Nutshell

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Understanding
Customer Journey Mapping

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From the Chairman's desk

Dear Member,

At first glance, a customer's journey is pretty simple. You, as a company, offer a product or a service and the customer buys it. But once you get into the detail, customer journeys are quite complex and come in many varieties. Your customers can come into contact with your business in a multitude of ways and from many different starting points, for example, marketing, referrals, search, social media, customer service enquires and above-the-line campaigns.

Customer Journey Mapping helps businesses step into their customer's shoes and see their business from the customer's perspective. It helps businesses gain insights into common customer pain points, how they can improve the customer experience and define what customers and prospective customers need in order to complete a purchase.

This issue of the Nutshell attempts to understand Customer Journey Mapping process and how best to utilise it for maximum effectiveness. We would love to hear from you. Do send in your feedback to isa.sg@insocietyad.com

Regards,

Sunil Kataria
Chairman

Customer Journey Mapping

A customer journey map is a visual representation of every experience your customers have with you. It helps to tell the story of a customer's experience with your brand from original engagement and into hopefully a long-term relationship. Customer journey mapping helps businesses step into their customer's shoes and see their business from the customer's perspective. It helps businesses gain insights into common customer pain points, how they can improve the customer experience, and define what customers, and prospective customers, need in order to complete a purchase.

Customer experience and beyond: customer journey mapping

Customers, apart from buying products and services also look for experiences and emotional gratification. The buying decision is connected, highly individual and highly emotional, even if rational elements "hide" that emotional dimension. Customer journey mapping is a relatively straightforward method to map all these elements. Although such maps are rooted in the practices of customer experience management and user experience design, they can be used for much more, including marketing budget allocation, content mapping and conversion optimization of processes and of online marketing, to name just a few.

In an ideal world, the journey people take to become loyal customers would be a straight

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SANTOOR

shot down a highway: See your product. Buy your product. Use your product. Repeat.

In reality, this journey is often more like a sightseeing tour with stops, explorations, and discussions along the way—all moments when you need to convince people to pick your brand and stick with it instead of switching to a competitor.

Staying on top of all of these moments might seem overwhelming, but mapping your customer's journey can help. It can give you and your team a greater understanding of how your customers are currently interacting and engaging with your brand, and also help

illustrate how your products and services fit into their lives, schedules, goals, and aspirations.

What is a customer journey map?

A customer journey map is a visual representation of every experience your customers have with you. It helps to tell the story of a customer's experience with your brand from original engagement and into hopefully a long-term relationship.

At first glance, a customer's journey is pretty simple. You offer something, they buy it. But once you get into the detail, customer journeys are quite complex and come in many varieties. Your customers can come into contact with your business in a multitude of ways and from many different starting points, for example, marketing, referrals, search, social media, customer service enquiries and above-the-line campaigns.

No doubt you want to make every experience a customer has as good as it can possibly be. So to make sure no interaction slips through the cracks, you need to map out every touchpoint or experience along the customer journey.

Importance of a customer journey map

The reasons for creating customer journey maps include understanding the path and channels your customers take to get your product. It's a valuable tool that can be used to forecast the path of future customers, as well.

RICHER. DARKER. CREAMIER.
THE GROWN UP CHOCOLATE.

Creating a customer journey map can provide insightful information for all levels in a department, from a sales rep who needs to figure out the best ways to interact with potential customers to managers looking for insight on which outlets customers use most. It can also highlight gaps or misdirection, and can identify gaps in the customer experience.

Perhaps the main benefit of a customer journey map is that it provides clear information on how customers move through the sales funnel.

Maximizing the efficiency of that path means more sales at a quicker pace. In addition, understanding the customer experience is vital for sales and marketing to understand the customer experience.

Customer journey mapping: what and why
By building strategies upon the customer journey, you take the position of the customer and go for customer-centricity. This helps you avoid taking outside-in views that don't take the customer reality and experience into account well enough.

Two examples of such approaches that often are placed before a customer-centric view:
1. Content-centricity: putting content first and then looking at distribution mechanisms

to target often poorly defined segments, let alone understanding the individual buying decision.
2. Channel-centricity: being too blinded by the various, often isolated, channels and media used to interact with customers (for instance, in marketing) or enabling interaction (for instance, in customer service).

By working with customer journeys and matching them with business goals, content and channels become the function of value creation.

