Customer Journey Mapping: 10 Tips for Beginners

mcorpcx

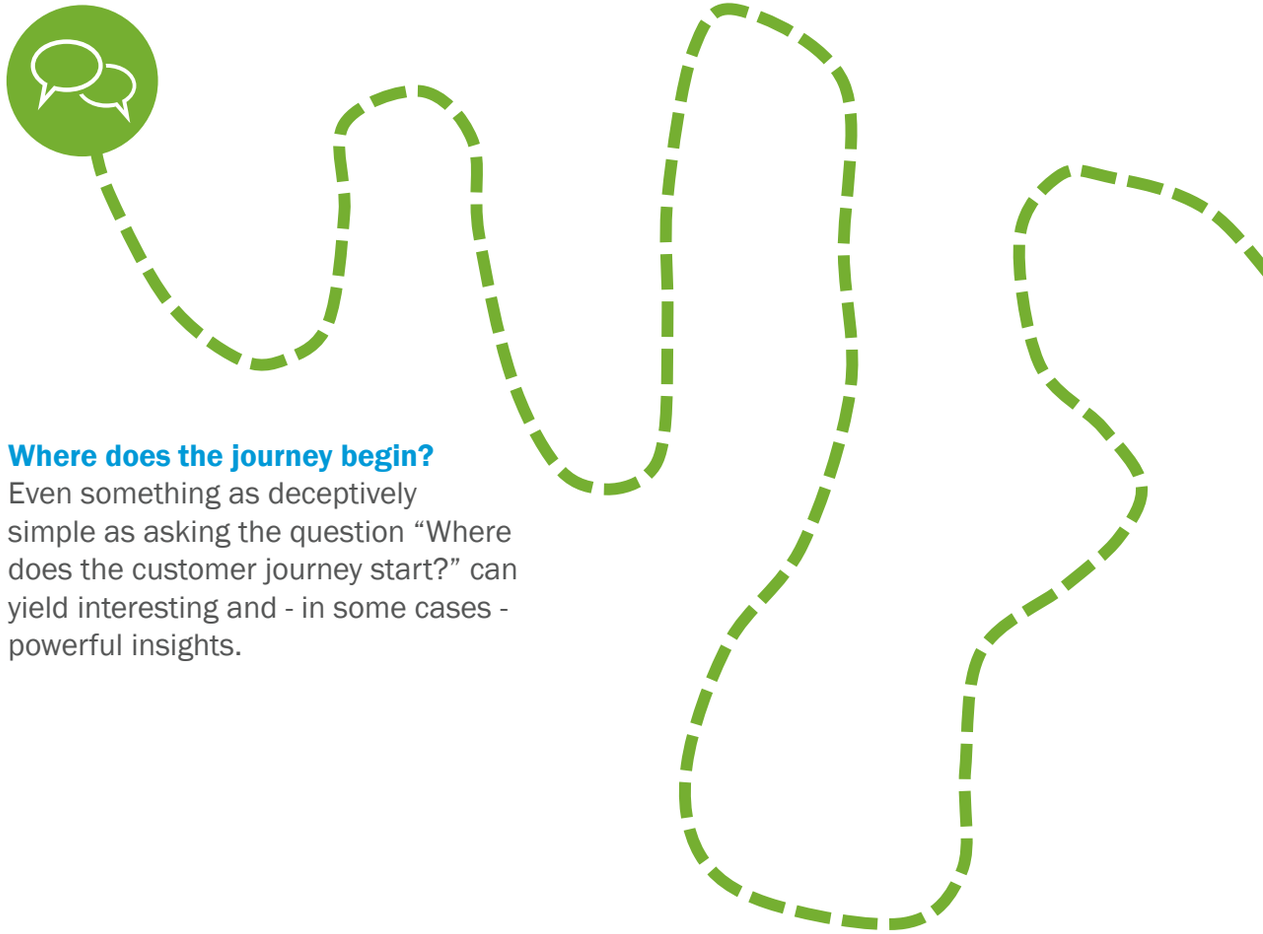
Most executives know the importance of becoming more customer-centric. They're also aware of the increased significance of differentiating on customer experience, as competitors focus on better understanding and serving their customers.

