



Customer Journey Mapping & Management

Theory into Practice: Making it Happen

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Introduction

Customer Experience Management is a hot topic in many companies, who have realised that they are no longer 'in control' of all the channels, media or messages that their customers utilise. Understanding and "managing" customers' cross-channel journeys sits at the heart of Customer Experience theory, and numerous different approaches have been taken to map out the current and desired experience.

Many companies concentrate their journey mapping efforts on "getting the processes right". This approach is likely to see quality and consistency improvements, but often at the cost of the customer feeling 'processed', plus opportunities can be lost because the customer doesn't want to "do it your way".

We believe that Customer Experience designers must understand that how the customer **felt** about the experience is very often more important than what was physically done.

Another common approach is to design the experience from the inside out, starting with the corporate desired outcomes. This can result in journeys that describe rather one-way "what we'll do to you" communications (i.e. contact/DM plans) rather than engender genuine engagement and dialogue.

In our experience "inside out" is also a mistake. Customers view their journeys differently to the way organisations do, so we believe that experience design must be "**outside-in**".

Sophisticated companies design 'blueprint experiences' for key journeys. These are based on customer needs & wants, and the journeys almost always extend beyond the internal processes of the company, and sometimes cover important elements of the experience that are **not** within the company's control.

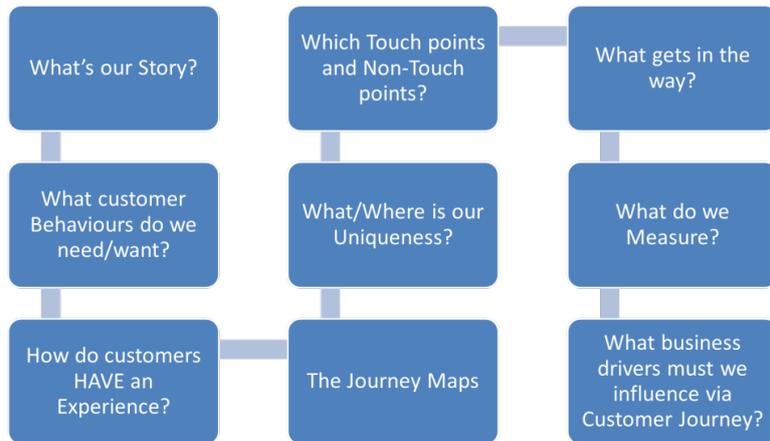
Two Effective Approaches

We offer two approaches that are based on a common methodology to quickly and efficiently make progress in customer journey mapping – with an uppermost prominence of action.

By this we mean focusing in on the MOTs that will make a difference rather than an academic exercise to map every detail even if it's of no consequence to the customer.

Both approaches are based on a "light touch" model of consulting – consuming as little stakeholder time as is practicable. The emphasis is to drive real change to enhance the customer experience whilst meeting our client company's strategic objectives.

The approaches follow a best-practice template for customer journey mapping, illustrated here:



Approach 1: Conventional Project

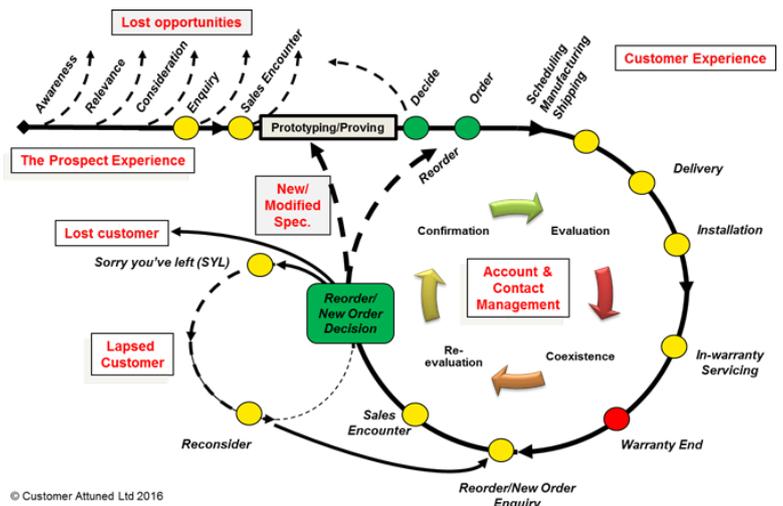
The project approach initially considers the high-level framework that maps the end-to-end customer experience. It then confirms the priority Journeys to be mapped in accordance with this template.

These journeys can then form the foundation of the company’s Customer Relationship Strategy, planning and governance.

A typical Work Breakdown for this approach is itemised below.

