

White Paper

Adopting new mindsets and methods, tools and techniques to leverage agile, responsive customer journey maps.

mcorp<sup>cx</sup>

## Journey Mapping 3.0: Moving at the Speed of Customers

How business leaders are maximizing the true potential of journey maps to widen the gap between themselves and their competition

# Journey Mapping 3.0: An experience mapping workhorse gets an upgrade

Welcome to the new era of journey maps—  
agile, integrated and optimized for the  
decade ahead.

## Key Takeaways

1. Journey maps (and journey mapping) help cross-functional teams better understand their customer experiences.
2. Historically, journey mapping has been a time- and resource-intensive exercise. In a world where accessing information quickly and increasing ROI are business imperatives, journey-mapping efforts must keep pace with rapid customer and business change.
3. Journey Mapping 3.0 harnesses technology and new methods to drive deeper understanding of customers and quicker time to value.

CX professionals have embraced journey mapping as a way to help organizations understand, navigate and deliver on customer expectations. Mapping gives a visual representation of real and ideal customer journeys with the fewest friction points and the fastest path to fulfillment.

The mapping process itself helps break down silos, and makes it easier for teams to rally around customers and cooperatively problem solve to make experiences better, all while maintaining the hard data and detail that organizations need to make decisions.

But customer expectations and business are both dynamic. So what happens when they evolve at a speed that renders journey maps too sluggish to deliver a strong value-to-effort ROI?

Enter Journey Mapping 3.0, the current and future of journey maps that allow organizations to learn faster, pinpoint issues more precisely and thoroughly, and improve experiences more efficiently by identifying not just customer pain points, but the places where technology, touchpoints, processes, and even people, might be causing friction.

Just as customers constantly evolve their expectations, competitive organizations continue to evolve their CX sophistication and agility. High-performing businesses have widely adopted technology-powered journey maps, and they cite their journey-based business strategies as integral to their success.

Journey Mapping 3.0 combines all the tried-and-true practices of traditional journey mapping with digital insights, design, and management tools to create the best of both worlds. This combination results in an agile way of working that delivers richer results more quickly—and usually more cost-effectively.

No matter what your stage of journey mapping, the evolution never stops.

Historically, insights-driven journey mapping takes time. But businesses need to make decisions and drive value faster, which is where Journey Mapping 3.0 comes in.

## The three stages of journey mapping

To fully appreciate Journey Mapping 3.0, we first need to understand where we've been. Here at McorpCX, we've noted three distinct stages to journey mapping: 1.0, 2.0 and 3.0.

### Journey Mapping 1.0

Beginning in the early 2000s, organizations embarked on a critical shift in thinking, asking: what if we put the customer at the center of everything? This concept broke away from basing decisions on the bottom line to basing them on understanding the customer. As we've noted in countless articles and whitepapers, prioritizing the customer always has a positive impact on the bottom line, even if it takes time. But it was difficult for many in the C-suite to adopt this perspective. Journey Mapping 1.0 helped to prove the concept, and laid the foundation for customer-centricity as a business strategy.

### Journey Mapping 2.0

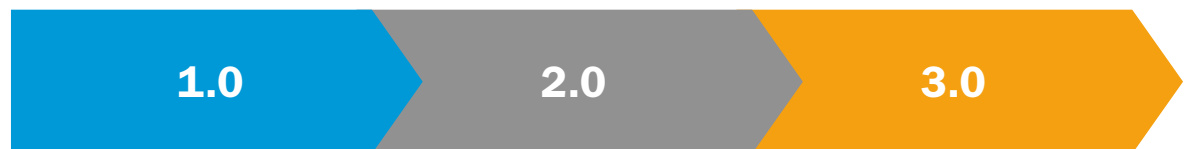
In the mid-2000s to early '10s, organizations had—for the most part—acknowledged that customer-centric ways of working were simply better. Teams sought to understand the customer journey from start to finish, and all the touchpoints along the way. Organizations mapped out those journeys for their key customer personas, and cross-functional teams collaborated to solve pain points along that journey.

Even in these early days, journey maps gave organizations powerful tools to visualize the experience they wanted to create for customers. But like any good endeavor, journey mapping takes time—time that businesses can't always afford.