At the same time, "smart" customers are increasingly leveraging digital innovation to rewrite the traditional relationships between themselves and the companies that wish to serve them.

Together, these trends have driven broad recognition that embracing "customer experience management" is the critical path forward in an ever more complex business landscape.

Which leads us to one increasingly popular piece of the customer experience puzzle: customer journey maps.

Improve the experience you deliver to your customers, by mapping out your customer journeys.



Where does the journey begin?
Even something as deceptively simple as asking the question "Where does the customer journey start?" can yield interesting and - in some cases - powerful insights.

© 2015 McorpCX, Inc., All Rights Reserved

Using customer journey maps to improve customer experience

Customer journey maps are visual diagrams that illustrate the steps your customers go through as they interact with your company, across different journeys, interactions, channels, and devices.

The more complex your customer relationships are — the more segments, journeys, channels etc. — the more necessary journey maps become.

Journey mapping can be a complex, research-driven endeavor, so this guide isn't meant to make you an expert.

But it *can* help you better understand customer journey maps, and how they might help you and your organization better understand and serve your customers.

Happy mapping.

In a world of radically changing customer expectations, there is only one sustainable competitive advantage: Deliver a better customer experience, across all channels and interactions. Journey maps are one of the tools that can help you do so.

What is a Customer Journey Map?

Customer journey maps allow you to "walk in your customers' shoes" by traveling with them as they interact with your company.

When based on sound research, they provide an accurate "outside-in" view, focusing on desired outcomes from the customer's perspective.

You'll see what customer needs are at each interaction, how well you meet them and where opportunities for improvement lie.

A customer journey map is a tool that fits into the broader context of your customer experience strategy. Effective mapping requires that you incorporate inputs directly from research-driven customer insights, and have internal buy-in to use journey maps to better meet customers' needs.

Which is why the most effective maps are part of a broader effort that uses these insights to drive action across the organization.

It's also important to keep in mind that journey maps aren't static.

As markets, customers and systems change over time, maps must be managed and updated accordingly.

The results? Actual, measurable improvements in customer experience, and happier, more loyal customers.

© 2015 McorpCX, Inc., All Rights Reserved

Ten customer journey mapping tips for beginners: A quick guide to help you and your organization get the most out of your journey mapping efforts.

There are many things that any company contemplating a customer journey mapping initiative should consider. With that, these ten tips can help beginners get started (and provide a useful checklist for those further down the journey mapping path).

One. Be clear on what you wish to accomplish

Customer journey maps are excellent at showing the gaps between customer expectations and perceptions of the actual experience at key steps along the journey.

They also help identify improvement opportunities, and communicate with employees the “why” and the “how” you’re meeting (or not meeting) customer expectations across channels, silos and functions.

In journey mapping as in so many things, beginning with the end in mind will define the path for getting there.

So know what you want and keep your strategic goals in the forefront to guide you in your employment of journey maps.

By following our customers’ journey, we can learn…

What He’s Thinking

- What are his expectations across the journey?
- Are we meeting his needs?

What He’s Doing

- What is he doing at each stage of the journey?
- What touchpoints does he encounter?
- Which are most important?

What He Wants or Needs

- What is he doing, and why is he doing it?
- What does he want or need to accomplish?

How He’s Feeling

- Is the experience easy?
- Does he feel great?
- Are we causing him “pain”?