Customer journey mapping starts with understanding the customer (journey) in correlation with the business and brand goals. From a customer experience view this means that the customer journey map maps the experience:
• You want to "provide" to the customer.
• The customer would like to receive.

Although this is rather simple, there's more to it. But this emphasizes where the customer experience gaps really occur: in-between what you believe the customer wants and what the customer actually wants.

Customer journey mapping: understanding the customer

Essentially, with customer journey maps we have an outside-in view and place ourselves in the shoes of our customers. But is that even possible and how do we involve the customer?

An honest answer to the question whether we can place ourselves in the shoes of our customers is no. Admittedly, the customer journey of a buyer of clothes, for instance, is much easier to (try to) understand than that of a buyer of an expensive software solution for very specific business needs in a complex journey whereby vendors have complex go-to-market models and decisions are group decisions (which buying clothes can be as well, by the way).

It's clear we can't put ourselves in the shoes of the individual buyer, even if it's about buying shoes. We're all different but at the same time – fortunately – we decide in more or less identifiable ways with more or less known parameters. Otherwise, customer journey mapping wouldn't even be possible. However, the more complex buying journeys with multiple influencers, decision makers and stages, the more complex the customer journey map is.
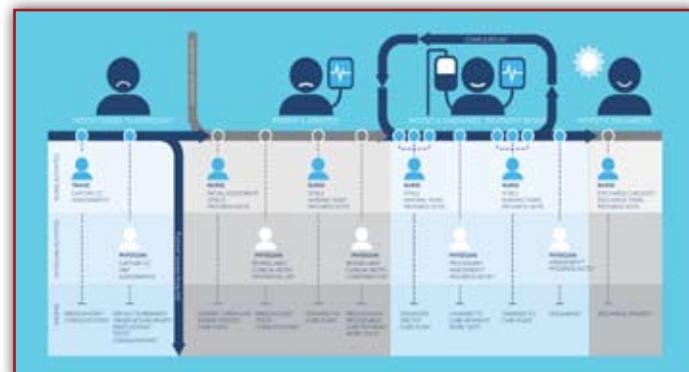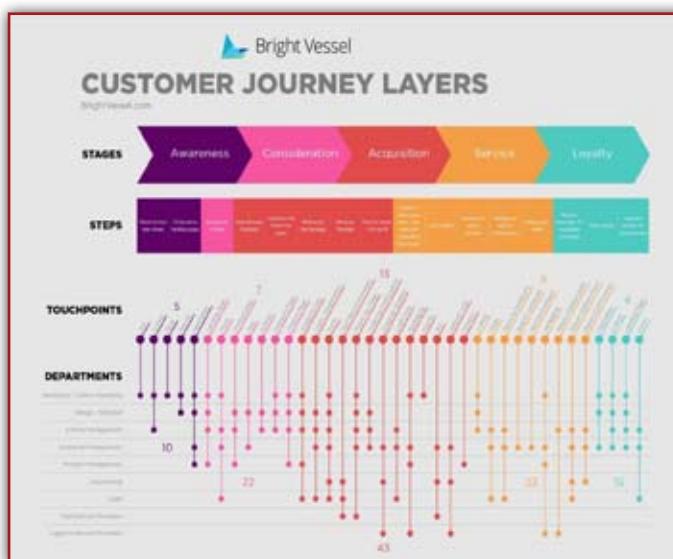
Understanding the customer: sources of insight for customer journey mapping

Putting ourselves in the shoes of our customers is great but of course we need to avoid the (pure) inside-out approach and thus truly understand the key elements and customer-related data, facts and realities we need to grasp so we can build a customer journey map and build an outside-in customer culture.


There are several ways to do this and, although none of them is perfect and never will be, it is advisable you to consider more than one to reduce the number of potential errors.

Customer journey mapping is an underused method and many existing approaches are too narrow. When using them in a broader way than just the actual journey and the user experience context, they offer many opportunities.