As customer expectations rose, as more companies saw the value of improving their CX, and as technology developed to speed the process, businesses came to understand that addressing the customer journey on the business's timetable wasn't enough.

To truly stand out, it's essential to predict how the customer journey will change in real time, and be positioned to respond and adapt to those changes. To do that, the journey-mapping process needs to be accelerated, while also being fully and seamlessly integrated into the process of doing business.

**Journey Mapping 3.0 doesn't leave the core focus of traditional journey mapping behind. It's additive, leveraging and moving beyond basic maps to get to solutions more quickly through the lens of experience architecture and the data, processes, people and technology that bring experiences to life.**



- Personas
- Journey Maps
- VoC Research
- Design Thinking

- Experience Strategy
- Capability Maturity
- Operating Model
- Experience/Service/Design

- Experience Architecture
- Agile Process (iterative insights & incremental design, development & delivery)
- Journey Management
- Optimization & Orchestration
- Live Experimentation



Journey Mapping 3.0 combines all the practices of journey mapping with digital execution methods to create the best of both worlds.

## Journey Mapping 3.0: The future of journey mapping

At its core, Journey Mapping 3.0 aims to deliver journey maps that are more integrated, agile, easier to develop, and—most importantly—fully activated throughout the entire organization. 3.0 recognizes the need for maps that can adapt in real time to the rapidly changing needs of today's customers.

Technology is essential to this level of agility: data analysis, machine learning, customer-listening tools—so much is available to us today, to help us track customer habits, preferences and roadblocks. The technology baked into Journey Mapping 3.0 enables experience improvements that move at the same speed as your customers, providing real-time (or at least very fast) adaptations.

## Why does it matter?

Understanding customers is no longer a thing that's "nice to have." It's essential. More and more, customers in both B2B and B2C arenas expect companies to quickly adapt to their needs and wants in a seamless, integrated manner. A recent Salesforce study revealed that 54% of consumers and 67% of business buyers expect the companies they interact with to *anticipate* their needs,<sup>1</sup> and technology helps us do that. Welcome to the future.

Furthermore, if you're not implementing a journey-based customer experience model, you've probably already been left behind by your competition (or you will be soon). High-performing businesses have widely adopted agile journey maps; Pointillist notes that 90% of strong performers cite journey-based business strategies as integral to their success.<sup>2</sup>





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## Common pitfalls for journey map activation

Experience clearly shows that, with the right tools and knowledge, every organization can achieve stage 3.0. But doing so means avoiding—or addressing—some common gaps that can derail journey map activation.

The main gaps fall into four overarching categories.

### #1 The customer expectation gap

This gap opens when your brand makes promises that you don't deliver, and customer expectations are dashed. To close these gaps, you need to measure and understand what your customers want, and then commit to *delivering* the experiences that fulfill their expectations and keep them coming back.

### #2 The organizational capability gap

When a company lacks the means to listen to customers (VoC), to measure customer data, to convert data into actionable insights (analysis), to map journeys, or to fund known initiatives (C-suite support), there's a capability gap. Closing this gap may require CX value socialization to improve cross-silo buy-in, data analysis tools, or even creating a customer experience management team.

### #3 The leadership understanding gap

Leadership got there by being smart, self-confident, and “knowing things.” So it's not surprising that they often think they know what customers want or feel based on assumptions or speculations. This can hinder buy-in and socialization of a journey-mapping effort. Closing this gap may require education for leaders including proof of how journey maps can deepen their understanding of the customer experience.

### #4 The employee knowledge and skills gap

Employees don't necessarily know how to create journey maps, nor do they always understand their role in the bigger picture of the customers' journey. But it helps if they understand the concept of a customer journey, and the context of where they fit into that.

Closing this gap requires training to educate, enable and empower employees (and departments) to do the work that will allow them to deliver consistently great experience based on rich customer insights.



