Phase5

# CUSTOMER JOURNEY MAPPING

## For Better Business Decisions

**Help your group, or your entire business, design experiences that map onto your customer's world**

Phase5

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# INTRODUCTION

Dear Reader,

The **inspiration** for this customer journey mapping ebook comes out of countless conversations with people like yourself: those who want to make their businesses more customer centric. The material in the ebook comes out of many years of experience researching and creating these maps, and working with clients to ensure they are understood and adopted throughout the organization.

Inevitably there will be topics we've left out, intentionally or inadvertently. I encourage you to drop me a note (stephans@phase-5.com) and let me know what questions you have or what you would like to see next time. You'll get a personal response from me and we'll incorporate your feedback into the next update.

Thanks for reading and stay customer-centric out there!

**Stephan Sigaud**
EVP Marketing & Development, Phase5

Phase5

# CJM – A PARADIGM SHIFT FOR BUSINESS PLANNING

## Principle of CJM

The seemingly simple core idea of CJM centers around this question: “How does my customer experience the relationship with my company?”

How does my customer experience the relationship with my company?

# Basic CJM Structure

Under CJM, the customer experience is conceptualized as a journey, with many points of contact with a brand and product category long before an actual purchase is made. And the journey continues with the post-purchase experience.

Broadly, then, a journey can be divided into phases. There are multiple ways of doing this, but the following is typical:

**PRE-PURCHASE:** Includes all a customer's interactions up until they decide to satisfy a need by making a purchase. At Phase 5 we often refer to an early period we call "awakening," in which awareness and understanding is developing. During pre-purchase, the journey maps a customer's interactions with:

- The product category, including your competitors
- Your brand
- The environment: other sources of influence and information including friends and peers (social networks), media of all sorts, professional connections, and so on.

**PURCHASE:** Not just the literal issuing of a PO or swiping of a card, but including the actual selection of a particular product / service. The CJM captures factors that might:

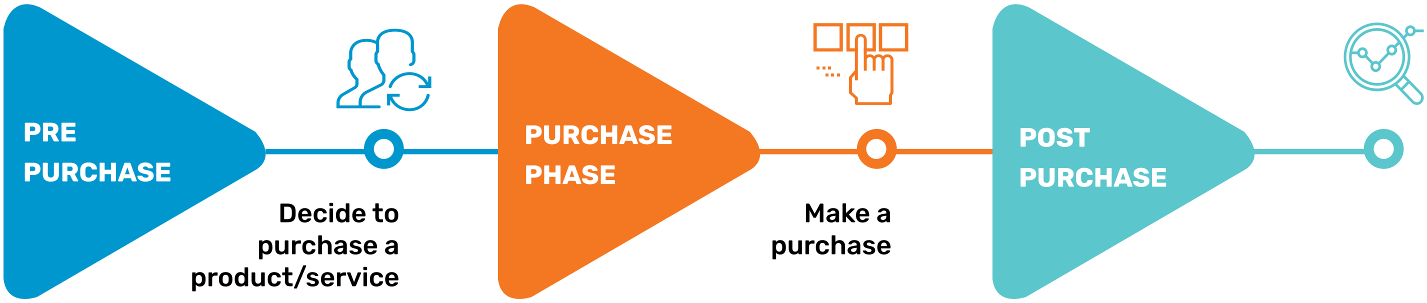
- Influence brand selection
- Stop, delay or hasten a purchase
- Increase or reduce spend

**POST PURCHASE:** From receiving delivery through the conclusion of all interactions that involve the brand, product, or service. In transactional businesses, this also may involve the customer going back into the market to become a prospect – the whole process of building awareness and interest begins anew. Activities to watch:

- Use of the product or service
- Rectifying problems encountered, including through customer service
- Word of mouth that loops back to the pre-purchase stage for others

# Conceptual Customer Journey Map

So conceptually, a journey map looks like this:




# You're gonna need Hunches

Customer journey mapping can sound kind of academic until you realize what drives it: hunches. Academically, we can turn a hunch into a hypothesis by articulating it clearly. But at the level of business intuition, a successful journey mapping effort will start with hunches about deep-seated problems with how a business is working with customers, or solving its customers' problems.

Therefore, journey-mapping research is always exploratory. It starts with hunches, develops those into hypotheses, then tests and revises those hypotheses to come to a customer-centric view of the business.

This is what makes customer journey mapping different from classic decision-based research, and as a consequence some people hate it. They see hunch-based research as a throwback to the bad old days of Research for No Purpose. And anyone who's done CJM has to admit, there's a bit of potential danger there. This is entailed in the CJM paradox, which runs like this:

**A** Research that doesn't focus on decisions runs the risk of wasting everyone's time and money because after it's done, no one DOES anything with it.

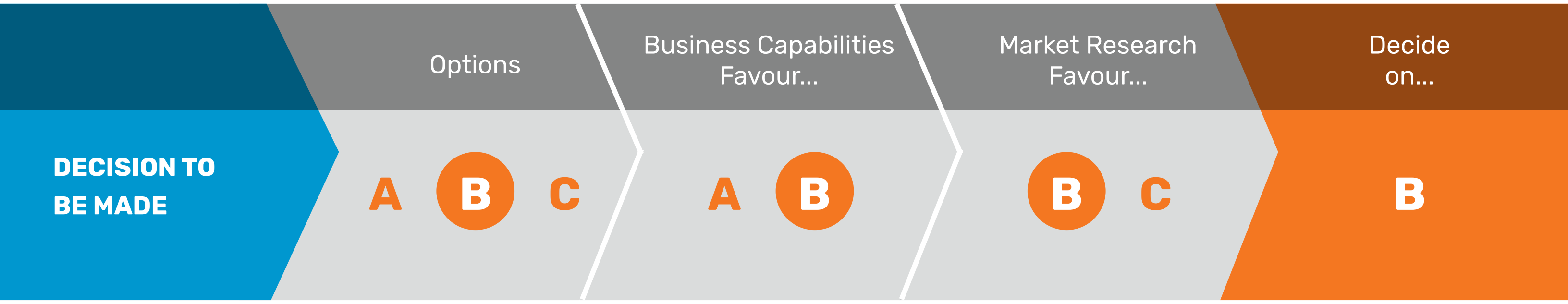
**B** CJM **doesn't** focus on decisions yet has enormous top-line and bottom-line potential for your organization.

A successful journey mapping effort will start with hunches about deep-seated problems with how a business is working with customers, or solving its customers' problems.

That indeed is the situation. Most research is decision-focused (rightly so!) and is based on core questions like these:

- What new product / service should we bring to this market segment?
- How should we bundle and price our new software suite?
- What's the best messaging for our new product?
- etc.

The path for decision-focused research is clear: (1) formulate the decision, (2) do the research to provide insights and information, (3) make the decision. Graphically, it looks like this:




But CJM is different. CJM is focused on "How does my customer experience the relationship with my company?" In other words, it's focused on what the **customer** is doing rather than the decisions you are making.

