Qualtrics XM institute™

INSIGHT REPORT

Maximizing Value from Customer Journey Mapping

23 BEST PRACTICES FOR DRIVING ACTION FROM CUSTOMER JOURNEY MAPS

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EXECUTIVE SUMMARY

Customer Journey Maps (CJMs) are a valuable tool for understanding how customers truly interact across an entire organization, but companies aren't capturing enough value from their CJM efforts. Creating a CJM is only the first step in the process for change; the real benefit comes from using the insights from CJMs to drive action. In this report, we identify 23 best practices for using CJMs, and these practices cut across five areas: 1) Find and Fix Problems, 2) Build a Customer-centric Mindset, 3) Design Innovative Experiences, 4) Create Strategic Alignment, and 5) Refine Customer Measurement. To truly maximize value from customer journey maps, companies need to set themselves up for success by establishing organizational alignment, determining if outside help is needed, training key stakeholders in customer journey mapping, and scaling customer journey mapping techniques across the organization by employing *Customer Journey Thinking™.*

CUSTOMER JOURNEY MAPPING IS VALUABLE, BUT OFTEN MISUSED

Companies naturally tend to view their customers through an internal perspective; however, it is impossible to create a complete picture of the customer's experience with such an inward focus. To overcome this hurdle, companies are using customer journey maps (CJMs) to understand and improve the overall customer experience. Temkin Group define CJMs as:

> *A visual representation of the steps and emotional states that a customer goes through over a period of time to accomplish a specific goal that may include some interactions with your organization.*[1]

Customer journey maps help companies identify how the customer views their organization by putting interactions in the context of the customer's broader goals, objectives, and activities. To craft a customer journey map that drives organizational change, companies need to:

- **Define a persona or target customer.** A common CX mistake is treating all customers the same. To avoid this misstep, companies need to first identify key customer segments, then prioritize the ones that are most important, and finally create design personas to better understand the most critical problems each segment faces. A design persona is *a vivid description of a prototypical customer or archetype within a segment* (see Figure 1). To effectively drive decision-making using CJMs, companies must first develop rich, detailed personas that are based on in-depth qualitative customer research. By creating detailed personas, companies can avoid the common pitfall of having CJMs that are too generic to drive any meaningful change.[2]

[1] See Customer Experience Matters post, "Seven Steps for Developing Customer Journey Maps" (April 2013).

[2] See Customer Experience Matters post, "CX Mistake #4: Treating All Customers the Same" (February 2012).

- **Select a specific journey for the target customer.** A customer journey occurs because a customer needs to achieve a goal that involves your company. Companies can use CJMs to visualize different types of customer journeys. And these types of journeys can be anything from an event that occurs over an extended period of time, such as buying a new car, to a contained action, like making a car loan payment.
- **Develop a draft journey map.** Typically, cross-functional teams collaborate to produce a high-level outline of the key stages and interactions in the customer's journey based on customer research (see Figure 2). This includes details of each stage, the customer's expectations and emotional state, and issues or obstacles that impede the customer's success (see Figure 3).
- **Highlight and prioritize moments of truth.** Not all of the points within a customer's journey are weighted the same, and some moments, called *moments of truth*, should stand out from the pack. Moments of truth are *the individual interactions that have the most significant impact on customer loyalty*. These can be positive experiences, customer pain points, or part of the "white space" where the company is not currently interacting with the customer, but could be in the future. To get value from CJMs, a company must know its customers' moments of truth as such information helps it to prioritize and focus its efforts on areas where changes will have the greatest impact (see Figure 4).
- **Utilize research throughout the process.** When drafting their customers' journey and identifying moments of truth, companies should tap into resources like voice of the customer (VoC) insights, other internal customer data, and employee input. And after drafting the CJM, companies should then conduct additional customer research to validate their hypotheses. Finally, companies can measure changes to moments of truth effectively by adjusting VoC listening posts to capture feedback about newly designed experiences.

Customer Journey Mapping Efforts Often Fall Short

While customer journey mapping can be valuable for providing an end-to-end view of customer experience, it is widely misapplied. Customer journey maps fall short in delivering the full potential of their value when companies:

- **Do not identify a clear objective.** Customer journey maps can serve many different purposes, from uncovering insights to fix current problems to looking for opportunities to wow customers in the future. While CJMs various applications make them incredibly useful, it also means that without a clearly defined objective, companies will struggle to assemble the necessary resources, involve the appropriate stakeholders, and identify essential external customers to include in the process. This leads to companies ending up with a generalized CJM, which is not useful for driving action.
- **Confuse touchpoint or process maps with customer journey maps.** Touchpoint and process maps typically examine internal processes from the company's point-of-view, not the customers' point of view. Teams will often base these maps entirely on an internal perspective, omitting the steps in the customer's journey that do not

directly include the company.[3] As a result, teams may overlook important customer activities because they run parallel to or outside of the project's scope.

- **Create unrealistic expectations for customer journey mapping.** In their excitement to use customer journey mapping, CX professionals may inadvertently set leadership's expectations too high for what the tool can realistically achieve. An initial project whose scope is too large or complex can overwhelm stakeholders and may fail to deliver the desired customer understanding, leading to frustration and disappointment with the process.
- **Are not ready to take action.** Many companies wrongly assume that creating a journey map alone is adequate and do not embark upon customer journey mapping with any plans or resources to drive action and change. The result? An effort that creates buzz but falls short of making a substantive impact on the customer experience.

BEST PRACTICES FOR DRIVING ACTION FROM CUSTOMER JOURNEY MAPS

A map provides value by enabling a company to design better experiences and gain a deeper understanding of its customers. To understand how companies use customer journey maps to drive action, Temkin Group interviewed a number of practitioners and vendors with a wide-range of CJM experiences.[4] We found that companies gained value from their customer journey mapping efforts by driving action in five areas (see Figure 5):

1. **Find and Fix Problems.** Identify pain points and deploy customer-focused solutions
2. **Build a Customer-focused Mindset.** Foster customer-centricity across the organization
3. **Design Innovative Experiences.** Uncover and fulfill unmet customer needs
4. **Create Strategic Alignment.** Link customer experience to desired business outcomes
5. **Refine Customer Measurement.** Focus insights and metrics on key moments of truth

#1: Find and Fix Problems: Identify Pain Points and Deploy Customer-Focused Solutions

Companies can take a new approach to alleviating interactions that the company suspects or knows are broken by using customer journey mapping to:

- **Ensure that internal processes don't impede the customer.** After creating a customer journey map, companies need to examine the underlying processes that negatively impact the customer's ability to successfully accomplish his or her goal. By linking internal processes to moments of truth, an insurance company learned that its different software platforms created challenges for their agents because data did not

[3] See Customer Experience Matters post, "CX Mistake #10: Mapping Your Internal Touchpoints" (August 2011).

