CX MASTERCLASS SERIES

THE SECRET TO EFFECTIVE CUSTOMER JOURNEY MAPPING

A guide to protect from making the same mistakes everyone else is doing

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INTRODUCTION TO THIS GUIDE

Awareness → Consideration → Purchase → Retention → Advocacy

Customer journey mapping is the most-discussed tool within customer experience; It is also the most difficult to learn. When done properly, journey mapping has the power to transform how your entire organization works together and how you envision improving your end-to-end CX. This guide will detail lessons our firm has learned creating journey maps for tech, ecommerce, higher education, tourism, and financial services. Our goal throughout is to enable you to overcome the common barriers that sink journey mapping projects.

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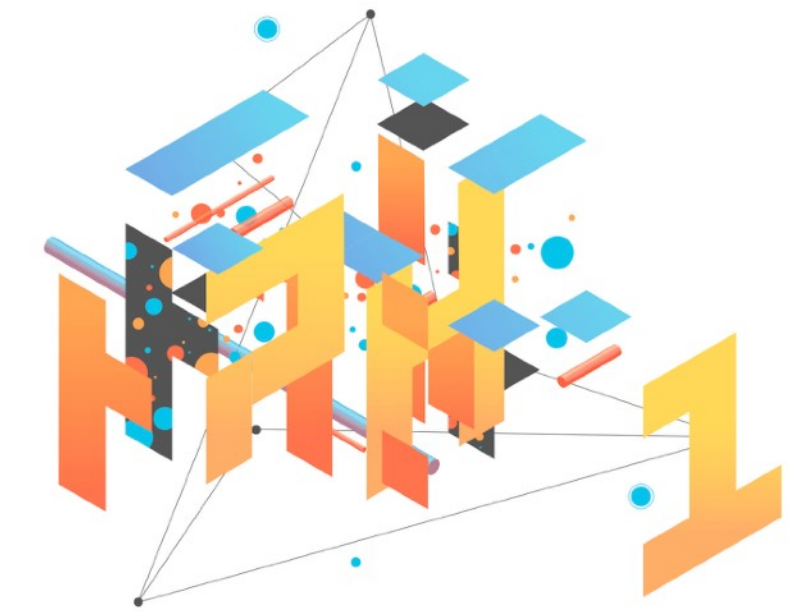
Customer Experience & Service Design consultancy

PH1 was founded in 2012 and has developed a Service Transformation Methodology which is a hybrid of service design, behavioural science, and design thinking. This dynamic approach enables us to evaluate your CX & UX to improve conversions, usability, and inclusiveness.

We have helped organizations across government, financial service, telecommunications, tourism, education, health, startups and more. By working with PH1 your organizations will gain deep insights about what your customers/users want and recommendations on how to deliver a best-in-class experience.

This guide is part of a CX Masterclass series being published by PH1 Research as free resources. To be sent the other resources please email info@ph1.ca or visit http://PH1.ca/cx-masterclass

CUSTOMER JOURNEY MAPPING BASICS

It used to be that you'd walk into a store/office, speak to one person, and walk out with exactly what you wanted. The knowledge learned from those interactions would be shared amongst teams to help one another grow. Back then training was largely an oral culture told from a personal perspective.

Organizations today are too complex and the customer interactions too numerous to easily understand what customers/clients are going through. The field of CX was created to bring some sanity to the complexity of your channels, where customer journey maps are the most commonly-used deliverable.

Journey maps align your entire organization around the needs of customers by clearly demonstrating:
● The steps/decisions they take to accomplish a goal
● The impact of touch-points/interactions
● What influences decisions
● Opportunities to improve their experience

