

Customer Journey Mapping

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What is customer journey mapping

“Customer journey mapping is the process of tracking and describing the experiences that customers have as they interact with a service, taking into account not only what happens to them, but also their responses to their experiences.”



Would journey mapping help me?

Are you sure you fully understand the experience that customers have at the moment?



Would it help you to have high impact feedback to challenge conventional thinking?



Do you have intractable policy challenges – where you keep trying things but without getting anywhere?



Do you need to convince colleagues in other functions about the importance of a customer-focused approach?



What can a journey map do for you?

**Better
Customer
Experience**



**Greater
Efficiency**

Better Customer Experience

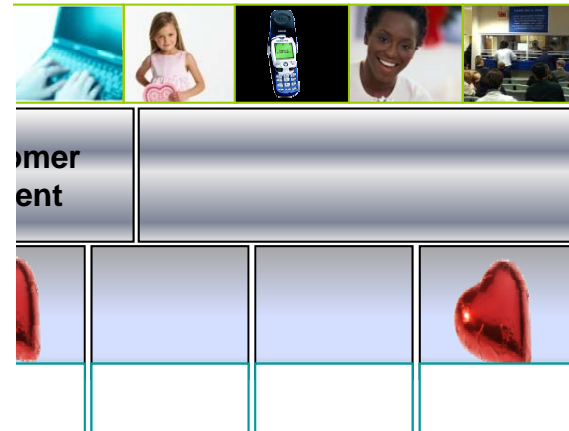
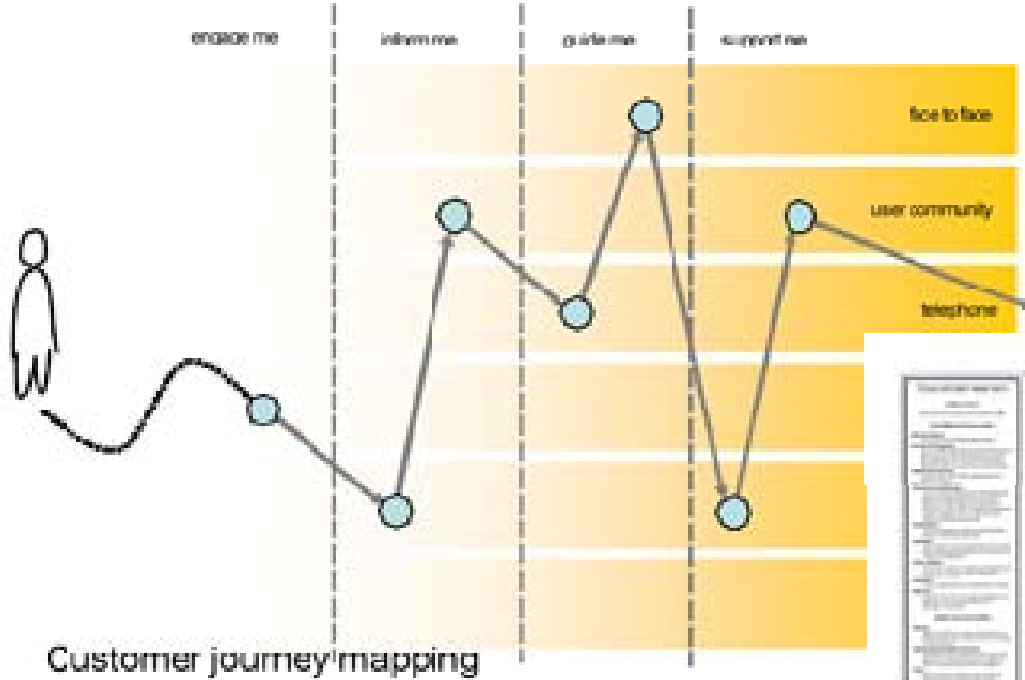
- See and approach things from the customer's point of view
- Meet expectations, recognising people's time is valuable and the need to be flexible about how and when they can access your business
- Deliver a seamless, streamlined experience cutting across silos by recognising where and when to join things up for the customer
- Understand how much we can expect customers to do, and where we might be putting undue stress on them
- Deliver information, messages and services at the most appropriate time based on the customers experience
- Get it right when it really matters e.g. when emotions are highest or need greatest

Greater Efficiency

- Target limited resources for maximum impact
- Plan the most efficient and effective experience
- Anticipate demands on the system and plan so that we can meet them
- Prioritise between competing calls on resources based on greatest needs
- Work across silos and identify process change points where problems can arise
- Identify problems and issues without attributing blame, be ready to change
- Set performance indicators to measure and track progress
- Identify cheapest cost to serve, and influence people to transact in a cost efficient way (e.g. new channels)

HEART MONITOR MAP: Use this tool to record the highs and lows of the customer experience throughout their journey, to express it in a visual way that clearly identifies problem areas.

Service: a journey through "touchpoints", across channels and over time



Building Journey Maps

What is involved in customer journey mapping

Track and Describe

Follow and monitor, high level of detail, from customer viewpoint.

Customer Experience

Understand the experience they have with you as if we lived it ourselves.

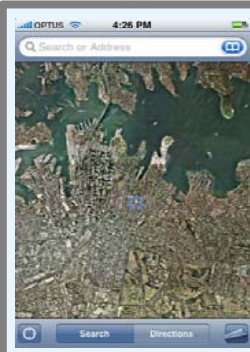
What happens

Identifying exactly what customers go through, every step of the way.

Customer response

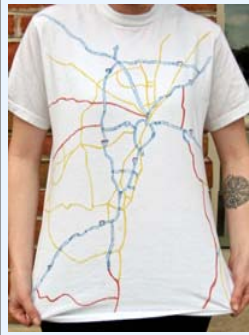
Uncovering both the physical and emotional response to the service we provide.