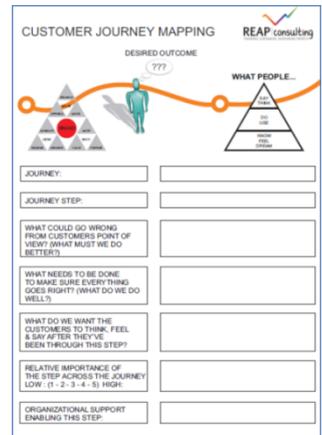
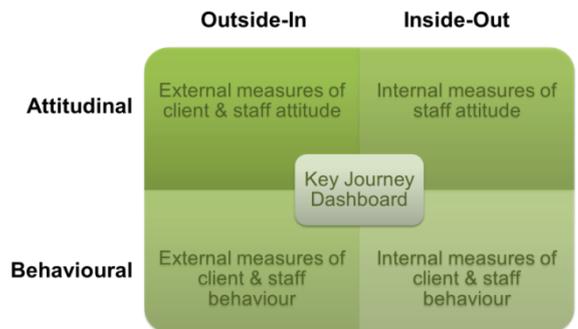
End-to-end Experience:

1. Consolidate and review all existing customer research and project outputs that relate to your customer journeys
2. Produce a draft high level and outside-in End-to-end Experience Map that sets the context and gives the framework that links individual journeys and internal processes. An example is illustrated here:
3. Conduct a workshop to agree the framework, confirm the prioritised Journeys, and to agree the mapping method & graphical representation that will be used



For each Journey:

1. Prepare a draft cross-channel Journey map based on existing work
2. Conduct a workshop with key stakeholders that goes through each step of the template, utilising engaging and easy to complete forms that are pre-populated as much as possible
3. Generate/update the resulting Journey map with MOTs pinpointed
4. Specify the desired experience for each MOT. An example MOT specification form used in the workshops is as follows:
5. Specify top-up research if required - to identify current and potential future customer needs areas
6. Develop a log of common definitions of needs & behaviours so that there is mutual understanding of what is meant by each one
7. Develop a coding framework that will enable the identified needs and behaviours to be captured in this Journey
8. Investigate non-transactional behaviours that are triggered by or associated with needs being met/unmet at each MOT
9. Specify a KPI dashboard for each journey, broken down into a simple quadrant matrix as illustrated:
10. Design a 'heat map' template that will show where needs are being anticipated, met, missed, exceeded, failed, ignored, etc.

Deliverables

1. Blueprinted cross-channel maps of the prioritised Journeys with MOTs pinpointed and specified as illustrated
2. Journey dashboards and heatmaps, also as illustrated
3. Top-up Research specifications & proposed cross-business definitions of customer needs & non-transactional behaviours
4. Coding framework to capture needs, behaviours & performance at key MOTs
5. Documentation of the journey, as illustrated:

Journey Example

Commentary commentary

The Journey



Segment/CVP Variations

Segment / CVP	Variations

Dashboard



The MOTs



Enablers

People	Channels	Processes	Data	Staff systems	Client interfaces	Standards
Competencies Culture Development	Coverage Joined-up	Documented Compliance	Quality Compliance Availability Insight	Functionality Single view Usability Reliability	Functionality Availability Usability Reliability	Defined Upper/lower boundaries
Programmes	Programmes	Programmes	Programmes	Programmes	Programmes	Programmes

Heatmap



Approach 2: Master Class

This approach engages all the stakeholders in a two day Master Class that is based on the Project approach but distils it into an intensive facilitated training / workshop format.

It has the double benefits of moving forward quickly towards the above deliverables and also equipping your people to deploy and manage the approach.

These Master Classes have been successfully run internationally, and some excerpts from a recent session are included here that set out the benefits and typical schedule for the two days.

Programme Outcomes

- An understanding of customer journey mapping within the context of customer experience management and The Customer-Centric Organisational Blueprint® (CCOB).
- A strategic development approach to create customer journey maps that reflect the full customer experience, including both rational and emotional dimensions.
- Expertise in order to create practical, valuable maps that help design truly innovative and differentiated experiences without the need for expensive technology solutions.

Schedule – Day 1

08:00 Registration and networking
08:30 Commences

The Customer-Centric Organisational Blueprint® (CCOB)

- The 21st century organisation
- Defining customer-centricity
- Why "outside-in" is a critical business philosophy
- Systems-thinking in the context of customer-centricity
- Transcending a silo-based business model
- Components of the CCOB
- Discussion: What is on your customer experience transformation agenda?

10:15 – 10:30 Refreshments

Experience Management

- Researching customer experience
- On-going listening
- Designing the customer experience
- Delivering differentiated experiences

- Discussion: Which customer experience capabilities does your organisation excel at?

12:30 – 13:15 Lunch

Customer Experience Design

- The nine-step experience design framework
- What's your story?
- What customer behaviours do you want / need?
- What are your touch points and non-touch-points?
- Where is your uniqueness?

Schedule – Day 2

08:00 Networking
08:30 Commences

Customer Journey Mapping

- Preparation and focus: segments and data collection
- The customer lifecycle
- Macro journeys
- Exercise: Defining customer lifecycle stages and macro journeys

10:15 – 10:30 Refreshments

Customer Journey Mapping (Continued)

- Micro journeys
- Journey steps
- Exercise: Delving into the micro journeys within a macro journey

12:30 – 13:15 Lunch

Customer Journey Mapping (Continued)

- In-depth journey step analysis and insight
 - What are the customer's needs?
 - What could go wrong, and what should go right?
 - What do you want the customer to think, feel and do?
 - What is the high-contrast signature experience?
 - What is the customer effort?
- Facilitating customer journey mapping within your own organisation

14:45 – 15:00 Refreshments

The Transformational Journey

- Stages of the transformational journey
- Discussion: What is the deep transformation that your organisation requires in order to deliver a signature, high-contrast customer experience?
- Closing

16:30 Day two and programme ends