# Customer Journey Mapping 101.



#### PART 1

## What is Customer Journey Mapping and Why do I need it?



# The key to creating business value...

...is to develop a compelling customer value proposition that delivers real value. Truly understanding the needs and preferences of customers, as well as their behaviour along the customer journey, is essential to you achieving a successful business strategy.

The term 'customer experience' is commonly associated with how customers interact with a business and its services on a transactional level, at each interaction or touch point. In response, many organisations structure each department's responsibilities towards specific interactions with customers, and accountability falls to them for any issues that arise. It seems a sensible approach, and a growing number of companies are working hard to keep customers happy in this way, with each department striving to provide a quality product alongside excellent sales and post sale customer service.

The challenge with this method is that it's disjointed. The customer's experience, when divided up across departments and individual touch-points, misses the bigger, overall picture: the customer's end-to-end journey and experience as a whole with your organisation.

By **taking the customer's viewpoint** and walking with them through their journey, businesses can begin to understand and empathise with what their customers truly value and learn how to best unlock this value (and improve their service) in future.



## What is a Customer Journey Map?

Have you ever tried to list the range of services your organisation offers? Do you ever struggle to articulate exactly what it offers? Does your organisation talk a lot about 'putting customers first', or 'keeping them at the heart of your service delivery' but you're not sure what this means? What do these 'throw away' phrases mean to a real customer interacting with your organisation across multiple touch-points?

Say hello to your new pal, Customer Journey Maps! Or CJM's for short...

Simply put, a **Customer Journey Map tells the story of your customer's experience** from their first interaction with the organisation through to the end.

Kerry Bodine, author of 'Outside-In' says that "Journey maps are diagrams that visualise the actions, thoughts, and feelings of a person or group over time." The secret ingredient to creating outstanding experiences for your customers is to understand their perspective. Only then do you have the information to design an improved experience they will truly value.

A customer journey map helps identify areas of friction, creates empathy, and really does keep customers at the heart of every interaction during their journey with you.

What makes a customer journey map highly valuable is its process. Creating one requires you to perform detailed customer research that **leads to compelling customer-centric stories that can be visualised along the journey.** 





An example of a medium-fidelity customer journey map for Sydney Metro



## What is the value of a Customer Journey Map and why should I have one?

These days the voice of the customer should be the loudest one in any business. The impression you make on each and every customer is of enormous importance.

The true value of customer journey maps lies in their ability to invoke empathy. They bring real human experiences to light, those that organisations often overlook, whether the experiences of internal staff or external customers. They are also a great tool to provide a clear view of the organisation's overarching customer strategy.

Customer journeys can be long, stretching across multiple channels and touch-points, and span over days, weeks, even months. Interactions could include your customer on-boarding process, problem resolution in the contact centre, how customer enquiries are handled and how quickly calls are answered.

Proto's in-depth customer research helped us to uncover underlying customer needs that wouldn't have been possible without an 'outside-in' approach. The team identified the core customer problems and provided actionable insights that enabled us to remove key areas of customer friction and frustration and redesign a credit card experience like no other.

— Christian Johansson Head of Marketing, Customer Finance, Westpac

In our nine years of experience, we have found the main pitfall for organisations is their failure to understand the full context of their customers' experience. **The flow-on effects of a disjointed end-toend experience can be dramatic:** the reality could be hundreds of calls to the contact centre, increased customer churn, loss of sales, falling staff morale and employee Net Promotor Score (NPS).

At the other end of the spectrum, we have found companies who have nailed the art of customer understanding and prioritising the things they value. These organisations reap the benefits of increased customer satisfaction via positive NPS, increasing sales, reductions in attrition and reduced service costs. They also have happier staff, who feel they are having an impact, changing customer's lives for the better instead of just being a cog in the wheel.

