

Using Customer Journey Maps to Improve Your Customer Experience



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In recent years, many companies have discovered, or re-discovered, the importance of the customer experience. The customer experience primarily exists in the everyday interactions that customers have with a company, through such touch points as requesting service, purchasing, repurchasing, asking questions, checking prices, and other activities. Across a wide range of industries, interest has grown in improving the customer experience, customer satisfaction surveys have become more commonplace, customer satisfaction measures are increasingly part of management scorecards and bonus structures, and companies have created teams, task forces, departments, and positions devoted to the customer experience.



The customer experience is complex, in part because it typically cuts across divisions, departments, and functions. As an example, consider an everyday process such as filing a claim at an automobile insurance company. The claim may involve multiple functions, such as customer service, field agents, underwriters, adjusters, and repair shops. Each may have a

different set of metrics and objectives. The claim may take place over a period of weeks or even months. It may require numerous communications to the customer - some outbound, others inbound; some tied to a calendar or specific timing, and others occurring at any time. Similarly, asking a question of a cell phone carrier may involve not just customer service, but also technical specialists in areas such as phones or billing. Customer service reps and technical specialists may have different skill sets, perspectives, and different compensation plans.

Given this complexity, efforts to improve the customer experience can face numerous organizational obstacles, such as:

- Departmental barriers that interrupt a seamless customer experience, and may produce competing visions for the customer experience.
- Organizational cultures and perspectives that focus from the inside out, concentrating on organizational processes rather than customer experiences.
- Accumulated history and culture that resists change, even when faced with an excess of task forces, process maps, policy manuals, and research reports.



The best customer experience typically comes when a company can act as a single seamless entity across the different steps of customer involvement. To do so, a company must improve the steps that most need improvement, and not waste resources on steps that are less important to customers, or that do not need as much improvement. This article describes Customer Journey Maps (CJM's), which are a powerful tool to help companies visualize and evaluate the customer experience from the customer's point of view.



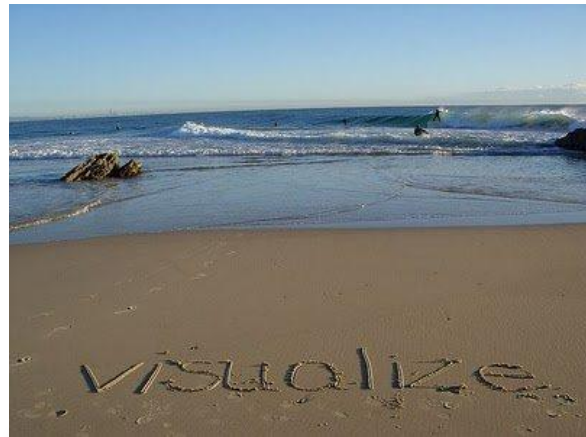
CJMs describe key touch points where customers interact with the company. They also describe the customer's emotions and experience along the way, including the spots where the customer's journey with the company is more or less difficult or satisfying. CJMs also identify interactions that are particularly important for the customer and the company.

When done properly, Customer Journey Maps depict and describe the customer experience in clear, concise, and simple terms. They can provide rallying points for a common vision, and can be used to communicate with a variety of levels and functions. This article shows how Customer Journey Maps should be created and used, providing examples from past MMR Strategy engagements.

What are Customer Journey Maps?

A Customer Journey Map is a visual picture of the customer's experience with a company. It describes that experience from customer's perspective, describing the activities the customer would undertake, in words the customer might use.

A Customer Journey Map may be drawn from two perspectives. One perspective describes the end to end customer experience. For example, a CJM might describe all the steps involved in taking an airplane trip might include arrival at the airport, such as check in, security, waiting for the flight, boarding, taking the flight, exiting the plane, and picking up luggage. Alternatively, the map may describe a single product line or process, such as the process of security in the airport experience.



Not every step of the customer experience is equally important and not every customer needs to be highly satisfied on all steps. For some routine transactions, such as paying a bill, customers may want a simple interaction that goes smoothly but does not need to be memorable. For other transactions customers may seek a higher and more memorable level of service. Think about the difference between taking out a new mortgage and making a monthly payment on the mortgage – taking out a mortgage is a less frequent and more emotional experience.

By identifying the key moments of truth – those steps that are most important to customer satisfaction and renewal - Customer Journey Maps provide a resource allocation guide. They identify the places where investments in higher levels of service are more likely to attract or retain customers.

