



**VEREQUEST**

Helping companies keep the promises they make®

# Customer Journey Mapping Playbook

# When to Engage an Outside Consultant

Like most things, it is important to develop the internal expertise necessary to sustain the momentum around an initiative – particularly one like Customer Journey Mapping which can form the cornerstone of your customer acquisition and loyalty efforts.

There are times, however, when it makes sense to engage a seasoned Customer Journey Mapping expert to help you along the way:

1. Create an organizing framework for Customer Experience Management ... including a Customer Journey Map
2. Facilitate a Customer Journey Mapping Workshop or Innovation Workshop
3. Translate your work into a Graphic Illustration
4. Opportunity Spotting, Ranking and Prioritizing
5. Innovative Problem-Solving and Ideal Experience Design

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# Time to Begin Creating Better Customer Experiences

Customer Journey Mapping is all about developing *empathy* related to the *effort* customers expend to do business with you (or not). With Customer Journey Mapping you can create a framework for prioritizing and acting on opportunities that remove barriers to purchase and create loyal customers.

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# Key Definitions

Just to make sure we are all on the same page!

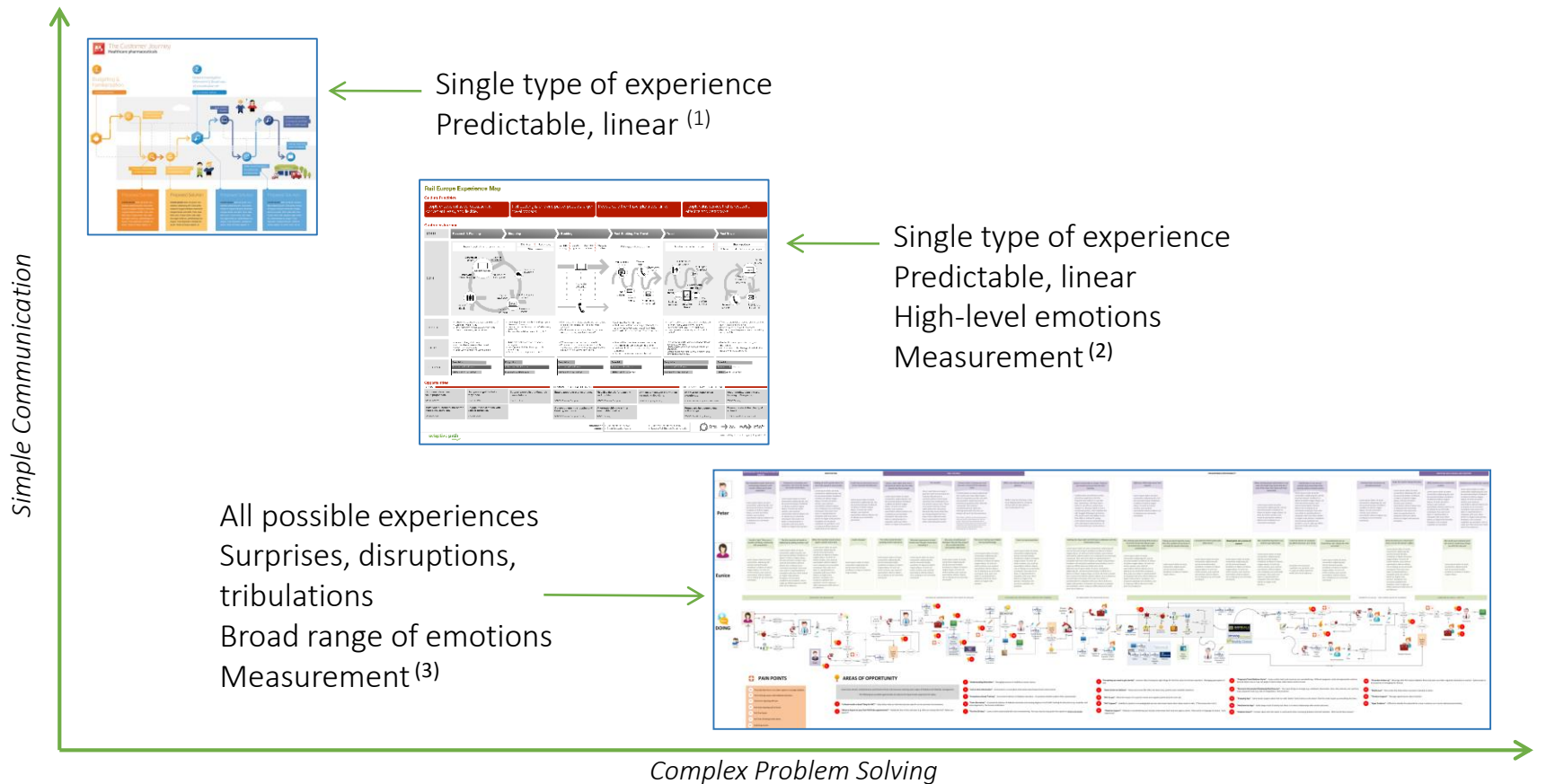
→ <b><i>Customer Experience</i></b>	The result of interactions that occur through a collection of touchpoints, decisions and moments that influence a customer's relationship with and perception of a brand or organization. (May also be referred to as CX.)
→ <b><i>Customer Journey Mapping</i></b>	The process of tracking and describing the experiences that customers have as they encounter a service, channel, employee or other person. The map takes into account not only what happens to the customer, but also their responses to each interaction and experience.
→ <b><i>Channel</i></b>	The media used to interact with customers. Face-to-face, print, web, mobile, email, telephone, and brick and mortar locations are all common channels for reaching out to and interacting with customers.
→ <b><i>Interactions</i></b>	The activities in which customers engage.
→ <b><i>Jobs/Tasks</i></b>	A fundamental problem a client faces, and for which he/she is seeking solutions. They can be functional, social, emotional or a combination.
→ <b><i>Moment of Truth</i></b>	Key points in the journey where customers may pause and evaluate the experience or make a crucial 'go or no go' decision.
→ <b><i>Pain Points</i></b>	Key points in the journey where customers may experience anything from mild discomfort to distress or anguish.
→ <b><i>Touchpoint</i></b>	A point of interaction between a person and any part of an organization. Touchpoint interactions take place at a certain point in time, in a certain context, and with the intention of meeting a specific customer need.

# Great Experiences as Differentiators

As the number and complexity of customer interactions and touchpoints increase, the need for mapping becomes vital. Customer experiences must be designed and delivered seamlessly across many interactions. Customer Journey Mapping provides an opportunity to take a holistic view of the customer's physical and emotional journey and design ways to differentiate the experience from competitive offerings. It offers a proven framework to uncover moments of truth and key opportunities to bring an experience to life.

# Which Journey Mapping Style is Right for You?

There are many methods to help organizations identify barriers, inefficiencies and areas of opportunity to improve how they operate and interact with customers, suppliers, and partners. If you choose to build a Customer Journey Map, there are as many styles of Journey Mapping as there are companies creating them! It is important to choose a style that meets your key objectives. The key is to define how you will be using the Map and what insight you need to gather to realize your goals.



# Which Journey Mapping Style is Right for You?



## Standardized Practice Map:

A diagram of the typical steps a customer goes through when engaging with a company for a specific purpose (e.g. buying a car).