© 2015 McorpCX, Inc., All Rights Reserved

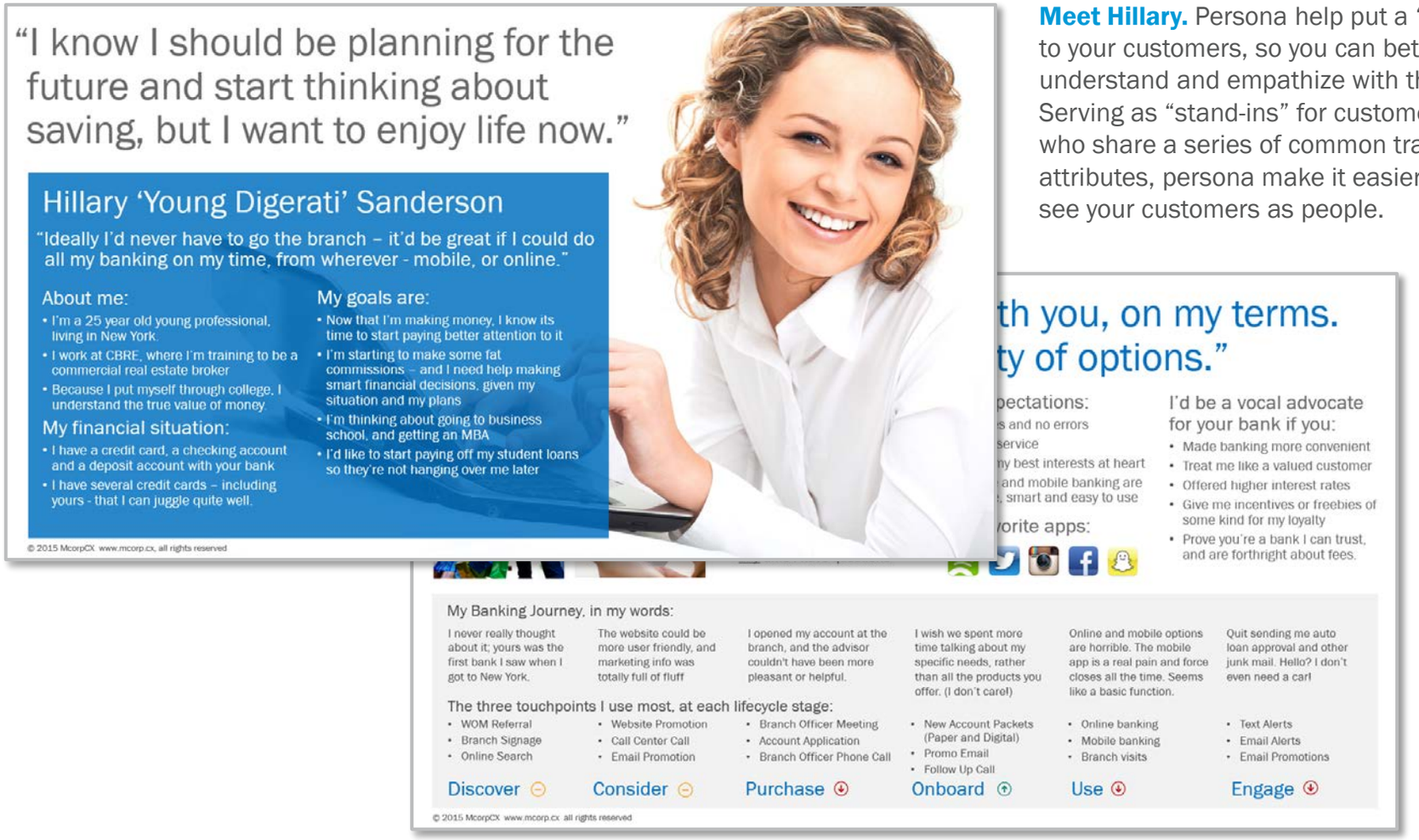
Persona help put a “face” to your customers, so you can better understand (and empathize with) them as people, rather than segments or targets.

Two. Know whose journey you are mapping

The power of a journey map is its ability to effectively illustrate the journey of a customer as they work towards achieving their goals.

To do this, you need to look through the eyes of a single customer, most effectively represented by a research-based customer persona, that represents a broader segment’s unique wants, needs and objectives.

Without this context, the map cannot as effectively represent the customer relationship.



Meet Hillary. Persona help put a “face” to your customers, so you can better understand and empathize with them. Serving as “stand-ins” for customers who share a series of common traits or attributes, persona make it easier to see your customers as people.

© 2015 McorpCX, Inc., All Rights Reserved

Customer journey maps are…

- **A tool and a technique,** to inform the design, creation and delivery of better customer experiences.
- **Customer-focused,** and based on qualitative and quantitative customer insights rather than internal perceptions.
- **Persona and segment driven**, uniquely representative of specific persona and segments, and their interactions with you.
- **Omnichannel views** of the experience, communicating touchpoints and interactions across channels, devices and key interaction moments.
- **End-to-End,** comprehensive, views of the journey customers take to search, interact and transact.
- **Outside-In** views, summarizing customer goals, emotions, interactions, moments of truth and pain.
- **Inside-out** views, which summarize an organizations processes, data, and technology as it supports the customer journey.