#### CJM's have the power to...

- Shift company perspective CJM's help you understand your organisation's internal happenings and its external impact. You'll refocus from inside-out to outside-in.
- Break down silos CJMs make collaboration and communication within internal business units inevitable. This leads to better alignment of customer goals and helps create a united plan of attack to work towards them.
- Assign ownership A lack of accountability along touchpoints creates inconsistencies in service, ultimately diminishing the customer's experience. CJMs assign tasks to the right staff and keep everyone in the organisation working towards the same target (happier customers!).
- Target customers A CJM is essentially a heat-map of where customers are receiving good quality attention. Once you understand how and why, you can use this information to discover newer ways to appeal to a wider audience or customer base.
- Help understand the numbers CJMs help to uncover the why (qualitative) behind the what (quantitative data) for specific metrics. For example: What has caused the drop in mobile app downloads?

#### PART 2

## The Anatomy of a High-Performing Customer Journey Map







## The goals of a Customer Journey Map

In Part 1, we looked at why every business needs Customer Journey Maps and how they can be used to help businesses see through the eyes of their customers, develop empathy and take an outside-in approach.

Now we look at how to build a Customer Journey Map that's designed to inform the business on how to address customer needs.

When creating a Customer Journey Map, it's important to articulate the goals it needs to fulfil.

Many organisations have accumulated a great deal of research, particularly statistics based, (quantitative) research, which identifies customer problems. The task our clients struggle with is prioritising these problems. **Which part of the journey should the organisation concentrate on solving first?** 





## Which part of the journey should the organisation concentrate on solving first?

7 ways Customer Journey Mapping helps address this question

#### Makes sense of quantitative data

Quantitative data can only tell part of the story. It might tell you your customers are unhappy with their call centre experience. Digging deeper with qualitative research (surveys, interviews, mystery shoppers) will help you find out why.

#### Identifies main pain points and moments of truth

The addition of gualitative research will help understand the emotional drivers of customers unhappiness and pinpoint the key moments on the journey which cause the most pain.

#### Identifies areas of greatest opportunity for improvement

The areas of most pain for customers and their moments of truth are clearly the areas in need of most improvement and where the greatest opportunities lie.



#### Gives clarity on why customers behave the way they do

Customer behaviour is not always rational. Sometimes it's motivated by deep emotional drivers that even the customers themselves aren't fully aware of. A Customer Journey Map can help identify these.



Proto were the only company I came across that not only looked at the prospect or customer journey, but also looked at the organisation providing that experience. Including the employees, how they feel at the different milestones, as well as the customer. They think about the business holistically and understand that to succeed you need to look within the company as well as at your customers. That's what set Proto apart for me when we went into this process.

— Matthew Liebmann Chief Operating Officer, Movio

### Is well designed for maximum impact and understanding

A Customer Journey Map is a map, and maps can be beautiful. Use this opportunity to illustrate with maximum impact exactly what your customers experience when they deal with you.

#### Prioritises opportunity areas

The Customer Journey Map matches key pain points/moments of truth along the customer journey with opportunities for improvement. Priorities are clarified and the plan for change becomes far more obvious. This prioritisation helps organisations focus on activities that will have the most positive impact on customers and result in the greatest return on investment.

### Identifies areas of greatest opportunity for improvement

The areas of most pain for customers and their moments of truth are clearly the areas in need of most improvement and where the greatest opportunities lie. A well-designed Customer Journey Map provides guidance for the creation of a roadmap for change. This roadmap is the key to helping organisations reap the financial benefits of providing customers with amazing customer experiences. This could be seen as increased customer satisfaction via positive Net Promotor Score (NPS) results, increases in sales, reduced churn, reduced costs of servicing customers and happier, more fulfilled staff.



## The Elements of a Customer Journey Map

Customer Journey Maps have three main elements: a perspective, an experience and findings and insights.

#### **The Perspective**

The perspective of the journey map is the person for whom this journey is designed for (persona/ actor) and the goal they're trying to achieve. For example, it could be a bank customer being on-boarded for their new credit card. In our experience, we've found taking the journey of a typical customer and mapping this process allows coverage of 70-80% of issues across a number of personas. Alternatively, a Customer Journey Map can be broken down by persona. This will help you understand the similarities and differences across different persona journeys. You can use these findings to prioritise high value personas.

