



# JOURNEY MAPPING WORKSHOP

November 14, 2019



## AGENDA

1:30 – 1:45 PM	Gather & Introductions
1:45 – 2:15 PM	Customer Experience Framework
2:15 – 3:30 PM	Journey Mapping – Hands On
3:30 – 4:00 PM	Team Sharing
4:00 – 4:30 PM	Q & A



## TODAY'S GOAL

To gain a deeper understanding of customer experience and the art of journey mapping, and take away the framework to start journey mapping on your own or with an external partner (like InSpeier).

InSpeier helps companies build loyal customers by identifying opportunities and developing strategies that enhance customer experience, leapfrog the competition and improve ROI.







**LET'S TALK  
CUSTOMER EXPERIENCE**



## FIRST, A DEFINITION

Journey mapping is one artifact in a big toolbox and discipline referred to as customer experience. Which I define as:

Customer experience is **the sum of all the interactions** a customer has with your company, products or services.

The experience includes **all phases of the funnel**, through to purchase, delivery/installation/usage, loyalty, advocacy and ongoing interactions. **Regardless of channel.**



# JOURNEY MAPS HELP ILLUMINATE THE CUSTOMER EXPERIENCE THROUGH THE ENTIRE FUNNEL



Successful companies drive growth by delivering experiences that meet customer needs in a way that generate positive impressions and leave customers feeling like they would want to repeat that experience...or tell others.