McorpCX can help

McorpCX is expert at driving customer experience transformation in an increasingly connected world.

Are you interested in learning how we can help you better understand and improve your customers' experience with your organization?

Then give us a call at 1-866-526-2655, or visit www.mcorp.cx/contact.

Our customer journey mapping related services include:

- **Customer understanding**, including research (interpreting existing customer research, or conducting new qualitative or quantitative research)
- **Journey mapping workshops** at your location or ours - we work together to map your customer journeys and identify opportunity.
- **Training and capabilities development**, helping you and your team become best-practice-driven experts at mapping and improving customer journeys.
- And more…

Persona and journey maps are research driven, and can include qualitative, quantitative, descriptive, perception and outcome data.

Good: Voice of the Business	Better: Qualitative	Best: Quantitative
You can learn a great deal by talking to your people	Interviews and online focus groups provide directional insights	Surveys and analytics give you highly defensible data
Alone, these can be informative - though you'll have little ability to monitor results	Adding the customer view can drive some decision making and prioritization guidance	Statistically projectable data is a solid foundation for widespread efforts
Internal workshops with customer-facing teams and subject matter experts.	Add one-on-one customer interviews, social listening, and focus groups	Add web surveys, multiple interviews or unstructured data mining
Informative	Directional	High Confidence
Little or no ability to monitor results	Limited ability to monitor results	Ability to monitor results over time

Three.
Talk to your people

Once you've identified whose journey you're mapping, build an internal view of the relationship.

Bring together a cross-functional, customer-facing group to map out their view of the journey, including touchpoints, opportunities, transitions, issues and more. Internally driven maps are a great step to mapping the relationship, and for identifying key interactions, inputs and outputs. But you cannot stop there. You need to...

Four.
Talk to your customers

Many companies don't regularly gather "outside-in" customer perspectives - or broadly share the insights when they do.

But without an outside view on what is and isn't important, and what does and doesn't work, your maps will lack an accurate view of the customer.

Leveraging only an inside-out view can cause you to make decisions based on incomplete, missing or flawed information.

© 2015 McorpCX, Inc., All Rights Reserved

Five. Must haves

It's a journey, right? So start by understanding your unique customer relationship lifecycle, in the context of customer interactions.

For example, what do they want and need from each interaction as they move through the journey? How do they transition from one stage (such as consideration) to the next (such as purchase)?

Lastly, articulate what customers think and feel. Communicate their expectations at each step – and how well you are (or aren't) meeting them.

