

2019 SPECIAL REPORT SERIES

Customer Experience Journey Mapping

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What Can I Achieve Using A Customer Journey Map?



Customer journey maps are more than just a handy visualization tool for rooting out pain points and gaps in the customer experience. It's more than just about fixing things that are broken. Journey maps shine a light on why you aren't meeting your business goals - why are customers churning, why is the sales team consistently failing to meet targets? Taking these insights and turning them into measurable goals is the essence of a successful customer journey map. In this Special Report, we'll dive into what types of questions a journey map can help you answer, the seven bottom line-related business goals it can help you meet (and exceed) and a step-by-step process of how to create your own customer journey map.

A Primer On What A Journey Map Looks Like

A customer journey map visually represents every touchpoint your customers have with your business throughout the sales cycle, from discovery to research and purchase, to delivery and after-sales care.

On top of that, an effective journey map layers the considerations, emotions and pain points a customer encounters at or between each touchpoint, which can influence them to advance to the next phase of the purchasing funnel, take a step back, or switch to a competitor. Taken together, these two layers help your business understand how your product or service fits into your customer's lives and identify any pain points or experience gaps that are causing customers to abandon their online carts or buy once and never return.

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Customer journey maps are important because the purchasing funnel is never straight-and-narrow, and there's no such thing as a textbook customer. The end goal of a customer journey map is to guide the customer through the sales funnel, convince them to purchase, and keep them coming back.



“What’s really important is looking at the objective experience of the user at a very horizontal level. How is somebody moving through the complexities of doing tax compliance when running payroll and what does this mean when they’re hitting different features along the way?” - Margot Dear, senior director of user experience, client solutions at ADP

Done right, a robust customer journey map can help you answer big-picture questions like the following:



1. Why is my churn rate so high?



2. Why do customers seem to prefer the voice channel over email and chat?



3. What targeted emails and calls-to-action should I send out and when?



4. When should I proactively reach out to the customer?



5. What is the customer trying to achieve in their own life using my product?



6. What is the best way to handle customer complaints?



7. What kind of after-sales care or outreach should I offer?

Journey mapping requires a deep knowledge of your most important buyer personas, because you want to be able to anticipate what customers are feeling and thinking at each stage of the journey — especially during moments of truth. These are decisive junctures in the sales funnel that determine customer sentiment, and whether or not prospects will become customers and whether existing customers will continue to buy from you. In other words, moments of truth directly or indirectly lead to conversions (or lack thereof). Often, it hinges on the following:



Did you deliver what you promised?



Did you adequately compensate the customer when something went wrong?



Did you make it easy for the customer to make a decision?



Did you give the customer something of value?

For example, say a head of household is researching health insurance coverage for the family. The moment of truth is when they arrive on the landing page listing available policies on the insurer’s website. If the policies aren’t easy to understand and compare, the prospect will leave the site simply because the UX design is broken, and not necessarily due to an inferior product. You do not want to lose a high-value prospect to poor web design or other ancillary failing, so understanding moments of truth and fixing pain points is imperative.



What Business Goals Can You Achieve With A Journey Map?



Journey maps help you identify experience gaps, pain points, and unmet customer needs. All of these represent opportunities for achieving business goals, or creating new ones. In fact, the insights from your journey map are only useful if you design solutions for them that are directly tied to business goals.

1. Optimize Conversion Rates

One of the most underestimated virtues of journey maps is their ability to improve conversion rates not only by identifying moments of truth, but allowing site administrators to offer better-targeted calls-to-action both onsite and off.

For example, a customer lingering on the checkout page might be prompted with a chatbot greeting asking if they need help. A customer who's saved a bunch of items without adding them to their cart might receive an automated email two or three days later containing other similar products they might like, as well as a discount or offer on the items they previously saved, serving as a gentle reminder for them to complete the purchase. In both scenarios, the call-to-action was based on the context of what the customer was doing and what might have been stopping them from proceeding (confusion about the checkout process or a desire to comparison-shop before buying), and responded directly to the customer's reservations.

Say your web analytics tool shows that customers tend to navigate away from your site after reaching a certain landing page. Depending on how detailed your journey map is, you may be able to infer where on the landing page customers drop off, especially if you have access to a landing page heatmap. You might then act on that information by adding a call-to-action or FAQ section, or making the cart icon on your menu bar more prominent, thereby increasing the chances of conversion.

2. Shorten The Sales Cycle And Increase Customer Lifetime Value

A customer journey map offers so much more than just the opportunity to *fix* things that are broken. Understanding your customers' lifestyle, aspirations and needs can help you align your business goals with your customer's goals, thereby increasing the lifetime value of each customer and the likelihood of retention.