Traditional goals of customer journey mapping are:
- End-to-end customer experience management/optimization.
- Mapping and ranking touchpoints in order to identify where to optimize/invest first

It gives managers an overview of the customer's experience. They will see how customers move through the sales funnel. That will help them to identify opportunities to enhance the experience. The map will show how enhanced customer service can differentiate the organisation's digital experience.
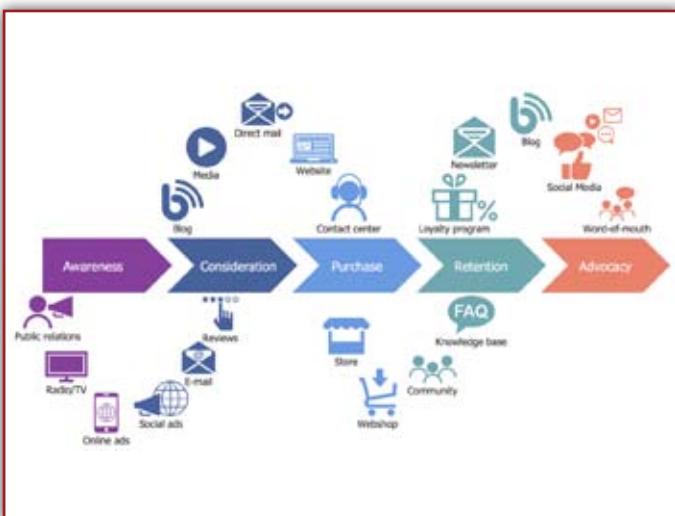
(because in practice, you can't invest in every single experience or touchpoint at once).

Why Customer Journey Mapping Is Essential
A customer journey map is a powerful tool:

If you are a designer, it will help you to understand the context of users. You will gain a clear picture of where the user has come from and what they are trying to achieve.

If you write copy, it will help you to understand what questions users have and how they are feeling.

Customer Journey Mapping

For the user experience designer, a customer journey map helps to identify gaps, points in the customer experience that are disjointed or painful. These might be:
• Gaps between devices, when a user moves from one device to another.
• Gaps between departments, where the user might get frustrated.
• Gaps between channels (for example, where the experience of going from social media to the website could be better).

Most of all, a customer journey map puts the user front and centre in the organisation's thinking. That is in contrast to their tendency to look at *their* priorities. It is so easy to get caught up in what you want a project to achieve that you forget to consider how it will benefit users.

Finally, customer journey mapping can be a helpful tool in broader digital transformation, because, at its heart, digital transformation is about adapting to changing consumer expectations.

Customer journey mapping helps to expose these changes in customer behaviour. It ensures organisations are not planning based on out-of-date assumptions. The problem is that senior management sees digital as nothing more than an add-on to their existing offering. They fail to realise just how much digital has changed things. By mapping the customer journey, you help to highlight that change.

Customer journey mapping also helps management teams look beyond their current obsession. For example, management has a

CUSTOMER JOURNEY MAP

habit of focusing on things like mobile, social media or SEO. Instead, they need to see these things in context. A customer journey map helps give that context.

Providing this context helps to highlight gaps or shortcomings. That shows management where the business is failing to meet the needs and expectations of customers. It also helps them to focus on the customer, rather than on their products, services and organisation. This customer service mentality is lacking, especially within larger organisations.

How to Research Your Customer Journey Map

Many organisations already have some information about users. In fact, you might meet resistance from those who feel that repeating this exercise would be a waste of time. That is why gathering existing research is a good start. Often, this research will be out of date or buried in a drawer somewhere.

By gathering existing research, you will see what the organisation knows and how relevant that information is. That will appease those who are resistant, while potentially saving
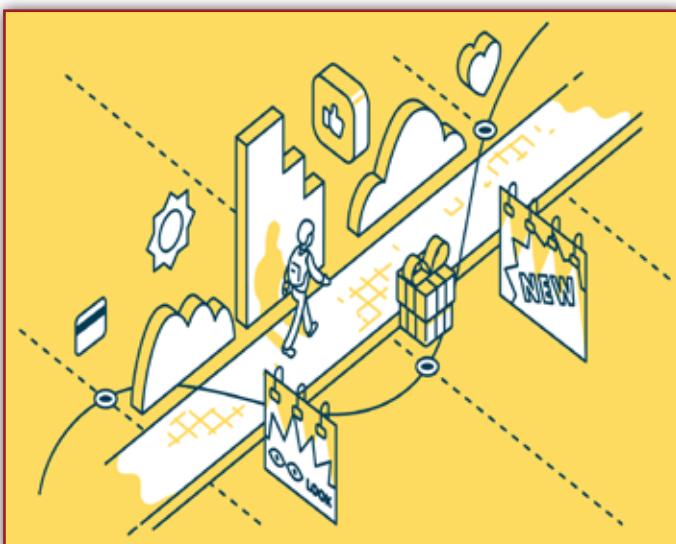
you some research effort. There are two types of research: analytical and anecdotal.