[4] For this report, we interviewed the following companies: Allegion, AT&T, Blackbaud, Cisco, CustomersFirst Now (formerly Mulberry), EMC, Fidelity, Ipsos, MaritzCX, Pearson, Penske Truck Leasing, Pinpoint, Strativity, suitecx, Sysco, Touchpoint Dashboard, Vermeer, Verint, Walker, and Wiley.

populate across the systems. Thus, when an agent tried to sell an auto policy and a homeowner's policy to a customer, the agent had to use two distinct software platforms and enter all the relevant information twice. Understanding how this process impacted its agent's experience helped the company to design a more efficient solution.

- **Adjust customer communications to improve the experience.** Not all fixes need to be major redesigns. During its journey mapping efforts, JumpstartMD, a Bay Area weight loss program, saw that it was able to set expectations through targeted communications, which then improved its overall customer experience. The company noticed it was losing customers early in its program. After analyzing member data and mapping the journey of two different personas, JumpstartMD identified both their highest value segments and the moments of truth where attrition occurred. The insights from the journey map uncovered the challenges that members faced in these moments of truth, which included staying on track during business travel and when entertaining. By focusing on improved timing for clinic activities and better digital and face-to-face communication around those difficult situations, the company helped participants stick to the plan. By making changes such as tips for difficult scenarios (e.g. eating out), calls to reschedule missed appointments calls, and better scheduling, the business significantly improved its member retention (see Figure 6).
- **Improve systems to reduce customer frustration.** Customers can become frustrated when a business they work with doesn't recognize them when they contact the company. This is particularly true in B2B relationships when customers expect their vendors and partners to know them personally. During a customer validation session of its journey map at an annual client executive summit, Blackbaud customers identified "knowing my business" as a critical area where they felt the company was underperforming. By digging into this issue, Blackbaud realized that because of internal silos, customers had to identify themselves every time they called in, regardless of whether they'd contacted service, sales, or another department. Blackbaud addressed this issue by making technology investments to optimize back-office infrastructure, thereby consolidating 16 sales and marketing applications and five professional services applications into single platforms. This allowed Blackbaud to recognize customers when they contact the company.
- **Combine CJM findings with quantitative data to make the case for change.** When a company is working to implement changes, it should not use CJM insights in isolation from other customer feedback systems. Verint merged its customer journey map with its voice of the customer data to prioritize areas for improving customer satisfaction. As part of its CJM effort to define a desired future state for customer experience, Verint customers cited "issue resolution time in support" as a moment of truth. When Verint performed a regression analysis of its satisfaction survey to validate these moments of truth, the company saw that "issue resolution time in support" also emerged as a key driver of satisfaction. This combination of findings helped to make a stronger case for increasing support staff in the contact center than the results of the CJM would have made alone. Verint was then able to approve additional staffing for the contact centers even before operational measures indicated a problem.

#2: Building a Customer-Focused Mindset: Foster Customer-Centricity Across the Organization

One of the primary goals of customer journey mapping is to increase organizational understanding of customers and their interactions with a company. A clear view of what customers need, want, or like can help all employees to serve their customers better. To raise customer-centricity across the organization, a company can use customer journey maps to:

- **Challenge internal ideas of what the customer wants.** While many companies seek to make experiences easier for customers through the use of CJMs, Fidelity discovered that customers expect certain aspects of online banking to actually be complicated, or else they see it as a potential security threat. When mapping its online check writing capabilities, the company hypothesized that online banking customers would want to add check writing to accounts over the phone, with or without a signature. During customer focus groups, however, the company quickly learned that customers did not like this idea. The customers were unsure how Fidelity could accurately verify the caller, and they worried about sharing their information with others around who could potentially overhear it. Similarly, Fidelity considered eliminating the signature card for online check writing, but customers expected to sign the card because signatures are typically an integral part of check writing. Fidelity was able to remedy these issues and create an environment that felt safe for customers.
- **Highlight how employees fit into the bigger picture.** Creating awareness of what happens before and after an employee's role in the customer journey raises employees' empathy for customers and improves collaboration across internal departments. Lynden relied on its journey map to help employees who didn't directly interact with customers understand how their work still affected the customer at each interaction point. Lynden launched an internally developed board game called *Be the Customer* that takes employees through a "Chutes and Ladders"-style game based on the company's customer journey map (see Figure 7). Managers encouraged cross-functional teams of four to five players to play the game together. Employees experienced the customers' journey and learned how to handle a variety of positive and negative scenarios at key interaction points that they would have not been exposed to otherwise.[5]
- **Incorporate customer-centric thinking into daily activities.** A Middle East based global airline recognized that its customer journey map could be used as a tool to get all of its employees into a customer-centric mindset. The company held meetings to educate employees about customer journey mapping and created picture cards of different customer situations to use with its multi-national workforce. In weekly team meetings with baggage handlers, team leaders walked through how to manage issues—such as a customer losing their baggage tag—and then the team discussed how to handle the issue to best meet customer needs. By instilling the idea that employees can use collaboration to find the best solution, the airline improved teamwork and showed its employees the advantage of customer-first thinking.
- **Have CJM stakeholders try to complete customer tasks.** Employees get a true sense of what the customer experiences when they put themselves in the customers'

[5] See Temkin Group Report, "Best Practices in B2B Customer Experience" (April 2013).

shoes. Fidelity has its customer journey mapping participants act like customers while experiencing the customer journey on its website—fidelity.com. Using laptops set up in the room during internal CJM sessions, Fidelity employees attempted to complete typical customer tasks that are part of the journey. While completing this activity, participants uncovered that there are multiple ways for customers to access information and manage their accounts. The digital team took this information and looked more holistically at how various personas navigate the site so they could change the design to simplify the process.

- **Socialize findings broadly across the organization.** It is critical that journey maps gain visibility with all employees, not just those who participate in the creation effort. Companies can share their CJM findings and corresponding actions through a variety of methods, from executive reports to infographic-style summaries (see Figure 8). AT&T uses a very effective tool for socializing its customer journey map: a *gallery walk*. This technique not only focuses employees' attention on the actual map, but also on the supporting documents and artifacts (such as examples of communications, materials, etc.). The map hangs on a prominent wall that showcases the customer's stages and steps, highlights moments of truth, and features compelling customer quotes that exemplify the map's findings. Much like paintings in a museum, the CX team guides executives and employees through the customer journey, stopping at points to share stories, which bring the map to life. The team notes the spots which grab the attention of the attendees and provides answers to questions about specific moments of truth by describing interactions that occur upstream and downstream of these points. Participants also can leave notes or comments on the map with their thoughts on the customer journey.