CJM does not put boxes around features the way product planners do. Features are just the way we package what we sell. Journey mapping is focused on the problems, not on the solutions.

Consequently, typical CJM questions are — this is the technical term — hunch-based. You've got a hunch that…

- A lot of your customer service efforts are wasted
- The competition is blowing you out of the water during the time the customer is looking at options, before the purchase decision
- Some interactions could easily be moved online and save the company big money

Embedded in those hunches is a But: "But we don't know what customers really think about this issue."

CJM is focused on what the customer is doing rather than the decisions you are making.

# Wanted: Product Management, UX, Marketing, CX

The customer-centered view means that all these business functions we've created have to work together. Here are four that are involved with almost any CJM effort:

### PRODUCT MANAGEMENT

If you're a product manager, maybe you've been trying to tell the organization to expand their definition of product. We see this a lot. The product manager is working within the narrow confines of "the thing that the customer is actually using" but maybe they believe that the service component, or the onboarding process is REALLY the thing that needs to be fixed right now.

CJM helps you break across those organizational barriers. Bust silos.

But CJM is also good for plain old product development. It identifies pain points, but not in the context of your product or service. It identifies them in the context of the customer's own journey. And that can lead to insights you never would have had in narrower-scope research.

CJM is also good for plain old product development.

### USER EXPERIENCE

For UX people, the value of customer journey mapping is in how to organize your user experience. Take a customer service portal for example. Through CJM, you might have a much clearer idea what customers are going through when they get to customer service. Maybe they're angry. Maybe they're on the verge of returning a product or asking for a refund.

The journey map can uncover emotions and needs that need to be very directly addressed by the user experience.

### MARKETING & BRAND

Since we already talked about product, let's focus just on the go-to-market aspects of marketing. CJM's ability to surface emotions can be enormously important in deciding how to communicate with prospects as they go through their purchase journey. At the same time, a good map teases out

- **A** Players – who is making the decisions (especially in B2B purchases) and what their concerns are
- **B** Sources of information – where people are going to learn about solutions to their problems

Consequently, the map helps the marketer speak with an authentic voice, talking to the appropriate people, through the channels they use.

> The journey map can help you understand why customers are irate.

### CUSTOMER EXPERIENCE

Customer journey mapping is great for customer experience people who take a broad view of what constitutes customer experience

When an organization has pigeon-holed customer experience into "those guys who deal with irate customers", the journey map can help you understand why customers are irate, and help you tell that story across the organization. The map can really become the foundation on which you build your case for a more comprehensive view of the customer experience.

## CJM – from the Outside In

So that's where it starts: the hunch, the mapping metaphor, the cross-functional focus on customer needs. While conceptually simple, the CJM approach has far-reaching implications for every facet of how an organization makes money and/or serves its customers. It's incredibly valuable in that regard, but only if implemented well and with the right internal people.

# SEVEN BENEFITS OF CJM, PLUS A BONUS

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How, exactly, does the journey map deliver its value?

## BENEFIT ONE
### Smash Silos

The silo problem is that everyone can have blind spots. Your vision might be limited by function, by geography, or type of work. By definition, those who work in a silo do not have good visibility into what happens outside their world. The trouble is that customer interactions within one silo all-too-often have repercussions for the direction of the customer journey — which then affects other parts of the organization.

The CJM wrecking ball can put a big hole in these silos. Here's a simple example:

- The technical support function of a large manufacturer measures success by the resolution of customer issues. It tries to do this as quickly as possible and is proud of its 3-day resolution.
- The CJM, though, shows that for certain stages of the journey, 3 days is far too slow. For other stages, it's unexpectedly fast. Also, customers usually call their account manager when they have a problem, which can add significantly to the perceived wait time, turning the so-called 3 days into 5 or more.
- Based on the findings of the CJM, the technical support team implements a triage system involving Sales. Urgent support needs are quickly escalated; communication between sales and technical support is improved.

CJM removes the blinders that we all have to put on every day to get our jobs done. We see the flaws in our organizational structures – in our goals, our systems, our business processes – that are preventing us from serving customers in a way that moves them smoothly along their journey. Once we see clearly, we can fix and adjust, or rebuild if necessary.

CJM removes the blinders that we all have to put on every day to get our jobs done.

# BENEFIT TWO
## Get Cradle-To-Grave Guidance

How would you like a research approach that could provide guidance through every phase of the product lifecycle, from innovation to delivery and service? CJM is the king of multi-phase research. It can help you with

- Strategic prioritization in the very early stages of finding opportunities and segments to target. What are the big pain points that should drive product and service development?
- Go-to-market campaigns. For example the journey map will tell you about the key emotions customers experience and the information sources they consult. This can inform where and how you talk to the market about your offerings.
- Customer relationship strategies. Is more communication needed between, say, Sales and Customer Service? Does the call center need a different triage system? Do we need (better) omnichannel planning? How do we engage and build relationships?

# BENEFIT THREE
## Get Pain & Opportunity Insight

This point might seem silly. Doesn't all research try to uncover pain and opportunities?

Well, yes, but standard research often asks questions from the company's or the category's perspective, rather than from the customer's.

- What kind of X do you want?
- How could we improve this tool?

CJM, by contrast, sits GoPro on the customer's head. Rather than focusing on the **tool** customers often use to solve a problem or meet a need, it focuses on **what the customer is trying to do**. This can uncover gaps that other kinds of research might never encounter — cracks in the coverage of products and services that exist to get the customer where they want to go.

# BENEFIT FOUR
## Address Emotions

The content of a strong customer journey map includes the emotional states of customers at each stage and sub-stage. How does the customer feel when they realize there's a problem that needs solving? What emotions run through their minds as they explore options, and make a selection, or call customer service?

Journey maps bring these emotions back into your organization. The report medium (highly graphical and shown as a "map") is well-suited to doing that.

Emotional communication creates empathy for the purchasers / users among the people who create, build, sell and service your products. This is a research value that is hard-to-measure, but vitally important, because as the scientist Seth Roberts said, we work hardest on what we personally care about.

Can other types of research do this? Sure, CJM is not the only way. But its human, story-telling structure, with a longitudinal element of discovery and engagement make it both memorable and compelling.

One caveat: We often presume that all customers want an emotional connection with us. This is far from true. Some customers want something functional, and nothing more. Understanding and teasing this out is a critical requirement for CJM – segmentation. But just because a customer does **not** want an emotional connection with your company or product does not mean that their emotions along the journey are not important. Quite the contrary. Sometimes addressing the worries and frustrations through a logical appeal is the perfect solution.

