



Cooking Up a Winning Customer Journey Map



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What is Customer Journey Mapping?

A customer journey map is used to identify and define your organization's customer touchpoints. It's a way to map, analyze, and visualize how a customer engages with your company, via your products, services, online experiences, retail experiences, marketing efforts, and/or other channels. It captures customers' needs (what are they trying to accomplish, what problem are they trying to get solved), processes (what steps did they go through to achieve their goals), and perceptions (what was the experience, how did the company perform) at each touchpoint. This visualization allows you to consider each and every touchpoint, identify where gaps lie, and determine how to optimize the overall customer experience.

Adam Richardson, writing on [Harvard Business Review's Blog Network](#), explains how to use customer journey maps to improve the customer experience. His customer journey timeline looks like this:

Engage → Buy → Use → Share → Complete

Richardson employs the following framework at each stage of the journey map:

- **Actions:** What does the customer do in the stage and how do they move to the next stage of the journey map?
- **Motivations:** Why is the customer here? Why would they continue along the journey map?
- **Questions:** What uncertainties does the customer have that might impede them?
- **Barriers:** What structures, costs, or other barriers would prevent them from moving to the next stage of the process?

Knowing what happens at each stage, as well as answering the questions posed along the way by conducting in-depth customer research, will result in the most complete customer journey map.

Why Map the Customer Journey?

Why is customer journey mapping a mission critical part of an organization's customer experience strategy? According to Bruce Temkin of the Temkin Group, customer journey mapping is one of the skills that will be required to move into the age of CX Mastery.

"Companies increasingly use customer journey maps to understand how customers accomplish their goals. These efforts provide a customer-centric view that cuts across channels and spans over time as well as uncovering key customer activities that don't involve the company at all. Today, these efforts are used to identify places for redesigning discrete interactions. In the future, companies will design and track experiences that involve multiple interactions to address customers' higher-level goals."ⁱ

Part I: The Ingredients

You probably haven't thought about your map in terms of "ingredients" and "a recipe" before, but journey mapping is like cooking in many ways. If you use fresh, quality ingredients when you cook, it's very likely that your recipe will result in something that will put smiles on the faces of your guests and get them to return for a second helping.

This is exactly how it works with a customer journey map. You build quality, meaningful information into your map, and when it's done "cooking," you will be able to pull out everything you need to build a prioritized action plan for transforming your business. Then you can consistently delight your customers and keep them coming back for more. Sounds delicious, right?

Let's get started! Here are the ingredients you'll need for a winning customer journey map.

1. Your Customers

An important part to the mapping process is to talk to your customers. Before you do that, though, you must know who they are. Identify your customers and segment them, since different customers and customer types will have different journeys with your organization. You're not going to map the journey for all of your customers. In the end, you'll focus on those that meet your 80/20 rule. During this step, you'll define your customer personas.

2. Customer Experience Lifecycle

How do people become your customers? Once they are customers, how do they remain so and (hopefully) help bring new customers your way? This process is referred to as the customer experience lifecycle. You must define these phases for your business; different companies label the phases differently depending on their products and/or services, but phases typically look something like this:

- Awareness
- Information-gathering
- Selection
- Purchase
- Satisfaction
- Loyalty
- Advocacy
- Churn

3. Channels, Areas, or Departments/Divisions

Define all the ways a customer could come into contact with your brand. Think in terms of broad umbrella categories for now. Examples of your channels might include:

- Advertising/PR/Events
- Digital
- Retail Store

- Dealer/Broker
- Customer Service/Call Center
- Finance/Billing

4. Touchpoints

Now it's time to take an inventory of your touchpoints. A *touchpoint* is any point where the customer touches the company; an *interaction* is what happens at a touchpoint.

To inventory your touchpoints, start with your list of channels from Step 2. List all touchpoints associated with each channel. Here are some examples of touchpoints for the digital channel:

- Facebook
- Twitter
- Website
- Microsites
- Web ads
- Searches
- Apps, etc.