## Technology-driven journey mapping drives a shift to more integrated maps, delivered faster

Moving From...	Moving Towards...
One-Off Mapping Efforts	Mapping = Business as Usual
Intensive, Large-Scale Efforts	Fast, Agile, Actionable Insights
Used in Functional Silos	Used Across the Organization
Journey Mapping	Journey Management and Analytics
Regularly Improving Journeys	Optimizing Journeys in Real Time
Driving Understanding	Driving Activation

## Evolving to Journey Mapping 3.0: an agile way of working with the customer at its center

With gaps identified and addressed, what are the necessary ingredients to create an environment where Journey Mapping 3.0 can thrive? There are three crucial components: First, an organization needs the right experience architecture. Second, organizations need an agile design and delivery mechanism for those experiences. And finally, they need the right tools.

### #1 Experience architecture

Traditionally, business structures were an inside-out affair. First they developed their internal processes and then they aligned business strategies with those capabilities. This approach was focused on business first. But a Journey Mapping 3.0-bound organization flips the focus to an outside-in approach. Today's customer-first organizations prioritize the needs of the customer—and work to create streamlined, friction-free, responsive journeys.

Of course, traditional concerns of addressing and aligning internal processes still exist; after all, you need streamlined internal processes to build a seamless experience. But in Journey Mapping 3.0, the business-centered approach takes a back seat to the customer-driven experience architecture.

### #2 Agile design and delivery of experiences

The primary way Journey Mapping 3.0 stands out from 2.0 is in its agility. Not only does the organization build a broad portfolio of journey maps for all its customer personas, but it also sustains and improves those journeys over time. And this happens quickly and fluidly, adapting to changing customer wants and needs before the customer even realizes that their expectations have changed.

The right technology, training and teams are crucial to this effort. Most importantly, the teams in charge of customer experience must be empowered to make and act on decisions. That empowerment drives human-centered problem solving, testing what works and what doesn't on the fly—almost like a real-time case study. Because who better to test solutions for pain points than the teams that see them up close?

### #3 New digital tools to map and manage journeys

A large part of what empowers (and powers) Journey Mapping 3.0 is having the right tools for the job. No one person or even department can recognize all the pain points on the fly (though a savvy employee might have a really accurate gut feeling), crunch the data in real time, or be a fly on the wall at multiple listening posts. Technology assists the process in profound ways, and is crucial to developing journey maps that adapt at the speed of your customers.

Gone are the days when businesses had to DIY their journey maps in day-long, in-person whiteboarding sessions; there are tools for everything and we highly recommend examining what might work for you in terms of task, scale and cost. Here are a few of our favorites:

- **Whiteboard collaboration:** Best suited for ideation, gathering input from various teams, and key audience validation: Mural, Miro, Lucidspark and O365 (Teams and PowerPoint)
- **Journey Mapping:** Best suited for low-fidelity visualizations of critical journey elements: Smaply, Lucidchart and UXPressia
- **Journey Management:** Best suited for integrating strategic business objectives into comprehensive journeys while measuring performance and optimizing action plans: Cemantica, CXOmni, Quadiant and SuiteCX
- **Journey Orchestration:** Best suited for expanding on the customer journey to automate business processes to influence customer behavior: CSG, Pointillist by Genesys, and Qualtrics

Take your time selecting the right tools and partners, always start with your goals for your organization and customers, and work back to the right solution.

CX leaders deliver better customer experiences, which drive massive, measurable benefits: greater win-back rates, faster average sales cycle, astounding revenue from customer referrals, and more.

## Key takeaways for creating a new way of working

Just as customers constantly evolve their expectations, competitive organizations continue to evolve their CX sophistication and agility. No matter what your stage of journey mapping, the planning never stops.

### If you're at Journey Mapping 1.0

Don't worry, you're not too late. In fact, having the examples of other businesses who've gone before you can make journey mapping even easier.

But start small: you don't have to build a large portfolio of customer journey maps from the get-go. Start with one pilot project. Create a simple map for your primary customer persona—a picture of the ideal journey you'd like them to have with your organization. Then compare it to what's actually taking place. Ask yourself:

- What are we doing well?
- What are the steps the customer takes on their journey?
- Where are the gaps along the journey?
- And how do we fix those pain points?

Granted, that's a very simplistic approach. But simple is a great place to start. We've found that good work on just one map creates a demand for more good work—and more journey maps. A “test-run” can give you data that proves the value of journey mapping, and makes the case for wider adoption of the practice. Best of all, the process drives an outside-in, customer-first approach that can truly revolutionize the way you do business, one step at a time.