# JOURNEY MAPS & RESEARCH IDENTIFY THE HIGH POINTS... ...AND THE LOW POINTS

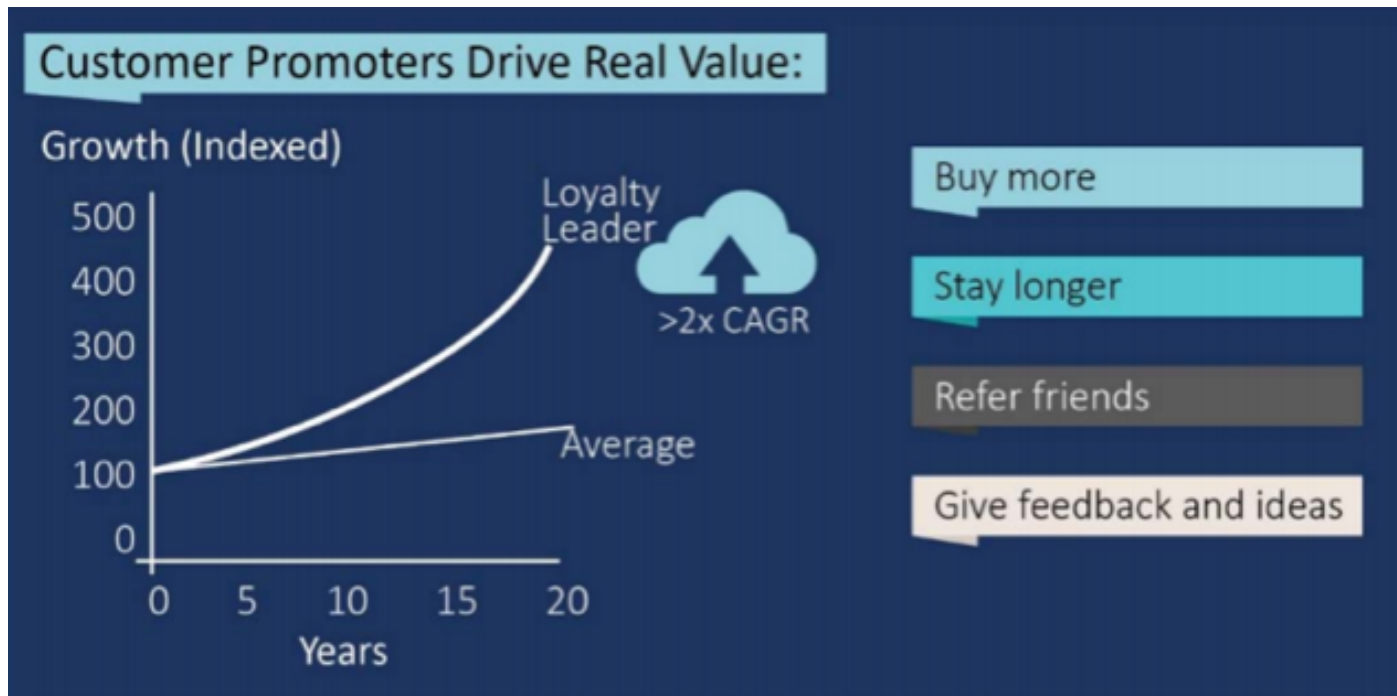


<https://www.youtube.com/watch?v=oYIHLUxzRr8>



# WHY CUSTOMER EXPERIENCE (AND JOURNEY MAPPING) MATTERS

- The #1 reason we care about customer experience is that when customers have excellent experiences, they:



Source: Bain & Co.

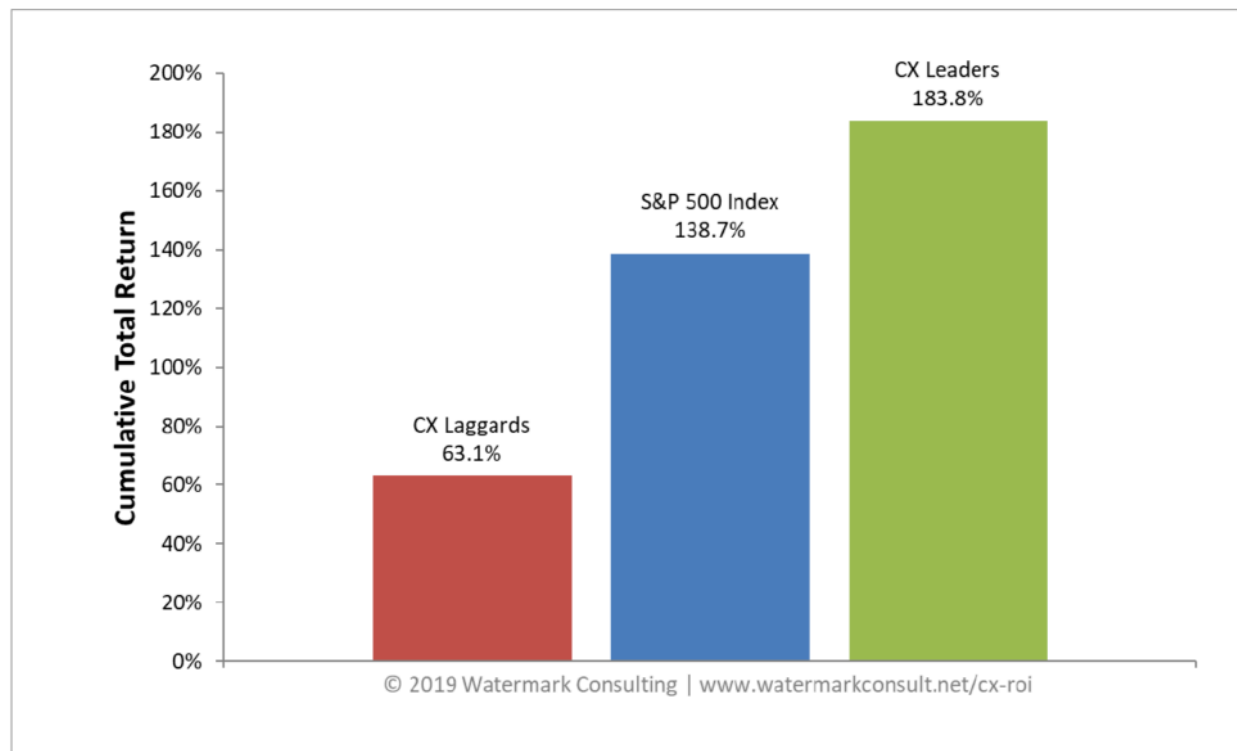


# IMPROVING YOUR CUSTOMER EXPERIENCE = FINANCIAL GAIN

- Watermark Consulting has been studying the customer experience phenomenon since Forrester coined it the Age of the Customer in 2010. Their first-of-its-kind, groundbreaking study shows that not only is it good for sales and loyalty, it's also good for stock performance.

