

qualtrics^{XM}



THE ULTIMATE GUIDE

Customer journey mapping

How to pinpoint and document the key moments of your customer's experience



Introduction



While you likely have a general idea of how your customers experience your business and your brand, the next step is to take it up a notch and build a customer journey map.

A customer journey map is a visual representation of customers' processes, needs, and perceptions throughout their interactions and relationship with an organization. It helps you understand the steps customers take – the ones you see, and don't – when they interact with your business.

Customer journey mapping helps you look for the moments that matter, so you can make sure the customers' experience in those moments matches their expectations.

To see the benefits of the journey mapping process, start by making it.

Of course there are many ways to build a journey map that could work for your business. This guide covers the steps that we see customer experience (CX) innovators using to drive measurable business impact. To see the best results you'll need to have the ability to collect and analyze customer feedback from all touch points.

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[Bonus: Journey Map Template](#)

SECTION 1

Gain executive buy-in

Gain executive buy-in

Executive buy-in is critical to any successful journey mapping effort. You'll want to have a clear executive sponsor to champion the effort and to engage other members of the executive team early and often. That will help ensure the right cross-functional resources are committed to participating in the mapping process and to taking ownership of the improvement initiatives that are identified.

Define the “why”

In order to obtain executive buy-in, it's important to define the objectives of the customer journey map with their input and educate them on why it's important to the business. In an increasingly competitive business environment, a company's ability to create positive customer interactions with their product and services is paramount to success.

Mapping the customer journey is critical to your company's success and ability to become more customer-centric. Aside from the obvious benefit of understanding the activities, expectations, thoughts, and to build customer empathy to create or redesign interactions feelings of your customers, journey mapping allows your company to dispel silos, streamline services across departments, and tailor them to meet the most critical needs of your customer.

Why businesses map journeys

- + To understand the customers' experience from their perspective
- + To evolve focus from touch points to journeys
- + To build customer empathy
- + To help determine where to listen to the Voice of the Customer (VOC) along the journey
- + To create or redesign interactions

Furthermore, creating a customer journey map early on in your program solidifies the importance you are placing on the customer and helps align everyone in the company around a common understanding of the customer journey from the customer's perspective. The journey mapping process also provides employees with greater visibility to what happens upstream and downstream of their interactions with customers thereby improving their ability to deliver the desired experience.

“Identify which experiences matter the most in balancing customer satisfaction with profitability.”

Executive Director of CX

From a major telecommunications company

Tie it to your business goals

Define the “why” for your business by tying outcomes to your business objectives. Are you trying to increase customer loyalty? What about customer lifetime value? Are you trying to mitigate risk or decrease churn? Are you trying to gain more market share by competing more aggressively? Are you trying to gain a better understanding of a new customer segment you’re now serving as part of an expansion or recent acquisition?

Make sure you can connect the dots on how your journey map will help meet these goals. For example, if you are trying to decrease churn, your map can help you identify key points in the journey where customers are most likely to stop doing business with you. If you are trying to gain more market share, a journey map can also pinpoint when and why customers are choosing you over the competition so you can capitalize on those moments. Executives are especially likely to want to see a return on value for your journey mapping effort. Defining why you are creating your journey map and tying it back to your business goals will make this buy-in much easier.

SECTION 2

Define the scope

Define the scope

Most people wouldn't start travelling without first mapping out where they want to go and how they want to get there. Create a clear scope and objectives for what you plan to accomplish with the customer journey mapping effort.

Define and communicate objectives

To be successful, you need a clear purpose for the journey map and a specific reason for its creation. Make sure that everyone who is working on the map understands the objectives that you identified when you tied your map to business goals. Interviewing executive stakeholders for their input and agreement on the objectives is a valuable early step in the process.

Identify the persona(s) and define team roles and responsibilities

Once you have clear objectives that everyone understands, define the scope of the effort, including the persona(s) or target customer segments and the specific processes being evaluated. Consider focusing on one area initially such as the purchase experience vs. the end to end experience. That often enables you to drill into enough detail and affect change while gaining additional stakeholder support. Then, identify the employees who will be engaged in the mapping effort as well as their roles and responsibilities.

The importance of engaging cross-functional teams throughout the mapping effort cannot be stressed enough. Some teams aim to have employees who interact with customers more than 75% of the time such as members of the front-line Customer Service or Retail teams as well as individuals who understand the underlying processes, policies, and systems. It's also valuable to have individuals who will be responsible for owning the improvement efforts identified through the mapping effort engaged in the process.