When making a journey map you must prioritize each of the four variables differently and select a lens for the data set.
A. Timescale (day/interaction/lifecycle)
B. Protagonist (individual/persona)
C. Key metric (emotion/priority/effort)
D. Activities (touchpoints/actions/influences)
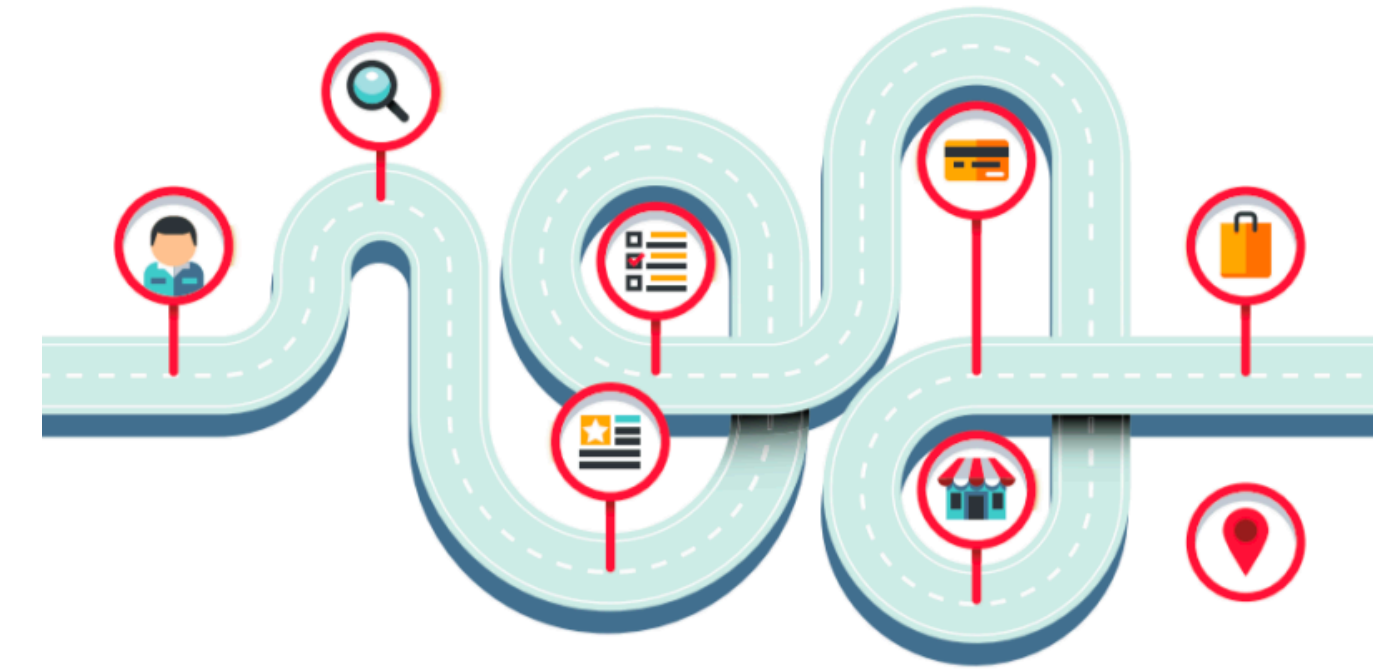
TIP: Types of projects where we have seen journey mapping used most effectively

To understand what changes in your NPS scores & voice of customer actually mean

To evaluate training methods/ materials and to identify ways of improving training

To determine what is harming your conversion rates and how to improve them

To pinpoint new ways of innovating and/or conducting competitive intelligence against market leaders

To evaluate how effective your marketing is and how to create deeper relationships with customers/clients