Next, think about how customers encounter each touchpoint. What touchpoints are present during each lifecycle phase? Organize and further define these touchpoints, taking into account the following:

- What is the business reason for each touchpoint (Why does it exist from an operations perspective? To educate, provide support, receive payment?)
- Why does the touchpoint exist from a customer's perspective? To set you apart from a competitor, for repeat sales, to build loyalty?
- What databases and supporting applications enable these touchpoints?
- What department is responsible for each touchpoint?
- Which touchpoints are most actively used?
- Are touchpoints specific to particular product areas or customer segments?

These backend processes are typically found in great detail within service blueprints, the behind-the-scenes, company-centric view of the customer journey. It is still helpful to include this level of detail to provide additional diagnostic value, in order to make your journey maps more actionable for those in the organization who will use them.

5. Interactions

Once you have an understanding of the various touchpoints, the next step is to define the various interactions that might occur at each touchpoint. So, if we think about your website as a touchpoint, the interactions that might occur there include a purchase, a product/information search, a customer support request, downloads, etc.

6. Customer Journey

This is where the rubber meets the road. It's time to talk to your customers. It's time to do some in-depth research to figure out exactly what their experiences are at each touchpoint. Go back to Step 1 and look at your personas. For each, to get the conversation started, roughly plot the journey based on what you know; then let them do the talking.

Document the journey a customer takes for each touchpoint, channel and lifecycle phase. For now, a simple step-by-step list will do. These questions can help you get started:

- Why did the customer contact the call center?
- Talk me through that process. What steps did you take to make and complete that call?
- What were the pain points?
- What went well?
- What does it look like from an employee's perspective?
- What other touchpoints are involved in this process?

In the end, you want to understand what it takes for a customer to move through the lifecycle, as well as to discover any roadblocks – or highlight best practices – along the way.

7. Customer & Employee Feedback

Whatever method or listening post you use to gather customer feedback — surveys, testimonials, comments through your website, etc. — gather and organize this information by channel and lifecycle phase, and sift it down to the specific touchpoint if possible. You should also ask employees for their feedback about their performance and their ability to deliver the desired experience. You will use this information to gauge the effectiveness of your touchpoints. Consider the following:

- What do your customers have to say about their experiences during each lifecycle phase?
- Does each touchpoint enhance or weaken a customer's experience?
- What does a customer expect at each point?
- Do you meet their expectations?
- How do they feel?
- How do you want them to feel?
- Are there any redundancies or unnecessary touchpoints?
- Which touchpoints are most and least effective?
- What does the experience look like from the perspective of a front line employee or those who manage a specific are of the customer experience?
- How do employees rate the effectiveness of a touchpoint?

This ingredient is critical because it will help to determine the performance gaps and action items that will need to be completed in order to deliver a superior customer experience.

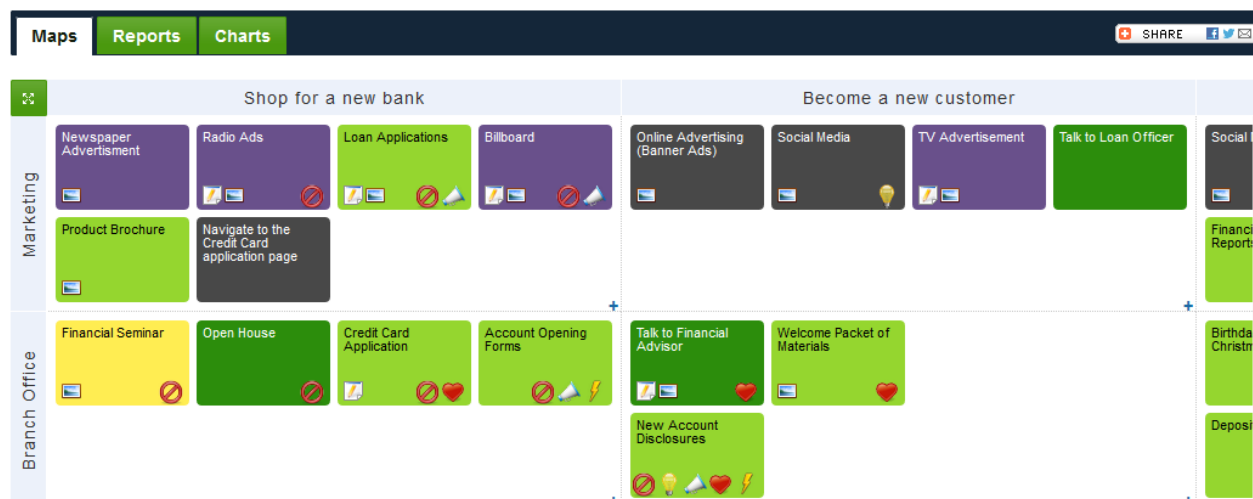
While gathering your ingredients is not a simple process, it's important that you take the time to define, and organize these elements. By doing so, you will have a solid framework from which to build a robust, "flavorful" customer journey map that will be packed with priceless insights about your customers, your processes, and your overall operations.