#3 Design Innovation Experiences: Uncover and Fulfill Unmet Customer Needs

Customer journey mapping can highlight unmet customer needs or opportunities for innovation, such as filling a gap in the "white space" between interactions, or deploying creative redesigns of current experiences. To drive action in this category, companies can use customer journey maps to:

- **Meet customer needs that fall outside the company.** Customer journey maps examine the customer's entire experience, not just his or her interactions with the company. The result? Sometimes opportunities for improvement will fall outside of the company's four walls. When validating its journey map with online banking customers, Fidelity discovered that these customers wanted to know when the check they wrote would arrive at its destination. Fidelity recognized the value of providing customers with the ability to track the movement of their checks, even though delivery is outside of its control. Fidelity also saw areas for improvement in other account management functions that could benefit from improved tracking. As a result, Fidelity is designing a unified tracking capability across these different activities, based on its understanding that customers desire this type of functionality.

- **Create a closer relationship with customers.** Understanding the customers' journey can uncover new focus areas that can differentiate a business. Blackbaud learned that one of the key themes that its nonprofit customer base mentioned during external validation was the desire for the technology solution provider to be a "trusted advisor." These advisors are defined as a partner who proactively anticipates needs and shares best practices; the person you would first turn to when an issue arises, be that a crisis, a change, a triumph, or a defeat. To better meet this need, Blackbaud updated its sales and account management professional development curriculum to focus on building rapport and improving response time, availability, empathy, and emotion. They also hired a senior-level account director whose sole focus is managing longer-term relationships instead of being accountable for sales goals.

- **Expand alternatives during process redesign efforts.** Often, continuous improvement efforts focus on making the company more efficient, rather than focusing on customers. Because of this, companies need to infuse more customer insights into those processes, and CJMs are a great tool for driving this kind of change in mindset. For Penske Truck Leasing, over-the-road failure has long been known as a pain point for customers. Customer journey mapping provided detailed insights into the type of challenges drivers face when their vehicle breaks down. Penske learned that when over-the-road failure occurs, the driver has two key questions for the company: 1) How long until someone arrives to assess my disabled vehicle, and 2) How long will it take to get my truck running so I can make the delivery? With a deeper understanding of customer needs during this stressful scenario, Penske is now able to evaluate alternatives as it redesigns the experience, such as sending its own technician, engaging a vendor, sending a tow truck, or something else that will alleviate the situation.
- **Ensure new relationships get off to a good start.** Through its customer journey mapping effort, Sysco wanted to get closer to customers to find opportunities to innovate and deliver a better experience. The company found that its locally-managed independent business segment had trouble getting established as new customers. During external validation, these smaller-scale customers indicated that they did not always know the best way to work with the company and even if they did, they did not think they would get the attention they needed to succeed. In particular, customers identified moments of truth related to communication, visibility into the escalation process, reliable deliveries, and familiarity with the available product assortment. Sysco made a wide array of changes, which vastly improved the onboarding experience for these customers while also enhancing employee engagement (see Figure 9).
- **Streamline initiatives within a design framework.** A mechanical hardware manufacturer that utilizes Six Sigma drives action by tying findings from each stage of its customer journey map to a value stream map (see Figure 10). The company's operational excellence team utilizes the four value streams to plan out the work for the upcoming year. The operational excellence team kicked off the annual process with a series of weeklong meetings during which it identified owners accountable for each value stream, created one-page project plans, and defined "Just Do It" and "Rapid Improvement Events," which were influenced by findings from the customer journey map. Throughout the rigorous improvement process, value stream leaders attend ongoing meetings to provide regular status updates. By working within the structure and culture of the organization, the company has driven significant change in its customer experience.
- **Create engaging opportunities for customers to share feedback.** Providing customers with a chance to contribute to and validate a customer journey map is valuable for both the company and its customers (see Figure 11). Verint learned this

firsthand when it set up the *CX Zone* at its annual user conference. Customers got the chance to provide feedback directly to Verint about the customer journey map, and they also answered a separate question posed on a flip board when they exited the *CX Zone*. This question asked customers, "What would you like to tell us that we did not ask?" (see Figure 12). The company discovered that customers offered such detailed feedback that the provided Post-It Notes couldn't capture it all. Instead customers wrote their thoughts directly on the large flip chart paper. Verint hung these ideas on the walls around the *CX Zone* and soon other customers added their own ideas and commentary. Verint received valuable and actionable feedback from this endeavor, and customers appreciated the company's transparency and interest in their point of view.

#4: Create Strategic Alignment: Link Customer Experience to Desired Business Outcomes

Customer journey maps not only help an organization improve individual journeys, but they can help to align a company's collective customer experience efforts with desired business and financial objectives. Utilizing customer journey mapping to drive strategy can help companies to:

- **Increase knowledge of market changes.** By identifying key customer segments, markets, or geographies to include in the customer journey mapping effort, companies are more likely to create maps that are actionable and less generic. A heavy equipment manufacturer launched a customer journey mapping initiative to understand the business needs of its customers to guide its 5-year planning process. As the company recognized the generational shift occurring in the market as family-owned businesses begin to change hands, it made sure to include Millennial-aged customers in its journey mapping. This increased awareness helped the company understand the evolving needs and expectations of the market, which the company will put to use in its long-term planning.
- **Use maps as part of due diligence during an acquisition.** Understanding the customer experience of a potential acquisition can prepare the acquiring company for the realities of integrating these new customers into its existing customer base. By mapping the customer journeys for both companies, the acquirer discovers what parts of the customer experience they need to embrace from the acquired company, identifies issues that might arise during the transition, and highlights differences that might impact customer churn when the two companies merge. Acquiring companies can also use the journey map to think about how to prioritize and coordinate the myriad of individual projects as well as the outbound customer communications that are typically part of an acquisition.
- **Validate and drive prioritization of current projects.** Most companies have numerous projects and initiatives underway to improve the customer experience, and customer journey mapping can highlight which ones will have the most impact on the critical customer experiences. A mechanical hardware manufacturer used customer journey mapping to confirm the addition of regional distribution centers for its repair and replacement market to minimize the lead-time for customers to receive parts. The company also learned that these changes would be most beneficial to customers in the Northeast, where the demand for parts was highest, rather than in the West and

Midwest, the areas in which the company had previously targeted for starting improvements. As a result of these findings, the business began working on a strategy to bring the Northeast location online sooner than originally planned.

- **Engage back office employees to improve company policies.** Key insights can come from unexpected parts of the company. A financial services company had a higher than average attrition rate for customers when their financial advisors left the company. During their internal customer journey mapping session, the cross-functional team learned that it was common for retiring financial advisors to give only 1-day notice. The Legal and HR teams explained that this was because retirement benefits were based on the advisor's previous 30 days portfolio, and advisors did not want to risk their compensation by giving notice too soon. To rectify this, the company made their retirement policy more employee- and customer-centric by basing retirement compensation on any 30-day period in the previous 12 months, thus minimizing advisors concerns about giving advance notice. The company also used a model to assign new financial advisors based on the best fit for the customer and created opportunities for overlap and an efficient hand-off between the retiring advisor and the customer's new advisor.