*Best used for:* Communicating best practices or standardized processes across a broad audience.

*Shortfall(s):* Overly simplistic in enhancing the customer experience overall.



## Experience Map:

A map of the physical and emotional aspects of the steps customers travel when going from Point A to Point B of their journey as they attempt to achieve a specific goal or satisfy a need.

*Best used for:* Understanding how a specific situation impacts a customer in the context of their life. Good for identifying what should be measured.

*Shortfall(s):* Does not take into consideration all possible experiences as it related to a specific goal or need.



## Touchpoint Map:

A detailed graphic representation of every interaction a customer has or could have with a company. It uses graphics, pictures and visual cues to illustrate and examine all touchpoints from a customer's point of view.

*Best used for:* Understanding how customers interact with a company or a group of stakeholders and/or channels throughout their lifecycle.

*Shortfall(s):* Can be overly complex and difficult to communicate. Heavy graphic production component.



## Customer Journey Mapping:

Building on a Touchpoint Map, this map overlays the motivations, frustrations and other emotions experienced by the customer. It highlights meaningful opportunities and provides insight needed to prioritize and innovate.

*Best used for:* Uncovering motivations, frustrations and barriers and prioritizing the impact they have on the experience.

*Shortfall(s):* Also see *Touchpoint Map*. Requires time and research to fulfill the full potential of this type of map.

# Why Tackle Customer Journey Mapping Now?

Not only does a Map inform how to create and support better experiences, but the activity of mapping also builds knowledge and consensus across departments, teams and stakeholders. Customer mapping is useful for:

## DESIGNING

- ✓ Visually illustrating the end-to-end experience from the customers' point of view
- ✓ Uncovering gaps in our understanding of the experience that customers have
- ✓ Identifying opportunities to differentiate the experience
- ✓ Driving deliberate customer experience development at each experience stage

## IMPROVING

- ✓ Improving our understanding of the complexity of customers' needs
- ✓ Identifying how to deliver a seamless, streamlined experience that cuts across functional silos
- ✓ Identifying the most appropriate time to deliver information, messages and services
- ✓ Identifying 'hand-offs' where service or communication breakdown is most likely
- ✓ Troubleshooting areas which are not delivering to the level they should be (e.g. sales, service, fulfillment)

## COMMUNICATING

- ✓ Challenging an organization to look at the corporate capabilities needed to support the holistic customer experience
- ✓ Motivating colleagues and other functions about the importance of a customer focused experience within their own environment
- ✓ ...and much more



## Building Customer Personas

A Customer Journey Map typically illustrates the journey of a customer segment or representative group of customers. When considering Customer Journey Map, it is best to identify a variety of user attributes in advance. The more specific your customer profile, the easier it will be to map – knowing that you can go back to the beginning and overlay other customer profiles.

## Choose the 'Customer' to Map

Once you have chosen the customer segment you wish to map, you will want to know as much as possible about them. Now is the time to delve into existing research. The more fact-based the profile, the better.

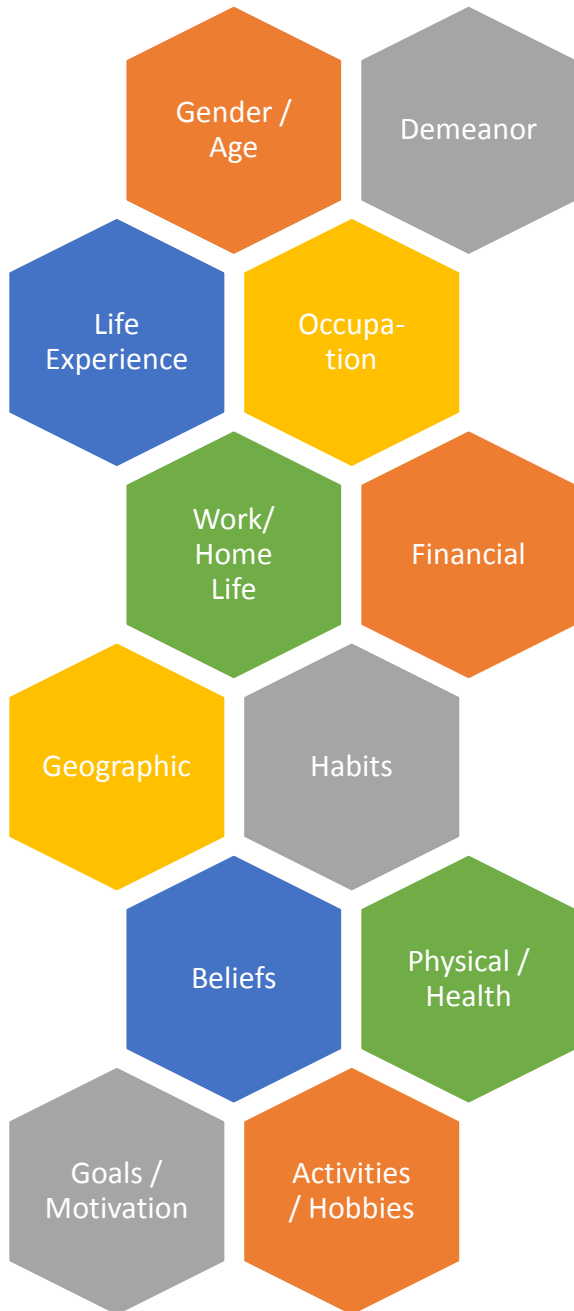
Once you have completed the initial map, you can choose to layer on additional customer segments or create unique versions of the map for each customer type.



## Customer Segment Examples

- Demographic (e.g. seniors, youth)
- Geography (e.g. urban, rural, within 10 minutes of a store)
- Loyalty (e.g. repeat purchase, value, recency, frequency)
- Key Segment (e.g. high income, potential lifetime value)
- Lifestage (e.g. buying a new home, having a baby, retiring)
- Channel Preference (e.g. retail, online, phone, chat)

# Developing Customer Personas



Prior to starting the Customer Journey Map, you will need to know who you are building it for. Developing a customer persona and back story helps to both narrow the scope as well as to foster empathy for how they feel about things. Stay focused on the customer and make the customer data come alive (e.g. Talk about “Joanne” and not the “customer”).



## Jessica

- 26 years old
- Unmarried
- Bachelor of Arts
- Annual Income: \$60,000 / Debt: \$34,000
- Owns a late model economy car
- Rents an apartment
- Loves fashion
- Heavy social media user
- Travels annually with family or friends

### HER BACK STORY

- Jessica shares an apartment with a friend in trendy Liberty Village.
- For the last 2 years she has worked in sales for an up and coming software company. The majority of her income comes from commission.
- Jessica got a car loan when she was 20 and couldn't keep up the payments. The bank repossessed the car and her credit rating suffered.
- Although she would prefer to always pay cash, she now needs a credit card for business travel purposes.
- She is very anxious about the application process and very concerned if she should be declined. Joanne wants to appear professional to her clients.
- Her boyfriend has been quite critical about her financial state and she would be so embarrassed if things don't turn out well.

## Where to Begin and End

Setting parameters around your Customer Journey Map will be important to establish early on to focus your efforts. If you are mapping a lengthy and/or complex experience, you may wish to break it into smaller 'chunks' by phase and tackle one at a time.

