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# Five Steps to Uncovering the Real Customer Experience Journey

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"Journey Maps are the backbone for CX programs."

Tony Costa | Forrester Research

Today, a coffee shop is an iconic gathering place. From the moment you walk in, the aroma of the coffee surrounds you. The environment in the store is calm, relaxing, and inviting. The store invites you to stay and relax for long periods, and many people stay to study, work, check their e-mail, or share some time with friends. The servers are not called servers; they are "baristas," adding to the sense that you are doing more than just grabbing an ordinary cup of coffee. Each cup is prepared individually and the customer's name is written on the cup to personalise the experience.

**In other words, the product is not the focal point; it is the experience the company delivers.**

Successfully delivering a good customer experience requires a comprehensive orchestration of a great many things. One of the most essential to the backbone of your CX program is a thorough understanding of the customer and their experience with your brand, people, product, and service—a process popularly known as customer journey mapping.

Starbucks knows its customers well. It has a well-mapped journey of what the experience will be like from the moment the customer walks into the store or orders online. By selling more than just a product, the company is able to charge 5-10 times what a competitor could and still attract more customers. Starbucks clearly understands that focussing on the customer experience is not just a corporate tagline for shareholders. It is a business strategy.

## What is a Customer Journey Map?

A customer journey map is a visual representation of the journey a customer has with your brand, products, services and people. It is important to note that journey mapping is not an appropriate replacement for quantitative efforts, but rather a good starting point or supplement to quantitative efforts. It includes multiple touchpoints from the customer's point of view, such as:

- Key moments and evaluation points in the process
- Positive and negative components of the experience
- Attitudes and emotions that may come into play

## Step One:

# Build the Journey from the Company's Point of View

Mapping the customer's journey starts with identifying and building out the steps of the journey from the company's point of view. Start by identifying the key interactions a customer has with the company. Achieving consensus on the discrete steps a customer takes can be difficult, as each functional area and stakeholder will bring a unique perspective to the table. However, it is critical for the organisation to work off a common vision of the journey so measurements, improvements, and enhancements can be created using a shared framework.

## BUILDING OUT THE STEPS

Once the steps of the journey are identified, expand upon the experience of each step, detailing the following elements:

- **Customer's desired outcomes**
- **Time or duration**
- **Attitudes and thoughts**
- **Emotional responses**
- **Emotional needs**
- **Customer pain points**
- **Areas of weakness**
- **Areas of strength**
- **Importance of the step**
- **Satisfaction with the step**

Though some might argue that this process is overkill for organisational stakeholders, the elements of this process enable a more educated

approach to the secondary probing and qualitative research phase. Additionally, the process of including all stakeholders embeds customer journey mapping within the cultural framework of the organisation. As stakeholders help build the journey, hear different perspectives from their peers, and eventually see the customer's perspective of the journey, they are more likely to understand and buy into the final product.

Finally, it is very insightful at the end of the process to highlight the differences in the customer's perspective of the journey versus internal stakeholders' points of view.

## CUSTOMER STORY: SEEING THE CUSTOMER JOURNEY FROM EVERY ANGLE

A financial services company used customer journey mapping to identify root causes of attrition and strategies for retaining more customers when their investment representatives retired.

The process identified a key challenge: investment representatives were not giving any advance notice of their departure, which left the company unable to get transition and communication plans in place to keep customers up-to-date and on board. Clients were often left without a personal representative for months while a replacement was coordinated. This was a major concern, especially since most customers had selected the company based on accessibility to an investment representative.

As the journey was laid out, numerous opportunities for improvement were identified. One of the most basic opportunities

related to the way that the human resources and legal departments designed the contractor agreement and the associated retirement compensation plan. The contract stipulated that retirement benefits would be based on the last three months of revenue and assets. Because of the significant and long-lasting implications of retirement revenue, investment representatives were concerned that giving advanced notice of leaving the company would lead to fewer leads and would potentially encourage their peers to prematurely lure current clients away with the promise of someone who would be around for the years to come.

Clearly, this is something that would not have been identified in a simple tracking study. Instead, it took a comprehensive review involving a diverse cross section of stakeholders, some of whom might have been considered irrelevant because they

didn't have direct customer contact.

In this example, one of the root causes could not be identified without a structured review of the upstream impacts on the customer experience elements. When mapping the customer reassignment journey, multiple key steps in the experience are identified, including the notification of the change from one representative to another. Doing this well wouldn't just improve the customer experience, but also the company's bottom line. By improving the customer experience, the company expected to reduce switching behaviours that impacted retention rates. By improving retention rates, the company improved their revenue and maintained a larger asset level.

Check out the figure on the next page to see how the journey mapping exercise paid off for this brand!