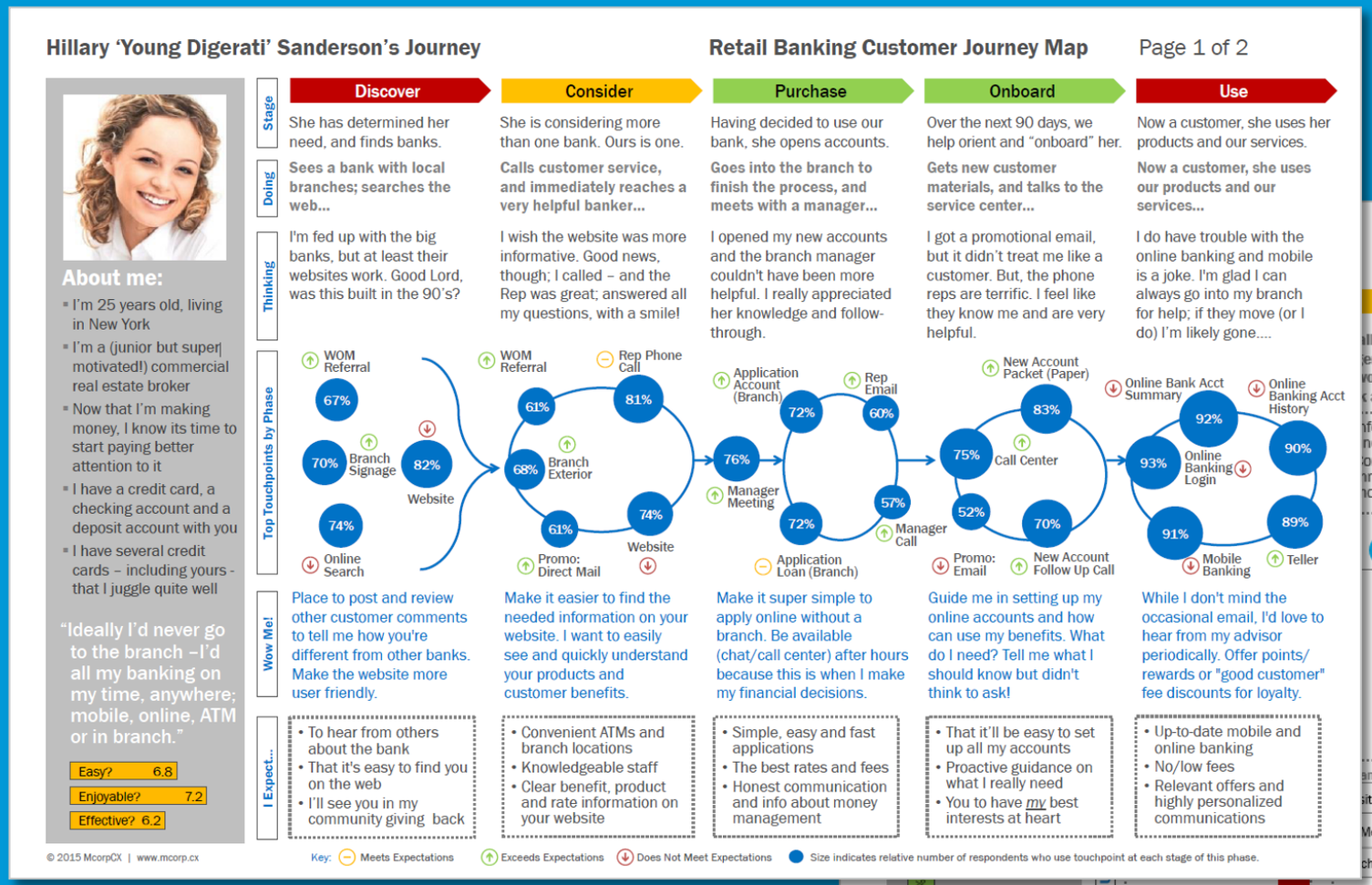
The goal of customer journey mapping is to understand what occurs in each stage of the customer journey, and what moves (or impedes) customers as they move from one stage to the next.

Types of journeys	Descriptions
Relationship	A high-level view of a customers entire relationship with your company, over the "end to end" lifecycle from initial awareness to advocacy or dissolution.
Transactional	An actual transaction, like an online purchase journey, or the experience of calling customer service to resolve an issue.
Physical	A physical journey, like following a customers as they walk through a mall to a retail store, then following them as they walk through the store itself.
Emotional	While most journeys are emotional, focusing entirely on how a journey makes someone feel -- like the hiring or firing of an employee -- can drive deep insights.
Personal	A view of an entire personal relationship, for example that of a financial advisor working with a business owner or high-net-worth client over time.

What journey are you tracking?
There are many different ways to define journey maps, dependent on the issues you want to understand and resolve. The examples above are among the most common types.

© 2015 McorpCX, Inc., All Rights Reserved

A retail banking journey. This example shows a relationship-level journey with Hillary's persona to understand what she thinks, wants and is trying to achieve at each stage. The first page of the map has broader insights; the second page includes quantitative data to help illustrate priorities.



Hillary 'Young Digerati' Sanderson's Journey

Retail Banking Customer Journey Map

Page 1 of 2

About me:

- I'm 25 years old, living in New York
- I'm a (junior but super| motivated!) commercial real estate broker
- Now that I'm making money, I know its time to start paying better attention to it
- I have a credit card, a checking account and a deposit account with you
- I have several credit cards – including yours - that I juggle quite well

"Ideally I'd never go to the branch –I'd all my banking on my time, anywhere; mobile, online, ATM or in branch."