#### **The Experience**

The specific experience being mapped. This is the core of the journey and catalogues every customer action, thought and emotional experience. To make it feel real and increase customer empathy, it should contain verbatims (direct comments from customers), videos and images gathered from the research.

#### **The Findings and Insights**

This is the part of the Customer Journey Map used to transform insight into profits. What key learnings and insights has your research uncovered? Based on these, what are the opportunities to move ahead with? What significant pain points were discovered? Which insights can now be put to practical use so internal teams can begin to meet customer needs?



# The requirements for a Customer Journey Map

- Qualitative research Adding deep qualitative research like surveys, interviews and observations to your existing research will fill in the gaps existing (quantitative) research won't cover. It may also validate areas where the results of quantitative research are not clear. Different types of research work together to increase the quality of insights
- Storytelling The power of customer stories gathered in building the Customer Journey Map cut through organisational noise and clarify which actions are needed. When the voice of the customer is expressed loudly (and actively listened to), the path to change becomes far clearer.
- Collaboration Collaborating with stakeholders within the organisation will help develop a direction for customer experience. It will also establish engagement across the business for the key task: improving the customer journey.
- The right design Customer Journey Maps should be designed to communicate with their intended audience. They should be simple and functional, not overly complex or full of tricks.

- Prioritisation Understanding the key moments of truth and areas of opportunity that appear along the journey makes it simpler to prioritise exactly what customers value. Attention and resources can be focused in the direction of priorities, maximising return on investment.
- Assignment of responsibility Use the Customer Journey Map to assign ownership of customer experience to everyone within your organisation. Use it to illustrate, illuminate and educate your people so they can work towards creating an amazing experience for your customers.

#### PART 3

## What problems does Customer Journey Mapping Solve?





An example of a low-fidelity customer journey map for a Sydney Council



## The positive impact of an integrated Customer Journey Mapping program

Never underestimate the power of good Customer Experience (CX) design. It's been transformational for many of our clients. These clients were precisely where you are now: looking up at the mountain of challenges and goals, and wondering how on earth they would overcome them.

With our help, they committed themselves to the outcome they wanted, and now they're reaping the benefits.

In the following pages are some examples of Customer Experience problems we helped to solve by implementing the principles of Customer Journey Mapping.

If you can relate to these situations within your own business, get in touch to get started before you lose more time.



## **Eliminating Frustrating Call Centre Interactions**

#### The Problem

Dealing with over 500,000 interactions per year, the call centres of a large telecommunications company were experiencing high customer churn and universally negative feedback.

The company itself wanted to move beyond a price-based strategy to attract and retain a growing share of customers. As part of this, they wanted to increase customer advocacy by eliminating the frustrating elements of their call centre experience.

#### The Solution

By mapping the Customer Journey, we were able to identify the critical components of a great customer interaction and the characteristics and behaviours of an excellent customer service representative.

Using customer research tools to focus on both staff and operational processes, we were able to identify that the 41 point phone call checklist was too restrictive and was removing the sense of warm human engagement from customer interactions.

We developed a 6-month training program with their call centre in Manila, which included the teaching of ideal call flows, customer experience scorecards, grading standards and explanatory videos.

#### 🗘 The Benefits

By simplifying and personalising the customer experience, we helped the customer achieve their customer churn reduction targets and exceed customer satisfaction targets to +25 NPS. Providing a dynamic and personalised experience throughout the customer journey is key to maintaining a positive customer experience. By implementing Customer Journey Mapping, we were able to remove the factors that were preventing that kind of experience, all while stripping out more than 20% of our service costs in under 12 months.



## Improving Customer Engagement

#### The Problem

A sizeable Australian superannuation company wanted to improve their customer engagement. Companies that lack consistent customer engagement lose the opportunity to generate loyalty, sales and insights from customer feedback.

#### 🚺 The Solution

Through the Customer Journey Mapping process, we were able to step into the shoes of the customer across a number of touchpoints and channels. This allowed us to empathise with how they experienced the company and what measures we could take to enhance that experience.