## The Impact of a Successful Customer Journey Map

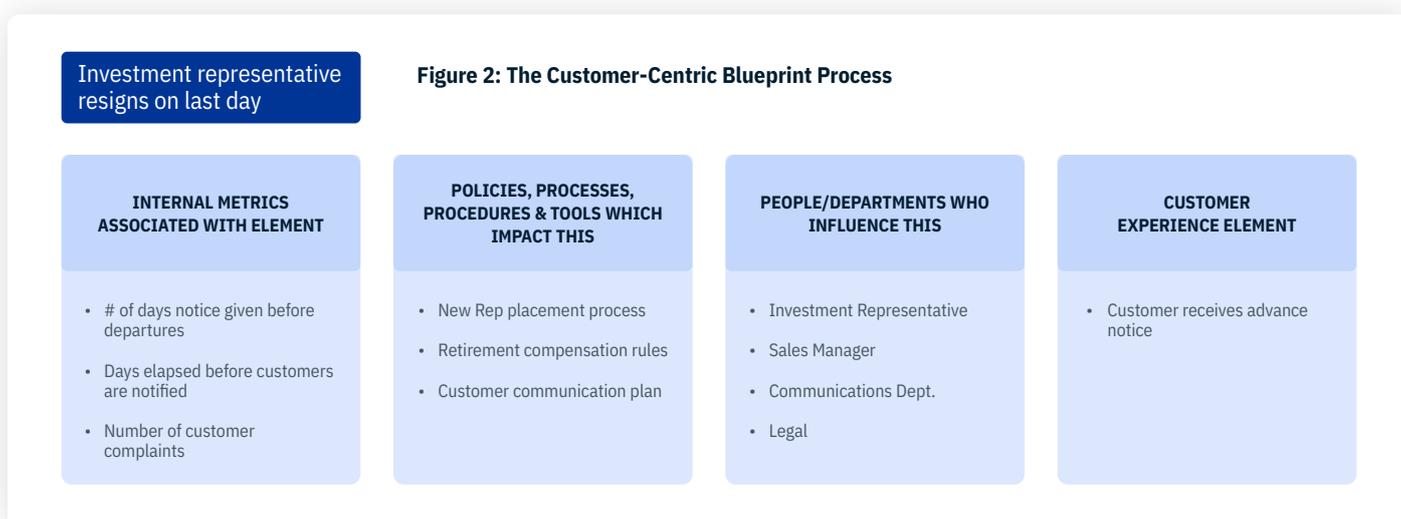


### CUSTOMER-CENTRIC BLUEPRINT

A byproduct of customer journey mapping is a customer-centric blueprint, which dives into customer experiences that lead to a decision or behaviour that impacts financial outcomes for the organisation. A customer-centric blueprinting process involves:

- Determining what critical elements are impacting each step in the journey
- Identifying all people and departments who are even remotely connected to this element
- Identifying the policies, processes, procedures and tools that impact this element
- Listing all internal metrics associated with this element of the step, which can serve as early indicators of a good or bad experience by customers before they even take a survey

The customer-centric blueprint process, as it relates to the previous example, is illustrated below.



The previous process is repeated for each customer experience element that impacts every step in the journey.

While this is a detailed exercise, the insights are critical to creating a better customer experience.



### Step Two:

## Build Out the Customer Journey View

Once the internal stakeholders have laid out their view of the customer journey, it is time to have the end customer validate this framework. A series of qualitative research sessions are usually helpful for this purpose. In these sessions, customers walk through their version of what the journey looks like, using all the same criteria used by internal stakeholders.

During or prior to the interview, customers may also be asked to:

- Create a collage, drawings, or photos that illustrate how they feel about the experience they have when dealing with the brand, category, product, service, or people. The use of imagery adds a richer perspective to the experience, which can elicit deeper insights than verbal cues alone.

- Share metaphors that describe emotional needs are at each step. These can come from a standard list, or they can share their own. This part of the process creates a clear delivery goal for the company at each step of the journey.

### Step Three:

## Review the Current State

The next phase of the journey mapping process often takes the form of a workshop, during which the customer journey is reviewed, while keeping the following objectives in mind:

- Create a common understanding of the customer journey
- Identify areas within the experience with the greatest opportunity to improve/address

- Identify elements that should be included in the program
- Review the design criteria for improvements and development of new experiences
- Prioritise the steps in the journey that should be addressed

This step is critical for embedding the journey into the organisation. It involves immersing participants in the qualitative research in a way that helps them step into the shoes of their customer. In order to do this, the room where this final workshop is conducted is turned into a customer gallery, which may contain detailed summaries of each step in the journey, customer quotes from the qualitative research, any photos or imagery created or solicited during the research, and any relevant previous research that contributes to the organisation's understanding of the customer journey.

Once this information is absorbed, it is time to prioritise the areas the company considers most important for improvement. Among the improvement opportunities is the chance to evaluate the current VoC measures against what customers identified as their key moments of the experience. This process can either validate current measures or identify current gaps that need to be addressed.