Easy? 6.8
Enjoyable? 7.2
Effective? 6.2

Stage	Discover	Consider	Purchase	Onboard	Use
Doing	She has determined her need, and finds banks. **Sees a bank with local branches; searches the web...**	She is considering more than one bank. Ours is one. **Calls customer service, and immediately reaches a very helpful banker...**	Having decided to use our bank, she opens accounts. **Goes into the branch to finish the process, and meets with a manager...**	Over the next 90 days, we help orient and "onboard" her. **Gets new customer materials, and talks to the service center...**	Now a customer, she uses her products and our services. **Now a customer, she uses our products and our services...**
Thinking	I'm fed up with the big banks, but at least their websites work. Good Lord, was this built in the 90's?	I wish the website was more informative. Good news, though; I called – and the Rep was great; answered all my questions, with a smile!	I opened my new accounts and the branch manager couldn't have been more helpful. I really appreciated her knowledge and follow-through.	I got a promotional email, but it didn't treat me like a customer. But, the phone reps are terrific. I feel like they know me and are very helpful.	I do have trouble with the online banking and mobile is a joke. I'm glad I can always go into my branch for help; if they move (or I do) I'm likely gone....
Top Touchpoints by Phase	WOM Referral 67%; Branch Signage 70%; Website 82%; Online Search 74%	WOM Referral 61%; Rep Phone Call 81%; Branch Exterior 68%; Promo: Direct Mail 61%; Website 74%	Application Account (Branch) 72%; Rep Email 60%; Manager Meeting 76%; Application Loan (Branch) 72%; Manager Call 57%	New Account Packet (Paper) 83%; Call Center 75%; Promo: Email 52%; New Account Follow Up Call 70%	Online Bank Acct Summary 92%; Online Banking Acct History 90%; Online Banking Login 93%; Mobile Banking 91%; Teller 89%
Wow Me!	Place to post and review other customer comments to tell me how you're different from other banks. Make the website more user friendly.	Make it easier to find the needed information on your website. I want to easily see and quickly understand your products and customer benefits.	Make it super simple to apply online without a branch. Be available (chat/call center) after hours because this is when I make my financial decisions.	Guide me in setting up my online accounts and how can use my benefits. What do I need? Tell me what I should know but didn't think to ask!	While I don't mind the occasional email, I'd love to hear from my advisor periodically. Offer points/ rewards or "good customer" fee discounts for loyalty.
I Expect...	• To hear from others about the bank • That it's easy to find you on the web • I'll see you in my community giving back	• Convenient ATMs and branch locations • Knowledgeable staff • Clear benefit, product and rate information on your website	• Simple, easy and fast applications • The best rates and fees • Honest communication and info about money management	• That it'll be easy to set up all my accounts • Proactive guidance on what I really need • You to have *my* best interests at heart	• Up-to-date mobile and online banking • No/low fees • Relevant offers and highly personalized communications

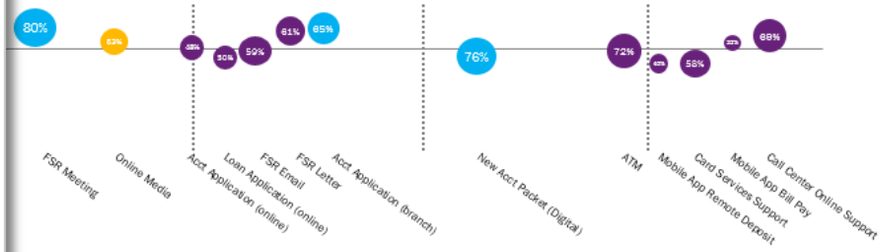
Key: (–) Meets Expectations (↑) Exceeds Expectations (↓) Does Not Meet Expectations ● Size indicates relative number of respondents who use touchpoint at each stage of this phase.