## BENEFIT FIVE
## Break through the Byzantine B2B

Customer journey maps work very well for consumer journeys. They work **fabulously** for complex B2B journeys. Everyone who has marketed or sold to business customers knows the frustration of trying to understand how decisions get made. Is it the engineer? The front-line assembly worker? Strategic sourcing? A department head? Is it all these people at different stages? If so, who, when and how much?

The journey map — provided it's grounded in customer research and designed to include all possible players — is the perfect place to tease out the answers to these questions. It provides a structured view of the process, the interplay between influencers, and what each person's emotional and practical considerations are, and what their degree of influence is.

Do any of these archetypes sound familiar?

- The engineer whose requirements limit the selection set, the shortlist created early on
- The squeaky wheel that Sales often focuses on, but whose opinion colleagues ignore
- The procurement team with power to blacklist vendors
- The worker bee low in the hierarchy who uses the product but has outsize influence in its selection
- The nominal decision-maker who rubberstamps the purchase as long as the sales tactics don't offend

The journey map can identify all these people, and help you understand who to talk to, about what, and when. It also identifies external influencers like labor unions or regulatory bodies that you may not have considered.

This is not to say that the CJM supplants all traditional purchase decision / influencer research. In certain situations, other approaches provide the best source of information. But CJM provides a concise view of multiple players across the long timeframes of B2B decision-making. This view can catalyze changes in marketing, sales, and even product development.

Customer journey maps work very well for consumer journeys. They work fabulously for complex B2B journeys.

# BENEFIT SIX
## Address Emotions

As we discuss in an upcoming article in this series, the customer journey map is best done under the auspices of high-level executive support. But being a cross-functional undertaking, the CJM will always have in its audience leaders of functional areas — especially customer service, marketing, sales, channel owners and digital masters — who are only interested in a certain detailed section of the big picture.

The structure of the CJM, with its pre, during, and post-purchase mega-sections, makes it easy to present to and communicate with these mid-level executives. They can quickly get a big picture view before diving into their particular area of interest.

You might ask: does this mean you're inviting the executives to stay holed up in their silos? That's not our experience at all. The visual structure of the CJM makes it clear that you're blowing out one detail of the big picture for them. But since focusing on one area is a logical necessity of execution, the CJM is a great way to do it without losing that larger perspective.

Thinking you understand the moment of truth can be deceiving because you might not be focused on the most important one.

# BENEFIT SEVEN
## Rethink Moments of Truth

The idea of the "moment of truth" can be both powerful and deceiving. It's powerful because it sharpens organizational focus. Understanding that there is a specific experience that might make or break the relationship with a customer can focus the attention of an organization on

improving that experience. Is the rope going to hold, or is it going to break?

But thinking you understand the moment of truth can be deceiving because you might not be focused on the most important one. Let's take the consumer insurance industry as an example.

In insurance, undeniably, filing a claim is a "moment of truth" for many of those customers who experience it — an experience that the insurance company MUST get right in order to retain that customer, discretely look for fraud, and so on. For this reason it's common in the insurance industry for companies to want to drill into just that single experience, the claims journey.

That's where the "moment of truth" idea can get deceptive.

Drilling into the claims journey is a fine thing to do, but with one caveat: to look at claims in the larger context of a more complete customer journey. Without that larger context, the drill-down is deceiving. Because not every customer *has* a claim. A journey map with the proper perspective will show **different** moments of truth for those many never-had-a-claim customers. To continue with the insurance example, a far bigger issue and critical moment for insurers is the process of billing and payment – actually taking people's money. This act touches many more customers than claims, and insurers are among the worst at getting it right. They are more worried about regulations, privacy and technology – which all get in the way of a really good experience in allowing the customer to give you their money.

A good journey map shows the moments of truth that apply to different segments of customers. It is often eye-opening for an organization to see that many customers have moments of truth that have traditionally gotten much less attention, because they seem less urgent or critical. Continuing the insurance example, a longer list of moments of truth might include:

- Insurance claim
- Technical support with the website
- Billing issue
- Late payment handling
- Unified billing across home and auto
- Giving customers features they really want and need, not what is actuarially attractive

Some of these aren't sexy, but if they are the rope that keeps you connected to your customer, they're worth inspecting.

## Bonus: Force the Organization to Get Things Right

Customer journey mapping demands the organization do other things right:

- Get segments right and get them socialized across the organization
- Revisit metrics and rewards, aligning them with the customer view
- Tune business processes and systems
- Facilitate channel transitioning

## Conclusion

The mapping metaphor in customer journey mapping really holds. Just like a real map, the CJM guides us through territory we haven't explored before. It reveals important geographic features to pay attention to. It provides the customer's perspective about the landmarks we've traditionally thought to be most important.

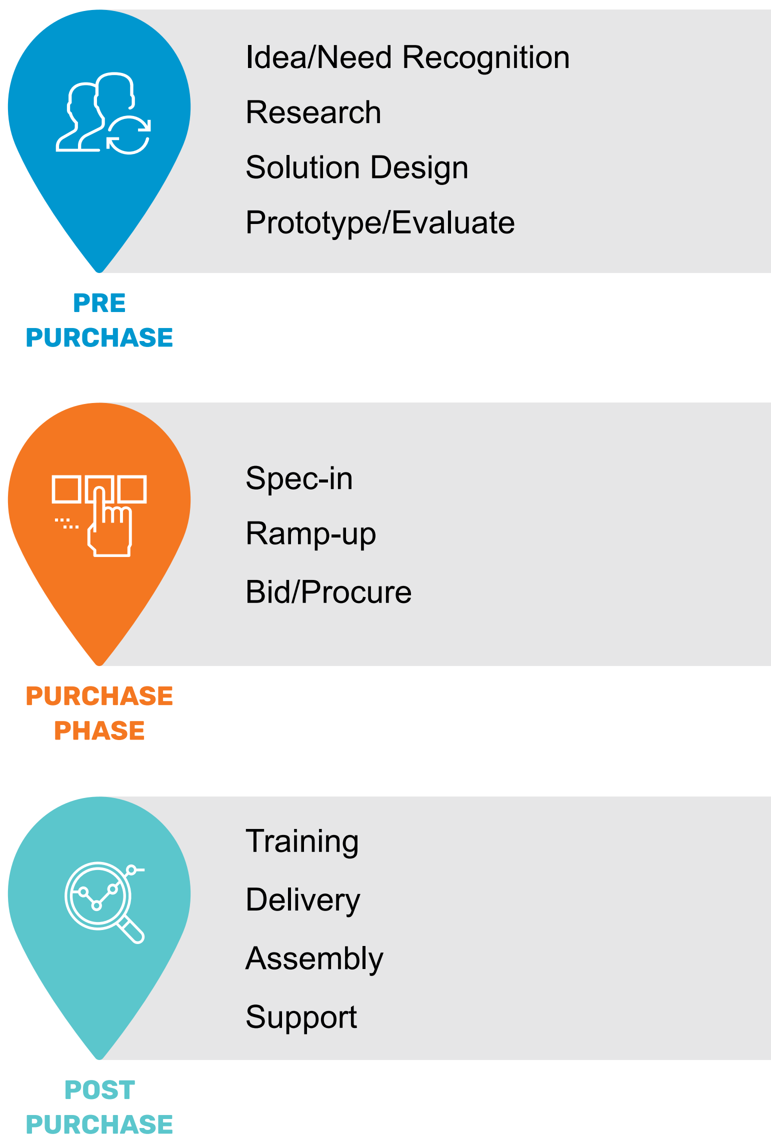

# EXAMPLE MAP AND GETTING STARTED

## Actual Customer Journey Map Example

In real life, journeys quickly get more complicated than the conceptual map we showed earlier. Below is the basic journey structure for customers of a manufacturer of high-tech materials used in a wide range of industrial applications.