Don't reinvent the wheel

What do you already know about your customer journey? More often than not, companies can gain valuable insights from the information that they already have gathered from their customers' interactions and feedback. This information is valuable when mapping the current state of your journey.

Look to your contact centers, surveys, social media comments, customer complaints, and the measurements your company uses to gauge the voice of the customer. This ensures that your journey map is as closely aligned with your customers as possible. Make sure you are looking at structured feedback and unstructured feedback, such as social media and review sites.

Key Components

At this stage, you should have a clear picture of what you want your map to achieve. You'll find a template at the end of this eBook, but that should simply be a starting point. In addition to the persona and goal, we recommend including the below items in your journey map and describe them using the customer's voice:



Stages Define the various stages of the customer journey. What are they? When do they occur? The amount of stages is up to you, but to keep the map digestible, try and keep the high-level stages under 10. If you think you need more, you can break down your stages into sub-journeys or smaller interactions.



Needs and Interactions What interactions do customers have with your company or partners who represent your company? What do customers need out of each interaction? What actions will the customer take to satisfy their needs?



Key Expectations What does the customer expect to accomplish at each stage? What is their current perception of how their expectations are being met?



Moments of Truth What are the make or break moments your customers have throughout their journey?



Listening posts Indicate where you are capturing customer feedback today along the journey and ensure they are aligned to the moments of truth and pain points.



Customer Quotes What is your customer saying that represents their thoughts, feelings, and emotions at each stage along the journey?



Sentiment Your map should include the emotional state of customers at each stage of the journey. Sentiment helps explore polarizing topics and serves as a quick beacon for moments of truth.



Effort Identify points of friction, confusion, and difficulty along the journey that can impede customer value and lead to channel switching.



SECTION 3

Gather and analyze customer feedback

Gather and analyze customer feedback

To fully understand the stages of the customer journey and the interactions your customers have with your business, you need customer feedback. And lots of it!

The most important thing to keep in mind when gathering and analyzing customer feedback is that you need more than just one source. Internal interviews are not enough. Surveys are not enough. Market research is not enough. You need to collect data from all the interactions that customers have with your business, and also have a way to understand customer needs, wants, expectations, and emotions during each interaction at scale.

Examples of Feedback Sources

- + Employee interviews, workshops, and surveys
- + Customer interviews, observation, journals, and surveys
- + Social media comments
- + Website analytics
- + Third party review sites
- + Call center recordings/agent notes
- + Chat transcripts
- + Inbound/outbound emails
- + Online/mobile app feedback

Conduct internal interviews and surveys

Internal interviews, workshops, and surveys with employees who regularly interact with customers and with internal stakeholders who are familiar with the existing processes and systems are very useful in understanding the customer experience. The information from your employees will help frame out the customer journey and the lifecycle stages, which are the progression of steps your customer goes through when considering, purchasing, using, and remaining loyal to your company or product. The team can then use that framework to interview customers to obtain additional insight about the journey. In addition, employees can provide insight into the supporting processes, policies, and systems and where obstacles exist that may be preventing them from delivering the desired customer experience.

Gather customer feedback

Customer-centric businesses are investing heavily in Voice of the Customer (VoC) programs to collect, analyze, and operationalize customer feedback. To do this, they are using VoC analytics solutions that gather and combine feedback from all channels for a single view of the truth.

In order for your journey map to capture all the ways in which a customer interacts with a business, you must look at multiple sources of data. While many VoC programs are primarily survey-based, the most mature programs analyze and act on feedback from a much wider universe of data sources, namely, unsolicited data.

Unsolicited data goes beyond surveys to sources such as social media comments, third party review sites, inbound/outbound calls, online chat, agent notes, blogs, forums, internal business data, and more. Because businesses aren't specifically requesting that customers provide this data at a particular point in the journey, this data can reveal much richer insights than solicited feedback data alone.

With solicited survey feedback, the business determines how and where the customer's voice is captured. Receipt-based surveys are a prime example of this. Shortly after a purchase is made at a retail location, the business asks the customer to go online and fill out a survey. By contrast, a frustrated customer who cannot find what he/she is looking for in a store might vent on Twitter about how poorly the store is laid out. Capturing emotion at the exact instant when it's felt is critical to understanding customer needs and wants.

It's also important to interview and ideally observe customers in the environment in which they are taking their journey, such as a retail store. That will give you additional context about each interaction and a better understanding of not only what they do but why they do it. The combination of the customer interviews and ethnography coupled with the customer data analysis helps you validate the journey framework and get a better understanding of the interactions, needs, and expectations and to identify the relative importance of each one and opportunities for improvement.