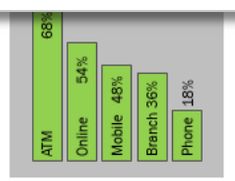
© 2015 McorpCX | www.mcorp.cx

Retail Banking Customer Journey Map

Page 2 of 2

	Consider	Purchase	Onboard	Use
	...ll about access to a ...er branch and ATM ...ork in SoCal, where I ... and live.	I need you to be faster and be much easier to work with than the bank I have my money with now.	Help me get the most from you - be proactive on my behalf. If you help me, I'll be worth it to you.	Quit sending junk mail that I don't need. At least target what you send me to my situation.
	...formation is easy to ...nd, and easy to assess ...convenience and access ...rough branches, ATMs, ...obile and the web	• I need you to be transparent with me; no surprises or hidden fees • Must have fast, efficient apps and transactions	• Get to know me • Don't surprise me - just be straight about it • Help me understand how to get the most	• Always make me feel valued and welcome • Fast, efficient, "anytime, anywhere" access to my money and my accounts





Most I

	Imp	Eff	Gap
ATM	4.0	1.9	-2.1
Online Search	4.3	3.5	-0.8

Channel

Channel	Imp	Eff	Gap
Branch	3.5	4.1	0.6
ATM	4.0	1.9	-2.1

	Imp	Eff	Gap
...site	7.0	7.3	0.3
...Meeting	7.2	7.9	0.7
...ch Exterior	5.1	6.5	1.4
Collateral	6.1	5.8	-0.3
Promo: Website	6.2	6.0	-0.2

Channel	Imp	Eff	Gap
Branch	6.2	6.8	0.6
Call Center	4.5	5.6	1.1

TP Name	Imp	Eff	Gap
FSR Meeting	7.0	7.4	0.4
FSR Phone Call	6.5	6.6	0.2
Application (Branch)	6.7	7.4	0.7
FSR Letter	6.0	6.6	0.6
FSR Email	6.9	6.9	0.0

Channel	Imp	Eff	Gap
Branch	6.4	6.8	0.4
Online Banking	7.6	7.4	-0.2
Call Center	6.5	6.5	0.0

TP Name	Imp	Eff	Gap
New Account Packet (Paper)	5.3	6.9	1.6
New Account Packet (Digital)	6.1	5.8	-0.3
FSR Meeting	6.2	7.2	1.0
Promo: Email	5.1	5.8	0.7
FSR Email	5.4	6.8	1.4

Channel	Imp	Eff	Gap
Branch	5.3	6.4	1.1
Call Center	3.4	5.1	1.7

TP Name	Imp	Eff	Gap
Online Bank Acct Summary	9.3	8.8	-0.5
Online Banking Acct History	9.1	8.5	-0.6
Online Banking Login	9.2	8.3	-0.9
Drive Thru Teller	6.0	7.5	1.5
Teller	7.6	8.2	0.5

Channel	Imp	Eff	Gap
Branch	6.3	7.4	1.1
Online Banking	9.0	8.4	-0.6
ATM	7.7	7.0	-0.7

© 2014 MCorp www.mcorpconsulting.com

Key: ● Excitement Factor ● Performance Driver ● Basic Factor ● Secondary Factor ● Size indicates relative number of respondents who use touchpoint at each stage of this phase.

You can bring different kinds of data into your maps, showing (for example) how different journeys, journey stages and individual touchpoints perform, based on customer perceptions.

Six. Nice to haves

Customer journey maps can provide enormous amounts of data, because customer journeys can be complex.

Brand perceptions, individual touchpoints, operational performance metrics, moments-of-truth, customer pain points, improvement opportunities and other customer-facing elements can provide great insight into your customers' experience.

Journey maps can also include "behind the scenes" or inside-out people, processes, technology and information.

Seven. The importance of design

A journey map is a widely shared artifact. There are dozens of ways to approach it depending on your goals, your brand, the depth of data displayed and the breadth of the journey mapped.

Regardless of your approach, it should look and feel important to your organization.

Use "your" identity and language, and ensure it is easy to understand for the people who need to use it.

Eight. Socialize and share

Journey maps need to be effectively socialized and shared across your business. Again, this means creating maps that are easy to understand.

It also means involving key stakeholders early, and consulting them often.

And it means showing the bad and the good; while a primary goal is to close performance gaps, it's important to identify those "best practice" areas where things are going right.

