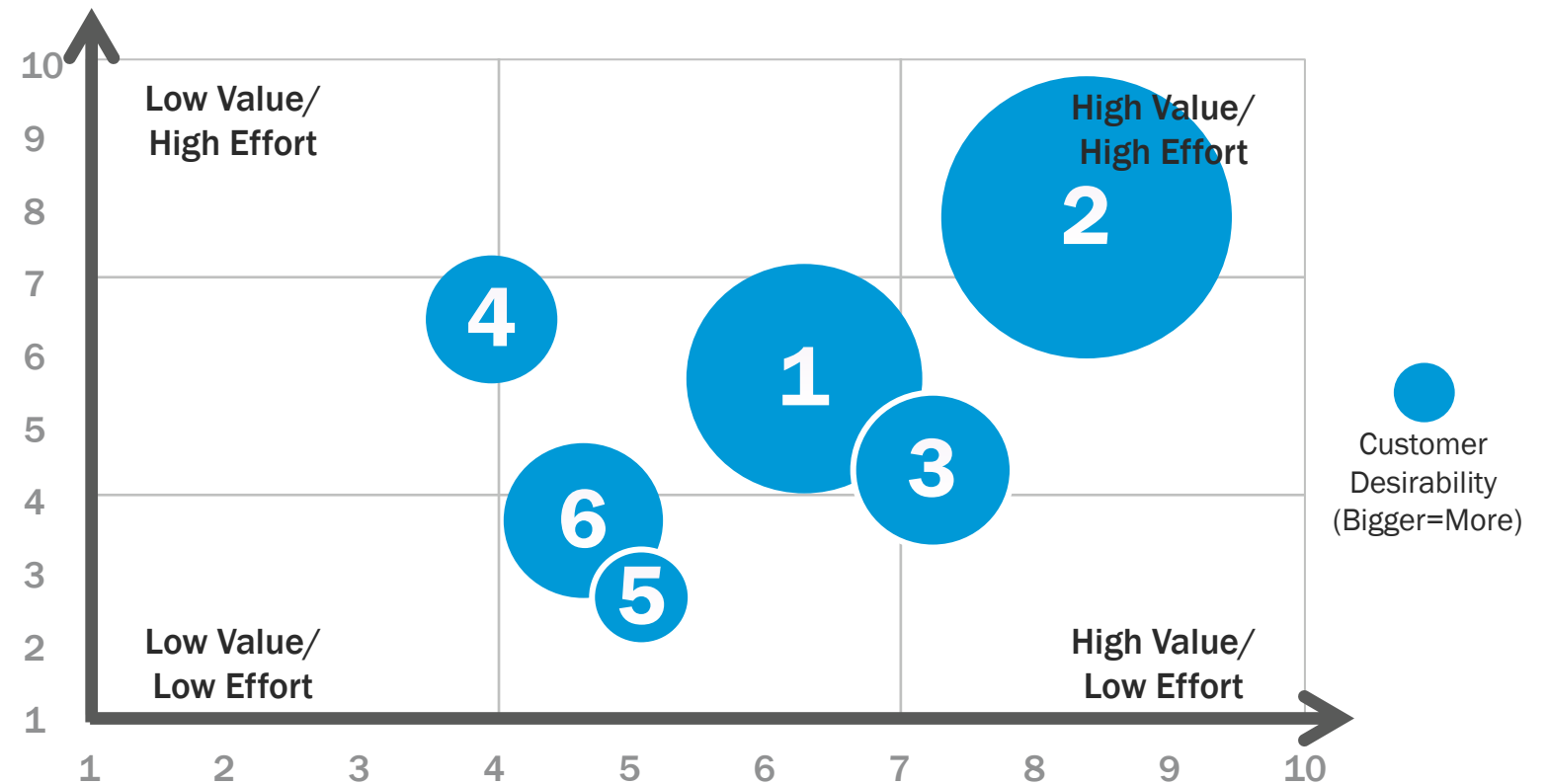
Extend their use across multiple parts of your business