# Determine the Start/End Points

Setting parameters around your Customer Journey Map will be important to establish early on to focus your efforts. If you are mapping a lengthy and/or complex experience, you may wish to break it into smaller 'chunks' by phase and tackle one at a time.

When does the Customer Journey Map begin?

- Thinking about it
- Investigating
- Purchasing
- 3 months after
- Customer has an incident
- Etc.

When does the Customer Journey Map end?

- After the first 90 days
- After the initial meeting
- After the customer cancels
- Once the customer agree to buy
- Etc.

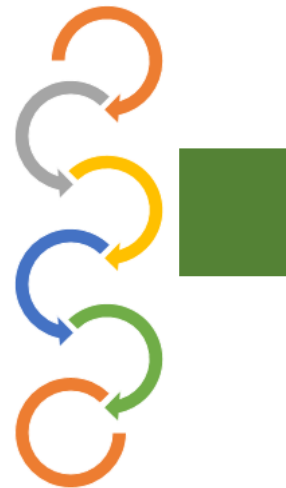


# Experience Stages

In more complex experiences, customers are dealing with a variety of tensions, frustrations, realities and unmet needs. These will ebb/flow based on the stage of the experience. For example, applying may be frustrating for a customer but once the order is taken things go smoothly.

Experienced users/customers will be looking to satisfy different needs than those who are experiencing the product/service/company for the first time.

Early phases of the experience may involve seeking answers to questions while the later phases are often more transactional in nature. By understanding the customer’s mindset at each phase or stage of the experience, you can customize the experience around relevant needs.



<ul style="list-style-type: none"> <li>A. Awareness</li> <li>B. Investigation</li> <li>C. Evaluation</li> <li>D. Trial</li> <li>E. Repeated Use</li> <li>F. Commitment</li> </ul>	<ul style="list-style-type: none"> <li>A. Awareness</li> <li>B. Applying</li> <li>C. Proving</li> <li>D. Receiving</li> <li>E. Reapplying</li> </ul>	<ul style="list-style-type: none"> <li>A. Knowledge</li> <li>B. Persuasion</li> <li>C. Decision</li> <li>D. Implementation</li> <li>E. Confirmation</li> </ul>	<ul style="list-style-type: none"> <li>A. Connect &amp; Attract</li> <li>B. Orient</li> <li>C. Interact</li> <li>D. Extend &amp; Retain</li> <li>E. Advocate</li> </ul>
<ul style="list-style-type: none"> <li>A. Thinking</li> <li>B. Investigating</li> <li>C. Buying</li> <li>D. Second Thoughts</li> <li>E. Using</li> <li>F. Returning</li> </ul>	<ul style="list-style-type: none"> <li>A. Need</li> <li>B. Research</li> <li>C. Select</li> <li>D. Purchase</li> <li>E. Receive</li> <li>F. Use</li> <li>G. Maintain</li> <li>H. Recommend</li> </ul>	<ul style="list-style-type: none"> <li>A. Problem Recognition</li> <li>B. Information Search</li> <li>C. Alternative Valuation</li> <li>D. Purchase Decision</li> <li>E. Post-purchase Behavior</li> </ul>	<ul style="list-style-type: none"> <li>A. Past Experience</li> <li>B. Trial</li> <li>C. Decide to Use</li> <li>D. Build Experience</li> <li>E. Become Proficient</li> <li>F. Champion/Advocate</li> </ul>



## Before Initiating New Research

Before initiating new research, arrange a few conversations with customers. Help them focus on their story – one that is relevant to the product, service, or problem area you are investigating – by probing:

- **Actions:** What are you doing at each stage? How do you interact? Why do you choose to interact that way?
- **Motivations:** What do you want/need from each interaction? What is the catalyst that motivates you to move to the next stage? How do you feel about each interaction?
- **Barriers:** What barriers, uncertainties or issues do you struggle with? What do you think about these challenges?

When possible and assuming the product/service you are offering is used in this environment, interview customers in their home or office to provide the richest source of data.

The Customer Journey Map itself will inform you of any information gaps you may have. Before conducting any new research, wait to see what *“I wish I knew...”*





## Walk the Journey

- **Mystery Shop** – do it yourself or hire a customer experience expert to shop your organization as well as your competitors
- **Customer Experts** – talk to people within your organization that have direct experience with your customers; like call center agents, research analysts, customer relations, marketing

## Getting Ready to Map

Critical to the success of your workshop is making sure the right people are in the room and that the room is sufficiently large for the task. Given this, set the date and confirm the participants as soon as possible.

In addition to creating a Customer Journey Map, the workshop experience can foster a common understanding, build consensus and create a shared reference. If this is your primary goal, choose your participants accordingly.

NOTE: While there are many benefits to going through the Customer Journey Mapping exercise with a customer, we recommend building the map internally and then *validating certain parts you may need clarification on* with customers.

## Select Participants Wisely

Start planning for your Journey Mapping Workshop early. Here are a few things to consider:

Keep the size of the group to 6-8 maximum  
Choose individuals who have direct experience with your customer, the product/service, channels, and touchpoints you are mapping  
Make sure to have a variety of roles and backgrounds represented at the workshop; try not to duplicate the expertise as a diverse group of participants is best

**REMINDER:** If you are engaging an individual to graphically create the Customer Journey Map, it is a good idea to have them observe the workshop so they can make sense of the maps afterward.

## Select Your Room Carefully

Critical to the success of your workshop is making sure the right people are in the room and that the room is sufficiently large for the task. Given this, set the date and confirm the participants as soon as possible.

Before finalizing the date, be sure to book the ideal room type for your workshop. The room should:

- Be booked for a full day (or suitable time period)
- Allow for at least 10 feet of uninterrupted wall space
- Provide considerable space in front of the uninterrupted wall for all participants to stand comfortably (e.g. without bumping into each other)
- Be large enough to also have table space and chairs for all participants
- (Optional) Be equipped with audio visual equipment

# Workshop Materials

For your workshop you will require the following:

- ❑ A roll of butcher paper or multiple sheets of flip chart paper (taped together)
- ❑ Painters tape to hang the paper on the wall
- ❑ Clear tape
- ❑ Black sharpies
- ❑ 6-10 packages of Post It Notes in multiple colors (3"x3" & 2"x2")
- ❑ Round Color-Coding Labels (1/4")
- ❑ A flip chart and felt pens
- ❑ Laptop/ projector or hand-outs
- ❑ A camera to take pictures of the charts as back-up

Given that the success of the mapping process involves 'getting into the flow', avoid all unnecessary breaks to support continuity of thought. [If your team agrees, you may want to work through lunch.] If the cafeteria is not close at hand, you may also wish to:

- ❑ Arrange for coffee/water
- ❑ Bring a few snacks
- ❑ Arrange for lunch to be delivered

## Pre-Workshop Communication

Prepare a *Pre-Workshop Package* which contains information related to (at a minimum):

- ❑ Date/Time/Agenda and Directions to the workshop location
- ❑ An overview of the project and key objectives
- ❑ The product/service you have chosen to map and the persona you have created for your customer
- ❑ A summary of relevant research (if available)
- ❑ Specific date a response is required and whether or not you will allow this invitation to be delegated to another
- ❑ Workshop protocol re cell phone/email access
- ❑ Your contact information