Analyze the customer feedback to understand customer needs, wants, and emotions

A key part of your journey map will be identifying customer sentiment at each stage. You can uncover these emotions through a sentiment analysis.

Sentiment analysis of customer feedback provides a wealth of useful business information. It isn't enough to know what customers are talking about—you have to know how they feel. Sentiment analysis is the next evolution in how companies handle customer experience management. Social feedback channels, for example, provide untamed, unstructured feedback in the form of text, images, and video. Sentiment analysis parses through this data and allows you to categorize customer feedback into nuanced levels of positive and negative emotions.

Using sentiment analysis, you can mine these new sources of feedback with as much precision as traditional research outlets like customer surveys. As a result, sentiment analysis offers an unprecedented view inside the hearts of customers, helping you identify the emotions that customers feel throughout their journey.

It's also important to capture the customer's perceived level of effort required to do business with a company because it's often one of the earliest indicators of loyalty. If a customer cannot find something on a website or is not able to have their issue resolved without being transferred multiple times, that can lead to increasing levels of frustration and impact loyalty over time. Some organizations rely on solicited surveys to identify areas of friction; however, surveys fall prey to low response rates, bias, and responses that rely on the memory of an interaction, rather than the interaction itself. Therefore, don't rely on surveys alone and be sure to examine the language people use in their feedback or interactions to identify and measure points of friction or ease.



SECTION 4

Design your map

Design your map

Now that you've done your due diligence, it's time to design the customer journey map. This section will help you use the insights you gained in part 3 to design a map that you can share with key stakeholders across the business.

What your journey map should include

- + The buyer persona
- + The goal of the journey
(for example, purchasing a new smart phone)
- + The stages of the journey
- + The needs and interactions within each stage
- + The customer's expectations
- + Listening posts
- + Moments of truth
- + Customer quotes
- + The sentiment at each stage
- + The effort at each stage
- + The contact duration at each stage

Identify the Persona

Persona creation is a significant undertaking in and of itself, and we won't cover the details in this eBook. However, your journey map should be specific to one of your buyer personas. And you should create a different map for each persona distinct enough to warrant a different CX approach.

A persona is not a segment; it's a model that represents a certain type of buyer. Consider giving your persona a name, gender, and age. For example: Karen is a 40-year-old stay-at-home mother with three children and loves to hunt for bargains. She seeks out products that are a good value, and will go out of her way to save money. In this example, the customer journey map relates to Karen and the buyers that she represents. As a result, special sales and promotions might be a key element of the map. With a different buyer persona, let's say someone whose primary interest is quality, then discounts and promotions might not be as critical.

Additionally, buyer personas often include preferences, skills, knowledge, wants, and desires. Below is an example:



Karen is a 40-year-old stay-at-home mom, she is constantly rushed so she needs quick and easy access to our products. She uses Paypal to shop and does most of her shopping online. She's open to deals and will shop more with offers of free shipping or interesting discounts. She gets frustrated by offers that expire quickly."

Make sure you've taken the time to identify your key buyer personas, and create maps for each of them.

Define the stages

The output of your feedback collection and analysis should have identified or validated the key stages that customers go through in their journey with your business. Example stages include research, purchase, set up/install, use, seek help, pay bill, and renew. Consider the entire progression of steps your customer goes through when accomplishing their goal and the primary stages they fall into along the journey.

While you cannot plan for the unlimited touch points customers will undoubtedly have when interacting with your company, you can identify and plan for specific touch points that your company needs to focus on to drive customer loyalty.

Sample customer quotes

“Amazed by how friendly the service team was”

“I think this product is overpriced and I feel ripped off.”

“The website is organized poorly and I couldn’t find what I wanted.”

“I love the variety of products available!”

How the needs, interactions, sentiment, effort, and contact duration within each stage

By now, you've gathered both the voice of your customer and input from your employees during specific touch points and interactions. Keep in mind new interactions may also come to light based on customer feedback that the company didn't previously consider. Take what you learned and search for common themes throughout the data. What interactions do customers enjoy? What aspects of your service model do they say cause frustration? Which interactions are difficult and create unnecessary friction? What interactions take longer and are inefficient? Use the data from your analysis of customer sentiment, their perception of effort, and the duration of contacts to inform this area of the map.

You may also want to consider adding the customer's expectations and key questions they have as they traverse the stages of the journey to provide a more complete view of their wants and needs. Adding customer quotes or verbatim comments and using the customer voice throughout the map will help viewers look at the journey through the customer's lens.