Part II: Combining the Ingredients

Step 1: Determine Your Mapping Method & Design

Figuring out how to design your map can be tricky because there are dozens of ways to do it. You could manually arrange all of your data on post-it notes, design an [elaborate process flow chart in Visio](#), or use our [Touchpoint Dashboard tool](#), to name a few. *(We admit that we're biased, but we recommend the latter option. Touchpoint Dashboard automates the mapping process and outperforms every time when compared to other methods in terms of ease of use, design and touchpoint analysis, measurement, and management.)*

If you opt to design your own map without the power of Touchpoint Dashboard, we recommend starting the streamlined “Swim Lane” design, where touchpoints and data are organized and displayed in rows and columns. It looks something like this:



Step 2: Define Swim Lane Headers

Now that we've settled on a design, it's time to start adding the ingredients you gathered in Part I and build your map's framework.

One of the first things you did was define your customer journey lifecycle phases and your departments or channels. Use this information to design the skeleton of your map and set-up your columns and rows. Label each column header with a lifecycle phase going in order from left to right. Similarly, label each row header with your departments in whatever order you deem relevant to your business.

Step 3: Create a Key

Your map's framework is in place and you're almost ready to add the remaining ingredients that you worked so hard to prepare. But first, you'll need to create something that every map requires — a key or a legend.

Look at your list of touchpoints and the supporting materials you developed. How, in broad terms, do you touch your customers? Is it by email, web, mail, in person, phone, mass media, or an event? Add these touch types to your key and assign each one a color. This will help you keep your touchpoints organized. Also determine and add any symbols you want to use to indicate pain points, best practices, moments of truth (those interactions most important to your customers), listening posts, etc.

Step 4: Add Your Touchpoints & Plot the Journey

Now it's time to add the "meat" to the recipe. With your list of touchpoints and supporting materials in hand, start adding your touchpoints to the map. Organize them by lifecycle phase and corresponding department/channel, and color-code them according to touch type. It might be helpful to arrange your touchpoints in the order that a customer comes into contact with them, or you may want to group them by type. It's entirely up to you.

Once you've displayed and arranged all of your touchpoints, refer back to your supporting materials and the key. Add supporting details and associated symbols. Details could include:

- Why each touchpoint exists from a business and customer perspective
- Responsible departments
- Supporting databases or systems
- How you measure the effectiveness of this interaction
- How often it is used and cost involved

You want this map to tell a detailed story about your touchpoints. You want it to show you where you're delighting your customers and where you're letting them down, as well as to call out the areas of your business that excel and the ones that need work.

The trick in Journey Mapping is to figure out how to incorporate all of the background data and information so that you are not flipping back and forth between your map and supporting documents and reports. This is exactly why we built Touchpoint Dashboard. With our tool, there is no flipping back and forth. You have the ability to open each touchpoint and add as much or as little detail as you want, including uploads or links to background data. Every time you add additional information or make changes of any kind, the journey map updates automatically. It's a great way to bring your customer journey to life and map, analyze, and present your touchpoints.

Step 5: Synch Your Voice of the Customer Information

This is one of the most important, yet most challenging, steps in the mapping process. If you took the advice outlined in Part I, you already organized your customer feedback by channel and lifecycle phase and sifted it down to specific touchpoints. It's not an easy process, we know, but this will be the key to truly gauging the effectiveness of your touchpoints. Refer back to the questions we posed in #7 of Part I. Some of those questions included:

- What do your customers have to say about their experiences during each lifecycle phase?
- Does each touchpoint enhance or weaken a customer's experience?
- What does a customer expect at each point, and are those expectations met?
- Are there any redundancies or unnecessary touchpoints?
- Which touchpoints are most and least effective from a customer and employee perspective?