TYPES OF CUSTOMER JOURNEY MAPS

Day in the life

A study of how your customer(s) behave. They are powerful if you want to understand how they may or may not interact with your product/service. They are based on ethnographic research.
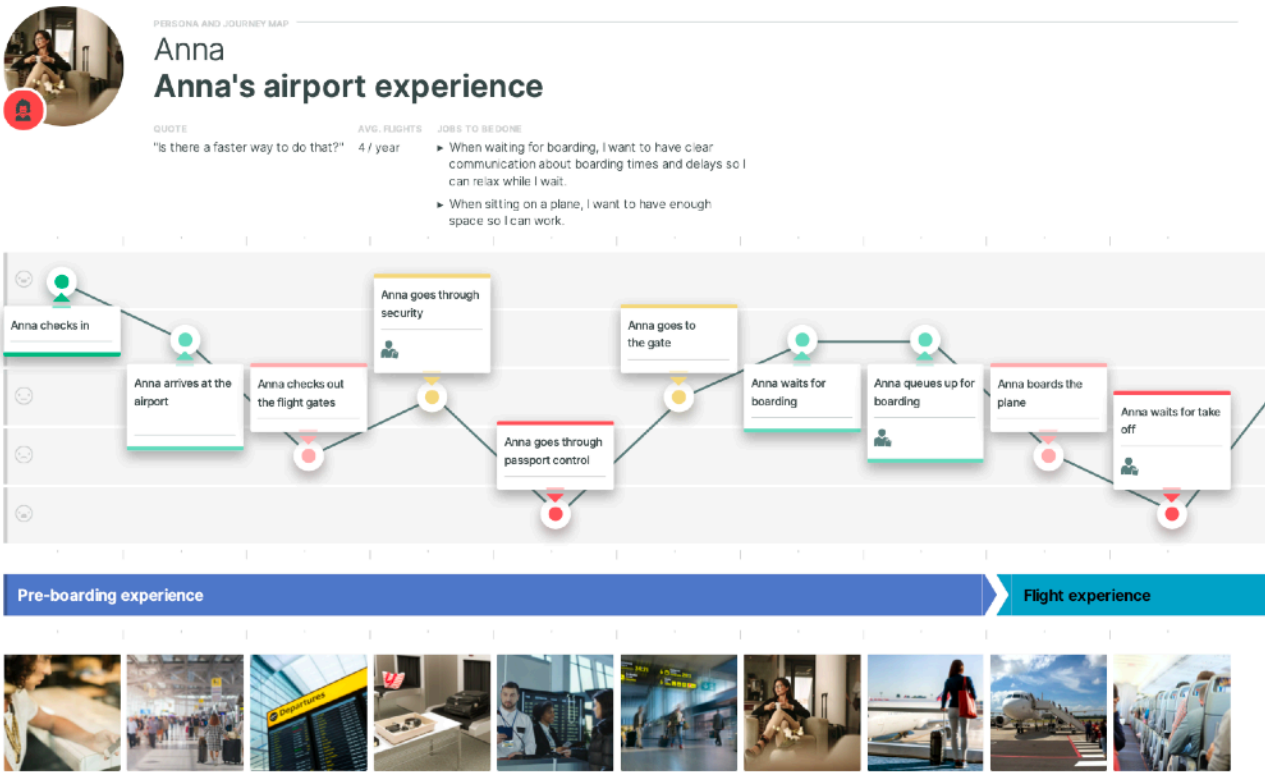

Image: smaply.com

Moment of truth

Similar to day in the life, however these are focused on specific conversion points and their decision-making process before and after. These are similar to user flows except contextualizes interactions around the needs of your protagonist