Identify key moments of truth

For the purpose of a customer journey map, moments of truth occur when the map reveals a gap between a desired customer experience and what actually happens. Moments of truth should not be taken lightly as they can serve to illuminate aspects of customers' interactions that could be improved, in order to reach their desired experience. You can identify moments of truth by listening to RSS feeds, community forums, social media groups, and what industry leaders are saying. A moment of truth is usually the make or break moment a customer has with a company that leaves a lasting impression. While some of your customers' expectations of your organization may seem extreme, you should strive to align your own expectations with theirs as much as possible.

Identify volumes and frequency

Look for total volume of comments at each stage to determine what matters most to customers and when. For example, during the checkout stage, there may be 6,200 mentions of a coupon, but during the product use stage, there may be only 25 mentions. Segmenting the data by different attributes associated with your customer base will allow you to take more targeted actions.

Additionally, look for volumes by segment. You may find that certain segments of your customer base have different needs and wants than other segments. For example, you may find that customers over the age of 55 have more complaints about a mobile website.

SECTION 5

Create a culture of action

Create a culture of action

Everything you've learned about your customers and their emotions and interactions with various touch points should be aggregated into a set of recommendations to be presented to your executives and stakeholders. If you kept them in the loop effectively throughout this process, they should already be aware of some of the insights your organization gained from your mapping exercise.

While it is important to implement changes to your service model, it is also equally important to maintain those changes across your company's lifespan. Be sure to set goals for yourself when implementing any changes, as it is not feasible to change the entire culture of your company's model all at once.

Establish/align listening posts and metrics

Once you've implemented the insights revealed by your journey map, you need to make sure you continue to listen to your customers and the community to know how the changes are working. How are those changes affecting your customers? Pair what you already discovered from your listening posts with key moments of truth, top pain points, and metrics such as NPS and CES, sentiment, churn, surveys, voice and text sources, and KPI's to gauge what people are saying about your company. It's important to know what your customers are saying at the most critical points along the journey. Use listening posts and metrics to help gauge and monitor how successful the journey is from the customer's perspective.

“Only when we added call center notes to our survey feedback did we uncover the real story.”

Analyst

from a major telecommunications company

Potential opportunities for improvement

Customer journey maps are a catalyst for change. Based on the insights in the map, potential opportunities for improvement should be identified such as where the company should implement closed-loop processes, where they can reduce customer effort, where they should modify how they set expectations for customers, and where they can be more proactive and less reactive in addressing customer needs. Engaging the cross-functional teams and customers in identifying, defining and prioritizing these improvement opportunities is important to ensuring your journey map is sustainable.

Embedding the customer journey into your governance model

Since your journey map is now a key component of your organization and tied to your business goals, it should also be a framework to evaluate and prioritize improvements and investments. Additionally, it can serve as a communications tool to align different organizational silos around a common understanding of the journey and as a model to assign ownership of action plans to different areas of the business.

Socializing the journey map

Your journey map should be something that everyone can easily use and understand. You need to socialize this map so that all of your employees who touch and/or enable the customer know how to access and use it. This starts with the basics of making your map visually appealing by using formats such as an infographic or other design. It should engage viewers and help tell the customer's story. Use your map as a vehicle for onboarding and ongoing training to help people understand the customer perspective and understand the role that they play in delivering the customer experience.

Your map can also be used to communicate critical customer metrics. Your customer's feedback should be mirrored on the map, as well as incorporated into the basis of it.



Refresh the customer journey map

Your journey map should be a living and breathing document. It is important to keep your journey map up to date and to keep iterating as the customer wants, needs, and expectations evolve. Creating a successful journey will undoubtedly change your customers' experiences. Updating your map to reflect those changes, both good and bad, ensures that your customer's wants, needs, and expectations are met and exceeded. Pay attention to the stages in your journey that are working well and use the lessons learned from those to make improvements where the journey is stalling. Identifying and addressing these pain points will improve the interactions that your customer has with you and could ultimately improve your bottom line.



3x

One bank saw that customers calling into support were 3 times as frustrated as customers who used self service tools online











Template

Template

Journey Map Template

This template has several key components that you need to visualize the customer journey. The sentiment line at the top will be determined by customer sentiment at each point in the journey, and you should fill in the boxes with details about customer needs and expectations at each point in the journey.

MOMENT OF TRUTH  LISTENING POST  CUSTOMER QUOTE 

Stage	01	02	03	04	05	06
Sentiment		 		 		  
Customer Needs & Interactions						
Customer Expectations						
Improvement Opportunities						

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