You can see that the three-stage concept still overlays the map, but the journey is broken up into multiple smaller stages. The customer research in this instance showed distinct stages within each big meta-stage as the manufacturer's customers solved their problems and made the decision to purchase their high-tech materials.

In the full map, under each one of the smaller stages is a detailed discussion of the process and the players involved, along with the emotions, constraints, information sources, and decision-making criteria they use to move the journey along.



## Whose Journey is this, anyway?

There are a few things worth noting in the example above.

- In the big-big picture, we talk about master journeys, then sub-journeys for customer segments, then micro journeys within specific stages
- Journey maps are a “generalized” view of the customer. Not every customer will necessarily experience every stage. Some will combine stages, or skip stages. But mapping out the full set of possibilities is important for identifying opportunities to improve.
- In B2B journey maps, it’s rare that one individual person will experience the whole journey. Rather, it’s the company as a whole, and part of the customer journey map investigation is to identify the roles that are involved with each of these smaller stages.

## Where to Begin Mapping?

One of the first questions you have as a company contemplating the customer journey is, okay, so where does pre-purchase start? Here’s the Goldilocks “just right” view of the pre-purchase phase:

- **You don’t want to start too early.** If you do, you’ll get lost in the customer’s life before it has anything to do with your company.
- **Don’t start too late.** If you start when your customer is already considering your product vs a competitor’s, it’s too late. The decision is already half-made. There’s lots of interesting stuff that happened earlier to help get them to the point of having such a decision to make. You want to know about that interesting stuff, because that can drive how and where you engage customers.
- **Start when your customer is encountering the problem that led them to your category.** This is the “just right” Goldilocks point. In a sense it’s like jobs-to-be-done theory. You’re focused on what the customer is actually trying to accomplish – the problem they are trying to get resolved – and then the journey is about how they find solutions to their problem.

## Start Inside the Box

After all this talk about how customer journey mapping is an “outside-in” view, you might find it paradoxical that we often recommend starting the CJM process by creating interaction maps from the inside out – actually starting inside the company or inside the box, as it were.

What we recommend is finding out what your company thinks the different points of interaction are and what happens at each of these touch points. This helps for several reasons:

**CONSENSUS**

It helps build consensus for the overall project by getting input from different teams and stakeholders

**GAPS**

It often tells you how much you don’t know about some interactions with customers and identifies gaps you will need to fill.

**HYPOTHESES**

It builds hypotheses about interactions and moments of truth that you can test in customer conversations.

**INTERNAL V EXTERNAL**

It allows the final customer journey map to be overlaid against internal processes

HOWEVER, the big caveat is that you need to be prepared to blow up your hypotheses. Some of them at least, maybe all of them. We tend to believe customers are logical and think like us, from a business systems perspective, so often these inside-the-box views really have no reality for the customer, regardless of how logical they are to us.

## Include the Right Internal People

A couple of caveats about the "inside the box" start:

- Don't limit your box to just your sales and marketing teams, unless your customer journey focuses only on interactions that are directly managed by sales and marketing. The best approach is to start with a cross functional team and map out each customer interaction at different stages - pre-purchase, purchase, post purchase if you are mapping the entire journey.
- Once you have this draft map completed, you will likely want to interview customer facing staff or staff who manage customer interactions across channels and hone in on the details of each step.
- The internal map is NOT to be shown to customers. It's to develop hypotheses that you can probe on when interviewing customers. This is also discussed in the next chapter's sections about interviewing customers.

## Ask them the Right Questions

Key questions to ask during your inside-the-box investigation:

- Engagement. How does the customer engage with category and our brand? What channels are they using?
- Objectives. What do we think the customer's objectives are at this touchpoint?
- Info needs. What kind of information do customers want and need?
- Obstacles. Do we think there might be obstacles or pain points at this touchpoint?

Phase5

# NUTS AND BOLTS OF CUSTOMER RESEARCH

## Segmentation First

Customer journey mapping without segmentation is like preparing a picnic without a guest list. You can ask the first few guests what they like and serve that, but chances are you're going to miss something important.

As in all things marketing, segmentation is foundational. Segments with distinct characteristics will likely have substantially different journey maps. That fact influences all other aspects of CJM, including the next one…

## How many Customers to talk to

Initial CJM research is typically qualitative. The idea is to do a deep dive on the customer's experiences. In our experience, getting input from 20-30 customers in your 3-4 most important segments is usually enough. While there may be additional learnings from interviewing more than that, the returns start to diminish quite a bit.

Customer journey mapping without segmentation is like preparing a picnic without a guest list.

However, there are some situations where you may want to include feedback from more people. Those include:

- **The journey is long.** For example: you are doing an end-to-end CJM exercise and it will take a long time to get the detailed insights you want from a single respondent. In this case, you may want to "break" the journey up and get feedback from different customers on different stages. For example, in the case of insurance, talk to one customer about purchasing and onboarding and another about servicing or claims.
- **B2B.** In a B2B context it will be a necessity to break up the journey because so many people are involved in different aspects of it. For a complex journey such as the one referenced above, a single purchase journey may have 5-10 individuals involved over the course of a year or more. Consequently the customer research may require hundreds of interviews.
- **Segments / personas.** Some companies have five or more substantially different segments they serve. In this case you may want to raise the numbers so you can group according to those segments / personas.
- **Business lines.** Customer journeys are likely to be very different for different business lines. So a financial institution may have separate journeys for day to day banking customers and another for high-net worth wealth management customers. Or a diversified manufacturer would look at different journeys for scientists using specific adhesives than for safety managers who purchase protective clothing and gear.
- **Regional differences.** When you have good reason to think that the journey is different in different regions your company serves, you'll want to increase numbers so that you can reveal such differences.

## Individual Interviews? Focus groups? Ethnographic?

While there's not a single methodology that is right for every situation, if you have to pick one that usually prevails, it's the individual interview. The reason is that in customer journey mapping we are looking to understand detailed, individually-nuanced interactions, including motivations, triggers, feelings, and expectations.