Image: treasuredata.com

Customer lifecycle

These investigate what it is like to be a customer at each stage, from acquisition, onboarding, through to off-boarding. It helps organizations understand the impact of initiatives, their timing, and tone.
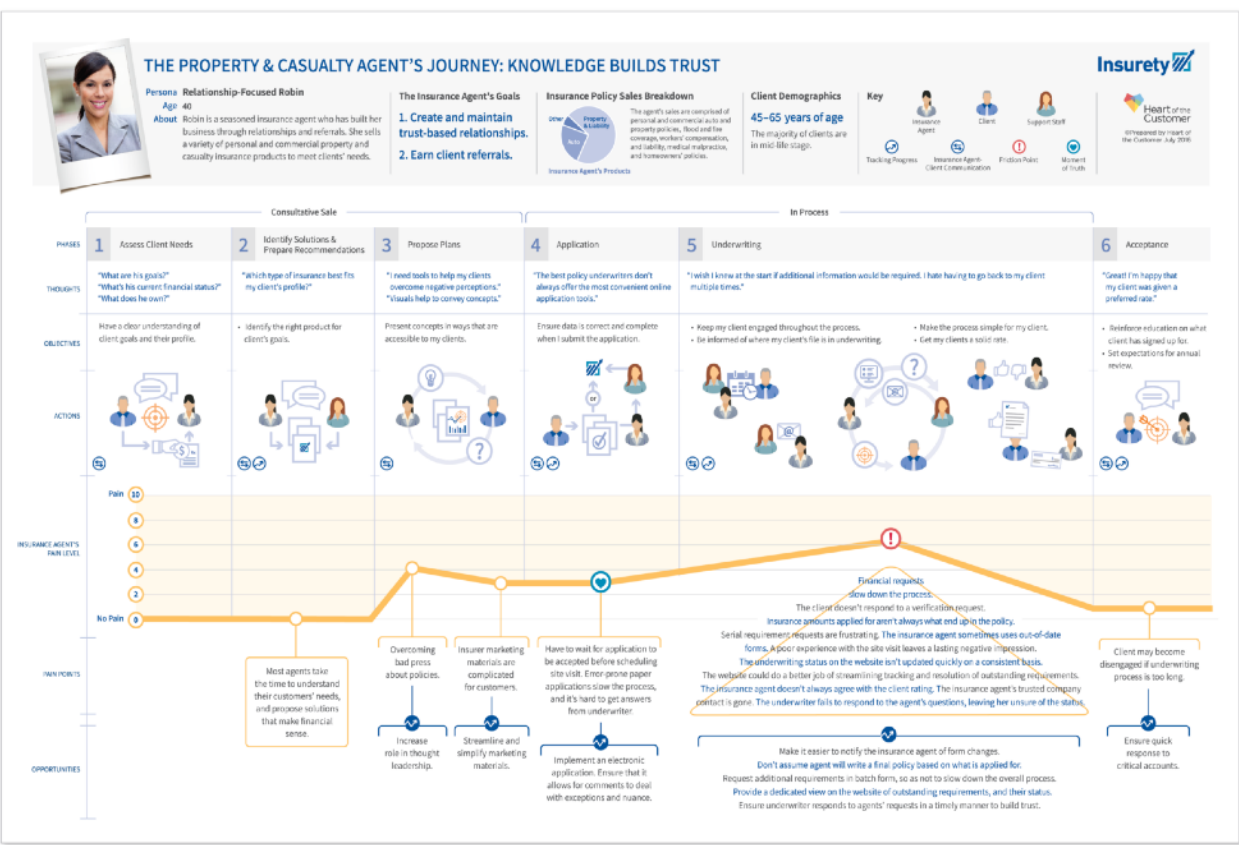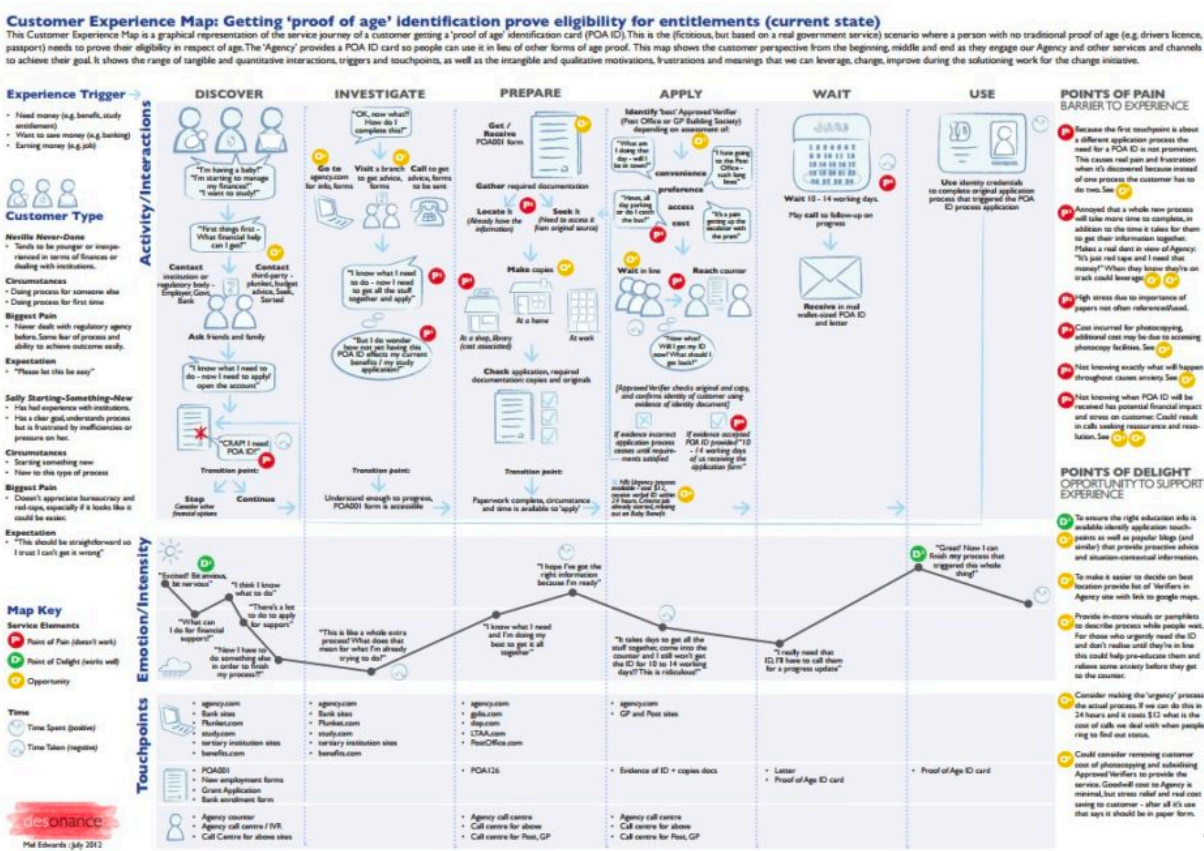