#5: Refine Customer Measurement: Focus Insights and Metrics on Key Moments of Truth

Companies have a bad habit of looking at customers through their internal perspectives and viewing customers based solely on their interactions with individual parts of the organization. To better understand how to view customers' experiences, companies can align their listening efforts to focus on the most important parts of the customer journey. To do this, companies should:

- **Align internal service-level metrics to customer expectations.** Companies often create service level metrics that do not accurately measure key aspects of the customer experience. During its CJM effort, Sysco heard that customers expect to receive the products they ordered at the quoted price on the promised delivery date. Internally, Sysco considered the delivery a success if the number of cases ordered equaled the number of cases delivered to the customer, regardless of whether the company needed to make a product substitution for an out-of-stock item. Unfortunately for Sysco, customers saw these item swaps as a breach of trust. Sysco also learned that if the price of an order changed even a small amount, customers were less concerned about the absolute value of the price change and more upset about their expectations being set incorrectly. This knowledge prompted Sysco to redesign its internal metrics to align with how customers defined success with the ordering and delivery process.
- **Define new metrics based on the ideal customer experience.** Many companies create customer experience measurement programs before fully understanding what is important to customers. A chain of gas stations and convenience stores wanted to understand customer expectations for a store visit so it could create relevant metrics for these interactions. After a thorough review of internal and competitive research, discussions with store managers, and shop-alongs with customers, the company mapped its customers' journey and identified four moments of truth, including "Get me in and out quickly" and "Treat me well." The company then revised its customer

experience metrics to include questions about each moment of truth and utilized the findings to drive new training and service recovery programs for store employees.

- **Identify gaps in existing customer feedback collection.** Customer journey maps often highlight where a company lacks an important VoC listening post. In the case of EMC, it had a robust *Voice of Experience* (VOX) program, but the company discovered it did not have a mechanism in place for customers to offer input for a key moment of truth – when customers' products reach the end of service life. So EMC deployed a survey to capture customer insights on how to provide the best "end of service life" experience for aging products. Some of the resulting recommendations that EMC implemented included providing sufficient advance notice and offering options for a technology refresh.
- **Bring together fragmented voice of the customer programs.** After developing customer journey maps, an enterprise technology company realized that its listening efforts were delivering isolated insights to a number of departments, including product, sales, support, and customer success. By reconfiguring its measurement and reporting to align with essential interactions in the customer journey rather than with company departments, the company was able to bring those groups together to discuss relevant insights and define the appropriate collaborative actions to drive improvement. The results? Better coordination when reaching out to customers for feedback, improved synthesis of findings from across sources, and more actionable insights for the company.

PREPARING YOUR ORGANIZATION FOR CUSTOMER JOURNEY MAPPING

The success of customer journey maps does not start in the "what" of the mapping session, but rather in the "how" that an organization plans and prepares to get value from its CJM efforts. As companies start down the path of incorporating customer journey mapping into their customer experience efforts, they should:

- **Establish organizational alignment.** Successful customer journey mapping must start with having a strong executive sponsor and the right internal stakeholders on board before the effort gets underway. This includes defining the scope and objectives of the mapping efforts, and aligning them with a company priority. Senior leaders and participants should be familiar with the scope and objective of the initiative before the mapping session so they can get their questions answered and be ready to contribute their best to the draft journey map. Early buy-in and understanding of what the company hopes to achieve with findings from the journey map also ensures that stakeholders will not be surprised by requests for help when it's time to redesign experiences or drive change (see Figure 13).
- **Determine if outside help is needed.** Customer journey mapping requires a structured approach to derive value, but not all companies have the expertise to manage this process themselves. Due to the scope, complexity, or simply the newness of customer journey mapping to the company, some CX teams will use a vendor or consultant, while considering whether or not to lead the process themselves in the future. Meanwhile other, experienced CX professionals may be ready to lead the process themselves. The key is to understand whether or not your organization could benefit from outside expertise and support.

- **Train key stakeholders about CJM.** In order to endorse and use results from CJM's, key stakeholders need to understand and buy-into the process. For instance, AT&T realized the CX team, key leaders, and stakeholders needed to be knowledgeable and comfortable with customer journey mapping before they could participate in their first project. The company recognized that including customer journey mapping as part of an overall customer experience education program would help to put the methodology in context and increase the likelihood of success. The education also prompted an important shift in the mindset to a more customer-centric focus. So AT&T created a CJM training curriculum with immersion activities that included webinars, in-person sessions, online materials, and templates.
- **Scale customer journey mapping techniques across the organization.** It is rarely possible, let alone necessary, to create customer journey maps for every customer segment and journey. Temkin Group's Customer Journey Mapping Pyramid identifies three levels of effort through which companies can capture the benefits of CJMs (see Figure 14).[6] *Customer journey mapping projects* are the most labor intensive and require significant customer research as they are designed for companies' more critical journeys. *Customer journey mapping sessions* can be used to map many of the company's less complex journeys using existing customer insights during a facilitated session with internal subject matter experts. To replicate the customer understanding gained through customer journey maps without creating a CJM, a company should embed the five questions of *Customer Journey Thinking*™ into day-to-day decision making across the organization. Employees can use these questions to actively consider why customers interact with the company and think about how those interactions fit within the customers' objectives and activities.

[6] See Customer Experience Matters, "Five Questions That Drive Customer Journey Thinking" (May 2014).

Sample Design Persona for an Online Travel Agency

Personas are derived from qualitative research with actual customers. Bring a persona to life with a name and demographic data.

Include a story that provides a rich description about the persona that gives readers an understanding of who she is and the goal she is pursuing.

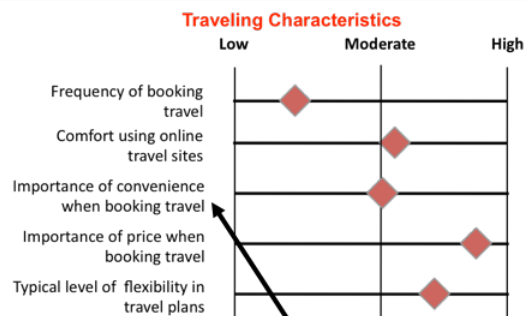
Name	Gender	Age	Family Income	Education	Location	Family
Donna Redding	Female	45	$95,000	B.S. from U.C.L.A.	Palos Verdes Estates, CA	Married with three kids

Donna Redding

"I keep our family up and running"

Suburban mom

I'm a 45 year-old mom who runs my house. We have three kids between the ages of eight and twelve who require just about all of my time. My husband is a lawyer who works a lot of long hours so I end up doing most of the family planning. I try to keep track of everything that's going on so that our family runs smoothly. My eldest son calls me the CFO of the family, since I keep track of the finances. We don't go on vacation very often, so I want to make sure that we get the most out of every trip together.