## Customer Experience Leaders Outperform The Market

11-Year Stock Performance of Customer Experience (CX) Leaders vs. Laggards (2007-2017)





## WHAT CX LEADERS DO DIFFERENTLY



NORDSTROM



1. They aim for **more than customer satisfaction**.
2. They **nail the basics**, and then deliver pleasant surprises across the journey.
3. They understand that great experiences are **intentional and emotional**.
4. They **shape customer impressions using research** and science.
5. They recognize the **link between the customer and employee** experience.
6. They value (and map) the **entire customer journey**, and not just touchpoints.



# WHY MAP THE WHOLE CUSTOMER JOURNEY?

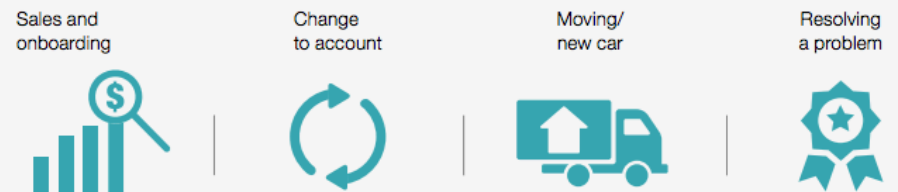
Companies have long emphasized touch points

But the narrow focus on maximizing satisfaction at those moments can create a distorted picture, suggesting that customers are happier with the company than they actually are.

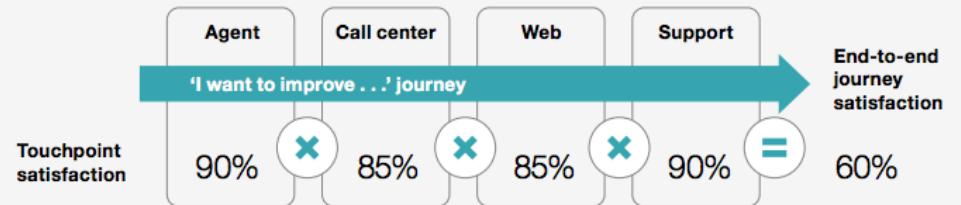
Exhibit 1

Best-in-class companies optimize customer journeys.

Customers experience companies through end-to-end experiences, not touchpoints



Individual touchpoints may perform well even if the overall experience is poor



Source: McKinsey Digital Labs

*“Organizations able to skillfully manage the entire experience reap enormous rewards: enhanced customer satisfaction, reduced churn, increased revenue, and greater employee satisfaction.”*

Harvard Business Review, 2015.

**InSpeier** LLC  
insight | strategy | inspiration





## A TOUCHPOINT GONE BAD



<https://www.youtube.com/watch?v=rXFwiESB9WI>



# JOURNEY MAPPING BASICS



# JOURNEY MAPPING BASICS

## B2B CUSTOMER

Customer profile and journey map



**JOHN T.**  
Family owned business—took over from father

H.S. Degree  
Ohio Territory  
25 Yrs. in Bus.  
Ford Vehicle  
ESPN TV channel

### GOALS

Overall, John is interested in building a partnership over time with his manufacturing partner. Specifically, he would like to:  
Get more customers  
Sell more oil and product  
Feel like a valued partner