Image: insurely.com

Infographic / Diagram

Simplicity often wins when it comes to journey mapping and often delivering the most compelling story as an infographic or diagram is the most impactful. These assets focus on being a utility for all, not only a select few.
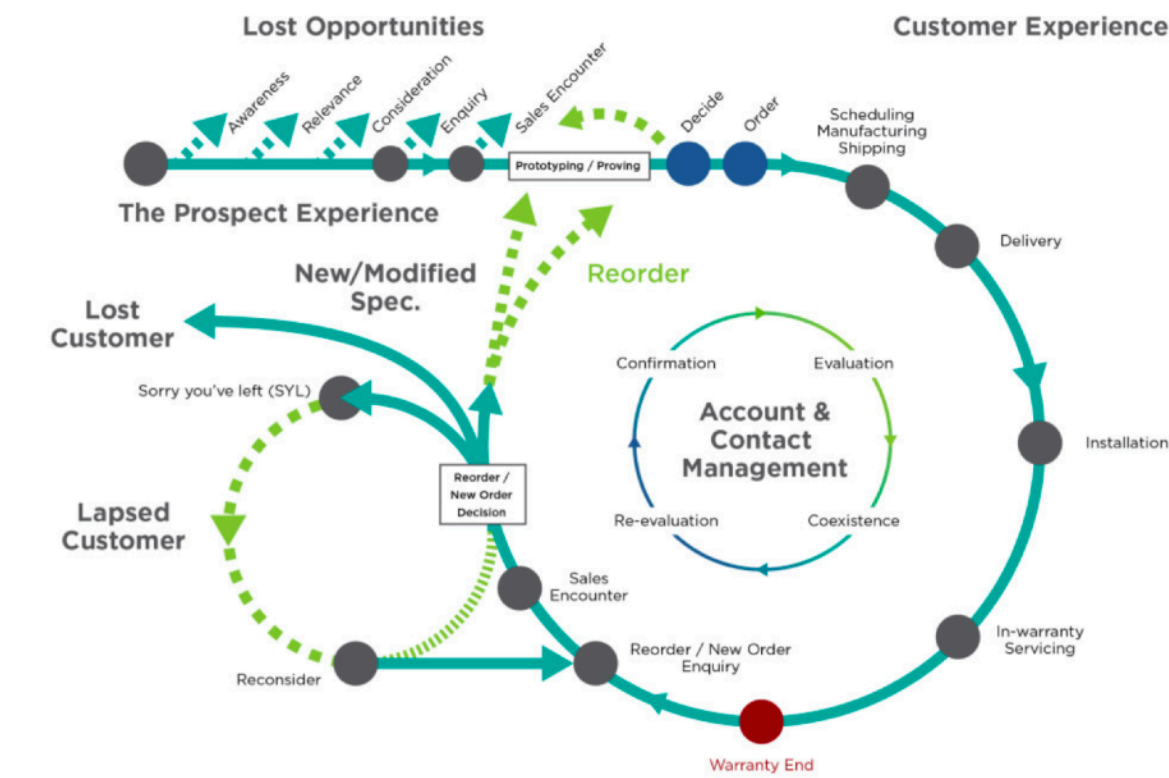

Image: zendesk.com

STEP 1: EVALUATE WHAT YOU'RE TRYING TO INVESTIGATE

Why do you want journey maps?
That's the first of many questions that must be asked if you want your Journey Maps to be successful within your organisation. Most are unsuccessful because they're assigned to teams or vendors who don't fully understand journey mapping or it's purpose. Those projects are further limited when clients fail to see journey maps as an investigative tool.

Journey maps should be an investigation of the current state with the goal of creating a model for the ideal state.

For best results, start your project by collecting these answers and use them as the basis for your investigation:
1. Do you deeply understand why you win /lose customers or not?
2. Is there a known problem you want to diagnose? Or are you most interested in the unknown?
3. Who will be using the journey maps: a specific team, all staff, or public?
4. What do you need a journey map to accomplish that other tools cannot provide?

These questions will guide you and whichever partner/vendor you work with because they will distill the assumption you're starting the project with and enable you to understand the primary purpose of your journey maps.