Round out the description with a segment name, indicative quote, and a picture.

Identify key characteristics that drive customer behavior and are relevant to the journey being mapped. These are used to distinguish behaviors of different personas.

Figure 1

Facilitating Successful Internal Sessions to Draft a Customer Journey Map

Who to Include	▪ Identify appropriate participants with executive sponsor ▪ Enlist subject matter experts representing functions across the journey ▪ Engage customer-facing and back office, non-customer facing employees ▪ Seek out participants who are creative, open minded, and customer-focused
How to Prepare	▪ Craft a clearly defined objective for the mapping project ▪ Identify which persona or personas to use ▪ Select which journey or journeys to map ▪ Gather and share appropriate customer research ▪ Determine pre-work or reading assignment for participants prior to session(s)
How to Run Session(s)	▪ Set up space for cross-functional collaboration ▪ Define journey start and end to maintain focus ▪ Outline the session(s) expectations ▪ Create opportunities to complete customer tasks (e.g. navigate website, place an order, etc.) ▪ Stay positive and upbeat
What to Do Next	▪ Finalize draft map into format to use when validating with external customers ▪ Share validation plan and timing with session participants (e.g. which customers to target) ▪ Distribute session highlights/outcomes to participants and leadership

Figure 2

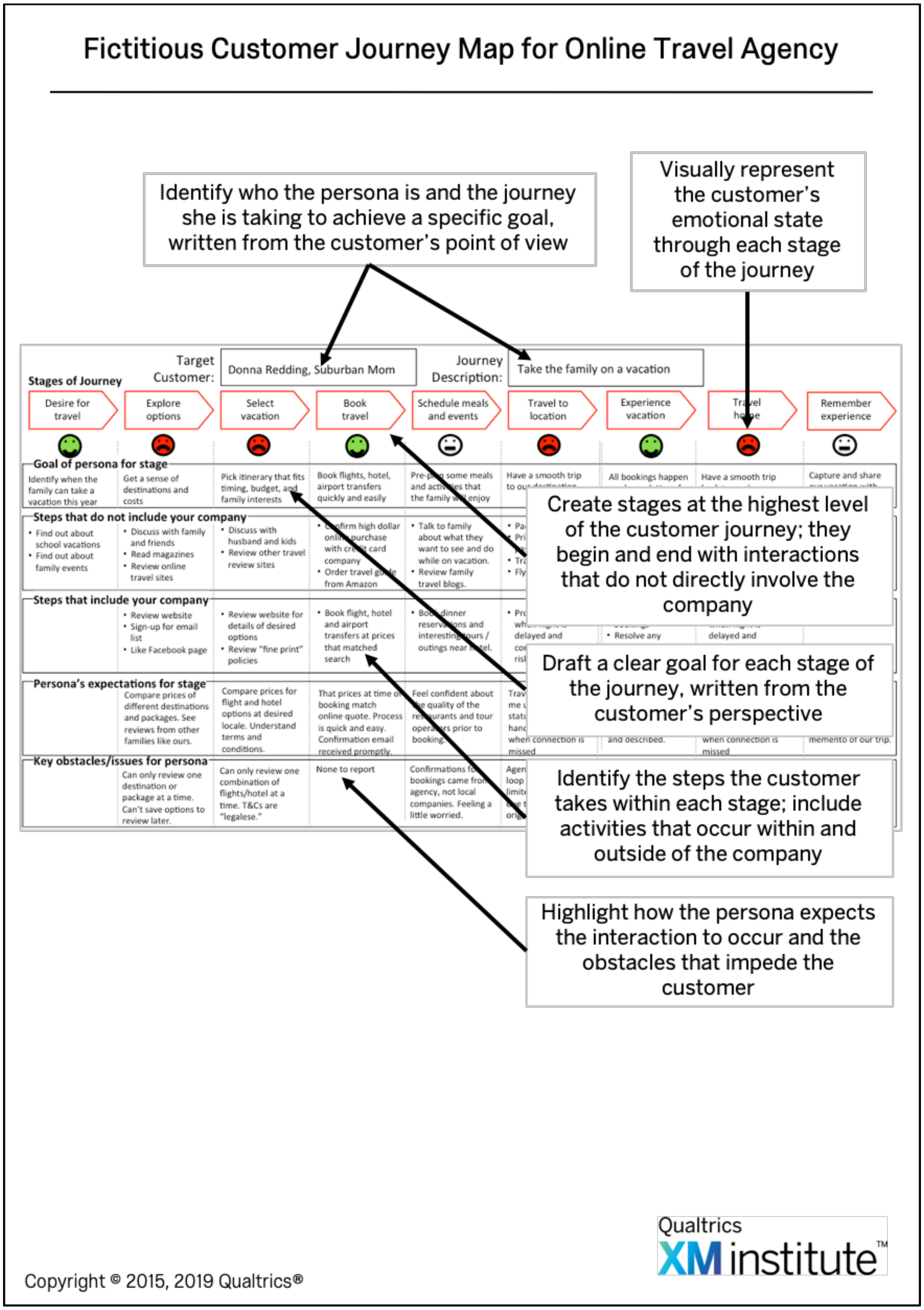

Fictitious Customer Journey Map for Online Travel Agency
Identify who the persona is and the journey she is taking to achieve a specific goal, written from the customer's point of view
Visually represent the customer's emotional state through each stage of the journey
Stages of Journey
Target Customer:
Donna Redding, Suburban Mom
Journey Description:
Take the family on a vacation
Desire for travel
Explore options
Select vacation
Book travel
Schedule meals and events
Travel to location
Experience vacation
Remember experience
Goal of persona for stage
Steps that do not include your company
Steps that include your company
Persona's expectations for stage
Key obstacles/issues for persona
Create stages at the highest level of the customer journey; they begin and end with interactions that do not directly involve the company
Draft a clear goal for each stage of the journey, written from the customer's perspective
Identify the steps the customer takes within each stage; include activities that occur within and outside of the company
Highlight how the persona expects the interaction to occur and the obstacles that impede the customer
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Figure 3

Understanding Moments of Truth

What are moments of truth?	▪ Not every interaction has the same effect on customers. Moments of truth are the individual interactions that have the **most significant** impact on customer loyalty.
Why do moments of truth matter?	▪ Organizations will often get the most value from their efforts if they disproportionally invest their time and energy into improving moments of truth. ▪ Even if a company does well on most of its interactions, customers will more vividly remember what happened during moments of truth.
What are typical moments of truth?	▪ The first time that a customer uses a company's products or services. ▪ A product or service is not working correctly and it is keeping the customer from doing something that she really wants to do. ▪ A situation where the customer is worried, upset, or very concerned.
How do you find moments of truth?	▪ Qualitative research to uncover interactions where the customer demonstrates strong positive or negative sentiment. ▪ Quantitative analysis to identify interactions that have a strong correlation with key loyalty metrics (e.g. SAT, NPS, Effort, Retention).