Use the symbols from your key and position appropriate ones next to the touchpoints on your map to indicate where pain, best practices, or moments of truth occur. You may also wish to include direct customer comments as supporting evidence.

Rank your touchpoints in terms of value and effectiveness. If a touchpoint has a high value and is not effective, you will know it requires immediate attention. This ranking of touchpoints will help you develop action plans.

Next Steps...

Congratulations, your map is complete, but (sorry) you are far from being done. Check out Part III for tips on how to pull insights from your map and use them to transform your business.

Part III: Now What?

You and your team have analyzed, synthesized, visualized, and now you're mesmerized with this finalized map that fully outlines the complete journey of your customers and all of the associated touchpoints. Whew! So now what?

Don't wait too long to get your customer experience improvement projects started! Start taking action on the insights you've uncovered immediately! Think about the laws of physics. An object in motion stays in motion, right? If the momentum comes to a halt, you're map becomes a dust collector.

Here are a few tips to help you use the insights your map delivered to keep your customer experience initiative moving forward:

- **Think big but start small.** Identify a few quick fixes you can make that will boost the customer experience at one or two key touchpoints and start fixing. Document successes and show how the results support your company's key metrics. Build excitement. A few small wins will help you justify further investment in your initiative. Be sure you have a prioritized list of all the critical improvement initiatives ready (or at least in the works), including estimated investment requirements. So, when executives ask for that information, it will be readily available.
- **Share for Success!** Improving a customer's overall experience with your company requires buy-in and collaboration from employees, managers, and executives from all areas of your organization. Resist the urge to share the findings with *some* of your internal stakeholders versus *all* of them. Sure, it will require more time up front, but it will eliminate a lot of headaches down the road. Share the findings with everyone — you'll garner more support, commitment and significantly increase the odds of your success.
- **Make it a Marathon, Not a Sprint.** To prevent your customer journey map from becoming a dust collector, have a long-term plan in mind. Where do you want the organization to be one, three, and five years from now and beyond? Document goals and benchmarks. Establish a timeline and stick to it. Be sure during the mapping process to clearly identify and appoint journey map owners and a support team who are committed to keeping projects on track. And, don't forget to check-in regularly with your customers. Their feedback will let you know if you're on track.

Part IV: Rules of Customer Journey Mapping

Now that you've got an understanding of the ingredients and steps involved to cook up a customer journey map, let's take a look at some of the rules that you must adhere to as you're creating your journey map.

A customer journey map...

- Must be developed from your customers' perspective, not the organization's. The map is in your customer's words, not in the company's words (i.e., not how the company would describe a customer interaction).
- Is a living, breathing document.
- Must be shared.
- Is a collaborative piece of work.
- Is actionable.
- Is the backbone of customer experience management. Everything you do needs to align with the customer journey.
- Is not used by just a small (perhaps CX) team in the organization; it must engage cross-functional teams and be used and acted up by the entire organization.
- Must be updated as the organization evolves and adapts.
- Is multi-faceted. There isn't just one map, there will be many.
 - After you map the entire lifecycle, pull out the individual touchpoints and map the experiences around them. You'll end up with a bunch of "mini maps" that can all be plugged back into the main, master map that encompasses the customer experiences from start (Need) through the end (Churn).
 - While you may map all of your touchpoints in the master customer journey map, identify the most important ones and focus on those for the mini maps.

Part V: What Journey Mapping is Not

Now that we know what a customer journey map is, let's talk about what it's not.

A customer journey map is not...

- Designed from the company's perspective or viewpoint.
- About your organization's internal processes and procedures.
- A project.
- A one and done effort.
- The end. It is the beginning. It needs to elicit action on an ongoing basis.
- Just for mapping customers' experiences; it enables employees, partners, and any other stakeholders of the organization to build a culture around the customer.

Looking for an Easier Way to Map?

As you can see, mapping can be down-right hard. Creating a customer journey map, incorporating your customer and employee feedback, and then pulling actionable insights out of it is a very labor-intensive and complex process. After reading this paper, you likely discovered, like we did, how limiting and time consuming the traditional mapping methods can be. There is so much information that needs to be represented on a map... how do you fit it all in in a way that makes sense? That's why we created Touchpoint Dashboard.