Used in Functional Silos ➤ **Used Across the Organization**

| Marketing | Digital | Retail | Call Center | Operations |

Understanding ➤

Priority Actions ➤

Implementation ➤
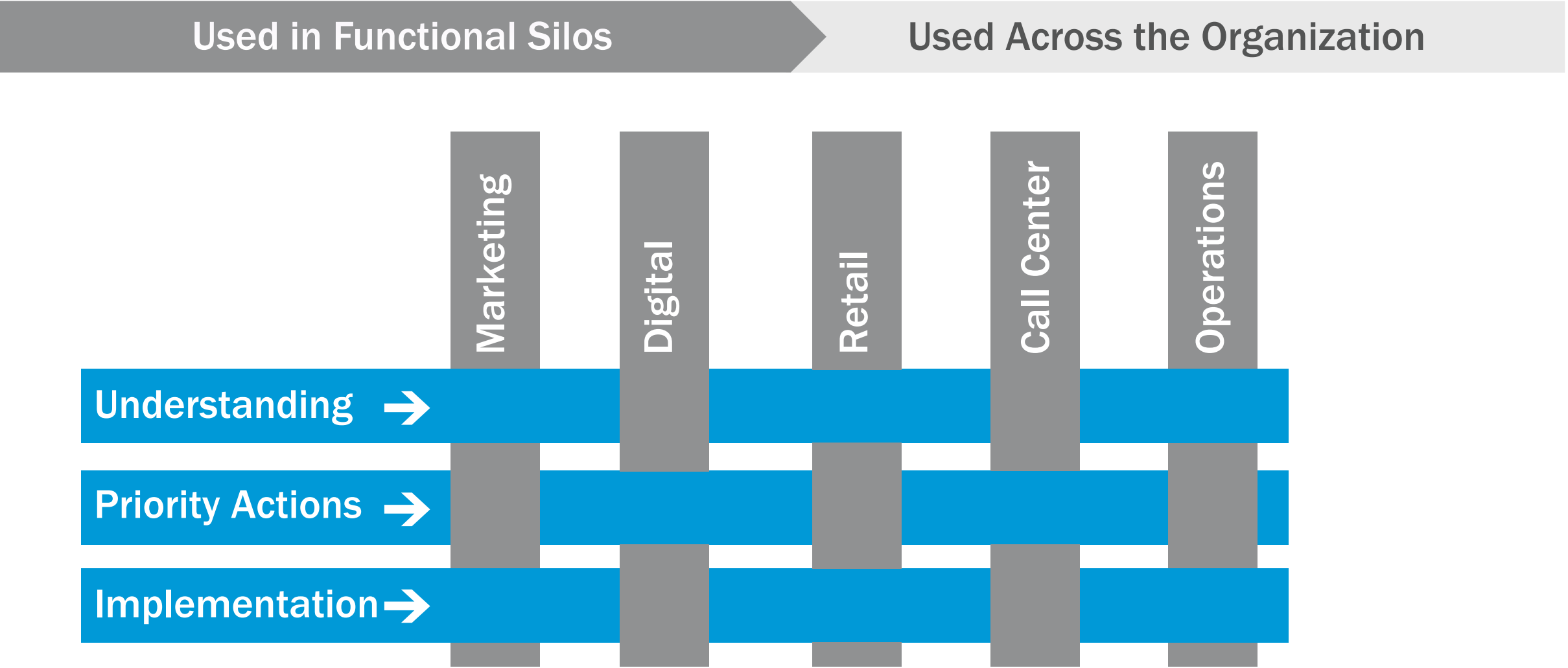
Create understanding, driving stakeholders to action
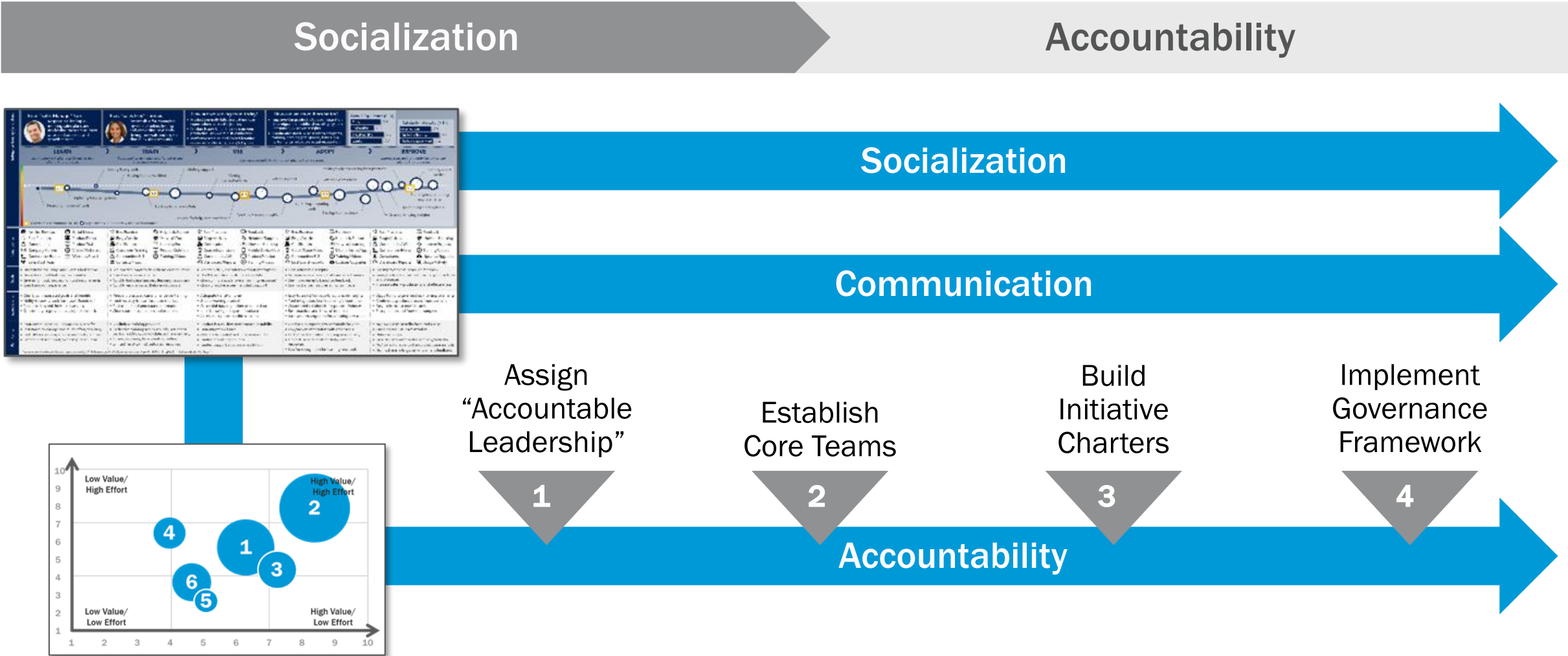
Don't stop at 'results'—link to measurable business value