The very first step in any journey mapping project is to be clear about the context.



Who will use the maps?

- Identify key users and their knowledge base
- Agree how they will be involved
- Identify additional stakeholders and their involvement
- Align expectations re. process and outputs



How will maps be applied?

- Confirm maps usage and the level of detail / robustness required
- Set clear, measurable objectives
- Consider other mapping approaches that might help; e.g. mapping the system



What is the scope?

- Confirm the budget and timescales
- Agree involvement of other departments & agencies
- Do an insight audit – what do we know already?
- Make an initial plan of the approach, process and anticipated outputs

The starting point for journey mapping must always be the customer, and the initial step is to decide *which* customer.

SCOPING

What resources are available and does this allow you to map all customers? Can you treat all customers the same, or do you need to segment them?

Use non-technical / customer language.

SEGMENTS

Is there an existing segmentation base and can you use it? If not, are there assumptions you can make on customer groups?

PRIORITISATION

Which group[s] are you focusing on and why? Does this feel right? Will focusing on them make a real difference?

We now move into the research phase to understand your customer's journey.

Recruit Actual Customers



Get customers to walk through the journey in real time in the real world

Customer Recall



Recruit real customers to recall the journey in focus groups or interviews

Staff Walk Journey



Knowledgeable staff 'walk the journey', recalling needs and emotions they see in customers.

Construct The Journey



Construct the journey using past research and staff input, ideally in a workshop setting.

Getting to the heart of what really drives customers is like peeling an onion...

Layer 1: Actions



- What people do
- Why – what's driving them?

Layer 2: Responses



- What people say
- Why – what's behind the words
- How honest are they being?

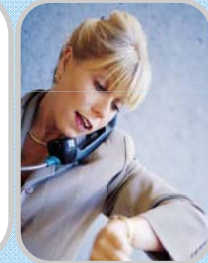
Layer 3: Language



- How people say things
- What words do they use?
- What's the body language?

Layer 4: Feelings

- What are they feeling? Trust? Comfort? Irritation?
- What's causing this?



Layer 5: Emotions

- What are their real loves and hates?
- Where are the passion points?



There are 5 steps to developing the map:

Step 1
Confirm the journey and customer

- Now you have customer insights, review the work of the set-up phase to confirm type of journey and customer segments
- Ensure definitions are clear and that everyone shares a common understanding of them

Step 2:
Identify key journey steps

- Note down all the journey steps people go through. Put these on Post-it notes so they can be moved around
- Arrange these in chronological order, challenge to make sure the sequence is right
- Ideally map around 6-10 key journey steps, focus on key steps.

Step 3:
Actions, feelings, thoughts and reactions

- For each step, write down what customers do and how they think and feel
- Write in the everyday language customers would use, include people's emotions and how strongly they're felt
- Use emotive words – they help bring people to life





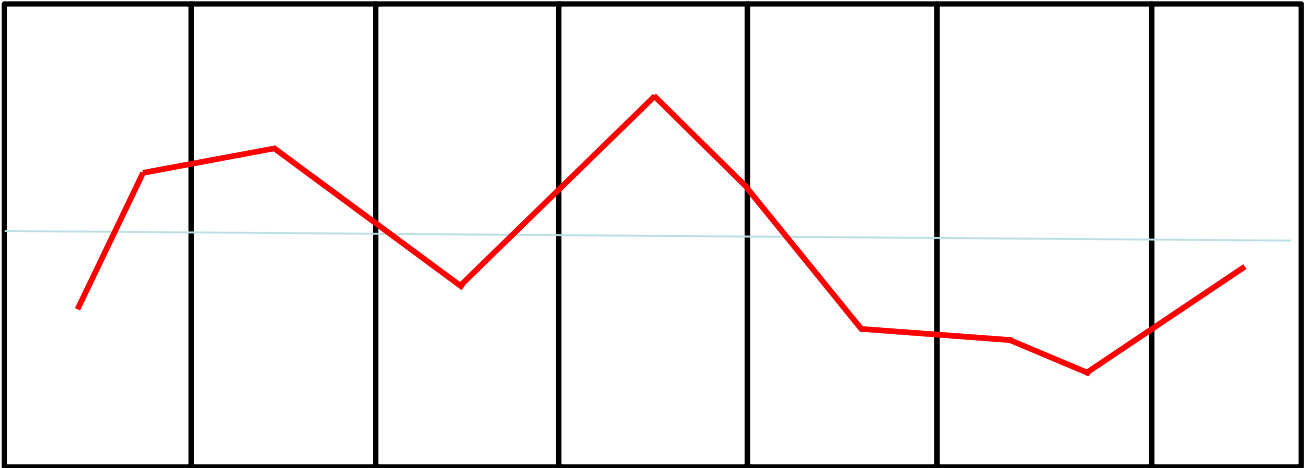
Step 4:
Touch points

- For each step in the journey write down what the touch points are - these are the points where you have some sort of interaction with the customer
- Think about physical interactions (e.g. buildings), human contact (face to face or remote) and communications

Step 5:
Moments of truth

- Finally we identify the 'moments of truth', the key points in the journey where customers evaluate the experience, or make a crucial decision
- Aim to be discriminating here – don't be tempted to label every step as a moment of truth!

Customer Journey Map: Home Insurance Claim – Walk through

Objectives, scope & journey type	Home break in claim			Customer segment	Over 55 and part time workers		
Moments of truth							
Key journey steps	Notify of claim	Submit claim	Await response	Minor items approval	Quotes for major items	Await processing	Receive payment
Ups and downs of the customer experience							
Addressing the issues	Ease of access to someone	Forms, email comms	Proactive notification Improve processes	Early awareness of eligibility	Scheduling, SLAs, proactive comms	Proactive notification improve processes	

Questions



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