Analytical Research

You can turn to many sources for data about users. The most obvious is website analytics, which provides a lot of information on where users have come from, and what they are trying to achieve. It will also help you to identify points in the process where they have given up.

But be careful. Misinterpreting analytics is easy. For example, don't presume that a lot of clicks or long dwell times are a sign of a happy user. They could indicate that they are lost or confused.

Social media are also a useful source of data. Tools such as SocialMention track mentions of a brand and whether those mentions are positive or negative. Search data also provides valuable insights into what users are looking for, revealing whether your existing website is providing the right information.

Finally, consider running a survey. That will help you build a more detailed picture of users' questions, feelings and motivations.


Anecdotal Research

Although data can build a compelling case, it does not tell a story by itself. For that, you need anecdotes of user experiences.

One challenge is getting access to customers. It can be hard finding customers willing to sit down and talk with you (even over the phone). But it is worth persevering.

If all else fails, you can interview people who talk to customers often. Salespeople or customer support staff are two examples. Depending on your company, there may be many more. But remember, these people won't see the entire customer journey. You will need to piece together the various parts by talking to different staff.

Time and budget will constrain the depth of your research. If your organisation has many different user groups, then creating detailed customer journeys for each might be hard.
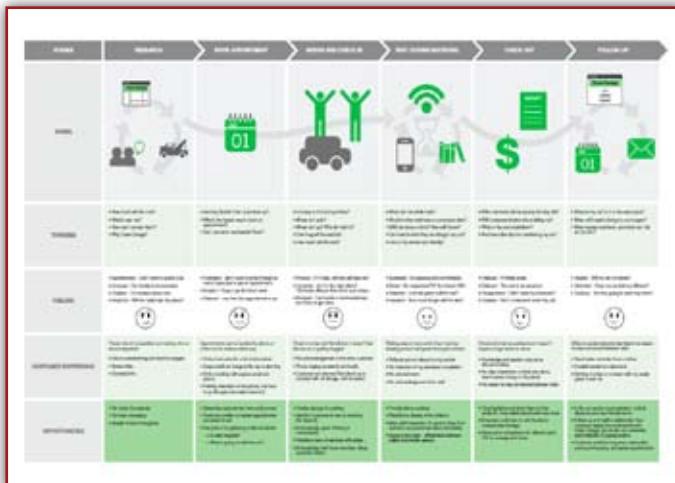
Therefore, focus on your primary audiences. You can make educated guesses about the customer journeys for secondary audiences. Do this by workshopping solutions with front-line staff and other internal stakeholders. Although this *"quick and dirty"* approach will not be as accurate, it is still better than nothing, presuming everybody is aware of its limitations.

Be careful to make clear what has research behind it and what does not. Making many decisions based on assumptions is dangerous. Once management sees the benefits of research, they will be willing to spend more time on it.

Whether you have detailed research or not, often the best way to kick off the process of creating a customer journey map is to run a workshop.
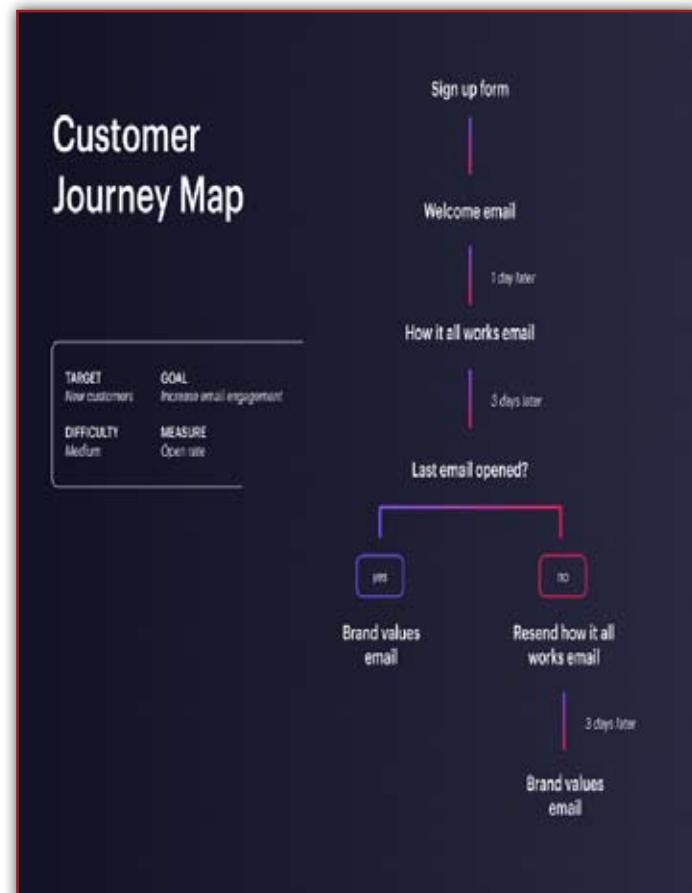
Note that customer journey mapping is not the same as touchpoint mapping. Both are complementary: the customer journey map puts the journey in the center while touchpoint maps focus more on these touchpoints and the value within each of them.