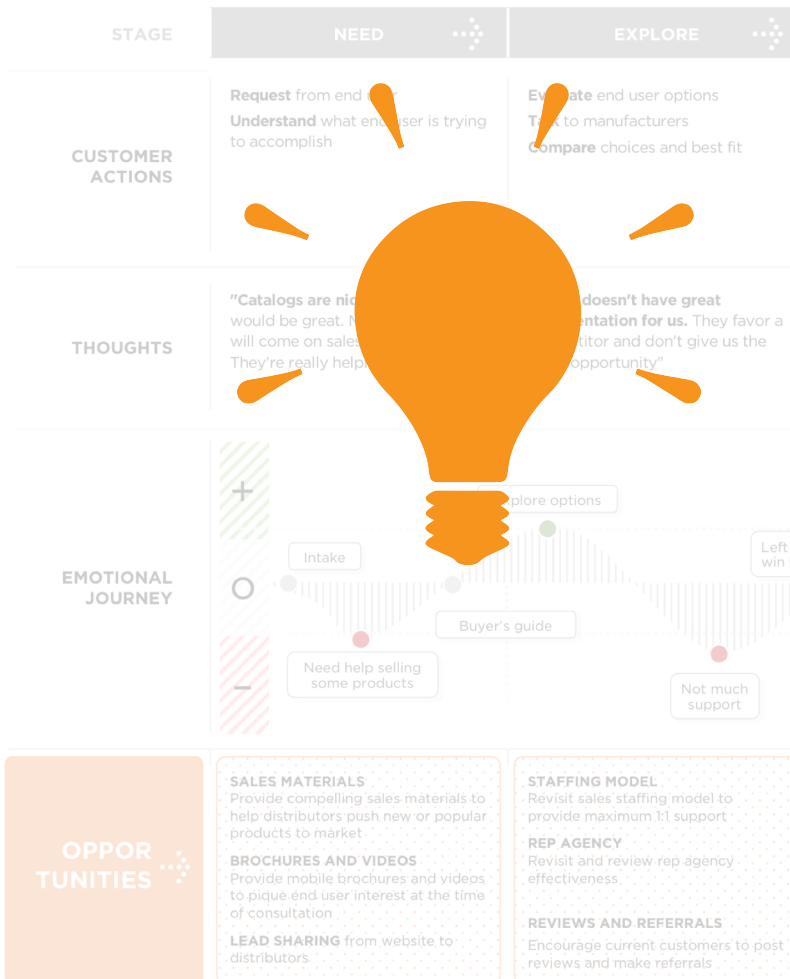
### FRUSTRATIONS

### MEDIA CHANNELS

### COMMUNICATION CHANNELS



In-person



## Why create journey maps?

1. They provide a structured way to look at your customers, opening the door for empathy toward them rather than defense of internal processes.
2. They quickly demonstrate differences between customers, especially when you align personas to your journey maps.
3. Journey maps are an effective way to show others (especially leadership and naysayers) tangible needs and broken processes that need fixing at points along the journey.
4. They can be created any way you want, at any budget, as long as you use customer facts and data as the source for content.
5. They provide a great opening for innovation and new thinking, especially when things have gotten stale over the years.



## JOURNEY MAPPING BASICS

### Journey maps are NOT:

- Flowcharts or timelines
- Hunches or tribal knowledge
- A documentation of touchpoints
- A one-and-done exercise
- Intended to capture every customer's journey (don't do 18)
- Good without a defined scope (know why you're doing one before you start)



### But they are great for:

- Building empathy toward customers
- Stepping out of silos
- Illuminating pain points
- Understanding complex journeys in small parts
- Prioritizing improvements
- Updating and capturing the customer experience over time



# THE JOURNEY MAPPING PROCESS

## **PART I**

### **Fact Collection**

- Define your scope (what are we trying to solve/uncover)
  - Stakeholder insights to form hypothesis
  - Consumer data and insights - web data, call center data, survey data, focus group or interview findings, ethnographies, etc.
- 

## **PART II**

### **Building the Journeys**

- Develop personas
  - Build your story
  - Plot the map (one sticky note at a time)
  - Map the pain points
  - Identify overall sentiment (good, bad or ugly)
  - Analyze for opportunities
- 

## **PART III**

### **Taking Action**

- Build internal alignment (ideally that's been happening all along)
- Prioritize outcomes
- Develop action plans