Nuances may be different for different customers so a 1 on 1 approach makes the most sense. It's a listening interview, where the moderator raises a topic and encourages the respondent to explore.

Individual interviews uncover diversity of "triggers" or emotions. In exploring triggers for life insurance, for example, one person might be motivated to get life insurance because she had a baby while someone else does it because the family's taken on debt to buy a rental property.

Groups are better suited to validating and refining a journey once it has been mapped out. Remember a CJM is a generalization of the customer experience but should resonate with all customers. In a group setting, showing a preliminary map to a more diverse group of customers is a good way to see if you got the journey right at this generalized level, to understand where steps may cycle and whether there are some steps that simply don't exist for some customers.

Interaction among group research participants is helpful for brainstorming on needs and pain points. There's also a role for prioritizing moments of truth, getting reactions to backstage strategies, and ensuring customer goals at each stage of the journey are clearly defined.

Using ethnographic approaches can make sense for some organizations. This approach is particularly appropriate for shorter journeys when it is easy to predict when they will occur. Retailers or food service industry companies can learn a lot about interactions by watching their customers as they interact with their staff, product and facilities. Understanding how people use products in a wide range of verticals is another situation where observational techniques help you understand customer experience.

Still, despite the rich information that ethnographic and contextual inquiry brings, it is not effective for gathering customer insights for journeys that are infrequent or difficult to predict. Another drawback is that it is rare that the full customer journey can be effectively captured this way. Full journeys often take days, weeks and months. Although ethnographic investigations are longitudinal, such an approach can be prohibitively expensive for longer engagements, or engagements that take only moments out of a person's day or week for months on end.

## Online Data -Gathering Options

Online qualitative approaches can also be very effective for customer journey mapping research. In the last five years we have been involved in more and more extended online qualitative research for customer journey

Nuances may be different for different customers so a 1 on 1 approach makes the most sense.

mapping. Conducting the research over 3-7 days or even longer has lots of plusses.

For one, it's possible to get more input from the same customer, e.g. 20 or 30 minutes a day for 5 days can be easier than a 100 or 150 minute interview.

In some situations, descriptive recollection is also better in the online environment. Summarizing what a respondent documented in day 1 on day 2 allows respondents to "remember" details they might forget on first telling. And participants can record day to day activities of journeys that are more extended if you recruit them in real time.

Multimedia data is easier to come by in the online / mobile environment. Customers can do "self" ethnography and upload pictures, video, websites, and so on to help document their interactions and pain points.

With online, the same research exercise can use both 1-1 and group approaches. When appropriate, you can first ask respondents to answer a question individually, then allow them to see others' responses when they're finished. Having thought about the question already, these customers are primed to respond to and expand on others' responses.

Finally, extended online research allows for developing a map and refining and validating it in the same research exercise. For example the journey can be recounted on days 1-4, then the research team can mock up a high level visual of the journey map and show it to participants on day 5 or 6 and get feedback on what's right and where it needs refinement.

With online, the same research exercise can use both 1-1 and group approaches.

## Do we need Quantitative Studies?

This is a good question – one that we got during a webinar on customer journey mapping.

Surveys can be a useful part of a CJM exercise, but not usually[1] at the outset. They are better suited to quantifying elements of the journey rather than describing it. In the context of CJM, surveys are most useful for:

- Measuring channel behavior and information sources. What channels are customers using? What is the relative incidence of information needs at different points in the journey?
- Prioritizing pain points. When you are undertaking CJM to re-engineer parts of the journey, knowing how frequently customers experience a pain point and how severe they rate it can help the team set priorities on what to tackle first.

## Make sure you get the Right People

While most CJM research is qualitative, that doesn't mean you just want to take any old customer you can lay your hands on. You should aim to get a good cross-section of customers. Even the term "customer" itself is a misnomer. Do you want to develop your view ONLY off of those who have already purchased a product or service from you? Not typically. More often you'll want to include non-customers who are users of your category to determine if they have similar needs and motivations and identify threats and opportunities.

Personas are also a good source of diversity, especially when they are properly based on rigorous quantitative segmentation. Make sure to include a proper mix of personas – most important ones first – and if you suspect their characteristics are different enough, consider interviewing sufficient numbers in each persona to see if there are substantial journey differences.

Other considerations around recruiting include:

- **Recency.** Some customer relationships are long standing. Trying to understand why someone selected the wealth management firm he did 10 years ago will miss out on important details. For long journeys, this may mean recruiting different respondents for different parts of the journey.
- **Category involvement.** If you make sports shoes, you probably want to make sure you include the marathon runner and the weekend jogger and the guy who just wears them for walking around.
- **Decision-making vs using.** In many cases, especially B2B, customer journey maps include both decision makers and end-users of a product or service. If this sounds like your company, you will likely need to include both types of respondents.

1 Sorry for the weasel-word, "usually" – but it's true! There are occasions when an early quant study can be needed. We did a study recently that helped us understand the difference between a rapid path journey and a more engaged one – clustering off the quantitative study was quite useful in this situation.

## Interviewing Technique – Work Backwards

Call this "What before Why." Ask customers to remember **what** they did before delving into **why** they did it. It's the art of working backwards, from an actual decision, which is easy enough to recall, into a discussion of the factors that went into that decision, which is not an easy place to start.

It also helps to work back to "triggers." What caused the customer to begin this step? Where did it start for them? For the initial trigger, this is typically the realization of a need, a problem, or often in the consumer space, a feeling or emotional need that the purchase addresses.

As the interview evolves, make sure to probe about actions and touchpoints, but without using this sort of marketing jargon! What did customers do at this step? How did they do it? What interactions did they have with your brand, whether passive (happened to see a machine with your brand name on it) or active (went to your website)?

> Here it is important to probe to understand all the different steps. Respondents can be prone to recall the big stuff but omit smaller activities which can end up being important.
>
> It's also important to get at not just interactions where your company has direct control – like a call center, but indirect interactions like third-party reviews of your products and services.

It also helps to work back to "triggers." What caused the customer to begin this step?

## Interviewing Technique – Feel the Emotions

At each step, even seemingly insignificant steps, you want to feel the emotion your customer is experiencing, and the source of that emotion. Were they in a good mood, angry or frustrated, anxious, overwhelmed, confused?

Understanding emotions at different stages of the journey helps identify opportunities on how to position interactions and helps your company address less-than-desirable emotional states.

**EXAMPLE:**

A financial brokerage finds out that customers are feeling overwhelmed by choices, powerless because of their lack of knowledge of different types of investments and anxious that they are not on track financially. Knowing this, they also then know that showing a consumer 20 types of mutual funds is not going to help. What they need to do is help simplify options, educate and provide their prospective client with a clear path to their objectives – and out of the negative emotions.