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Figure 4

Best Practices for Driving Action from Customer Journey Maps

Categories for Driving Action	Best Practices
Find and Fix Problems Identify pain points and deploy customer-focused solutions	▪ Ensure that internal processes don't impede the customer ▪ Adjust customer communications to improve the experience ▪ Improve systems to reduce customer frustration ▪ Combine CJM with quantitative data to make the case for change
Build a Customer Mindset Foster customer-centricity across the organization	▪ Challenge internal ideas of what the customer wants ▪ Highlight how employees fit into the bigger picture ▪ Incorporate customer-centric thinking into daily activities ▪ Have CJM stakeholders try to complete customer tasks ▪ Socialize findings broadly across the organization
Design Innovative Experiences Uncover and fulfill unmet customer needs	▪ Meet customer needs that fall outside the company ▪ Create a closer relationship with customers ▪ Expand alternatives during process redesign efforts ▪ Ensure new relationships get off to a good start ▪ Streamline initiatives within a design framework ▪ Create engaging opportunities for customers to share feedback
Create Strategic Alignment Link customer experience to desired business outcomes	▪ Increase knowledge of market changes ▪ Use maps as part of due diligence during an acquisition ▪ Validate and drive prioritization of current projects ▪ Engage back office employees to better understand company policies
Refine Customer Measurement Focus insights and metrics on key moments of truth	▪ Align internal service-level metrics to customer expectations ▪ Define new metrics based on the ideal customer experience ▪ Identify gaps in existing customer feedback collection ▪ Bring together fragmented voice of the customer programs

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Figure 5

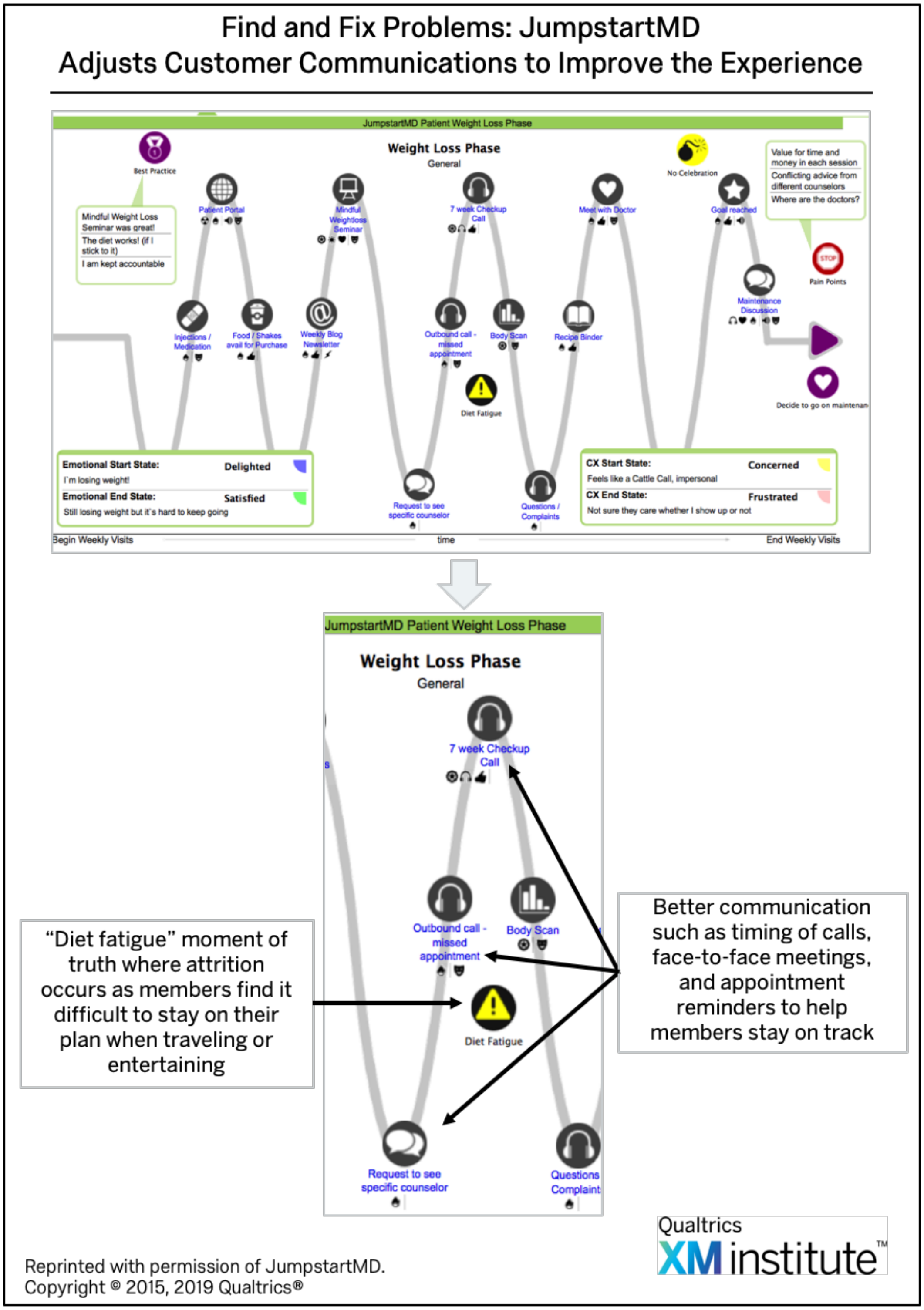
Find and Fix Problems: JumpstartMD
Adjusts Customer Communications to Improve the Experience
JumpstartMD Patient Weight Loss Phase
Weight Loss Phase
General
Best Practice
Mindful Weight Loss Seminar was great!
The diet works! (if I stick to it)
I am kept accountable
Patient Portal
Mindful Weightloss Seminar
7 week Checkup Call
Meet with Doctor
No Celebration
Goal reached
Value for time and money in each session
Conflicting advice from different counselors
Where are the doctors?
Pain Points
Maintenance Discussion
Injections / Medication
Food / Shakes avail for Purchase
Weekly Blog Newsletter
Outbound call - missed appointment
Body Scan
Recipe Binder
Diet Fatigue
Decide to go on maintenan
Emotional Start State: Delighted
I'm losing weight!
Emotional End State: Satisfied
Still losing weight but it's hard to keep going
Request to see specific counselor
Questions / Complaints
CX Start State: Concerned
Feels like a Cattle Call, impersonal
CX End State: Frustrated
Not sure they care whether I show up or not
Begin Weekly Visits
time
End Weekly Visits
JumpstartMD Patient Weight Loss Phase
Weight Loss Phase
General
7 week Checkup Call
Outbound call - missed appointment
Body Scan
Diet Fatigue
Request to see specific counselor
Questions Complaint
"Diet fatigue" moment of truth where attrition occurs as members find it difficult to stay on their plan when traveling or entertaining
Better communication such as timing of calls, face-to-face meetings, and appointment reminders to help members stay on track
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Figure 6