Description	Mins.	Time
Introductions and Icebreaker	15	8:30 – 8:45
Setting the Context	15	8:45 – 9:00
<input type="checkbox"/> Project background <input type="checkbox"/> Goals for today		
Understanding our Target Customer	30	9:00 – 9:30
<input type="checkbox"/> Review / expand customer persona <input type="checkbox"/> Share any new research		
Defining the Experience	30	9:30 – 10:00
<input type="checkbox"/> Review product <input type="checkbox"/> Agree on start and finish points <input type="checkbox"/> Agree on stages		
Fundamental Mapping Principles	30	10:00 – 10:30
BREAK	20	10:30 – 10:50
Build Customer Journey Map	70	10:50 – 12:00
BREAK	45	12:00 – 12:45
Build Experience Map	90	12:45 – 2:15
BREAK	20	2:15 – 2:35
Identify Moments of Truth	20	2:35 – 2:55
Identify & Prioritize Pain Points	65	2:55 – 4:00
Action Items & Next Steps	30	4:00 – 4:30

## Sample 1-day Customer Journey Mapping Workshop

- Start early in the day so everyone is fresh!
- Take frequent breaks and ban cell phones/email checking from the workshop
- Restrict individuals from coming/going as mapping requires continued focus and effort
- Consider bringing in an external, experienced CJM facilitator:
  - It will allow you to participate fully
  - Sometimes you will know too much to accurately reflect the customer's experience
  - It will greatly improve the likelihood you will complete your task
  - It will save you lots of time in the long-run

# Customer Journey Mapping Fundamentals

Creating a preliminary Customer Journey Map *prior* to the workshop is optional. However, you and/or your Facilitator will want a sense of how the Map will unfold before the workshop to help guide the workshop and gauge the time available.

At this point it is not important to put all the pieces together prior to the workshop but rather to uncover the right questions to ask.

# Mapping 101

Piecing together the story of how and why customers interact with different channels, touchpoints, products and services is the place where we begin.

For this exercise, we will use an example of an older couple going on a once-in-a-lifetime vacation to the Caribbean. Our customer persona, 'Eunice', is an inexperienced traveler.

Thinking of the starting point, what are the triggers that initially engage Eunice? And what is the motivation causing Eunice to move from one interaction to another? This is how your Experience Map may flow:

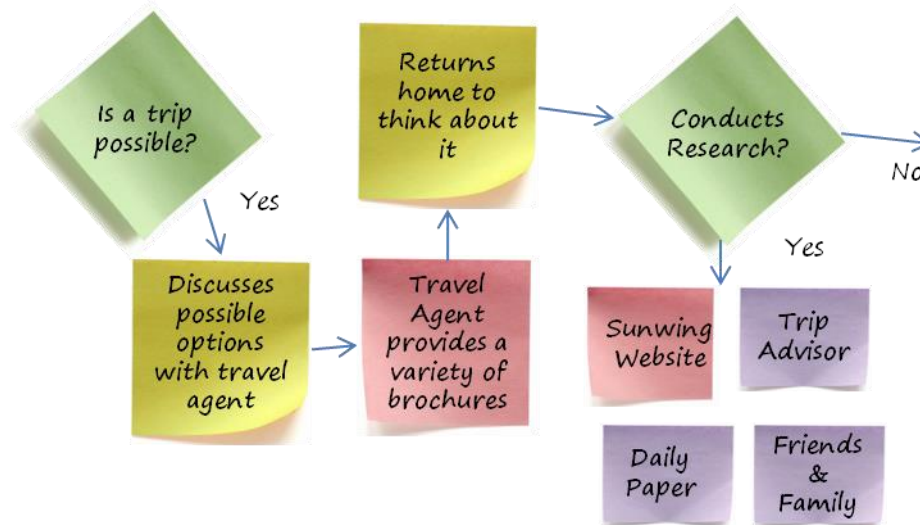


Eunice's decision to travel will be determined by how the experience progresses going forward. We illustrate this progression by way of a question. Use a diamond shape Post It Note and pose a question that can be answered with a 'Yes' or 'No'. A different colored Post It Note is used to visually see all decision points.

# Mapping Touchpoints

An important component of the Customer Journey Map is the visual representation of all internal or external touchpoints.

For example, let's assume that following Eunice's discussion with her Travel Agent, a travel brochure is provided to her. Eunice returns home to think about traveling and to conduct further research. Below is an example of how to illustrate this experience:

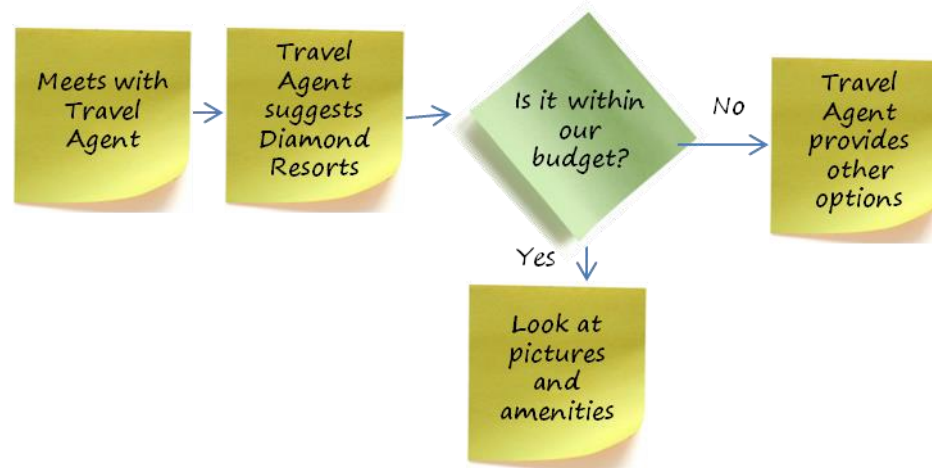


Company touchpoints are illustrated with pink Post It Notes while external touchpoints are represented in purple. Once again, the colors are optional but will help you see the various dimensions of your Map visually.



# Mapping Decisions

If the customer faces different choices or decisions, identify this with a diamond and be sure to track both YES and NO responses.

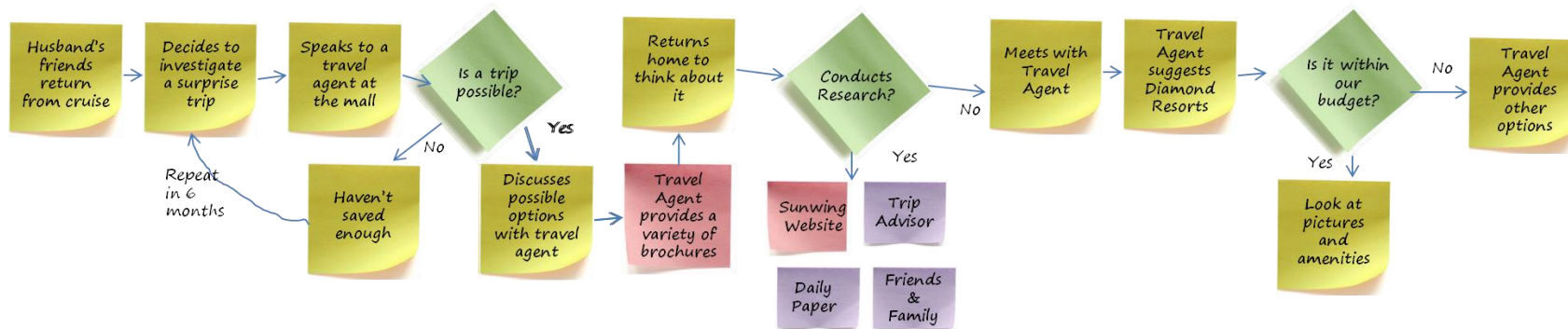


As the preliminary Map is built, keep in mind the level of detail needed to get started. Build the preliminary map at a high-level and then fill in the detail with other iterations. To determine *how* detailed your Customer Journey Map should be, and using the mapping example on the previous page, ask yourself:

- Is it important to know that Eunice took a bus to the mall to see her Travel Agent or that she had the interaction?
- Is it important to understand that Eunice waited 10 days before going to see her Travel Agent the second time? Or that she looked at competitors' brochures while waiting for the Travel Agent to get off the phone?
- Is it important to understand the detail that prompted the Travel Agent to recommend a specific property (e.g. What questions were asked? What was said?)

# “I wish I knew...”

After developing a preliminary Map, you should have started a list of IWIKs (“*I wish I knew...*”). Consider including these questions and/or observations in the list in your *Pre-Workshop Package*. Some of your participants may have the answers you are looking for and will bring them along to the workshop.



Bring your preliminary map (at least the Post It Notes) to the workshop and use it to guide the discovery process. This will help move the process along and avoid having to take the time to write out all the Post Its. Be prepared to deviate from your own map as new information comes to light.

# Customer Journey Mapping Practice Exercise

## What you will need to complete this exercise:

- Post It Notes (3 different colors)
- A large piece of paper (e.g. flip chart)
- A pen

## Activity:

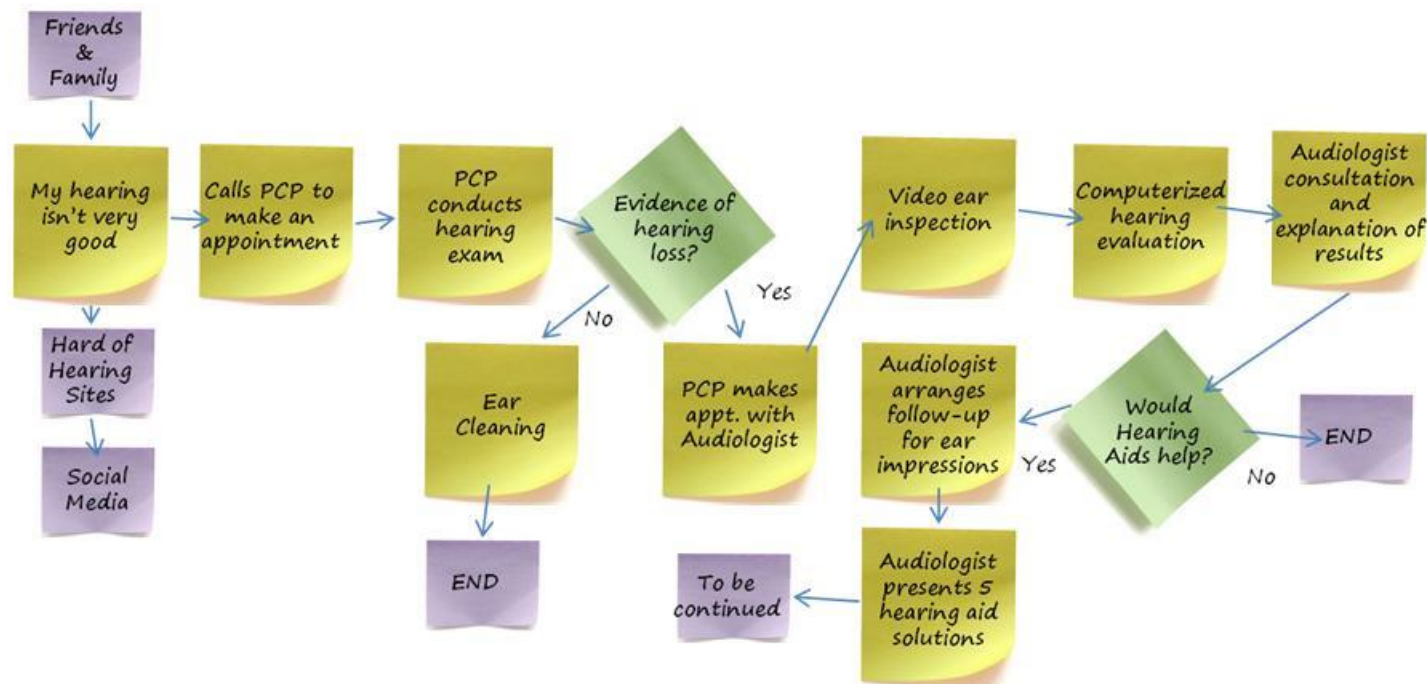
- You are being asked to create a Customer Journey Map for a new hearing aid customer.
- The Customer Journey Map begins when the customer first realizes that her hearing is diminished.
- The Customer Journey Map ends when her Doctor makes an appointment for the customer to have ear impressions made for hearing aids.

## Map the following story:

- My hearing isn't what it used to be. My friends and family have spoken to me about it for a couple of years now. I've done my own research and there is no denying it. I need to do something about it.
- I called my Doctor/Primary Care Provider (PCP) to make an appointment.
- He asks me a few questions and does a routine examination.
- Is there evidence of hearing loss?
  - NO – My PCP cleans my ears and I go home.
  - YES – My PCP makes arrangements for me to see an Audiologist.
- At the clinic, I have a video ear inspection and then a computerized hearing evaluation.
- The Audiologist meets with me to ask me some questions and explain the results.
- Are hearing aids warranted?
  - NO – I go home.
  - YES – My PCP Doctor makes arrangements for me to see an Audiologist.
- The Audiologist makes another appointment for me to have ear impressions made and fills me in on what types of hearing aids are available. He gives me a pamphlet that explains all the options.

# Customer Journey Mapping Practice Exercise

While your Customer Journey Map may not look exactly like this example, it should contain the same key elements.



# The Customer Journey Mapping Workshop

While this Guide is intended to help you facilitate and build a Customer Journey Map, there are times when it makes sense to hire an outside facilitator, including when:

- You wish to fully participate in the Mapping workshop yourself
- An independent, outside perspective would be valuable
- You are unskilled in the use of Visio or other mapping software or simply do not have the time to build the graphic map.