However, much more can be achieved using customer journey mapping. When adding stages, touchpoints and connections outside of the buying journey that often is at the core of customer journey maps (from awareness to actual purchase), even more opportunities arise.

Trusted content sources and research

In order to know decision makers in specific verticals for specific solutions (mainly in complex markets) and to understand the key "pain points", we consult the Web and offline resources, especially trusted resources such as some analysts, other companies targeting the same audiences, etc.
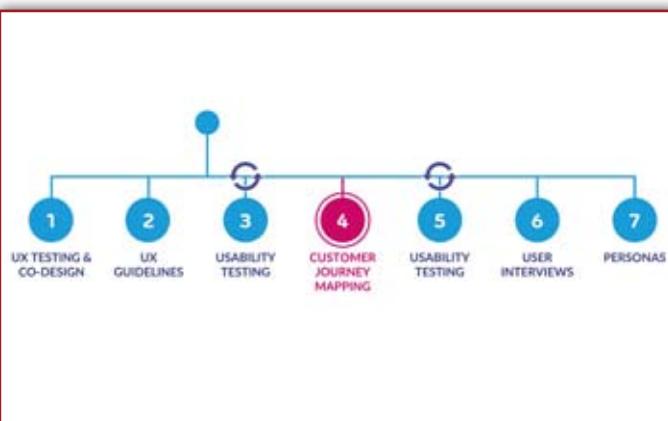
There is quite some research that can be conducted if you allocate the resources to do it, combine it with other ways of gaining market and even buyer insights and use some smart ways to conduct research in the stricter sense of the word and interview some experts as well.

Admittedly, this is not the way to get close and personal but it allows you to detect patterns and conducting research can lead to insights and facts you can use, among others, for marketing purposes (content). We feel that organizations in general should do more analysis themselves. To be fair, the line between consultancy, analysis, good journalism and research for content is sometimes a thin one. Again, not the closest to your target audiences or customers but you just need to stay in the loop and use what's available – and it also helps in seeing the trends and current evolutions that might lead to necessary digital transformation efforts as a consequence.

Your subject matter experts
Interview your internal "brains". Consult the people who are in your organization, especially those that are close to the end customer and – in case of a channel model – also those that work with those different "chains" in your go-to-market approach.

Obviously, subject matter experts in this case also include your good partners and any other contact you can work with (analyst relationships, consultants, subcontractors, whatever).

Subject matter experts on the customer level are not just people who are close to the customers such as customer service reps, customer analysts, sales people, etc. They are also those that regularly get out and talk to real customers, something every exec should do. And, often forgotten, they also involve people who inform R&D and product marketing because – normally – no product or service is developed if there is no clear customer need it covers – or customer expectation it fulfils. Communicating the business rationale and detected customer needs is the job of both these departments to, for instance, sales. It's one of many reasons it is recommended to involve product marketing in a content marketing plan.