Results	Value

Demonstrate results in clear business and financial terms

Link to cross-organizational initiatives and efficiency gains
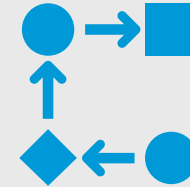
Track progress against defined customer and business KPIs

Align outcomes to executive scorecards and business goals

Explore ways to bring your journey maps to 'life'
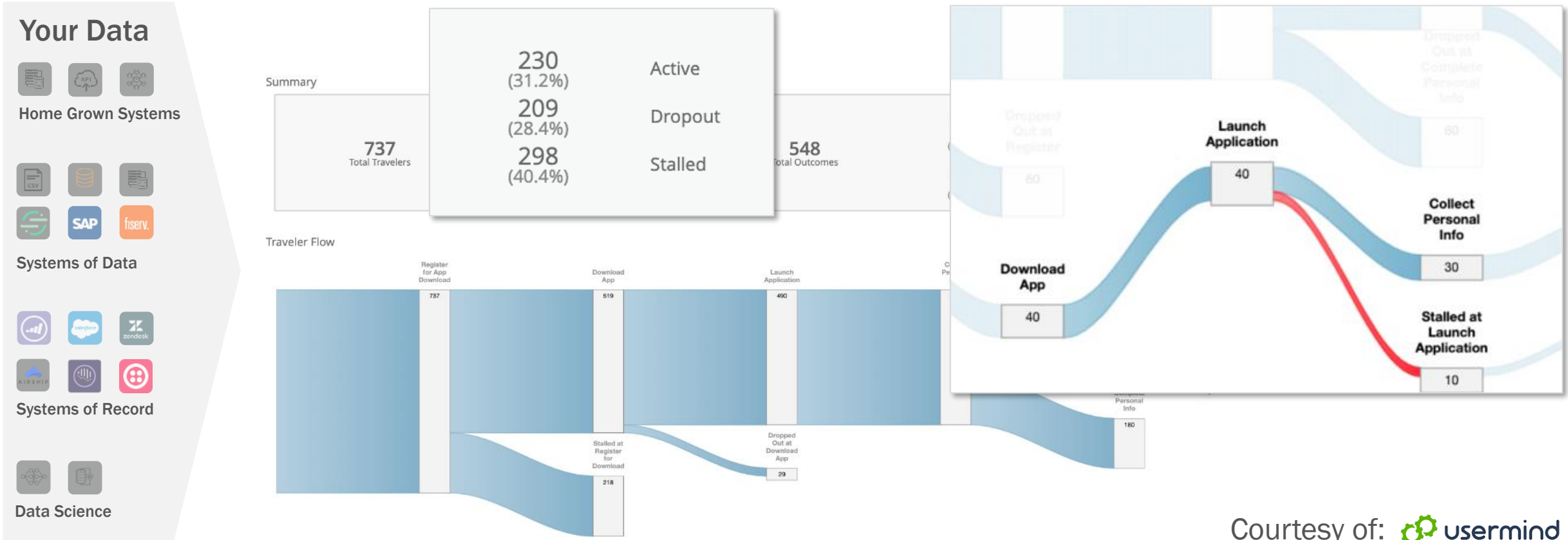
Courtesy of: usermind

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About The Institutes

- We are a 501(c3) that provides educational support, resources and leading research to the insurance community.

- Offering a wide variety of risk management and insurance courses, programs and professional development opportunities.

- Helping those in risk management and insurance better serve the public.

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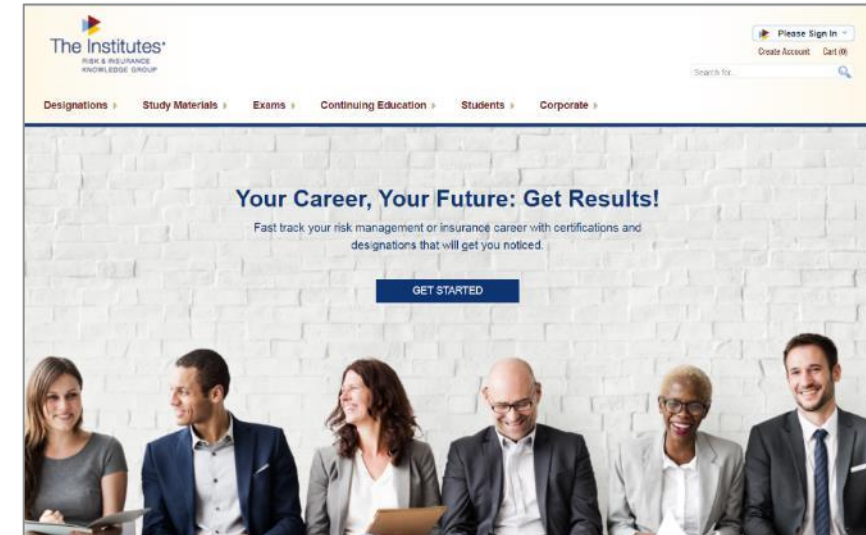
The goals that drove us to consider journey mapping

"Deliver an engaging experience for prospects and customers—one that is meaningful, relevant, personalized, and aligned across channels."