Once the interactions were mapped, we were able to identify key factors that prevented the delivery of a 'Wow the Customer' experience. We highlighted insights, emotions and areas of opportunity which would allow the client to improve their customer's journey significantly.

#### 🔂 The Benefits

As a result of integrating our insights into their customer strategy, our client was able to provide, inspiration and guidance to their employees to improve their customer engagement. This ultimately led to them delivering on their customer's idea of a 'Wow' experience.

## Upgrading the Onboarding Process

#### The Problem

One of Australia's four largest banks was looking to create an onboarding process which would encourage new customers to sign on for additional services.

With almost 1200 branches, many different service offerings, wide-ranging distribution channels and multiple communication and feedback channels, the customer journey had become overly complicated. This prevented the bank from offering a personalised and straightforward onboarding process that highlighted its range of additional services.

#### The Solution

We conducted an in-depth customer survey of 1555 responses, listened to 300 customer phone calls and spoke to over 40 internal and external customers. This allowed us to thoroughly map the Customer Journey and identify significant insights that became the basis of a new customer engagement framework.

#### 🔂 The Benefits

As a result of improving the Customer Journey Mapping process, three key focus areas were identified which would vastly improve the likelihood that a new customer would switch to a more expansive and valuable transactional banking relationship. This ultimately led to the creation of a new all-inclusive credit card to better meet both the client's and their customers' needs.

## **Empowering Staff Engagement**

#### The Problem

A large Australian cinema operator wanted to create customer loyalty by empowering their staff to consistently deliver an outstanding customer experience that was meaningful and relevant.

This plan required a clearer understanding of the current reality for their customers and team, increasing the customer experience capability of the frontline team and gaining alignment across the organisation.

#### 🚺 The Solution

Through the Customer Journey Mapping process we discovered four significant themes which now form the basis of the client's new customer strategy. By studying their customer's needs, they were able to differentiate themselves from their competitors by providing an excellent customer experience.

The key driver in this strategy was to empower their 3,000 staff, which allowed them to deliver the ideal cinema experience to their customers in 75,000 seats across 600 locations.

#### 🔂 The Benefits

By understanding what matters to their customers and communicating it to their staff, our client was able to move from a purely transactional model to an experiential one. Ensuring that an 'outstanding customer experience' is an essential part of any business leads to increased customer loyalty.

## **Moving forward**

Do you distinguish your customers, their needs and how you can best deliver them? Do you value relevant insights? Are they part of your CX strategy?

That all sounds pretty simple right?

Now think about how many different types of customers you have and how many touch-points they use to connect with you. Perhaps it's not so simple after all.

Companies who excel as customer-centric organisations show 6 distinct characteristics. These characteristics provide a clear framework for you to base your actions on, and their implementation has clear benefits which we will reveal in <u>our next blog</u>.

In the meantime, if you have any questions about Customer Journey Mapping or would like to find out how you can get one for your organisation, email <u>experience@protopartners.com.au</u> to receive more detailed information and pricing.



In 2008, Damian Kernahan and Kara Weaving, founders of Proto, identified the growing gap between the services large organisations promised and what customers received. Thus, Proto was born out of a small serviced office in the northern suburbs of Sydney to close that gap and was the first Service and Experience Design consultancy launched in Australia.

Proto uncover key customer problems and deep and robust insights to help leaders create change, transforming their culture and services into outstanding experiences that both employees and customer love and to provide pragmatic, actionable and robust solutions that they help implement into organisations with minimal disruption.

Over the years, they increased their emphasis on helping their clients increase their customer experience and service design capability across teams to continually meet the growing needs of customers and sustain business growth. They've helped over 200 major brands and organisations clarify, gain confidence and have conviction for commercially viable business solutions that are feasible, measurable and deliver 20X+ ROI.

If you'd like to find out how they've helped businesses like yours, and how they can help you too, get in touch to find a time to have a chat.



Damian Kernahan +61 418 494 489



Kara Weaving +61 423 577 177

#### **Proto Partners**

Get in touch to find out more about how to transform Customer Intelligence into Customer Growth.

+61 02 8379 6600

damian.kernahan@protopartners.com.au