Personas, your customers and the customers of their customers
Customer journey mapping works with personas. But, again, this is a model. Personas remain important to work with but remember that, just as the funnel and the customer journey map as such, they are depictions. Also remember that nothing – including the customer experience – is linear.
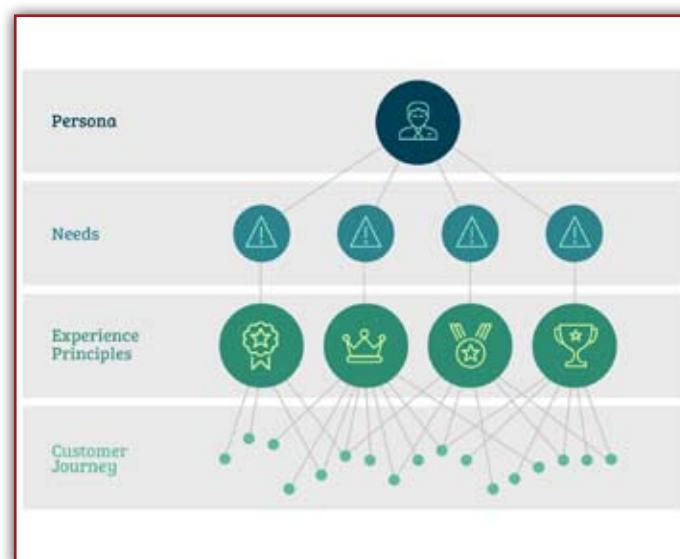
Furthermore, potential customers can interact with your business across each possible touchpoint, regardless of the stage they're in. With digital and content becoming pervasive, this is even more the case. It's not because you have a paper that is aimed at customers, comparing or considering vendors/products/ solution that they can't be downloaded by people in the discovery or awareness stage, for instance. In fact, in an increasingly real-time economy wherever more personalization is possible, there are reasons to consider other options than persona models.

Nevertheless, until further notice, personas are still the predominant way to work with in customer journey maps. There is an increasing trend to differ between different types of personas, depending on their stage in the overall customer life cycle (buying behaviour, to be precise). Some work with simple segments and job roles instead of personas or with pure psychographic models.

Regardless of the methods you use, it's clear that the customer is the only one really putting themselves in the shoes of the customer. So, it's equally clear that you'll need to involve the customer.

If you're in a go-to-market model with partners, remember the importance of value chains. In order to understand the customer, you also need to understand the customer of the customer, etc., all the way to the end buyer, whether it's in the capacity of a consumer or of a B2B buyer. Remember, however, that it's best to focus on what matters most and not make it too complicated unless you really can – and want to – dive very deep into the customer experience in relationship with, for instance, content plans, partner enablement efforts, etc.

Involving the customer

You need to get the customer on board of your customer journey mapping. Although it's obvious, all too often it still doesn't happen and people genuinely believe they can truly understand their customers just by talking to their peers, employees or, worse, relying on of those good old HiPPOs (highest paid person's opinion).

Empathy can go a long way but it's not magic. Involving customers in several ways
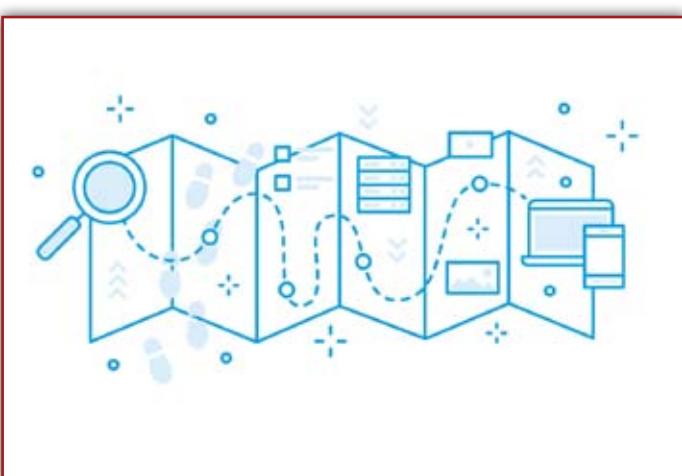
is essential. A non-exhaustive list of ways to involve the customer (and the customer of the customer, etc.):

Conduct customer research

Customer research is a first way to gauge what customers want, how their journey looks like, what their pain points and emotional triggers are and so forth. Also use it as a way to check the findings from what you've learned in other ways (validation).

The big caveat, however, and always to remember: there are very often big discrepancies between what people say they do/want/value and what they actually do/want/value in practice. Finding these discrepancies is already interesting as such and anyway, the discrepancies will be far smaller than those between what organizations

believe are valuable touchpoints and customer experiences on one hand and what customers themselves think about that on the other.

Research can be done via telephone, using online surveys, at events, etc. It's best to get an experienced partner on board to narrow down the error margin and avoid too much opinion.