Touchpoint Dashboard is designed to save you time and delivers a more robust and intuitive kind of map. The system's built-in business intelligence enables you to enter and organize your data, and it then automatically converts your information into a streamlined, yet detailed customer journey map. It delivers a clear picture of where and when your customers experience satisfaction or pain, who is most impacted and how it affects your bottom line. Touchpoint Dashboard helps you build a strong case for customer experience improvement initiatives and puts you on the road to success.

Here are 6 reasons why you should put the power of Touchpoint Dashboard to work for your business.

1. It's a User-Friendly, Secure System

- No need to have a background in value stream mapping and process flow design
- No need to license or understand how to use diagramming software
- Quickly and easily enter your touchpoints and related customer and employee feedback
- Start a map from scratch or use industry-specific templates. Great for expert mappers and beginners!
- Log-in anytime, anywhere to the secure, web-based system. No need to worry about your Powerpoint, Excel, or Visio files falling into the wrong hands!

2. Automate the Mapping Process and Save Time

- Eliminates tedious, manual map drawings and re-designs
- Auto-generates a map for you based on the touchpoint and customer data you enter into the system
- Provides real-time updates and design. As you gather and enter new data into the system, the map automatically updates to reflect your changes.

3. Involve Others in the Map Design

- Provide key stakeholders in your organization the ability to log in and monitor the map as it's being designed — they no longer need to wait days or weeks for you to show them a draft.
- Allow others to play a role by providing them access to view, proof, or even upload content.

4. Thoroughly Organize and Analyze Your Touchpoints

- Have an organized way to inventory all of your touchpoints.
- Merge your customer data with each touchpoint during the design phase, and eliminate the inefficiencies associated with separate data silos. Then later, you can open the touchpoints and can see exactly where your customers experience pain, when it occurs, and who is most impacted.
- Receive a detailed, holistic view of your customer journey and touchpoints across all channels and lines of business.
- Clearly see how your touchpoints affect your bottom line so you can ultimately improve it.
- Objectively audit and measure your touchpoints: Touchpoint Dashboard tells a story about each touchpoint and assigns each one a score so you can gauge its effectiveness and value, as well as monitor operational consistency.

5. Gain Actionable Insights & a Solid Way to Manage & Measure Your Progress

- Use Touchpoint Dashboard's built-in intelligence to assess which touchpoints are costing you most in terms of loyalty, retention and profitability
- Do a gap analysis
- Understand where you should build infrastructure and capabilities
- Spot and recognize best practices
- Generate insightful reports that you can use to create a prioritized action plans
- Chart your progress: Because your map and related assessments update automatically when you add new information, you can easily measure and report on your progress

6. Easily Share Findings & Achieve Widespread Organizational Support

- Visually represent all of the data you collected in a streamlined way and concisely present your findings to executive management
- Use the actionable insights you derive from your map to build a compelling case for change
- Deliver "dashboard" views of data that are customized for different stakeholders at different levels in the organization (executives, managers, associates).
- Easily report the information that's most relevant to your audience — provide an exec a high-level report, then turn around and show managers the details they need to take action.

Interested in adding the power of Touchpoint Dashboard to your customer journey mapping initiative? Contact us today!



About Touchpoint Dashboard

Touchpoint Dashboard is an interactive software platform that enables companies to collect, view and manage all of their CEM data in one convenient location, thereby allowing them to take the reins of the customer experience and define it in a customizable fashion. Using Touchpoint Dashboard, companies can do the following:

- Map all touchpoints across the customer experience in a collaborative setting
- Store attributes about each interaction including cost, systems and voice of customer data
- Report on a host of customer-centric measures
- Perform analysis on where interactions are succeeding or failing
- Build business cases for improvements in any part of the organization that impacts the customer

This is the first software of its kind to collect, automate and visualize customer experience data in a single location. Users can see areas of overlap that allow them to cut costs, as well as highlight pain points for improvement initiatives. The software also allows users to pull in Voice of Customer and Voice of Employee data to provide evidence to support prioritization of initiatives.

ⁱ Bruce Temkin, *The Future of Customer Experience*, August 2012