## Getting Ready

- Arrange tables throughout the room
- Hang at least 10 feet of continuous paper on the wall (tape a number of flip chart papers together)
- Set-up flip charts to capture IWIKs, diagrams, thoughts or key discussion points with felt pens
- Set-up AV and/or distribute hand-outs
- Lay-out pens and Post It Notes around the tables
- Prepare dots for voting/prioritizing
- Have your preliminary Map and/or Post It Notes close at hand



# Key Customer Journey Mapping Steps

- ❑ Start by noting all the phases or themes of the experience your customer goes through on Post It Notes. Ideally, identify around 6 to 10 Phases or steps. Place these Post It Notes at the top of the flipchart paper in chronological order.
  - *Do we have the sequence right? Are we missing any key Phases?*
- ❑ For each phase, capture all the steps that the customer goes through. Draw an arrow to show the inter-relationships.
  - *Are we missing any steps? Are the steps in the correct order?*
- ❑ If the customer accesses information, identify where they go.
  - *Is the information given to them? If so, by whom? Does the customer do their own research? If so, where do they go? Do we provide information directly or via a third party? If so, identify this interaction as a Touchpoint.*
- ❑ If the customer has an interaction with your company, identify this as a touchpoint (e.g. phone, internet, chat, brochure, third party reseller, branch/retail, person, customer service, etc.)
- ❑ If the customer faces different choices or decisions, identify these choices with a diamond and be sure to track both YES and NO responses.
  - *If the question prompts a MAYBE response, then you may wish to follow this with another choice (diamond) and add another defining question.*
- ❑ Continue to the end point then review the Customer Journey Map from the START and embellish or fill in the blanks.

# Touchpoints

Creating and delivering the ideal customer experience is not a solo effort. Typically there are multiple channels, touchpoints and individuals (both internally and externally) involved in shaping the customer's perception of the experience.

It is important to recognize upfront that we cannot *control* what happens outside of the company. We can only influence how external channels engage with our customers and with our company. Given this, it is critical to uncover and understand the important role touchpoints have in shaping the experience.

- Review your map and create an inventory of all touchpoints the customer encounters.
- Describe briefly the interaction the customer has with each touchpoint (e.g. what caused them to encounter this touchpoint).
- Identify if this touchpoint is also a Pain Point and, if so, what is the level of pain and what causes the pain.
- Identify the critical inputs, which is responsible for the inputs and what they do.
- Lastly, rate the impact this interaction has on the overall customer experience based on an agreed upon scale (e.g. high/medium/low).



## Touchpoint Inventory Example

Channel / Touchpoint	Description	Pain Point? (If yes, describe source of pain)	Inputs	Internal Functional Responsibility	Impact on Experience (High/ Medium / Low)
Retail	<i>Customer walks into retail location</i>	<i>No</i>	<i>Sales Report</i>	<i>Sales</i>	<i>High</i>
Sales Center	<i>Customer calls to clarify information on the website</i>	<i>Yes – frustrating to have to call</i>	<i>ASA Report Call Type Report FCR Report</i>	<i>Call Center Operations</i>	<i>Medium</i>
Baggage Claim	<i>Customer is worried their luggage is lost</i>	<i>Yes – unclear if the luggage is lost or just delayed</i>	<i>Lost Luggage Report</i>	<i>Operations</i>	<i>High</i>

## Stalled?

There may be a point in time when the flow of information stops and/or participants are uncomfortable with the direction the Map is heading and/or you simply don't know what the customer experience is. It is important to know which of the two occurrences has stalled the process:

- *To keep the process moving forward, you may need to make an 'educated guess' and add any questions to the "I wish I knew..." list. A key benefit of Customer Journey Mapping is to uncover and acknowledge what you don't know about the customer's experience. At the end of the workshop you should have a lengthy list of IWIK's to inform further research.*
  
- *How comfortable are we that this experience reflects our customer's reality?*
  - *If you are not comfortable: 'What is it we 'wish we knew'? [Add to IWIKs] 'Does anyone feel that the experience is simply inaccurate?'* Remind the participants that this is just the first step of the Mapping process and further research will be conducted to validate the map.
  - *If you are comfortable: Ask the question 'What now? Are there any areas where we could/should add additional detail?'* Review the map from the beginning.

## Moments of Truth



A Moment of Truth is a *critical or decisive time on which much depends*; a crucial moment. For example:

- The moment at which one experiences extreme emotion (e.g. joy, anger).
- The moment at which one's character, courage, skill, or other thing is put to an extreme test.
- Where customers may pause and evaluate the experience or make a crucial decision.
- The instance or interaction that gives the customer an opportunity to form or change an opinion about a company or brand.

Aim to be discriminating here. Don't be tempted to label every step a Moment of Truth.

- Provide participants with 5-6 color-coding labels to 'vote' for those crucial moments.
- Review those interactions selected against the description above.
- Discuss, debate, review and agree on Moments of Truth.

## Moments of Pleasure



Within any customer experience there may be moments when the experience brings a level of joy or satisfaction to the customer. Identify points in the experience when the customer feels:

- ✓ Pleasure / Joy
- ✓ Satisfaction / Pride
- ✓ Renewed Clarity

Obviously, we want to create more moments like these!

- Provide participants with 5-6 color-coding labels to 'vote' for those moments where the customer experiences pleasure.
- Review customer loyalty research and touchpoint survey results to identify those areas of the experience that customers evaluate highly in terms of exceeding expectations.
- Discuss, debate, review and agree on pleasure points.

# Pain Points



Within any customer experience there are moments when things aren't 'comfortable' for the customer. Identify points in the experience when the customer feels:

- Frustration
- Aggravation
- Confusion
- Sorrow/grief
- Disappointment
- Dissatisfaction
- Fear
- Anguish
- Nuisance or annoyance
- Defeat
- Anxiety
- Disturbed

## How Painful is it?



Given that there are *degrees* of pain, identify the level of pain or displeasure the customer feels for each Point of Discomfort, on a scale of 1 to 5 or Very Low to Very High. Here are some examples:

1. Annoying, Inconvenient → *Long wait time for the Sales Center*
2. Troublesome, Uncomfortable → *Passenger doesn't get to sit with friend*
3. Miserable, Distressing → *Traveller depressed about the fact that it has rained every day since arriving*
4. Intense, Dreadful, Fearful, Horrible → *Misses flight home*
5. Unbearable, Terrible → *Hotel is full upon arrival*

- Provide participants with 5-6 color-coding labels to 'vote' for those moments where the customer experiences discomfort. Write a number on the label from 1-5 to identify the level of pain.
- Review customer loyalty research and transactional survey results to identify areas of the experience that customers evaluate poorly in terms of meeting their expectations.
- Discuss, debate, review and agree on Pain Points.

## Customer Journey Mapping Workshop Wrap Up

- ❑ Set a date for a summary of the workshop outcomes, whether it be a draft Customer Journey Map or a summary of IWIKs, etc.
- ❑ Set a preliminary date to start circulating the visual map. Don't hesitate to introduce it to as many people, in as many different environments as you can. The more eyes and the more frequently you tell the 'story', the better the Customer Journey Map will be.
- ❑ Set a schedule for how, when and who will tackle the list of IWIKs.
- ❑ Take a photograph of your map before you roll it up (Post Its may shift or fall off during transport).
- ❑ Send a thank-you email to everyone who participated in the session reiterating the delivery dates.

## Crafting a Graphic Illustration of the Experience

The next step is to illustrate the experience through a visually engaging graphic. Complete this step as soon after the Workshop as possible.

In general, you are moving from 'Post It Notes' to an electronic version that can be easily shared. Be sure to allocate enough time at this step – you are not only writing a story but also illustrating it as well.

If you are not expert at graphic design or flowcharting, you will want to engage a professional for this step. Ideally the person you have chosen will have attended the workshop so they will be able to interpret the post-its, diagrams and flow.