Workshops

Just as agencies and consultants conduct workshops with their customers to map buyer insights, create personas and work on the initial drafts of the customer journey map (often along with storyboards), organizations can conduct similar workshops with actual customers and potential buyers.
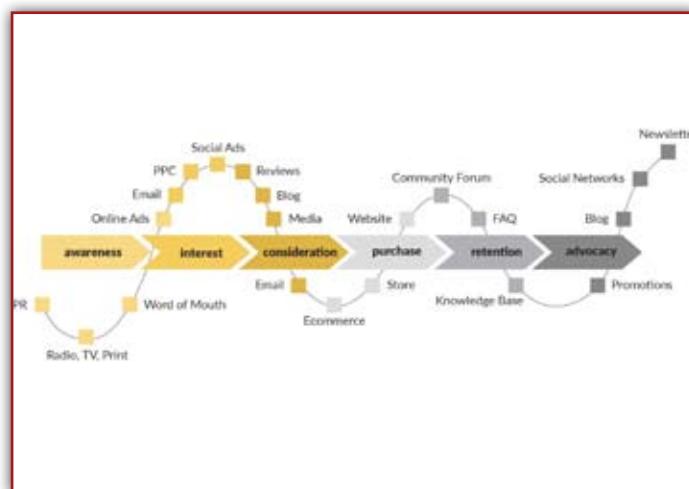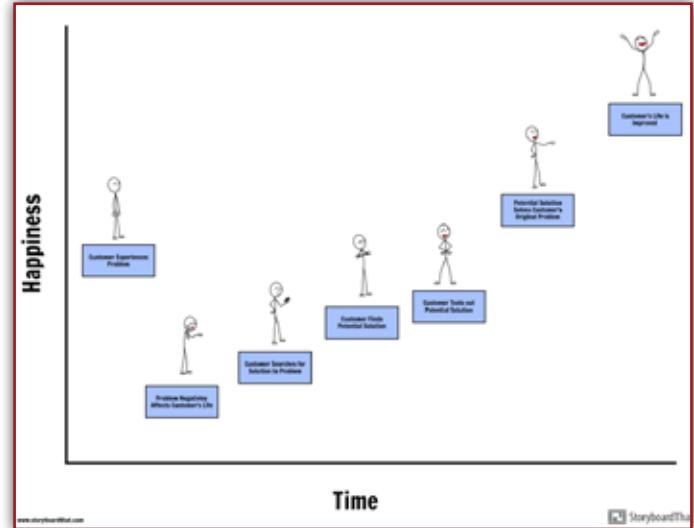
It is advised – again, if feasible – to involve the customers of customers in such workshops with agencies and consultants too. The quality and outcomes of such workshops are, among others, defined by the invited people (that is to say, how representative are they?) and making sure you have a predominant focus on the outside-in approach.

In such workshops there is of course always the risk of thinking what people and participants want versus actual behaviour and a partner might come in handy too for the same reasons as mentioned earlier.

Other methods
While surveys, workshops, interviews and customer advisory panels/boards are all good ways to involve customers into the journey mapping exercise, you need data for all the reasons mentioned above.

As you probably noticed by now, there is ALWAYS a genuine risk of mistaking opinions for facts, whether the opinions come from customers, panel members or your internal teams such as customer-facing employees and subject matter experts. That's why it's always a good idea to 1) validate the outcomes with several stakeholders a second time (others) before moving to the next step, 2) conduct workshops, interviews etc. with partners who have experience in customer journey mapping and 3) look at facts.
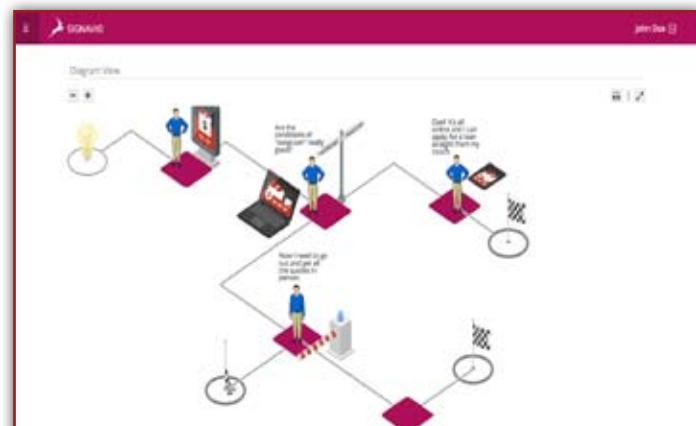
Get out. Validate your findings by getting out more often and listen and talk to customers and the customers of your customers. Tradeshows, other events, phone calls, face-to-face meetings, spending a few days in (your) shops, passing some time in sales and customer service, asking a partner to spend some time with them when they visit end customers or in their offices.