Cohesive Messaging and Content	An Omni-Channel Experience	Leverage Digital to Improve CX	CX-Related Value Measures	Customer-Centric Culture
1	2	3	4	5

The approach we took: Our 'journey mapping journey'

1. Assembled stakeholder team

2. Defined Desired Outcomes

3. Selected CX Partner

4. Cross Functional Workshops

8. Socialize and Communicate Across the Org

7. Identify, Prioritize Actions and Implement

6. Build Persona and Journey Maps

5. Qual and Quant Research (Wave 1)

9. Continue to Expand Internal Abilities

10. Continue to Drive Cross-Org Accountability

11. Continue Working the CX Backlog

12. Continue to Measure and Improve

Expectations vs. reality: Listening to your customers

What we knew	What we heard	What we measured

Voice-of-the-Business
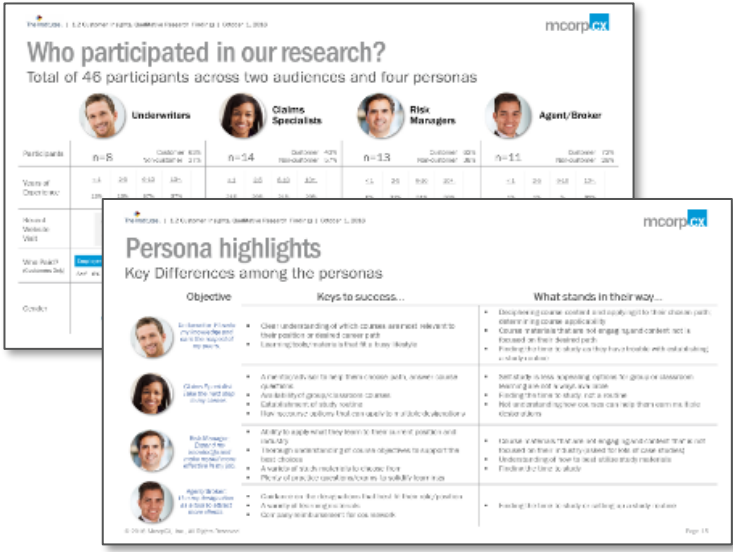
Online Focus Groups With Key Persona
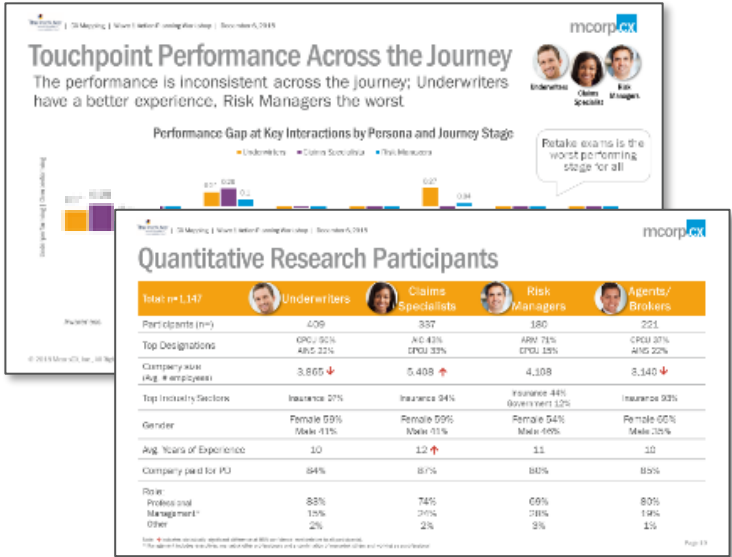
Quantitative Customer Lifecycle Research

What we learned....