## Converting Your Drawing into a Graphic

There are many different 'styles' of Customer Journey Maps. You can view a variety of them by searching online for images of *Customer Journey Maps*. The format you choose should:

- follow a 'timeline' from start to finish/conclusion using the start/end points and customer journey stages you identified earlier;
- highlight the critical importance of touchpoints;
- provides a sufficient level of detail to inform decision making; and
- is (reasonably) easy to follow and understand unaided.



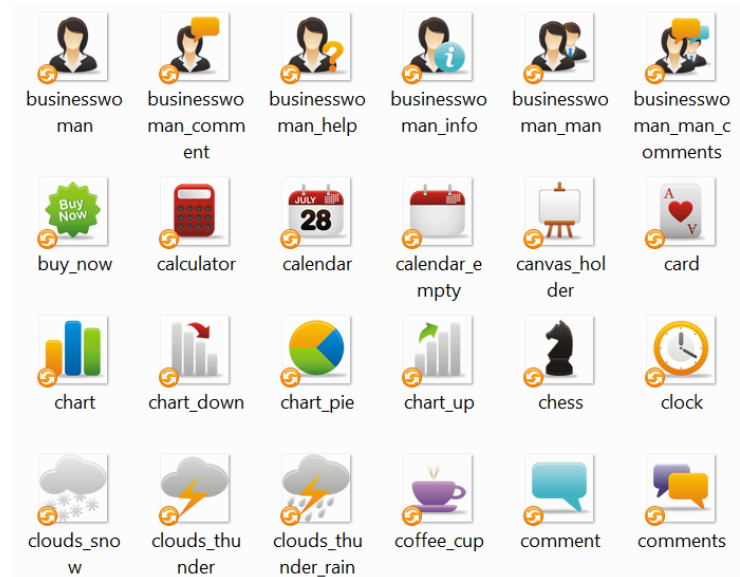
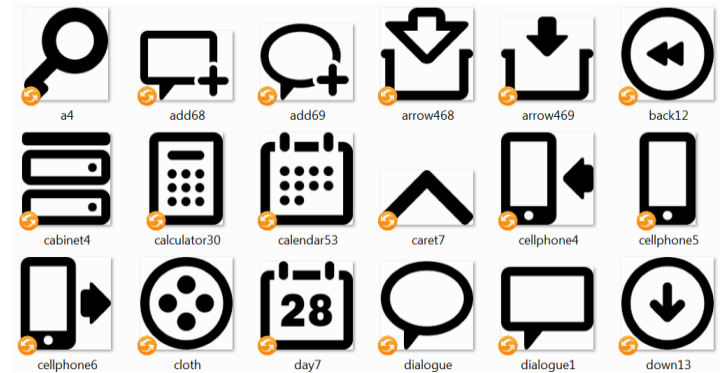


# What You Will Need

1. Microsoft Visio (see <http://office.microsoft.com/en-us/visio/>) or other flowcharting software
2. A set of icons
3. An attention to detail and lots of patience!

The use of icons to illustrate the experience is key to engaging the viewer, highlighting key areas of the map and bringing the experience to life. NOTE: Given that the entire Customer Journey has already been mapped, try to use the same icons across other maps so that the imagery will become familiar to your audience.

NOTE: It is always best to purchase icons as you need them (vs. purchasing them upfront in anticipation of needing them.) The key is to find a ‘representative’ image for the task or channel. It is best to label the icons, particularly if the image isn’t a perfect fit.





Skeptical



Upset



Excited



Surprised



Angry



Frustrated

## Overlaying the Emotional Journey

Much of the customer's journey will be banal, predictable or routine. However, if we delve deeper into the emotion experienced throughout the experience, the full picture of the customer's journey will emerge.

When you gathered research for this project, you may have found research that spoke to *HOW* the customer *FELT* about a particular part of the experience. Now is the time to bring that out.

## How Much Detail is Enough/Too Much?

The level of detail you provide is dependent on what it is you are mapping and how you intend to use the insight gathered.

Note the following considerations related to the illustrated map:

- 1) Always start your map with the catalyst that drives your target customer's behavior. If desired, illustrate what is happening in her life (e.g. eating, sports, friends, etc.)
- 2) Add visual cues that represent channels. For example, the addition of a building for a retail location or a phone for a call center.
- 3) Highlight channels that are within a company's control. For example, use a gold box identify internal touchpoints.

There is no right or wrong way to do this. Just remember to (a) be consistent and (b) label anything that isn't obvious.



# Spot the Opportunities

Just as no two Customer Journey Maps are alike, there isn't a right or wrong way to leverage the map to identify opportunities to improve the experience. A good Customer Journey Map will highlight the relationship between the customer and your company/brand with external forces. It will help guide the development of new strategies that align with your customer's needs and wants.

- Review your high priority Pain Points and the intensity of the pain for the customer. Before proceeding, make sure you understand the number and value of customers experiencing the pain. Are the numbers sufficiently large to warrant doing something about it?
- Avoid thinking about the solution in its entirety. Instead ask "What could make a great *moment*? Where would it be? What would it involve? How would it be remembered? How would it be retold?"
- Breakdown Discomfort/Pain Points by:
  - "Must Have" – The customer will not be able to continue or will not be able to engage initially if this component of the experience is not corrected. It could also cause harm outside of this area (e.g. reputation) or create additional Pain Points elsewhere in the experience. *Don't wait.*
  - "Should Have" – The customer is able to continue and/or engage, however, this point of the experience offers significant opportunity to differentiate the experience competitively. *Do it for competitive differentiation.*
  - "Nice to Have" – This area of the experience is working pretty well but could be better. Only a certain segment of the customer and/or prospect base may experience this. If the segment has a high value and/or you want to develop it further, consider it. *Do it to enhance the customer experience.*
- In general ask yourself, where are you going to get the greatest return in terms of both ROI and customer loyalty? Being 'best-in-class' does not necessarily translate into revenue or loyalty.

## Quantify the Opportunities

Scour your organization and the web for existing research, data and insights relevant to the customer experience and the customer segment you are attempting to map.

This information will help you get started and uncover any IWIK's (*"I wish I knew..."*) which will inform future research.

In order for others to buy into the story your map will tell, they need to know it's an authentic story built from strong insights based on real data.

As you collect your data, don't expect it to be organized. Research discovery is all about assembling the parts that help you build a strong foundation for your Customer Journey Map.

The following are just a few sources you may wish to explore to get an idea about how big the opportunity is:

- ✓ Primary & Secondary Research
- ✓ Customer Surveys
- ✓ Existing Customer Journey Maps
- ✓ Segmentation Personas
- ✓ Interviews with Subject Matter Experts (e.g. salespeople, trainers, brand associates, customer service agents, etc.)
- ✓ Call Center Reports
- ✓ Web Analytics Data
- ✓ Experience the Journey yourself (e.g. visit websites, call 1-800 customer service lines, visit physical locations, etc.)

# Pulling It All Together

The following example illustrates the journey of a customer applying for a credit card – when her credit rating isn't in the best shape. The graphic map works best when all the information you need to make decisions is captured in the image.