**EXAMPLE:**

A medical device manufacturer learns that type 1 diabetics are often ashamed of the shots they need to take – they don't even want their kids to know their super mom is not super. They feel shame, but their goal is to feel empowered, and make the 'tool' for managing diabetes a private part of their life. The message is **not** don't be ashamed, this is who you are and what you have. Instead, it is let us help you with a better solution, one that you don't need to share with the world, and certainly not your family.

## Interviewing Technique – Know the Influence(r)s

It might go without saying that you need to probe and understand who is influencing the customer during their journey. Certainly you need to know the influencers at each stage, and understand the dynamics of the interactions.

But we've found it's also important to probe on WHAT is influencing the purchase. This is especially important for B2B journeys where purchases are often made to satisfy multiple constituencies.

Often there are obvious influencers in B2B settings like the product or service end-user. However, there are also often less obvious influences like government regulations, unions, or seasonality. When doing CJM research with dentists in China for example, we learned that purchases were often timed to the school calendar as parents took their kids to the dentist during school breaks. During these peak times, dentists wanted to deal with vendors who could ensure an adequate supply and fast delivery of supplies.

## Interviewing technique – Feel their Pain

You might think that pain would be easy to see. What issues, concerns or frustrations did the customer encounter at this step? Just ask the question, right?

But there are some nuances. First, during the customer conversations, it is important to try to get at both major, obvious pain points as well as smaller pain points. A big pain point might be that the product was out of stock, the customer support center took 20 minutes to pick up my call and the agent couldn't give me an answer. A small one might be that there is no easy way to download detailed product specifications from the website.

Obviously as a company you'd like to solve the big pains. But those can take time. Among the "paper cut" pains, on the other hand, you might discover several that are relatively easy to solve. Those are the quick wins that you can use to

Seasonality can be an influencer – child dentistry in China.

maintain momentum in your customer journey mapping efforts.

It's also important to get at pain points that do not directly involve your products or services. If a customer explains that she is frustrated because companies generally use jargon that she does not understand or that it is difficult to learn how to use a product properly, these could be opportunities for your company to improve the experience and differentiate.

Finally, you need to keep an eye out for unrecognized pain. Know that your customer has a way of getting business done. Otherwise they wouldn't be in business! They might tell you that everything pretty much works. No big pain points. Because that's the way they've always done business.

But steps in the customer journey that take time and manpower are always targets for reinvention. The company that is able to envision a new way of doing business – that fits with the customer's overall goals – is the company that wins tomorrow's business.

## Other Interview Guide Development Tips

**01**

### KEEP IT OPEN ENDED

You want to understand the journey from the customer perspective so let them articulate it. Use open ended questions like "so tell me what happened next" and "what was going on in your life at that point in time"?

**02**

### PROBE, PROBE AND PROBE SOME MORE

Customers may think of their actions as routine and not noteworthy and mention only major steps or significant issues. You need to be vigilant about drawing out details.

**03**

### USE YOUR INTERNAL MAP, BUT NOT AS SOMETHING TO SHOW

If you created an internal version of the customer journey, refer to it when creating your guide to make sure that you can fill some of the gaps and to listen for customer comments that will either confirm or deny your hypotheses.

Do not base your interview guide on the map, however. The danger is you could impose your view of the journey on the customer, which is contrary to the whole CJM philosophy.

**Example:** If your marketing team thinks that many of your customers use social media like pinterest to get ideas for home goods accessories, don't include a question in the guide like: "Tell me how you used social media to get ideas" Instead, ask how and where they got motivation and if during that open-ended discussion Pinterest does not come up organically, **then** you can ask about it directly.

**04**

### COME FULL CIRCLE

Towards the end of the interview, retrace the main stages and sub-steps and highlight the facts and insights you got from the customer. This can help validate the journey and uncover some details you may have missed on first pass.

# BEST PRACTICES FOR CJM

These best practices are from an interview with the co-head of Phase 5's innovation practice and customer journey mapping expert: **MICHAEL DOLENKO.**

## Focus on the Category, not your Company

**The customer journey map (CJM) is the answer to the question: How does my customer experience the relationship with my company? Does that mean I should start by understanding when the customer first heard of us?**

**MICHAEL:** It's important for companies working on a customer journey map to understand that CJM starts before there is a relationship with your company. That has traditionally been a problem with all sorts of analytic approaches. Companies have been focused on the point at which money changes hands, or on brand awareness. Those are important moments, to be sure, but they're hardly the start of the journey, and if you start there you're missing most of the picture.

We typically start mapping a journey from the time that a prospective customer becomes aware of the category. They've got an unsolved problem, and eventually they become aware that Acme Company has a solution -- or more importantly, they become aware that there is some type of solution, and that Acme is one of the companies that makes it. That's the beginning of the map, the discussion of what sources of information they consult.

Your company wants to start influencing purchasers at least at the category level. In other words you care deeply about the information they come across regarding your category, because that information will directly affect whether they select your company for a solution.

We typically start mapping a journey from the time that a prospective customer becomes aware of the category.

## Divide, but don't forget to Conquer

**A customer journey map is a big undertaking, can we break it down into sections, say, after-sales service this year and pre-sales research next year?**

**MICHAEL:** Dividing can be a good thing, and sometimes it's politically or financially necessary. A full-blown customer journey in a large corporation -- especially a B2B enterprise where the customer journey involves a half-dozen individual roles -- can stretch over many months. It can be helpful to select part of the journey as a starting point, maybe to split budgets across years or maybe to rally the team around a big change and a big win.

Let's take an example of warranty returns. The company might decide at the outset that warranty returns is likely to be an area that needs work. To use the language of our last CJM article: they've got a hunch that things are not right. The SVP in charge is gung-ho about hearing a customer-centered viewpoint and making changes. So that's great. Start your customer journey map with the warranty returns component in mind. Recruit respondents who have gone through an after-sales service experience.

While you're going through the trouble of doing research about part of the customer journey map, don't forget to look at the journey end-to-end.

It can be helpful to select part of the journey as a starting point, maybe to split budgets across years or maybe to rally the team around a big change and a big win.

In fact, dividing the task is often the best approach, because it allows you to focus on a few moments of truth while still getting the whole picture. So we could, for example, recruit half the respondents to have some kind of warranty return issue, and the other half to have made a customer service call only. We could then dive deep in both these areas.

BUT -- and this is a big caveat because it's easy to stay narrowly focused -- don't forget about the bigger picture. While you're going through the trouble of doing research about part of the customer journey map, don't forget to look at the journey end-to-end. When you're talking to your warranty returns respondents, ask them as well about the very beginning of their journey, about the original problem they were experiencing, about encountering the solution category, and then about how they discovered your company.

This way, at the end of your warranty returns mapping, you'll not only have a great view of how customers go through that experience, you'll also have the broader view of the emotions, thoughts, encounters, and decisions that brought them to the point of a warranty return in the first place. That not only makes your understanding of the warranty return much more complete, it lays the foundation for the rest of the customer journey.