Lynden's *Be the Customer* Game

Executives reviewed the game and sent emails encouraging employees to play the game. Managers provided a half hour for cross-functional teams of employees to play together in groups of 4 or 5

Each space on the board relates to a specific step in the customer journey. Based on the emotion elicited by the interaction occurring on the space (customer pleasure, pain, or neutral), players get an extra turn, lose a turn, or move one space.

As employees finish each stage they stop and discuss what they have learned.

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Figure 7

Build a Customer Mindset: Ways to Socialize Findings Broadly Across the Organization

Output	Audience	Benefit
Gallery Walk	▪ Executives ▪ Employees who did not participate in sessions	▪ Provides opportunity to explain the map to those unfamiliar with it ▪ Allows for interactivity (leave comments, thoughts, etc.)
Desk pad or placemat version of map	▪ Cross-functional participants ▪ Interested senior leaders or employees in other areas of the company	▪ Keeps customer at the front of participants' minds ▪ Acts as a physical reminder to consider customer in all decisions
Report	▪ Cross-functional participants ▪ Executives ▪ Managers responsible for moments of truth	▪ Delivers strategic version for leadership in familiar format ▪ Creates tactical version for managers ▪ Compiles findings and actions plans in one location ▪ Lends itself to in-person sharing or as a take away document or file
Infographic	▪ All employees	▪ Details the process and the findings ▪ Offers an easy to understand format ▪ Provides a high level overview
CJM Poster	▪ All employees	▪ Creates visibility by hanging in office at various locations ▪ Looks eye-catching and appealing ▪ Keeps customer at the front of employees' minds

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Figure 8

Design Innovative Experiences: Sysco Ensures New Relationships Get Off to a Good Start

Moments of Truth	Improvements Made
Communication and visibility to escalation process	▪ Front line supervisor meets with every new customer in person and hand delivers new customer kit ▪ Front line supervisor hears about and reports back about additional opportunities as well as positive and negative performance issues
First new delivery designed to show reliability	▪ Warehouse employees directly involved in creating positive first experience for new customers ▪ Warehouse employee puts a sticker “selected with care by <employee name>” on every box for a first delivery ▪ Operations and sales work more closely together to meet customer needs
Understanding product assortment	▪ After 8 weeks, the new customer is brought in for a business review to ensure needs are being met ▪ Sales and merchandising work together to showcase additional, relevant offerings

Outcomes:

- Improved onboarding for locally-managed independent business segment
- Increased employee engagement and excitement around new customers
- More interaction between teams that traditionally did not work closely (e.g. sales, operations, merchandising)
- Sysco as a whole gets to know the account better

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Figure 9

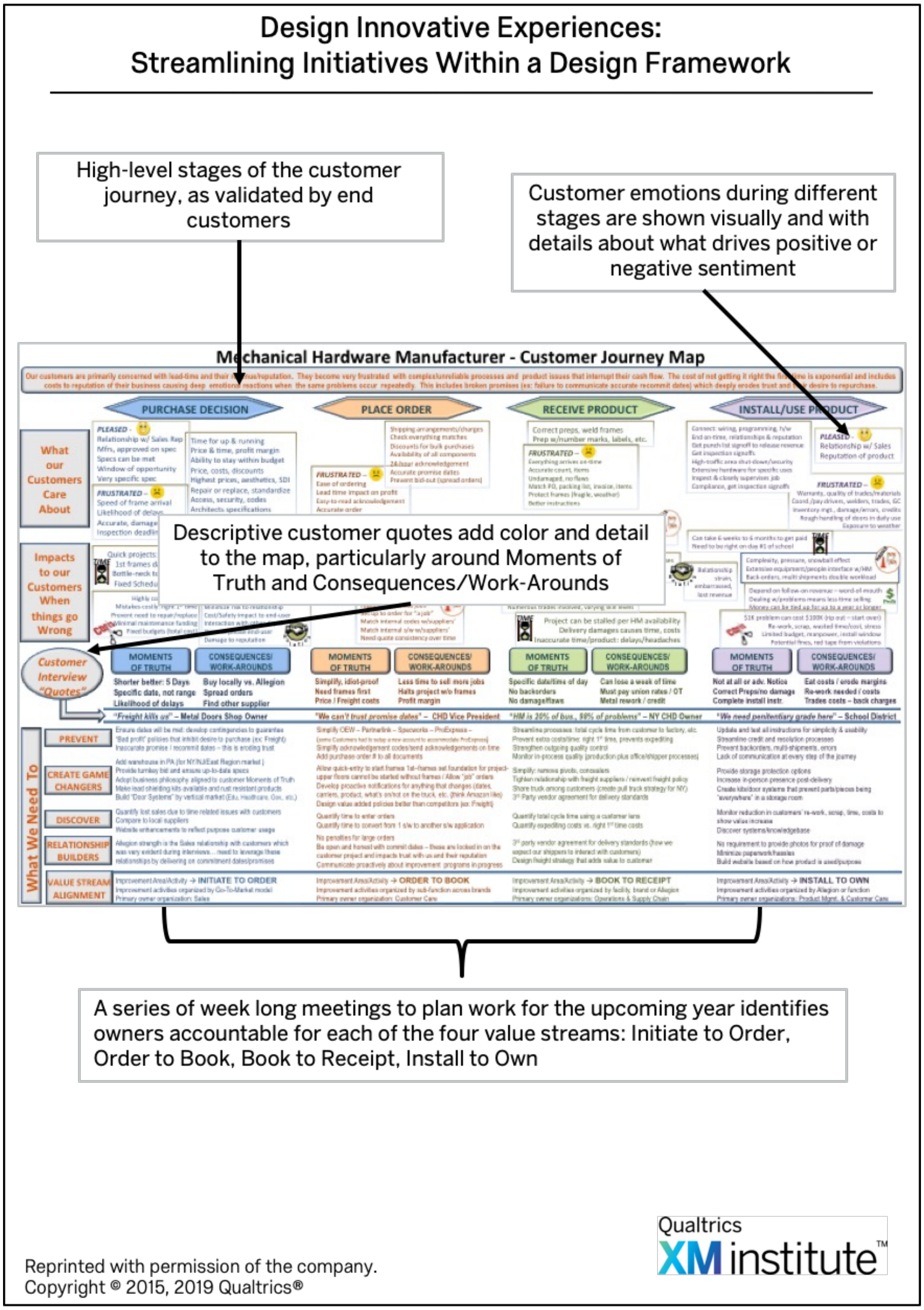
Design Innovative Experiences:
Streamlining Initiatives Within a Design Framework
High-level stages of the customer journey, as validated by end customers
Customer emotions during different stages are shown visually and with details about what drives positive or negative sentiment
Mechanical Hardware Manufacturer - Customer Journey Map
PURCHASE DECISION
PLACE ORDER
RECEIVE PRODUCT
INSTALL/USE PRODUCT
What our Customers Care About
Impacts to our Customers When things go Wrong
Descriptive customer quotes add color and detail to the map, particularly around Moments of Truth and Consequences/Work-Arounds
Customer Interview "Quotes"
MOMENTS OF TRUTH
CONSEQUENCES/ WORK-AROUNDS
What We Need To
PREVENT
CREATE GAME CHANGERS
DISCOVER
RELATIONSHIP BUILDERS
VALUE STREAM ALIGNMENT
A series of week long meetings to plan work for the upcoming year identifies owners accountable for each of the four value streams: Initiate to Order, Order to Book, Book to Receipt, Install to Own
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Figure 10