Common strategic goals for journey maps:
- Diagnose what is limiting acquisition and conversions
- Evaluate how personas behave differently
- Prioritize what influences key decisions
- Document which touchpoints are most/least impactful
- Identify areas of strength and opportunity

Northbridge® Insurance

CASE STUDY: NORTHBRIDGE FINANCIAL

As a corporate insurer, a high customer satisfaction is critical. Having completed a voice of customer study that provided inconsistent responses and data, they needed to understand what it all meant for the business.

Going into the project they believed that they understood why they win/lose clients, yet now were unsure. They wanted to explore the unknown, by focusing on what NPS was not adequately representing. The journeys were intended to be an exploration of what was happening across key segments, as well as a way to demonstrate to all teams what an ideal journey should be.

The strategic goals were two-part:
1. Diagnose what clients want and what influences a good/bad experience; and
2. Deliver a training tool that will help teams move from assumptions about what clients want, to an evidence-based model of when/how to nurture relationships

STEP 2: RESEARCH WHAT PEOPLE ARE DOING (& AREN'T)

Developing an appropriate research approach will save you from ending up with a useless (or at least underused) deliverable. Research for journey maps is unlike anything your team has likely done in the past. Below are some guidelines:

Planning your project:
- Based on the desired outcome of the journey map project, decide if it can be best communicated by comparing the journeys of different personas, or by doing a very thorough investigation of one persona
- Plan to interview four times as many participants as you expect to need
- Create a standardized set of questions to ask each research participant
- Plan the interviews to leave half of the time for probing into some of the answers
- Create a worksheet that allows you to capture insights and quotes into presumed journey stage and key milestones

Conducting your research:
- Spend your time listening to them paint their story while you ask them to fill in details and backstory
- Ask questions about what they did, as well as what they chose not to do
- Spend more time learning about what influenced their decisions than asking about what they did/didn't do
- Have them reflect on a particular moment by using images and stories to remind them of what those moments felt like
- Review your findings after reaching the ⅓ point of interviews to verify that your questions are working and that you are getting meaningful insights
- End each interview asking if you could contact them with any follow-up questions
- Conduct each interview with a colleague and debrief with them afterwards to capture insights and questions immediately

CASE STUDY: QUITNOW.CA

Quitting nicotine is hard, but doing it through online support can be even harder. While this project began as an evaluation of how well their website was performing, the insights gathered about what users were (& weren't) doing highlighted opportunities to innovate campaigns, initiatives, and how they support their users quitting journeys. Journey mapping was the key to demonstrating the opportunity by shifting how stakeholders perceived the journey to quit.

By using the journey map to illustrate what each persona was doing differently, it identified that what often led to success was better preparation and a change in mindset. It indicated —along with other qualitative insights— that a peer-based support system may be the most effective way to encourage new quit attempts.
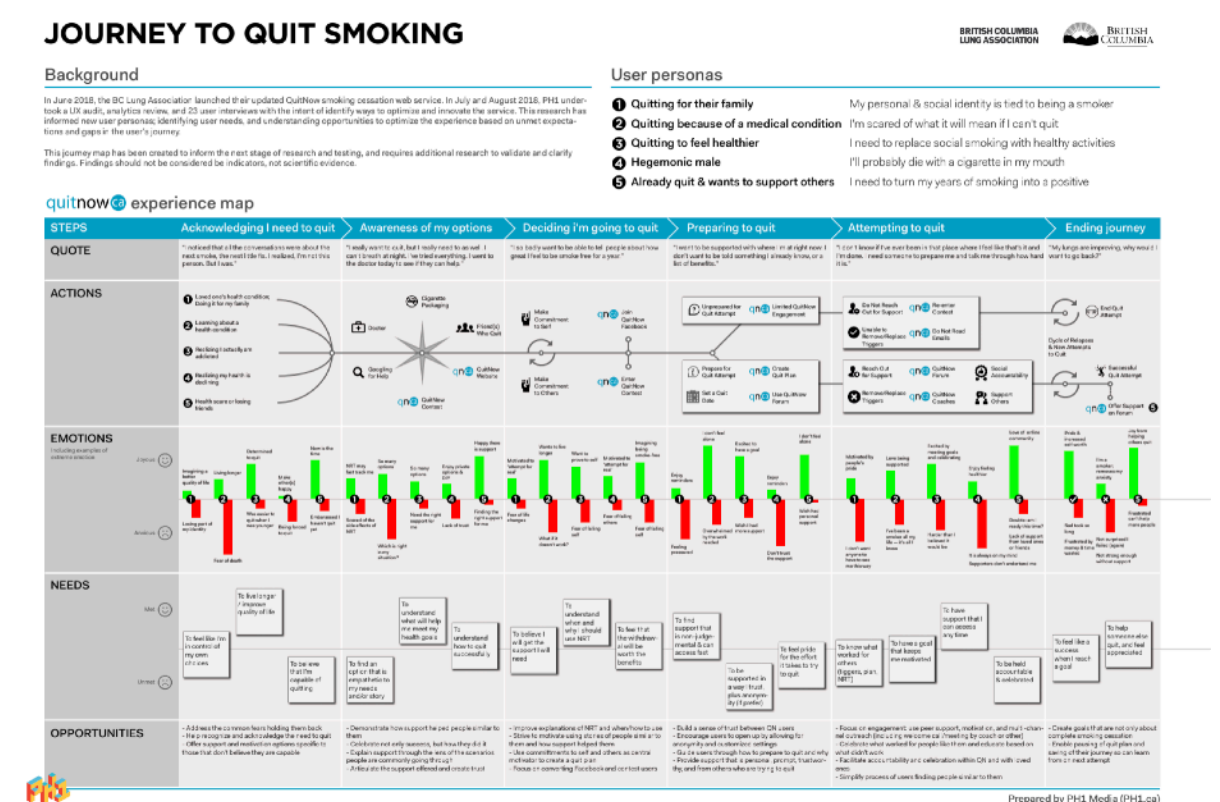
STEP 3: CREATE A VISUAL NARRATIVE THAT TAKES STAKEHOLDERS ON A JOURNEY