Say your goal is selling premium travel packages with as many luxury add-ons as possible at a high profit margin. Meanwhile, your customers prefer modest lodgings in exchange for seeing more attractions at the same price. You can spend your marketing budget on targeting and acquiring a new segment of customers, or you can meet your existing customers in the middle by partnering with more budget hotels and tour operators while maintaining your profit margins, but you've made it that much easier for them to purchase from you because you offer the value proposition they're looking for.



Conversely, the sales cycle becomes protracted when customers are unsure how your product fits into their lives, whether they're paying a fair price, and if they're skeptical about trusting your brand. A customer journey map should identify where these concerns arise and when to initiate communication or make an offer or CTA that can help allay those qualms. Customers are much more likely to continue buying from companies that not only understand what they're looking for, but proactively address any reservations they might have about purchasing.

3. Provide A More Personalized Experience

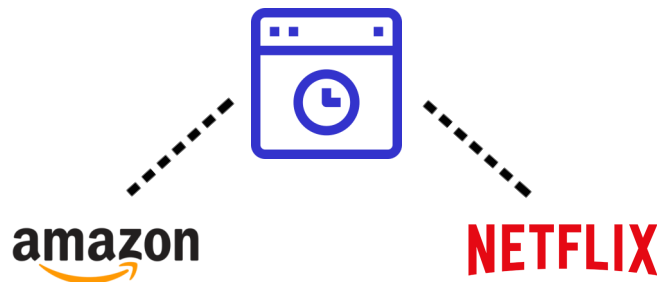
Perhaps the best example of businesses leveraging the customer journey map to provide a personalized experience is the “pregnancy prediction” model retailers use to lure new parents into buying exclusively from their brand. Brands know that when parents welcome a new baby, it’s a rare opportunity to change their buying habits for household needs when their lives are in flux and convenience is the number-one purchase consideration.

Retailers initiate outreach months before the child is born, knowing that if they can shift the brand loyalty of would-be parents, they can retain that customer as their household grows. Brands are also very crafty at targeting these consumers with products that correspond to the mother’s stage of pregnancy — gestating mothers are plied with offers for cribs, clothing and accessories, while new moms are sold diapers, formula and general household items.



In 2012, Target discovered a teenage girl was pregnant before her father knew about it by using sophisticated data mining methods. Target sent her coupons for discounted baby clothes, cribs and diapers, which her livid father later discovered.

Sometimes, journey maps are designed in real-time using AI capabilities. Recommendation engines like those deployed by Amazon and Netflix are great examples where user habits shape which content is shown to the customer, hence shaping their web browsing experience in real time. For example, baby food maker Danone Nutricia adopted Sitecore technology to tailor content on its Nutricia For You website to the mother’s stage of pregnancy when she first visits the site by asking questions to understand her needs.



If a mother two months pregnant returns to the site two months later, the system will know she is four months into her pregnancy and tailor content accordingly. If a customer made a recent purchase, the system can greet them with a thank you message. The more the system knows about the customer through multiple interactions, the more it can personalize the interaction. This is also known as context marketing, where customer intent and sentiment is used to determine the nature of the outreach.

Finally, effective email campaigns hinge on an understanding of the customer journey. Perhaps one of the most convoluted sales cycles is the university admissions process — prospective students comparison-shop in terms of location, on-campus cost of living, reputation of the faculty, availability of majors and so on. It is the job of the admissions center to proactively address each of these concerns and maintain an ongoing relationship with the prospective student all the way through to admission by communicating regularly via email or assigning an academic advisor to check in with the student.

Additionally, some of the pain points or detractors in this particular customer journey are inferred, rather than explicit. For example, students might have misgivings about studying out-of-state or need the flexibility of studying part-time while working full-time. By understanding the needs and wants of its buyer persona, organizations such as universities can understand and anticipate detractors and provide ancillary services to meet an unspoken customer need and reduce the barriers to purchase.



“If you’re McDonald’s and you want to serve a \$1.99 coffee, then people don’t expect anything else but functional, efficient, computerized ordering and service. But if you’re going to charge \$5-6 for coffee or even \$12-14, there’s the aesthetic quality of the brand, and that is more about the engagement.” - Colin Hunter, founder and CEO of Potential Squared

4. Reduce Customer Churn

Addressing barriers to purchase is instrumental to reducing churn, but it’s equally important to understand the pain points experienced by regular customers who aren’t at-risk. Some customers will continue to buy from you despite minor inconveniences — that is, until a competitor offers an experience that’s even marginally better.

Customer journey maps also highlight the touchpoints where customers tend to churn - or maybe churn occurs *between* touchpoints due to a lack of after-sales care or proactive outreach to new leads. For example, say you’re a SaaS company selling enterprise software and you notice that most of your B2B customers abandon their subscriptions after a year. Your journey map can help you understand the customer’s experience with your product after the sale based on their persona and transactional data as well as insights from after-sales customer interactions with your contact center.