## PART I - START WITH SCOPE

Scope is a critical phase **BEFORE** you start journey mapping

1. Talk about why you're doing a journey mapping project
  - Who asked for it? Why?
  - Is there a known problem that you're trying to solve for?
2. Define the end goal
  - What happens after journey mapping ends?
  - Who owns the journey maps when they're finished?
  - What will you do next?
3. Build the right project team
  - Multi-disciplinary
  - Mixed levels
  - Set regular touch points with the team and sponsors
4. Determine the max # of maps
  - Keep it small
  - Learn more about personas and segmentation (and tell others)
  - Remember journey maps are representative, not documentative



## PART I - GO IN WITH A HYPOTHESIS

What is hypothesis mapping?

- The start of journey mapping – laying out how your customers experience your organization and the impact each contact has on their perception of the business, product or service
- The hypothesis incorporates all that you know internally today – ideally based in fact, but this phase allows for hunches and tribal knowledge as well

When it's time for real journey mapping, there is one key difference:

- **Journey mapping comes entirely from the customer's point of view and incorporates your actual customer's actions, thoughts and emotions**

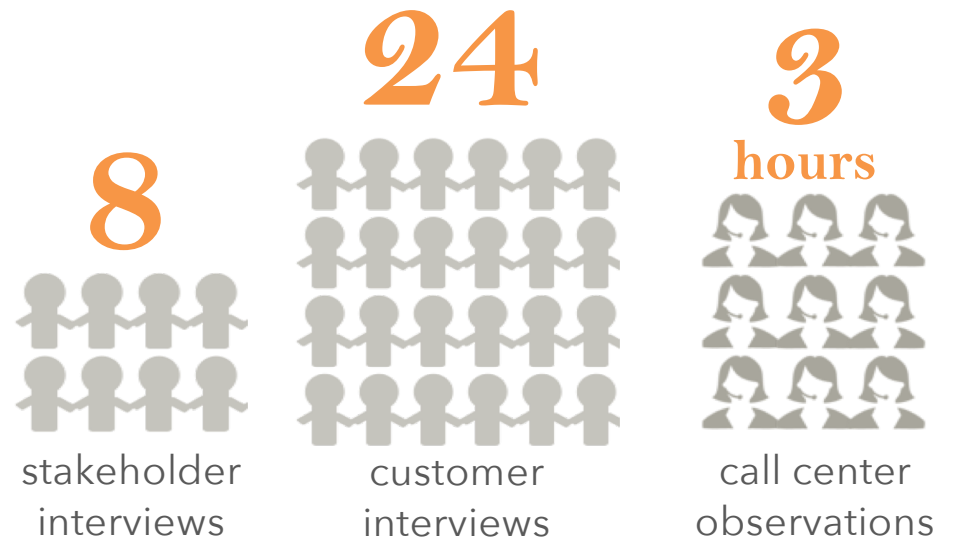
Thus the imperative that organizations partner with an external team to conduct research and develop journey maps – it's tough to step outside of the internal bias



## PART I - COLLECT INSIGHTS

- The project team
- The stakeholders
- Secondary sources
- Actual customers

**Note:** This is the order insights often avail themselves, but reverse order of importance to customer experience success



# 9,933,000

Simmons weighted sample of consumers planning a kitchen remodel in the next 12 months