Journey maps are as insightful as the research that went into them, and as impactful as the visual narrative they tell. This is why a one-size-fits-all approach will not work and every journey map must be designed differently.

Guiding principles for designing your journey map:

1. **It must have a narrative**. Select a timescale and key metric that amplifies the story, rather than bores readers. In some cases shorter is more poignant, while other times longer provides valuable context.
2. **Your key metric doesn't need to be about feeling good/bad.** It should be about a rollercoaster that's significant to your protagonist. This could be about effort, comprehension, satisfaction, or many others.
3. **Readers should be able to easily compare journey maps without much effort**. The real impact comes from understanding how your protagonists behave differently and how to influence them.
4. **Get inspired by infographics and data visualization**. You'll find many references on how to build more intuitive information hierarchies and how to layer several forms of data at once.

This strategic planning should begin midway through the research phase. If you wait you'll likely be forced to conduct additional research and delay your project.

Take these steps midway during your research to build a more impactful narrative:

A. **Consider that you may not be asking the right questions**. Often you'll feel the need to go back and ask more or that you don't know enough. This is a sign that your current research questions won't deliver the narrative you need.
B. **Evaluate the different key metrics, including the story they tell**. You may start the project assuming it is about positive/negative experiences and now have the opportunity to focus on something more specific that is more telling of your particular strategic goals.
C. **Explore the possibility that your personas/segments are incorrect**. Journey mapping often uncovers incorrect assumptions about who your customers are.

CASE STUDY: TOURISM VANCOUVER

While the tourism industry operates as an ecosystem, It rarely shares data in a way that any group can truly know what visitors are doing and what is influencing them.

Journey mapping offered a way to detail out the process visitors go through pre-trip, in-destination, and what influences their sentiments post-trip. It allows for the layering of several forms of data to paint a narrative of what content they are consuming, where they go, and what most impacts them. And because tourism is such an emotional journey already, pinpointing those high and low points can help organizations shift budget to the initiatives that matter most.