If you don't have sufficient data to work with, your journey map can at least help you infer what barriers customers encounter after purchase based on their buyer persona. In fact, if customers *don't* reach out after purchase only to drop their subscription months later, that could instead highlight the fact that you don't offer troubleshooting or customer support in their preferred channel, or you don't make it obvious enough how customers can access after-sales care. Lacking the information they need, they abandon your brand for a competitor.

The biggest takeaway here is that the customer journey map is an ever-evolving, fluid tool. The NBA is a brilliant example of a legacy brand that has adapted to changing customer journeys influenced by the advent of social media, cord-cutting and streaming services. Before, fans would either watch the games live at the arena or pay for a cable subscription to watch the full game.

Today, the league's younger, casual fans prefer to watch free highlights on social media, and even those attending games do so while browsing social media on their smartphones. The NBA has introduced a range of new stadium technologies to keep tech-savvy customers engaged, as well as changing the way fans view games remotely. The basketball league also caters to casual fans by offering \$1.99 piecemeal packages for customers to watch the fourth quarter of a close game rather than paying \$199 for full-season access to League Pass, the official NBA live stream. It understood that some of its customers prefer to watch the last few minutes of a close game rather than the entire 2.5 hour game, and offered a new product accordingly. Had it not done so, those casual fans who found it "wasteful" to pay \$199 for full-season access might have churned instead.



"Kids are growing up with iPhones and Apple watches and everything that is now part of their digital ecosystem that people of my generation didn't grow up with. Those create new expectations and if we want to be positioned to serve the customers of the future we really have to focus on digital innovation."
- Benjamin Judy, Head of User Experience at 7-Eleven

5. Achieve Digital Transformation And Build An Omnichannel Contact Center

You likely already track metrics for each of your contact center channels, but even more important is understanding how each channel fits into the overall customer journey, and whether it's helping or hurting the sales process. Customer journey maps can also help you pinpoint opportunities for digital transformation.



For instance, quick-service restaurants started offering dedicated mobile apps for one-click ordering and in-store pickup because they understood that busy office workers don't like to wait in long lines during short lunch breaks, so the savviest brands decided to digitize the ordering process.

As many organizations embrace digital transformation as an investment priority, a customer journey map can help you identify which touchpoints are in most critical need of digitization. Responsive IVRs are another example where businesses recognized that many customers get lost in the annals of directory-based IVRs, which also contributes to a sense of feeling unheard by the organization. It's at this point where a customer, after failing to reach a live agent, is at risk of churn - a moment of truth.

Finally, journey maps can highlight experience gaps where you might think your business offers an omnichannel experience when in fact it doesn't. For instance, data might show that many of your customers defect to the voice channel after using the self-service portal. The data alone is factual and doesn't necessarily mean anything, but in the context of the customer journey, it could be a red flag that your customers aren't able to achieve their goals in the self-service portal, so they're calling the contact center out of frustration.

It's also important to compare the performance of each of your channels because you want to honor customer channel preference. For example, if most of your interactions take place by phone when you know your customers are digitally-literate and prefer self-service or web chat, that's a sign that something is amiss with one or both of those channels, forcing customers to resort to the voice channel. Without the journey map, the data would simply show that voice is your top-performing channel in terms of usage volume, thereby misleading your organization into believing that voice is your customer's preferred channel.



"To innovate and change the way you do things and keep yourself fresh, every so often you need to be iterating, throwing everything up into the air and starting again in some way." - Colin Hunter, founder and CEO at Potential Squared

6. Know Who Your Customers Are And Anticipate What They Need

The customer's journey is more than just the totality of transactions and interactions they currently have with your company. Maybe after taking your product home - say, a beautiful light fixture — they decide they want to buy an area rug to complement it. If your journey map is solely concerned with existing processes, that unmet customer need won't show up. But had you been aware, you would have seen the opportunity to, perhaps, retail a wider range of home decor items, thereby becoming a one-stop shop for that customer. For instance, clothing retailers like H&M have begun offering selfie cameras and on-demand fitting room access where the customer is notified by SMS when a fitting room is available. These ancillary perks were not part of the initial customer journey, but these brands recognize that today's customers want to comparison-shop, share their outfits with friends on social media and save time, so they added those touchpoints to their existing customer journey in response to an unmet customer need.



“We get a lot of insights from our users and we apply all those insights into our design, so it’s a back and forth process of understanding the user and then presenting the user with our designs and then getting feedback from them and trying to optimize.” - Lily Bather, interaction designer at 7-Eleven

7. Encourage Repeat Purchases

By proactively managing the after-sales relationship, you vastly increase the odds that a customer will buy from you again. However, that outreach needs to be context-based and relevant, otherwise it won't help you achieve your business goals. For example, Volkswagen Australia sends its first customer feedback survey two days after a customer buys a car, whereas the industry standard is to do so 30-45 days after purchase, when it may be too late to fix any early problems.