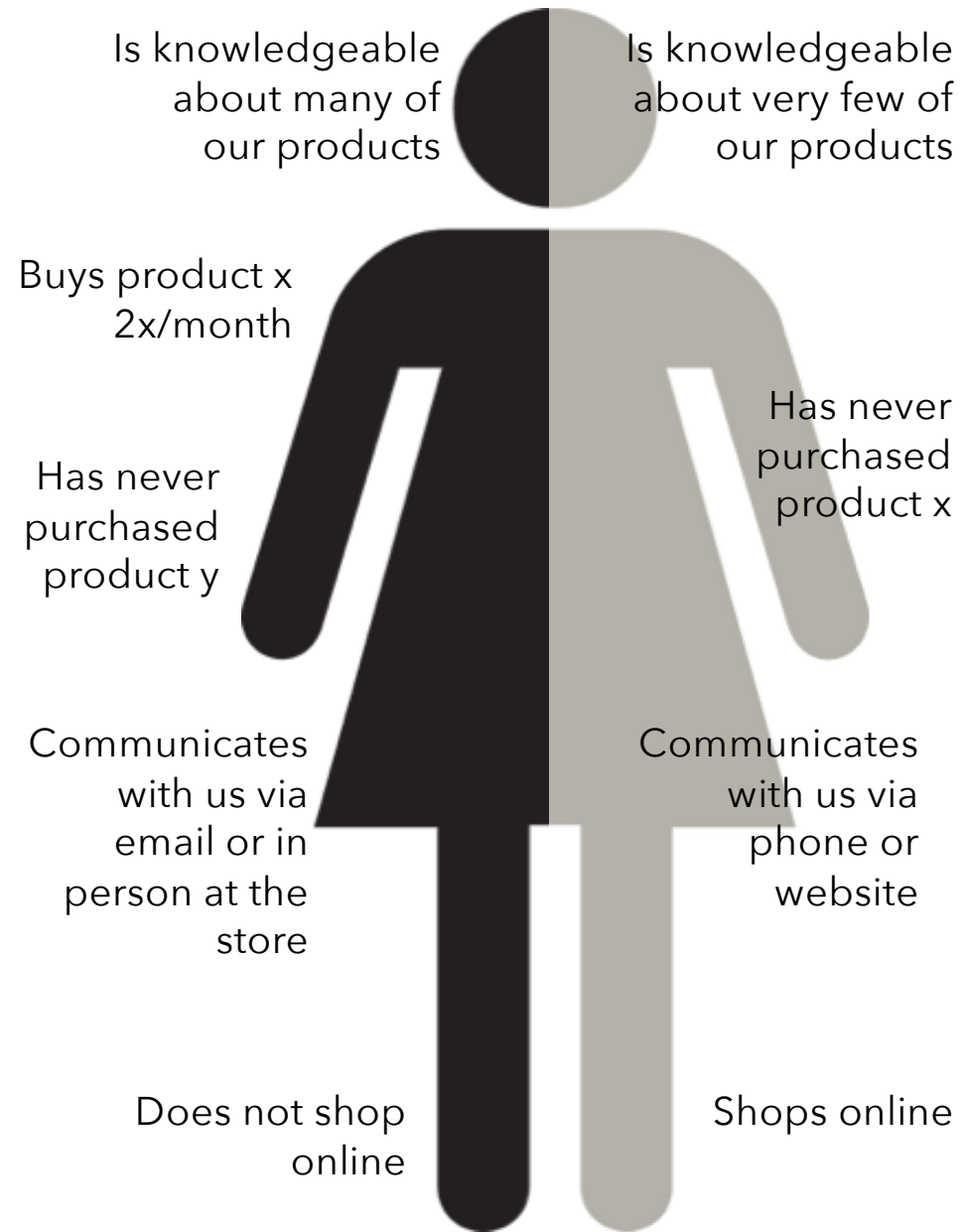


## PART II - DEFINE CUSTOMERS

Many companies communicate with customers based on the attributes they display in their purchase behavior or by the product segments they buy.

They can link this behavior to others who display similar attributes and create profiles to represent:

- Likes/dislikes
- Preferences
- Attitudes/behaviors
- Product/solution needs





# PART II - DEVELOP PERSONAS



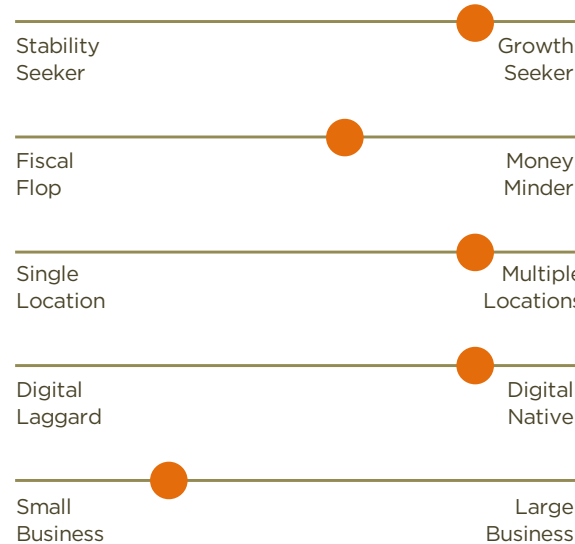
## ESTABLISHED AND EXPANDING: JEN

Jen has worked in retail for over 15 years and she has seen it all. She started her career at Sears and spent time at Target, and now Best Buy Mobile. The bulk of Jen's focus has been digital and ecommerce. Over the past decade Jen has seen a distinct shift from marketing products to selling experiences, especially as digital pure play businesses have created more of a commoditized selling environment.

<b>AGE</b>	37	<b>SAVVY</b>
<b>LOCATION</b>	Minneapolis	<b>DIGITAL-FIRST</b>
<b>BUSINESS</b>	Electronics	<b>INNOVATIVE</b>
<b>ROLE</b>	Ecommerce Director	<b>OPEN TO IDEAS</b>
<b>SEGMENT</b>	Omni-channel business	

“ There is a lot of competition in our business right now, from Amazon to Walmart, and everyone else trying to get in the game. I'm always looking for new ways to reinvent. ”

### KEY ATTRIBUTES



### BUSINESS GOALS

- Stay ahead of the other guys - new products, VR
- Grow customer base - existing and new
- Optimize digital channel via personalization

### WHAT KEEPS ME UP AT NIGHT

- Amazon, Walmart
- Meeting stock performance goals
- Evolving technology and customer interest

### WHAT'S NEXT FOR ME

- Optimizing online shopping experience for customers
- Balancing new technology with what makes sense
- Test and iterate

### HOW THE BRAND CAN HELP

- Unique opportunities for short-term space
- Exposure to new customer segments

### MY MEDIA





## PART II - BUILD YOUR STORY

As consumers proceed through the funnel, they are actively trying to accomplish certain “jobs” along the way. One method for building the story you want to tell is to evaluate the jobs consumers are doing at each phase and what that means to your business.