#### Step Four:

## Create CX Design Criteria

You now have detailed journey maps, photos, interview transcripts, previous research, customer quotes, etc. So, how do you make sense of all this information and avoid everyone running in a different direction to improve the customer experience?

Creating common customer experience design criteria helps prevent organisations from becoming overwhelmed. Customer experience design criteria are the three or four top criteria that serve as the essence of what customers need in any experience they have with your organisation. These criteria are derived from analysing the attitudes, thoughts, emotions and needs at each step in the journey and identifying a few common themes that represent the essence of what the customer needs. For example, the design criteria for a business technology supplier may look like the following:

- Proactively identify solutions that add success to the business owner
- Be impressively responsive
- Remove the technology burden from the business owner
- Make every interaction professional

Each of these represents what the business owners conveyed throughout the journey. By creating common design criteria, everyone in the organisation can now hold up these as criteria as the ideal for any customer-impacting service, tool, or interaction. Additionally, marketing and customer-facing communications should also reinforce the same criteria so that there is better alignment with every customer touchpoint.



**One of the greatest challenges to any customer experience effort is getting true organisational commitment and buy-in. It is not that companies are against having a customer focus; quite the contrary. The challenge is getting the attention of stakeholders who are stretched so thin that it is difficult to get their attention.**

## Step Five:

# Ideate a Future State

The final phase in the customer journey mapping process is to leverage the new insights and design a present—and future—experience. One of the greatest challenges to any CX effort is getting true organisational commitment and buy-in. It is not that companies are against having a customer focus; quite the contrary. The challenge is getting the attention of stakeholders who are stretched so thin that it is difficult to get their attention. But the benefits of engaging stakeholders in customer journey mapping gives them a vested interest in the process and increases their common knowledge of the customer experience well beyond where it was.

The final step is to channel this insight and engagement into the design of a better customer experience. This is done through ideation. Unlike brainstorming, ideation is structured so that it can take participants beyond their current framework of thinking and encourage them to view solutions through different lenses. While ideation is intended to unleash creative thinking, the design criteria help ensure the thinking is focused on what the customer needs the new solutions to address.

While there are entire books written on ideation alone, here are a few of approaches with very brief descriptions:

**TOP MIND IDEAS:** People throw out top-of-mind ideas (these tend to be very incremental/not very innovative, but allow people to get the pent up demand ideas out of them).

**PICK YOUR PROBLEM:** Split up into groups—each group picks two to three high-priority problems/opportunities identified in the journey mapping process. Each group then develops as many ideas as they can around their selected items.

**RELATED WORLDS:** After breaking into smaller groups, each group picks an industry outside of the one where they operate. Each group then identifies the characteristics of the selected industry, focussing on how that industry generally solves its key problems (e.g., telecommunication companies require contracts for additional service, they offer the phone for free or at a steep discount based on a two year contract, etc.). The intent is then to leverage the list of characteristics to ideate around how companies in the related industry would apply their thinking to solve the problems at hand in your business.

**GET FIRED:** Moderator encourages participants to generate ideas that are so outrageous that in a normal meeting you would “get fired” for bringing them up.

**GET HIRED:** Moderator asks the group for ideas that scale the outrageous ideas back to something for which you would “get hired.” The intent is to give participants the license to bring up ideas that normally they may be too cautious or prudent to do.

## Idea Tournament™ Session

The last step in the ideation process is to take the mountain of concepts and evaluate them in order to whittle them down to something more manageable. A structured process of voting is used based on top-of-mind reactions and tied to the design criteria. Different targets can be set, but generally allow people to vote for 10% of the ideas. Once this is complete, a process of evaluating the ideas on criteria such as customer need, revenue potential, feasibility, ability to create a sustainable competitive advantage, and time to implement (or other gauges that are relevant to the organisation) is completed. The output is a “portfolio” of ideas that includes some ideas with “breakthrough” potential (high risk—high return), and others that are more incremental in nature (low risk—low return).

# Conclusion

After conducting a thorough customer journey mapping process, your company will reap the benefits. These include a more comprehensive understanding of the experience your customer has with your organisation, insights in the areas that need to be addressed, and ideas for how to improve the experience for customers at every touchpoint. Walking out of this process, you will also have the following outputs to continue to guide the organisation's journey to improve the customer experience:

## **JOURNEY MAP: COMPANY VIEW OF THE CUSTOMER JOURNEY**

- + A detailed version of the customer journey and a more aggregate version that can be shared more broadly across the organisation**

- + A customer-centric blueprint**
- + A common set of customer experience design criteria**
- + A portfolio of new ideas to improve the customer experience (both short term tactical ideas and longer term break-through ideas)**
- + Transcripts of interviews**
- + Visuals created by customers**
- + List of measures to consider adding to new or existing VoC efforts**



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