Another great example of a brand using its understanding of the customer journey to spur repeat purchases is Amazon's 'Dash' button. These are adhesive badges customers can stick to any surface in their home and press when they need a refill of an item from a specific brand, such as ordering more detergent by pressing a Tide-branded 'Dash' button on their washing machine. While the product itself has been derided as awkward and unsightly, concept-wise it represents a deep understanding of the typical Amazon customer. People often forget to buy refills for fast-moving consumer goods like coffee pods or detergent until they reach for the item in the cabinet and realize supplies are depleted. The button makes repeat purchases easier by adhering to your coffee machine or kitchen countertop, for instance, so that the minute you realize you're out of a certain item you buy it immediately — and you buy it from Amazon.

Step-by-step Of How To Design A Customer Journey Map



Step 1: Identify your most important customers (or the ones you want to attract).

A customer journey map isn't just a user flow diagram of how customers navigate your website or mobile app. It outlines all the touchpoints your customer has with your business, as well as steps taken within the purchase consideration that don't involve your business at all, like comparison-shopping on TripAdvisor, asking friends' opinions or being interrupted by a crying baby while browsing online. At the same time, it's important to understand that no customer journey map is going to be 100 percent accurate or comprehensive.

Start by identifying the demographic of customers that spend the most with you, have the highest customer lifetime value - or, conversely, those at highest risk of churning. Build detailed buyer personas for each group: what are the reasons they buy from you or seek your products, how does your product or service fit into their lifestyle, what are their purchase considerations during the sales cycle, what types of needs do they have before and after sales?

Once you've identified these personas, it's imperative that you interview a sample of customers from each group about their journey to understand their goals, motivations, purchasing habits and pain points. Do not assume you know what customers want, or that you can put yourself in the customer's shoes. The closer you are to the product, the harder it is to imagine yourself as the customer.

Step 2: List all of your business touchpoints

Build a touchpoint inventory of all the interactions every type of customer group has with your business. Some may not apply to certain groups, but it's important to list them all so you can match them with the corresponding groups later. Focus on the offline touchpoints as much as the online touchpoints, and also think of the ones you *can't* control, such as word-of-mouth reviews.

Step 3: Organize the journey map by stages

For each touchpoint, identify what goal the customer is trying to achieve. Don't think in terms of business goals or the purchase funnel - that's not how your customer perceives the journey. In fact, remember that customers don't perceive their transactions with a business as a journey at all, which is why the journey needs to be seamless and omnichannel. Use data from the customer interviews to inform the customer intent at each touchpoint.

Step 4: Capture your customer's considerations

At each stage of the journey map, consider the reasons why a customer may choose not to proceed. These purchase considerations are often inferred, and they're informed by one-on-one interviews you've done with customers and how well you understand your customer lifestyle and habits. For example, a prospective college student shopping for dorm room furniture will undoubtedly need to take measurements of their dorm room before purchasing. If you can provide a visualization tool that makes this inferred task easier for the prospective customer, you're far more likely to make a sale. Paint sellers have long offered pantone samples for customers to take home, but deciding on the right color for the walls of a new home is still a big decision. Home Depot responded by creating the Project Color mobile app, which allows users to take photos of the room they want to paint and use the in-app photo editor to try out different coats of paint on their existing interior.



“When people try scanning items with the 7-Eleven app on their phone, paying and then walking out of the store without having to stand in line, it's really a fantastic experience. The problem is that when we would ask customers if they would like to try it, they would say, “Maybe later, not that interested.” It really was a discovery process.” - Benjamin Judy, Head of User Experience at 7-Eleven

How Do You Measure The Success Of Your Journey Map?



The best way to measure the success of your customer journey map is by the extent to which you've met your business goals. It's also important to note what new business goals you discovered and set after creating a customer journey map. There are no success metrics specific to the customer journey map; rather, you use it to set business goals, and then set business metrics for those goals.

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Kindra Cooper is a digital writer and editor for CCW Digital, the global online community and research hub for customer contact professionals. In her role, Kindra writes daily articles and produces podcasts on customer experience, design thinking, UI/UX, brand strategy and more. Her reporting has appeared in various print and web publications covering politics, arts & entertainment, business and architecture.



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Jul. 1	Choosing an AI Partner	May 24, 2019
Jul. 15	360 Degree Customer View	Jun. 10, 2019
Aug. 1	CX Automation	Jun. 24, 2019
Aug. 15	Intelligent Routing	Jun. 28, 2019
Sep. 3	Open Work Spaces for the Contact Center	Jul. 26, 2019
Sep. 16	Contact Center Security & Fraud Prevention	Aug. 12, 2019
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