Facts are partially about data but it's also good to ask people to fulfil specific tasks, rather than just asking their opinions. Such exercises, whereby people are asked to complete a task on a website and their actual behaviour is traced, have existed since a very long time in the field of user experience and usability. So, strictly speaking, they say nothing about the journey.

However, using such methods and knowing there are clear links between customer experience and user experience, even in offline environments such as shops and, if possible

Benefits of customer journey maps

1. **Shared understanding of customer experience**
2. **Define data to track & attribute**
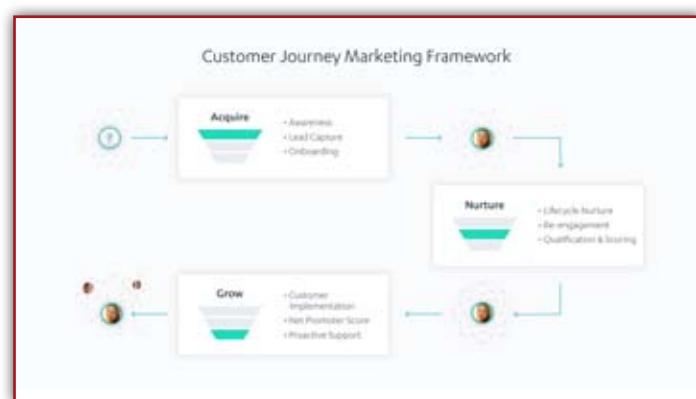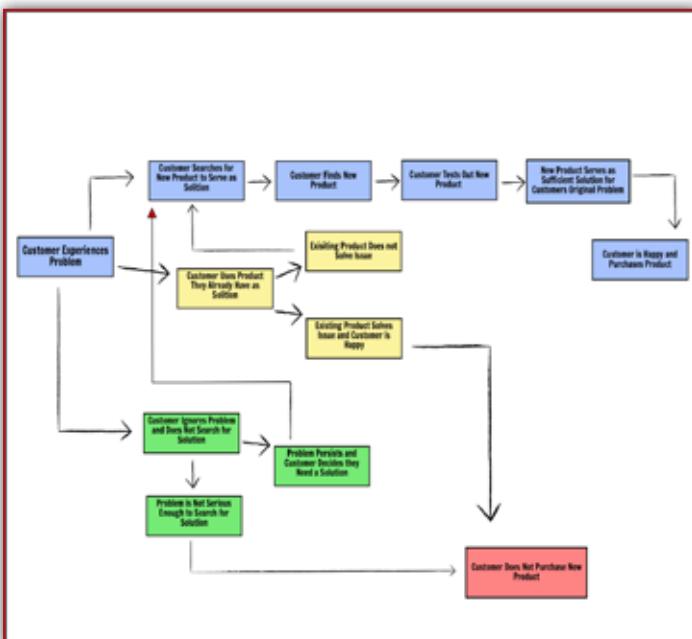
in a more-to-end way (you can even combine this with journals), you'll get a better picture of various steps in the digital customer journey (and of digital touchpoints but remember customer journey mapping is not the same as touchpoint mapping).

Let's face it: the customer does have a multi-channel or channel-agnostic journey but the number of digital touchpoints and touches is increasing in many areas. So, when it makes sense in a specific context/area, use such methods. Whereas in user experience you

would typically focus on a task regarding one service or property, you can broaden the scope of the task in a digital environment.

So, instead of saying "find the number of xyz on the website of abc" (to see how long it takes for the user to find the specific content and gauge how visitor-centric the website is), say something like "look for a new insurance provider using the Web". User experience experts might be horrified by reading this (in general, we focus on very specific tasks, as specific as possible) and customer experience experts will probably say it's an artificial setting and the journey is not just online.

They're both right but do the exercise to see what insights it delivers, knowing that it has shortcomings. You might learn quite a bit about not just which channels different people use but also about user experiences and touchpoints, even if that's not your core goal here (you can combine goals though, if they don't interfere).

Last but not least, note that the single customer experience is as important as the end-to-end customer experience so there is no need NOT to look at individual experiences as well.