### If you're at Journey Mapping 2.0

Good work, but don't get too comfortable! By now, you've probably learned most of your customer pain points, and you've brought in people to help you create models for how to deliver the improved experiences you've mapped out. That process includes mapping the roles, internal systems, and data needed to replicate that crafted experience to others.

A good next step is to encourage collaboration between those roles and systems necessary to maintain the outside-in perspective that aligns with your internal processes. Collaboration helps to break down the internal silos that often form, though it can also reduce the agility with which your teams can respond to customer needs. It may require some trial and error to establish who does what (and when), but over time, the effort pays off.

You can also lay the groundwork (or even begin) empowering employee teams to make decisions on their own when they discover a pain point. It can take some time to learn how and when to relinquish the reins, and of course guardrails are needed (not every company can grant its customer-facing employees the authority to spend \$2,000 to delight a customer, the way the Ritz-Carlton can<sup>3</sup>). But even small gestures can go a long way...for employees and customers.

Companies at this stage frequently find the need to appoint a head of customer experience or better yet, a customer experience team.

### If you're ready for Journey Mapping 3.0

We've talked about technology, but what's the biggest game changer? Empower your teams for agile, ever-evolving ways of working, and encourage them to keep expanding their own professional specializations. The more experienced a team is across a broad spectrum of business disciplines, the more agile they (and your organization) can be: they can speak to the strategy and execution of a wide variety of journeys, and the more hats they wear, the broader your capabilities.

For example, an understanding of data analysis and machine learning is essential to maintaining an agile approach. If team members can read and understand data themselves, they're empowered to head directly to the brainstorming and solutioning steps. Otherwise, they need a data analyst to get the answers, creating a pile-up of issues and reducing time to response.

And of course, if you haven't already, bring in the right digital tools to help drive the process. A few tools can make it much easier to process the data and insights you uncover with your journey maps.





## The mindsets and methods needed for Journey Mapping 3.0

### Learning & Growth



A genuine curiosity about what customers need and a can-do approach to solving customer problems

### Activation



Not simply a bias for action:  
A systematic approach for incorporating customer feedback into new solutions and improvements

### Iteration & Experimentation



A pattern of incremental design, release, testing and refining using customer insights and operational data

### Continuous Improvement



A commitment to prioritize continuous improvements through the lens of the customer journey and customer pain points



## Who We Are

McorpCX helps unlock growth by making ‘experience’ easier for you, your employees and your customers.

We do this by helping you put their wants and needs at the center of decision-making, and by simplifying the ways you sell to, serve, and engage with them.

An independent, people-first consultancy, we’ve been helping business leaders build capabilities, leverage insights, drive measurable value, and make experiences easier for over 20 years.

## We help companies with...

### Capabilities Building

#### *Experience Management Capability Building*

Helping you become more customer centric by adopting the best-practice capabilities of experience-led organizations, through coaching, education, business capabilities building, and change management

### Strategy and Design

#### *Experience Strategy, Design, and Transformation*

Helping you create easier customer and employee experiences, with experience strategies and human-centered design tools that help you deliver better experiences across touchpoints, channels, and journeys.

### Listening and Insights

#### *Customer and Employee Listening, Insights, and Empathy*

Helping you better understand, measure, and take action to improve the experiences of your customers and employees by leveraging data-driven and human insights on the experiences you deliver.

## Our clients tell us they love us because...

- **We don’t just create solutions for you.**  
We co-create solutions with you, your people, and your customers.
- **We don’t lecture you on CX theory.**  
We help you build your CX capabilities, learning along the way.
- **We don’t avoid the ROI question.**  
We link your CX investments to tangible, real-world value.
- **We don’t play in silos.**  
We engage cross-functional teams to solve cross-functional problems.
- **We don’t just consult.**  
We work with you, as partners, to put CX into practice.

## Let’s talk.

Learn how we can help accelerate your customer experience journey with proven CX education, training, and skills.

To send us a note or set an appointment to speak with one of our education experts, visit us online at [www.mcorp.cx/contact](http://www.mcorp.cx/contact).

You can also call +1-415-526-2655, or toll free on 1-866-526-2655.