In this project we created several forms of journey maps, including individual journeys, a summary per persona, and one detailing the places visited.
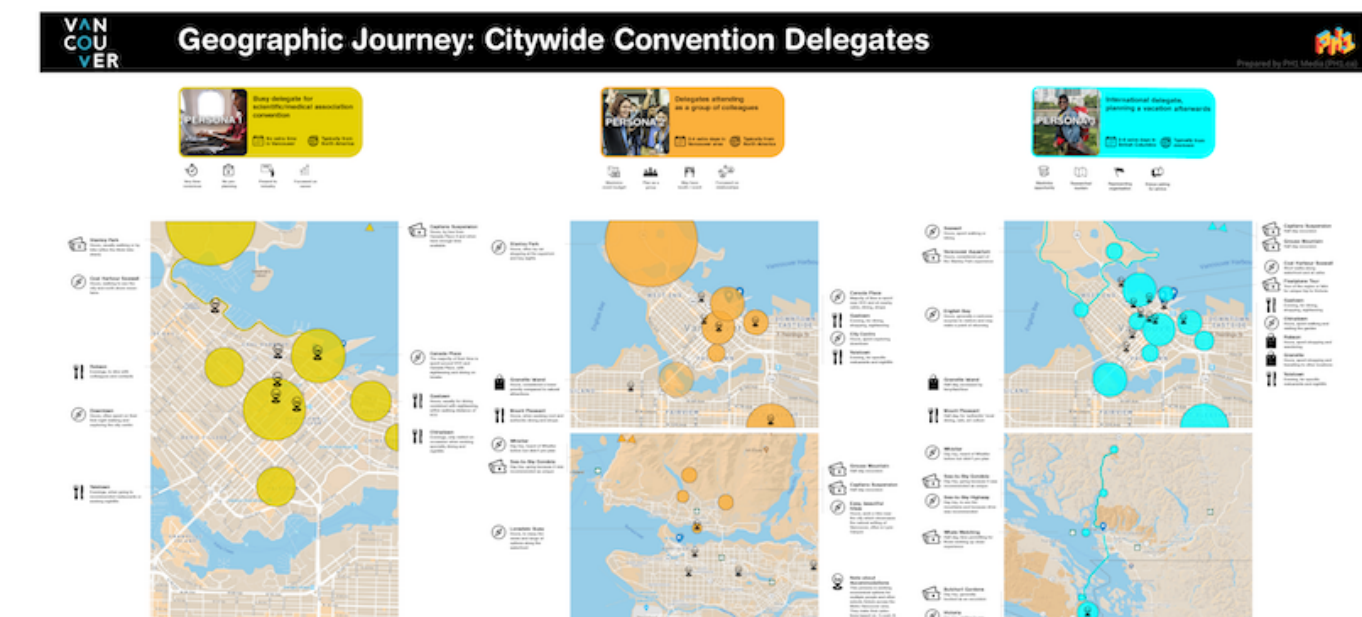
STEP 4: BUILD JOURNEY MAPPING INTO YOUR ORGANIZATIONAL CULTURE

Once completed, most journey mapping projects fail to inspire organizations to become more customer-centric. It's because they're treated as one-off initiatives with either no strategic goal or with the unrealistic expectation of fixing systemic issues. Journey maps have the ability to shed light on real issues and point to opportunities to create more meaningful relationships with your customers/community.

Delivering true impact requires an implementation plan that's equal parts inspirational and educational:

- **Make the entire journey mapping project inclusive and transparent**. If the project is done in a silo it will disregard the allies you'll need to implement real change. Engage them, collaborate with them, and you'll win advocates.
- **Understand the dominant narrative within your organization**. What does your organization aspire to be? What are the presumed barriers? Are uncomfortable truths valued or do they need to be veiled?
- **Focus on delivering clear evidence and prioritized recommendations**. Data helps researchers, recommendations helps everyone else. A huge risk with journey mapping is not presenting a thesis of how to do things better. This is your opportunity to present a compelling vision about how to improve the experience of customers.
- **Educate and support your teammates on how to implement the outcomes of the project**. As much as every organization says they're customer-centric, few are. Shifting the culture of teams and the obsession on results will require education and support to understand why it will be good for all.

Even with all the risks I've highlighted throughout this guide, journey maps will benefit you immensely no matter your level of sophistication or expertise, Why? Because the most successful journey mapping projects are part of an iterative, continuous innovation process. Those best-in-class teams have built journey mapping into their organizational culture. They create them annually or use journey mapping software to enable ongoing updates/comments/insights.

CASE STUDY: SIMON FRASER UNIVERSITY

Data is a double-edged sword: not enough and you're always guessing; too much and you have no idea what to do. For a university facing major changes finding ways of winning more new students is critical.

Our journey mapping project shed light on many opportunities, particularly because it included a competitive benchmarking as a way to isolate how to improve positioning. In cases like this where the research recommends significant transformations the journey mapping project must go beyond the deliverables and inspire change.

For this project we led several workshops, including one on how to integrate the findings. We also provided the insights with various lenses to enable stakeholders to isolate exactly what they needed to know. It allowed their organization to build a more human-centred culture that uses research to proactively strategize.

Image: *prototypr.io*

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