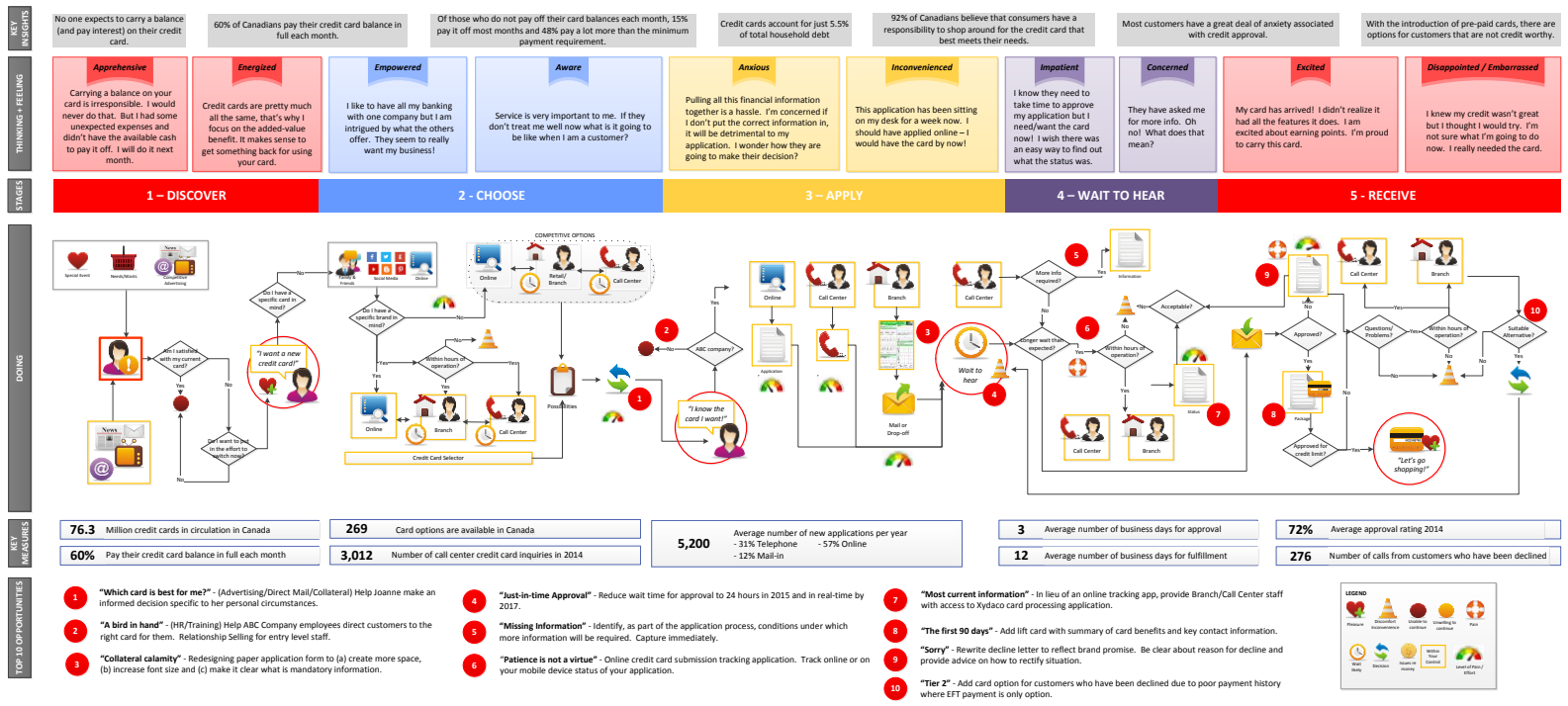


## JOANNE APPLYS FOR A CREDIT CARD

Joanne's back story:

- Joanne is 26 years old and shares an apartment with a friend in Liberty Village
- For the last 2 years she has worked for an up and coming software company.
- She is in sales with the majority of income coming from commission.
- Joanne got a car loan when she was 20 and couldn't keep up with the payments. The bank repossessed the car and her credit rating suffered.
- Although she would prefer to always pay cash, she now needs a credit card for business travel purposes.
- She is very anxious about the application process and concerned if she is declined. Joanne wants to appear professional to her clients.
- Her boyfriend has been quite critical about her financial state and she would be so embarrassed if she was declined.

Example Only

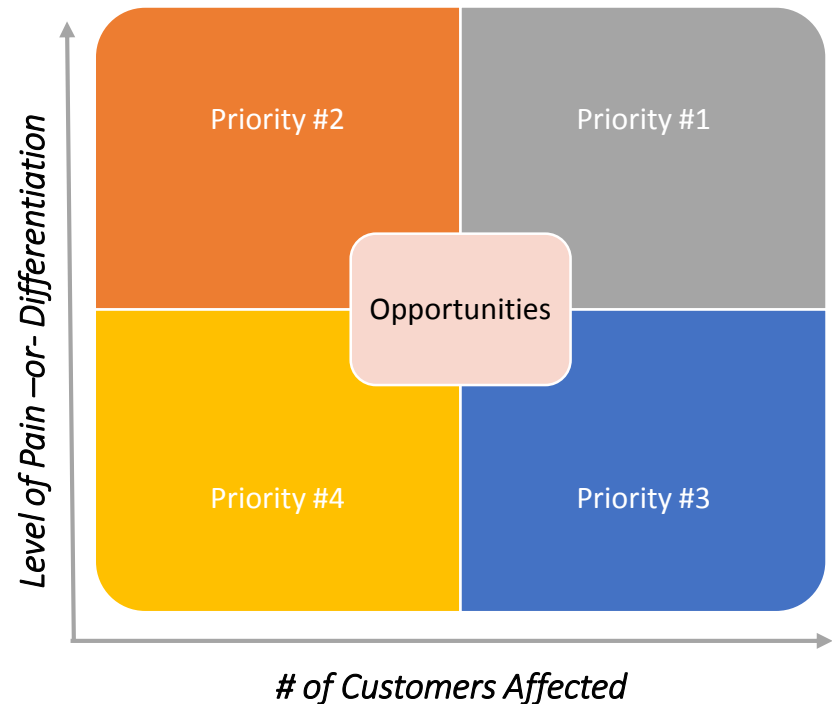


# Rank & Prioritize the Opportunities

There are a number of ways to rank and prioritize opportunities depending on your organizational goals – whether it be ROI or a lift in Net Promoter scores. Regardless of how you approach this exercise, make sure you have the quantitative data to back up the scope and depth of the opportunity.

Before starting make sure that you have:

- Identified all the opportunities
- Identified the level of pain involved
- Determined the number of customers affected – or- the impact on a key target segment
- Whether or not addressing the opportunity will (or will not) differentiate you in the marketplace (e.g. breakthrough or table stakes).





## Just the First Step

The most effective Customer Journey Maps engage an organization to be centered on the customer. At this step, it is important to recognize that creating a Customer Experience Journey Map is 'just the first step'. Using Customer Journey Mapping effectively is to realize the full benefits of this methodology for customer experience design and delivery.

Don't forget to:

- Share your Customer Journey Map widely across the organization to refine the map and share insights with key stakeholders across an organization.
- Use the Customer Journey Map as part of an ideation session, as input into business process mapping improvements, and for training and development purposes.
- Communicate the importance of the customer experience to business performance and to measure improvements over time.
- Keep the map updated as new information comes to light.

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## Reference

- (1) Lonocreative.com
- (2) Adaptive Path
- (3) VereQuest.com