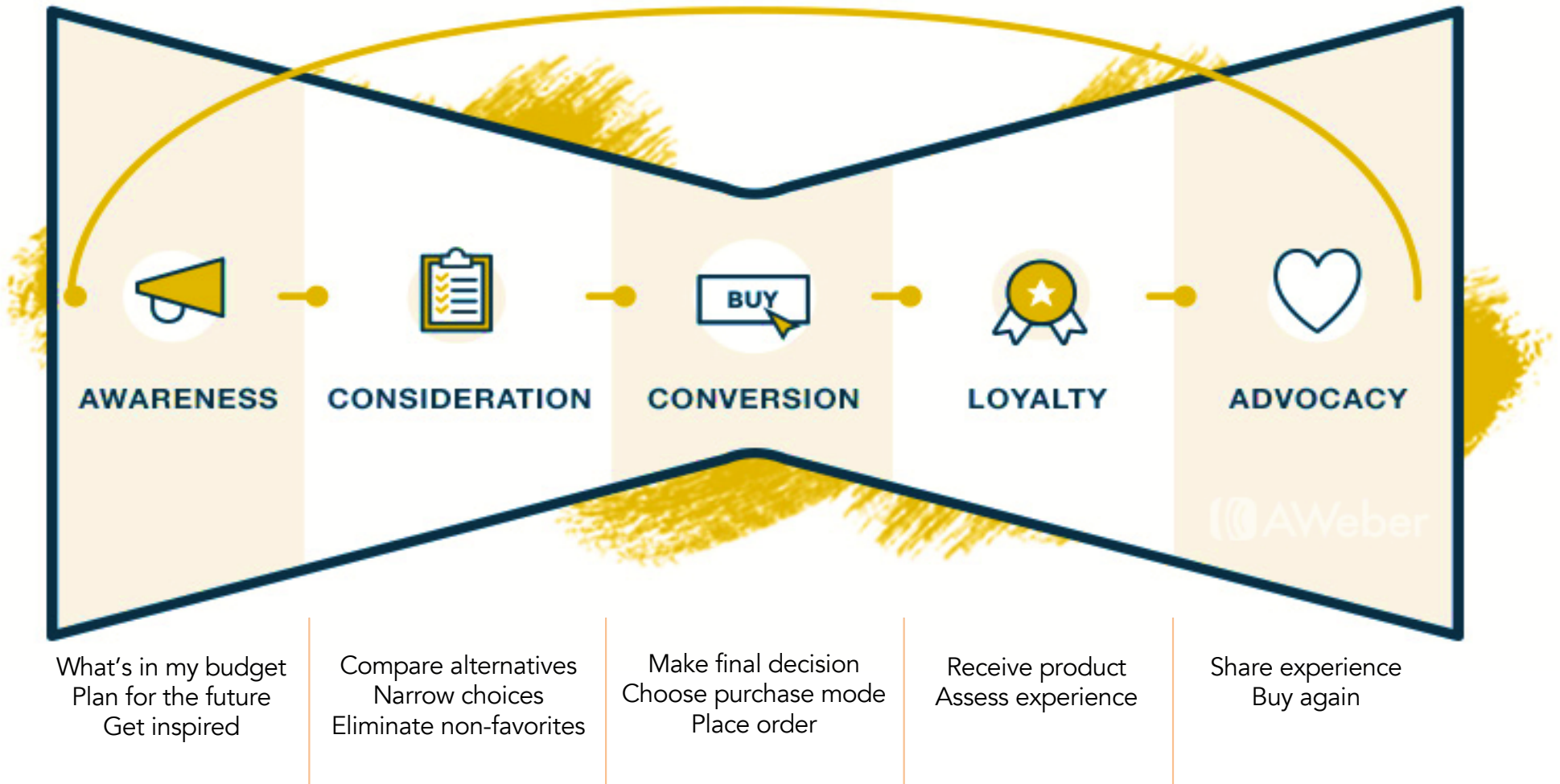


Image Source: AWeber, 2019



# HANDS-ON JOURNEY MAPPING



# ACTIVITY 1: BUILDING A PERSONA

Activity 1 | 2:15 pm – 2:30 pm

## ▪ THE CHALLENGE

- In order to develop a customer experience, it is imperative to create personas or characters, that represent a typical customer of your business.
- Personas help us step outside of our own thinking and place the emphasis on that of our consumers, identifying their unique needs, behaviors and preferences.
- We know there could be many different personas for any given business, but today we're going to focus on just one for each, that represents the archetype.

## ▪ YOUR TASK

- Break into your assigned groups
- Complete the persona template at your table
  - Reflect the attributes of a typical customer
  - Try to leverage facts or real insights

## • TASK TIMING

- 15 minutes to create



## ACTIVITY 2: BUILDING A JOURNEY MAP

Activity 21 | 2:30 pm – 3:30 pm

### ▪ THE CHALLENGE

- Journey maps give us a way to relate to our consumers by looking at the experience through their eyes. It allows us to build empathy around the journey they take to engage with us and how they see things.
- Journey maps also enable us to spot opportunities for improvement or change as well as points of differentiation in what we do as an organization that help us stand out from others in the market.
- Lastly, journey maps can identify gaps in what we offer or places where our customers experience difficulty in engaging with us.
- Today we will step into our consumers shoes and map their journey without bias.

### ▪ YOUR TASK

- Use post it notes to capture unique experiences that happen at each phase in the customer journey for your persona
  - What's happening in their life?
  - What are they feeling at each of these stages?
  - How do current solutions meet their needs
  - What's going well
  - What's going poorly

### • TASK TIMING

- 30 minutes to create
- Rotate
- 3 minutes per group to share out



# Q & A