## Enlist Multiple Champions (failure warning!)

**Let's say I work in an organization that desperately needs the outside-in viewpoint of customer journey mapping. If I'm a functional head, or say the director of the insights group, does it make sense for me to lead the charge to get CJM done?**

**MICHAEL:** I'm going to state what I see as an organizational reality. If your customer journey map does not have a C-level or business-unit-level champion, someone who can oversee the implementation of changes that will be suggested by the customer journey map, then the mapping exercise will be a boondoggle.

This sounds harsh to a functional head who wants to make big things happen in a coordinated way and knows that CJM is the way to do it. And of course such an enthusiastic functional leader is often the kind of person who actually makes things happen! What I say to them is that they should take the lead first in selling the idea to the business leader. Once bought in, that business leader can then delegate the other functional heads to do the heavy lifting of implementing changes.

Inevitably your customer journey map is going to uncover areas in need of change that cross functional boundaries. That is simply the nature of the work. Functional boundaries are what we create to run our businesses. A single company is what the customer needs to experience.

At the end of the day, a successful customer journey map implementation is the work of multiple champions. Even it starts with the business leader, it has to be carried out enthusiastically by multiple functional heads. The head of customer service, of sales, of marketing -- each of them has to see the whole picture and believe in the process that was used to create that picture.great. Start your customer journey map with the warranty returns component in mind.

If your customer journey map does not have a C-level or business-unit-level champion… the mapping exercise will be a boondoggle.

## Refresh every 3-7 years

**The customer journey is going to have a shelf life. How often does it need to be redone?**

**MICHAEL:** It's interesting that the reason for updating a customer journey is often as much internal as it is external. Externally, of course customers and markets change. The pace of change depends on the industry but even in relatively stable industries you wouldn't want to rely on a customer journey map that's over seven years old. Too much can happen. There's business model disruption, technical disruption, and even without disruption there are new channels and new sources of information that have dramatic effects on customer thinking and behavior.

The internal reasons for revamping a customer journey map are powerful too. If your company has gone through a reorg or a lot of turnover, you may need a new customer journey just to get that gut-level buy-in from the business stakeholders.

At the other extreme are the companies that want to update their customer journey to account for every little change in the marketplace. The risk here is fatigue. Remember that the customer journey is an abstraction and, like any map, an idealized view of reality. If you change it to match every aspect of reality, it no longer serves its purpose. Create a good map and give it 3 years. That's enough time for the organization to get comfortable with it, but not complacent.

You wouldn't want to rely on a customer journey map that's over seven years old. Too much can happen.

## Focus on Pain Points and Gaps of Real Customers

**The customer journey is going to have a shelf life. How often does it need to be redone?**

**MICHAEL:** The journey mapping I've seen that was most in danger of not being useful was that which was missing input from one very important source -- its customers. Some organizations will bring us in and say 'Well we've already done a journey for, say, someone who wants to buy XYZ product.' And I'll say "OK, great, what customers did you talk to?' And they'll say, 'Well I didn't talk to any, we created the journey internally.'

If you don't talk to any customers you're going to miss at least two thirds of the picture.

Now from a process perspective, starting internally makes a lot of sense. It gets stakeholders focused on their customer interactions and can help structure the conversation with actual customers. From within the organization you can ask: What are the touch points? What do you think the information needs are? Or what do you think the considerations are, what the potential customer issues are? – But you're not going to know these things unless you've gone out and talked to real live customers.

It's important, too, to make sure that you do not structure the entire interview around internal hypotheses. The internal hypotheses are great probes to make sure you've covered off on everything, but the danger is when you assume what's important inside the building is important to customers. So if for example you have a follow up email program for customer service calls. You don't ask the customer, 'Tell me about the email follow up" – instead ask it more open-ended 'Did someone follow up with you?' or even 'Did you get the follow up you needed and expected?' Because it might turn out that the email follow up is simply not important to that person – but they'll tell you about it if you focus on it.

So you want to make sure you don't lead them there. You want to understand from real customers, top-of-mind as they recount their experiences, where the pain is, where the confusion is, where companies are dropping the ball. If you get that, you're always going to have useful, actionable results.

Make sure that you do not structure the entire interview around internal hypotheses.

## Emotions, not just Actions; Workshops, not just Reports

**So how do you get functional leads, or executives, to buy in to journey maps at a practical level, where they're thinking along the lines of the customer journey, and leading changes based on it?**

**MICHAEL:** That's the $50 million question. Truly taking action on the findings of a customer journey -- closing the gaps and ironing out the wrinkles so that your customers experience your company as a natural extension of their thoughts and needs -- that's what you want. But anything transformative is hard. And one of the things that's hard about customer journey maps is making sure that leaders feel it in their gut, not just see it on paper. You want them to feel the same way that customer does as they're juggling options and spending split seconds on how to proceed. How do you do that? I'd say there are two overlooked factors.

The first is emotion. You have to make sure your interviews and your note-taking and your reporting capture the emotion of purchasing. It sounds crazy, but emotion applies to B2B journeys as much as to consumer. Some of the angriest interviews I've ever done have been with clients' customers who felt misled during the course of researching, purchasing or using the client's product.

You have to communicate that emotion prominently in your discussions and your reporting. It's very easy for it to get lost. We focus on what actions the customer took, where they looked for more information, who they talked to. But it's easy to forget the emotion, and that's a huge mistake. Emotion leads decisions, and emotional empathy is what connects your business to your customers and allows you to create better solutions.

The other way to get executives bought in is to rethink reporting. One of the most effective techniques is to skip the old-fashioned report meeting, where the research team presents a 200-page PowerPoint to various stakeholders.

Instead, run a workshop. Bring all the functional representatives into one room. Present findings section-by-section and do it from the customer's point of view, so that it seems she's in the room with you. Well-edited video from actual customers is a powerful way to convey this. Having the researchers present can also inject the emotion and context necessary to make the journeys come to life. Then after each section, you brainstorm implications and possible actions to take, as well as discussing how the action would affect each function.

## It's not a Single Journey – Think Segmentation

**Is a single map going to do the trick, at least to communicate the general picture?**

**MICHAEL:** Unfortunately no. A single map per segment is more the rule of thumb, assuming your segments are well-researched and clearly distinguished.

# IS NOW THE RIGHT TIME FOR CJM?

## CJM Now!

Okay, you've bought in! What's not to like about customer journey mapping? It answers the question: "How does my customer experience the relationship with my company?" It "has enormous top-line and bottom-line potential for your organization." It draws out emotions that allow you to connect more meaningfully with customers.

But then… should everyone be doing CJM?