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Some of the immediate "quick hit" actions we took...

What we Learned	Students Didn't Know What to Expect	They Want Relevant Information to Use Today	Students "Underwhelmed" on Program Completion
What we Need to Do	Set Expectations Proactively	Offer Greater Variety of Content and Examples	Communicate With Students Post-Completion
How We're Doing It	Marketing Automation and Content Creation	Review, Revise or Create New Content	Marketing and Communication Automation

Longer-term actions: Driven by insights and prioritization

Define/Prioritize Initiatives > **Near-Term "Quick Hits"** > **Longer-Term Actions**

Customer Desirability

Mission Impact

Level of Effort

Some of the immediate "Quick Hit" actions we took...

| What we Learned | Students Didn't Know What to Expect | They Want Relevant Information to Use Today | Students "Underwhelmed" on Program Completion |
| What we Need to Do | Set Expectations Proactively | Offer Greater Variety of Content and Examples | Communicate With Students Post-Completion |
| How We're Doing It | Marketing Automation and Content Creation | Review, Revise or Create New Content | Marketing and Communication Automation |

Re-Invent Digital Experience

Focus on Customer Lifetime Value

Evolve Corporate Culture

With our journey maps creating real (better!) experiences

Some of the many ways we are using our journey maps...
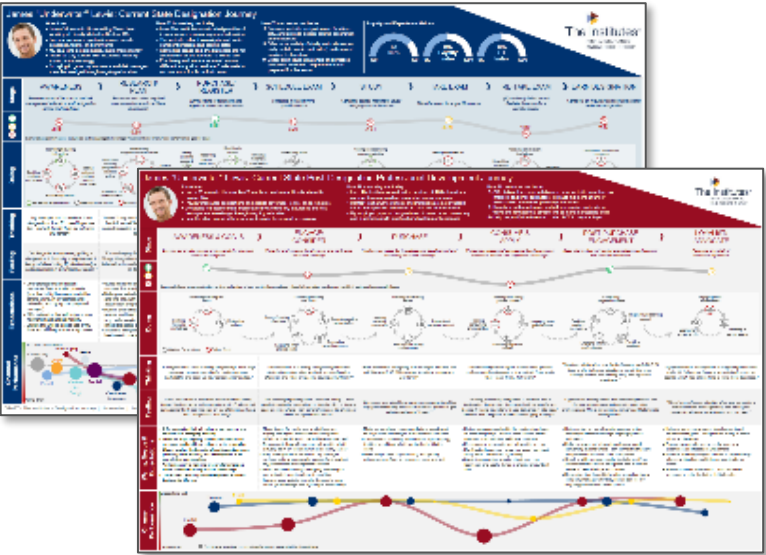
Teams Actively Using journey maps

Building Journey-Centric Marketing Programs

Driving Persona-Centric Product Design

Where we're going from here: The journey continues...

Embed Data and Customer Insights Into Decision Making

Inform Product Development

Drive Cross-org Understanding of the Customer

Align Content to the Customer Journey

Adapt Messaging to Customer Expectations

Ongoing Refinement of Personas and Journey Maps

Today we're going to: Discuss common journey map activation challenges; see how one firm is using them; share some key enablers; answer your questions.

Bringing journey maps to life—activating them to deliver real experience improvements—is a journey itself.

And as with every journey, it's easier with the right partners, and the right tools. These six 'enablers' can help accelerate your journey...

Takeaway: Six journey mapping activation enablers...

Executive Support
Partner with stakeholders committed to change

Governance Systems
Engage with existing governance groups to secure support

Journey Data and Analytics
Leverage data to tie real-time insights to prioritized actions

Measure Continuously
Journey-level metrics will elevate trends and opportunities

Accelerate Time-to-Value
Make it a priority to identify and share 'quick wins' as you go

Ongoing Improvement
Continually assess journeys and adjust to optimize CX

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Any Questions? It's time
for a brief fireside chat...

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