© 2015 McorpCX, Inc., All Rights Reserved

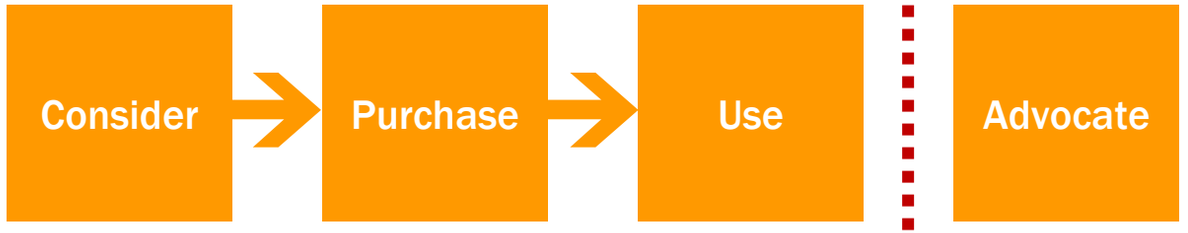
Nine. Take action

Journey maps aren't meant to be purely illustrative. They need to drive action as well.

A typical early exercise should identify a few quick fixes, including specific opportunities to simplify and improve the customer journey.

In brief, mapping the journey should help lead to specific actions – actions that improve the experience, and drive the ROI to justify the effort and increase internal support.

And of course, most firms discover that the process helps drive broader customer experience improvements, as customers and their needs are better understood.



Fix dissatisfiers first. Improving customer loyalty is the ultimate goal of must customer experience improvement experts. It's difficult to move customers to loyalty when their basic needs aren't being met.

So when it's time to take action, eliminate "dissatisfiers" first. Journey mapping is a good tool to find customer pain -- and fix it, opening the door to greater loyalty.

© 2015 McorpCX, Inc., All Rights Reserved

While journey mapping is just one aspect – an artifact -- in the broader discipline of Customer Experience Management, it is a great place to begin.

Ten. Avoid analysis paralysis

Given the depth of data customer research can surface, it's easy to try and include lots of it – quickly descending into dizzying complexity.

Don't.

Remember that journey maps are just a tool to help you more easily understand customers and their needs – and that core message can get lost in the details.

Often times, it can be enough to identify your customer, and what's most important to them – bringing the data (and your customers) "to life" as they pursue their goals.

For many firms, these insights are the result of getting multiple perspectives – internal and external – together in one place for the first time.

So use this opportunity to identify issues that will make a difference to your customers, and do something about it.

And be sure you've read and understand the other nine tips in this guide…

Final thoughts

There is no single 'right way' to create a customer journey, and your own organization will need to find what works best for your particular situation.

But the frameworks provided here should give you a head start at better understanding the journey that your customers travel through as they engage with your company, brand, products, partners, and people.

© 2015 McorpCX, Inc., All Rights Reserved

Additional resources

There are many online resources to help guide your journey mapping efforts; a Google search on the term delivers over 100,000 results.

Of course, our goal is to help you understand our expertise, and how we can help you – so keep our objective in mind as you review this guide, and the resources below and at right.

- Recorded Webinar: Customer Journey Mapping for Better Customer Experiences
- Recorded Webinar: Customer Journey Mapping 2.0: Improve Customer Experience, and Align the People, Processes, and Technologies that Support It
- Recorded Webinar: Experience Blueprinting: Bringing your Customer Journey Maps to Life with Execution-Ready Customer Experience Blueprints
- Get Customer Centric: Enjoy this collection of articles from our President Michael Hinshaw, in his regular column for CMO.com

© 2015 McorpCX, Inc., All Rights Reserved

"No other company delivers on customer experience like McorpCX—they drive measurable results, and can prove it." *– CX Director, Fortune 500 Technology*

McorpCX is a leading customer experience management company, delivering consulting and technology solutions to customer-centric organizations since 2002.

For more than a decade, our blend of strategic thinking, technology solutions and design innovation has helped companies transform products, services, customer experiences, and the processes that support them.

We deliver category-leading insights and tools that help our clients build stronger relationships, seize competitive advantage, and drive differentiation. The result is increased loyalty and engagement in a world where customers, markets, and industries are undergoing radical change.

Our practical, problem-solving approach to customer experience research, strategy, and design has led to successful business outcomes for clients including Microsoft, GE, lululemon, T. Rowe Price, Danone, and Blue Shield of California.

Learn how we can help you, too. Visit us at www.mcorp.cx

McorpCX, Inc.
1.866.526.2655
1.415.526.2655
www.mcorp.cx