Of course not. Like any transformative endeavor, CJM requires support and resources. Here is the checklist, and below is discussion of what it means with Michael Dolenko, co-head of Phase 5's innovation practice and customer journey mapping expert.

| Critical Questions | Need 5/5 |
| --- | --- |
| Is it widely acknowledged that your entreprise lacks a clear understanding of the customer's view of the business relationship? | ☑ |
| Does your organisation have strong hunches about problem areas? | ☑ |
| Is a strong project manager available to manage demands of executives and functions while running the research? | ☑ |
| Do you have the capacity to do customer-based research? | ☑ |
| Are key executives keenly interested in the CJM's success? | ☑ |

## A Clear Understanding of the Customer's View

**What's the starting point? When do you know it's time to start thinking about customer journey mapping?**

**MICHAEL:** This will often happen when I'm working with a client on their research road map for the next year. We're talking about the big picture, about the key business problems that they might want to get market input on, and we start talking about customer intuition. The question is, "If you were to ask your functional leaders, would they say they have good intuition about how customers encounter Acme Company's products, and why they choose Acme, or don't choose Acme? Do they know customers' pain points and emotions as they go through that process, how they feel as they use the product, or get help with it?"

At some companies the answer is going to be no. They might have good insight into one part of the relationship — say, onboarding — but not the entire process. If that's the case and you have broad agreement that understanding the big-picture customer viewpoint could be of use to Acme, then that's a good starting point for thinking about customer journey mapping.

## Hunches about Problems

**MICHAEL:** (continuing): At the same time that the functional leadership feels like they need the customer's viewpoint, they'll almost always have hunches about things that aren't right. For example, they might say, "I'm concerned that our after-sales service is hurting new sales by giving us a bad reputation and also driving away repeat customers."

That's a hunch. It's not a classic research question, where you're wanting to make a decision and you need research insights to inform that decision. It's something fuzzier — but it's important nonetheless. If you have a situation where you have a couple strong hunches, along with this general feeling of being a little out-of-touch with the customer view of your category, then that's a strong hint that customer journey mapping might be beneficial.

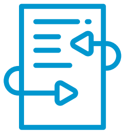
## Wanted: Strong Journey Mapping Project Manager

**So let's say you've met those conditions. Who should lead the research?**

**MICHAEL:** At the tactical level, any customer journey mapping project needs a go-to person within the organization. There can be a team to help divide the work, but the team needs a recognized leader. The go-to person can work with outside consultants, but the outside consultants cannot replace the go-to person — it has to be an insider. The go-to person should have good relationships around the organization to be able to exercise influence without power.

> The go-to person can work with outside consultants, but the outside consultants cannot replace the go-to person.

And here's why – because your go-to person is responsible for some key organizational activities:



**Keeping the executive sponsor abreast of progress and developments in the journey mapping**

**Gathering research hypotheses from the different business functions and making sure functional leaders are involved in their part of the map**

**Selecting and managing internal staff and/or outside vendors to advise on process, do data gathering, and analyze results**

This go-to person is usually found in internal consulting, an insights group, or a customer experience group. The right person can usually be found, but I stress the importance of the role because sometimes no one actually bothers to go and find that right person and make sure they can be allocated as needed to execute the project. You'll see undertakings where several people are put on the project part-time, with no one making final, day-to-day decisions. That's not a situation you want to be in.

# Research Capacity

**MICHAEL:** [continuing]: But that doesn't mean that you have to do the entire customer journey map with internal resources. One of the early assessments, in fact, needs to be where you are going to get your research capacity, your customer research capacity.

The biggest mistake you find on the research side of customer journey mapping is that companies simply fail to do it. They get started on the project. They do a lot of internal interviews to develop hypotheses: "This is what we think our customer journey looks like."

And then they stop.

Maybe it's a budget constraint. Maybe the maps look good enough. But there are organizations out there that claim to have customer journey maps that they have created without talking to any customers.

And that's really unfortunate. Because all that internal work, that's a good foundation. It gets the organizational creativity flowing. It develops hypotheses that you can test with customers, but it's not the customer's view of the world. Customer research is the core of CJM that you can't live without.

So make sure that you have the capacity internally, or that you have the budget to go externally, to complete robust research with the right customers and to digest the findings.

## Executive Sponsorship

Michael [continuing]: Of course in most cases you're not going to get the internal resources or the budget without executive sponsorship. And executive sponsorship is worth a lot more than just budget dollars. Even though I'm talking about it last, it's the cornerstone of a successful project. Everything else hinges on it.

The executive sponsor is going to be the one who says loudly enough to get people's attention, "It's true. We're not thinking like customers today. We're not thinking from the perspective of the journey that our customer takes to find us."

Think about the starting point we talked about: seeing your company through your customer's lenses. The executive sponsor is going to be the one who says loudly enough to get people's attention, "It's true. We're not thinking like customers today. We're not thinking from the perspective of the journey that our customer takes to find us." And just acknowledging that reality can be pretty important.

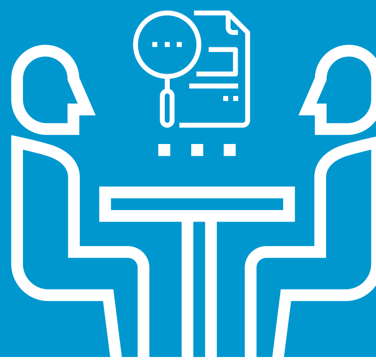
Or the hunches. The executive sponsor will have visibility across more of the organization and will have strong hunches about what is working and what is not. Following those hunches is vital to creating a journey with actionable results.

We find that companies with an enthusiastic executive supporter create more robust customer journey maps and implement the findings more deeply into their organizations. They can see across the silos and make necessary changes that might be unpopular within a particular part of the organization.

Phase5

# ABOUT PHASE 5

Phase 5 does a lot of customer journey mapping. But we do a lot more too! We provide research-based advice to help clients stay customer-focused at every phase of the product lifecycle.



## 1 FIND THE OPPORTUNITY

- Market Sizing
- Segmentation
- Performance tracking
- Ethnography
- Online Communities, Diaries
- Focus Groups, IDIs

## 2 DEVELOP THE PRODUCT

- Workflow Mapping
- Proof of Concept
- Prototyping
- Concept Testing
- Personas

## 3 UX & DESIGN

- Concept Testing
- Personas
- Strategy
- Design
- Usability Testing
- Eye Tracking
- immersive 3D

## 4 GO TO MARKET DECISIONS

- Decision-Maker Studies
- Pricing Research
- Positioning
- Communications Testing
- Win-Loss Research

## 5 CUSTOMER EXPERIENCE

- CX Strategy
- Customer Journey Maps
- KPI Tracking
- Advisory Boards

If you are facing one of these business challenges and looking for the best way to incorporate market feedback into your decision, please contact Stephan Sigaud (416-599-7555 x232, stephans@phase-5.com) for a discussion and review of possible options.

**STEVE HANSEN** | President, Phase 5 US

**MICHAEL DOLENKO** | Partner, Innovation Practice Lead