Types of Customer Research for Validation of Customer Journey Maps

Type of Customer Research	Should Be Used To:	Potential Challenges:
1-on-1 interviews	▪ Gather customer input in person or over the phone ▪ Reach geographically diverse respondents	▪ May be hard to capture context and body language over the phone
1-to-many interviews	▪ Include different user roles in an interview (decision maker and end user) ▪ Better understand role of each user with the product or service	▪ Junior employees may not feel comfortable sharing their opinions
User conference attendees	▪ Connect with a large number of key customers in one location	▪ Time bound by event date
Focus Groups	▪ Reach multiple customers at one time by bringing a group of customers together for a moderated discussion in person or online	▪ Group think can occur in this setting
Customer advisory panel	▪ Collect feedback from pre-screened customers who are willing to participate in online feedback sessions	▪ Skews toward most engaged customer segments ▪ Might not represent diverse viewpoints
Video of customer interaction	▪ Identify nomenclature that doesn't make sense ▪ Highlight confusing areas	▪ Time consuming to create, edit and view ▪ May be difficult to secure participation
Ethnography	▪ Accompany a customer through actual journey ▪ Provide context for questions and responses	▪ Requires interviewer skilled in ethnographic techniques

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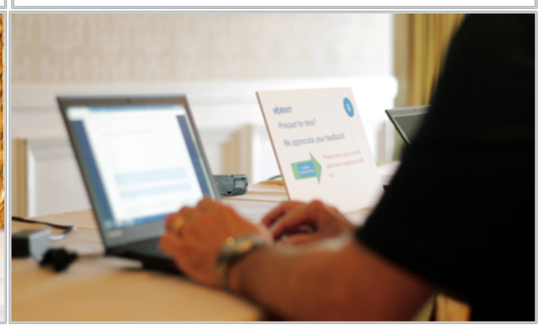
Figure 11

Verint's *CX Zone:* Create Engaging Opportunities For CJM Validation

CJM prominently displayed in the center of the room. Verint walks customers through the map and requests feedback on accuracy.

Customers use "emotion" stickers to indicate sentiment along the journey.

Verint makes kiosks available for in-depth interviews and follow up surveys.



Customers encounter flip charts with key questions when exiting CX Zone. The ideas are put on the walls and other customers comment and provide additional insights.

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Figure 12

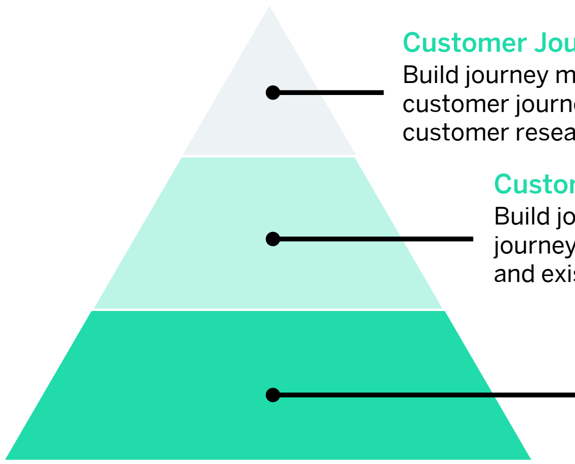
Checklist for Establishing Organizational Alignment

Recommendations to Successfully Getting the Right Objective Defined and Stakeholders Involved in Your CJM Effort

- **Frame the objective and scope for the CJM:** Clearly define the business problem (e.g. current state vs. future state) and what is and isn't included in the effort; determine the right level of detail to share with relevant stakeholders
- **Enlist an influential executive sponsor:** This leader should have a connection to the business problem being mapped, can influence other leaders to participate, and will help drive action on the map's findings
- **Identify stakeholders to participate:** Work with the sponsor to recruit the right individuals to the cross-functional team that drafts the map; they will have sufficient customer and business acumen and will help socialize the CJM
- **Set participants up for success:** Provide the cross-functional team with information about the customer journey mapping methodology as well as customer research about the persona and journey they will map
- **Remind participants about their ongoing role:** Creating and validating the journey map is just the beginning; they will need to stay involved to drive changes to internal processes, customer interactions, and outgoing communications

Figure 13

The Customer Journey Mapping Pyramid



Customer Journey Mapping Projects
Build journey maps for a few critical customer journeys using significant customer research.

Customer Journey Mapping Sessions
Build journey maps for many customer journeys using facilitated sessions with SMEs and existing customer insights.

Customer Journey Thinking™
Embed thinking about customer journeys into day-to-day decisions across the company.

Five Questions That Drive Customer Journey Thinking™

1. Who is the customer?
Start by recognizing that different customers have different needs. It's important to understand who the person is before thinking about a specific journey.

2. What is the customer's real goal?
To understand how customers will view an interaction and what's shaping expectations you need to think about what they are really trying to accomplish.

3. What did the customer do right before? (three times)
A company interaction is part of a larger journey, so you need to think about where they've been prior to the interaction and repeat the question three times.

4. What will the customer do right afterwards? (three times)
The customer interaction with a company is rarely the last step in a journey, so you need to think about what they do next and repeat the question three times.

5. What will make the customer happy?
Rather than just aiming to satisfy customers' basic needs, think about what it will take to provide each customer with the most positive experience.

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Figure 14