A Customer Journey Map is different than a process map, but the two are related. As shown by Table 1, a process map takes the company’s perspective, and describes a company’s internal processes, using terms, jargon and acronyms specific to the company. Process maps are often developed by specialists (including those with Six Sigma experience) or by specific departments. By contrast, the Customer Journey Map takes the customer’s perspective, describing the customer experience using the customer’s own language.

Table 1: Differences between Process Maps and Customer Journey Maps

Topic	Process Maps	Customer Journey Maps
Main focus	The company	The customer
Describes	The company’s internal processes, functions, and activities	The customer experience
Terminology	Terms and jargon specific to the company	The customer’s language
Who is involved?	Process mapping specialists and specific departments	All groups involved in the customer experience

Figure 1 and 2 show examples of Customer Journey Maps, using a disguised example presented here as a cell phone carrier. There are a variety of ways to present the maps for a given experience; Figure 1 shows a circular map, while Figure 2 shows a more horizontal map. Both are potentially appropriate ways to depict the customer journey. Each map:

- **Groups** the customer experience into a series of steps within larger processes.
- **Takes** the customer perspective, focusing on steps that a customer might experience.
- **Avoids** any internal jargon or acronyms.
- **Describes** the elements, here called value creators, which matter most to customers.

Figure 1: Example of Circular Customer Journey Map

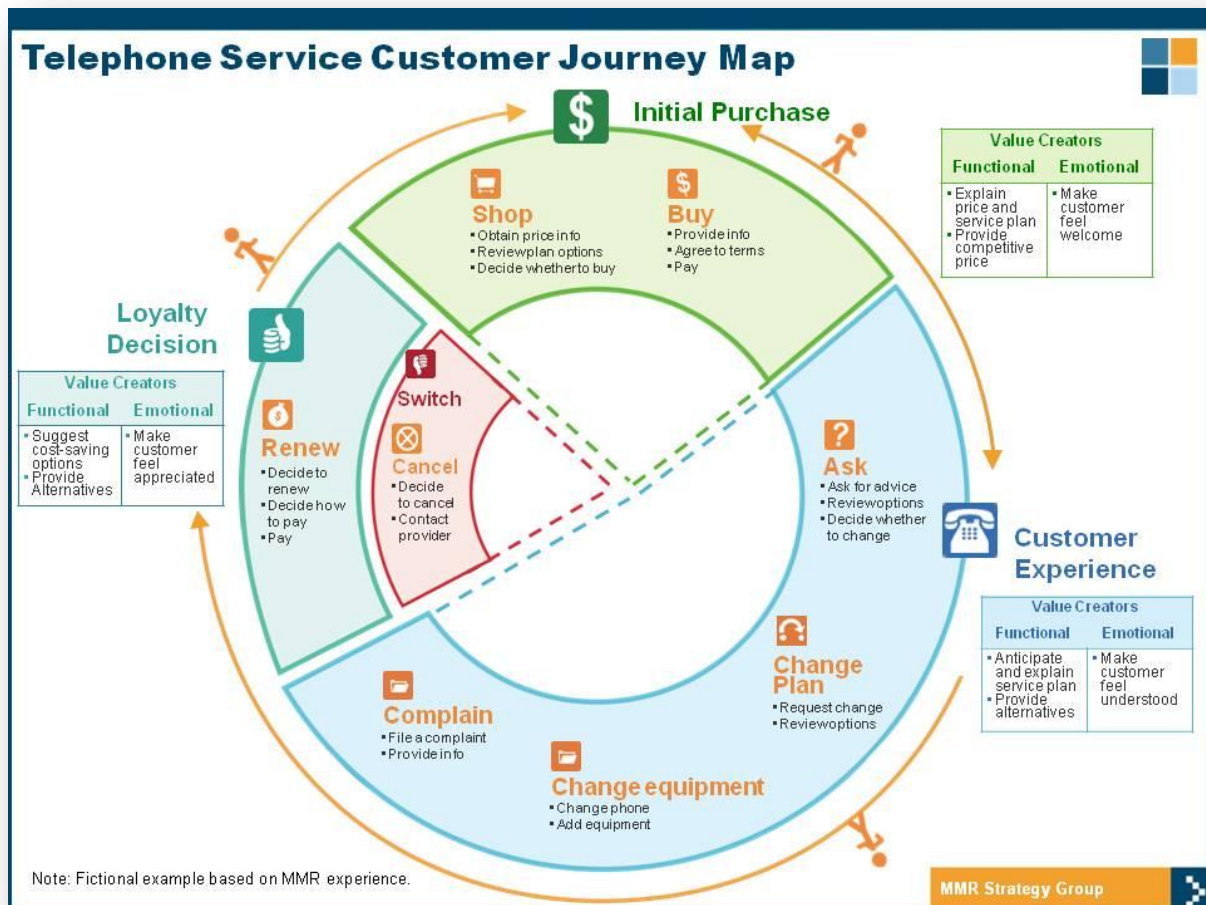
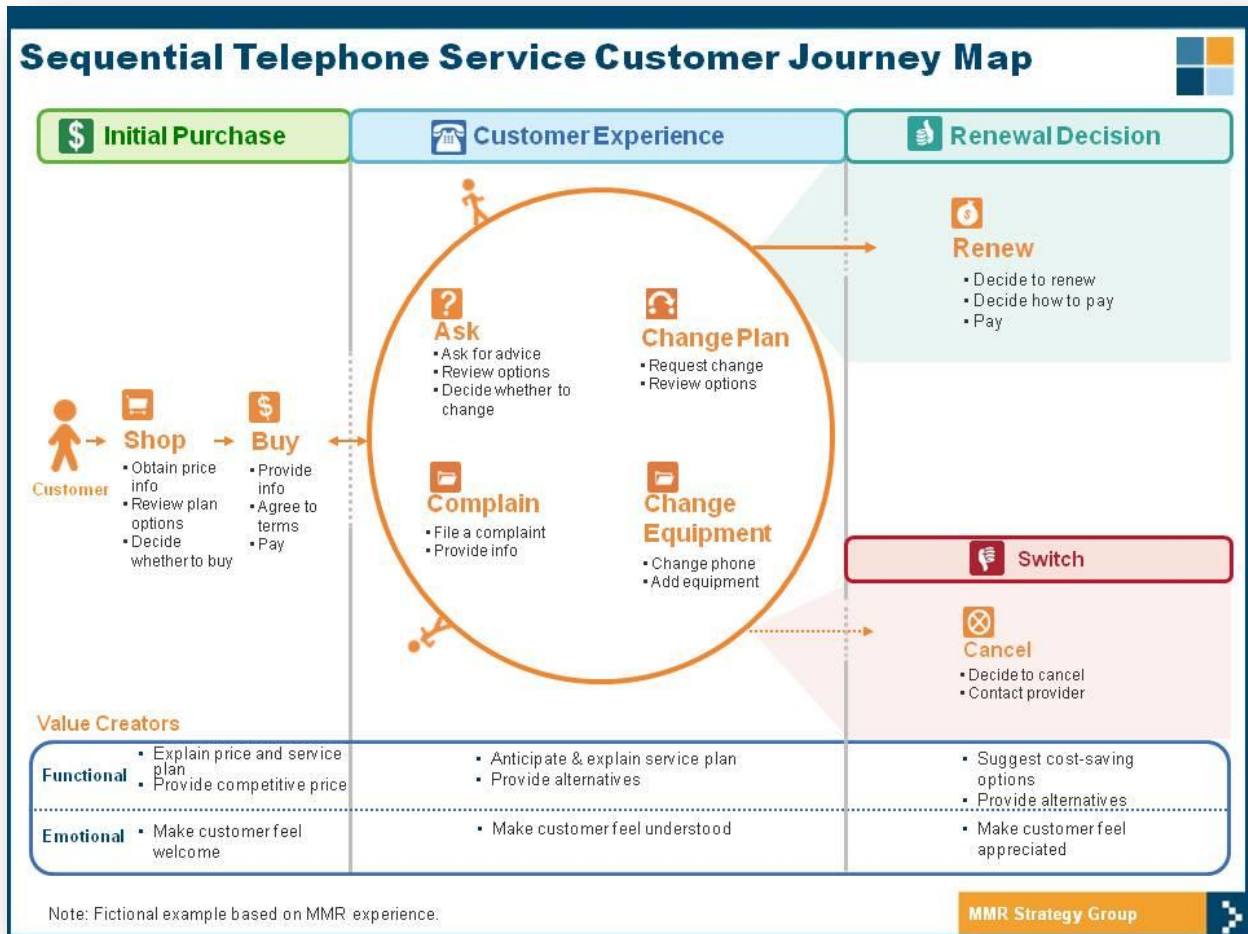


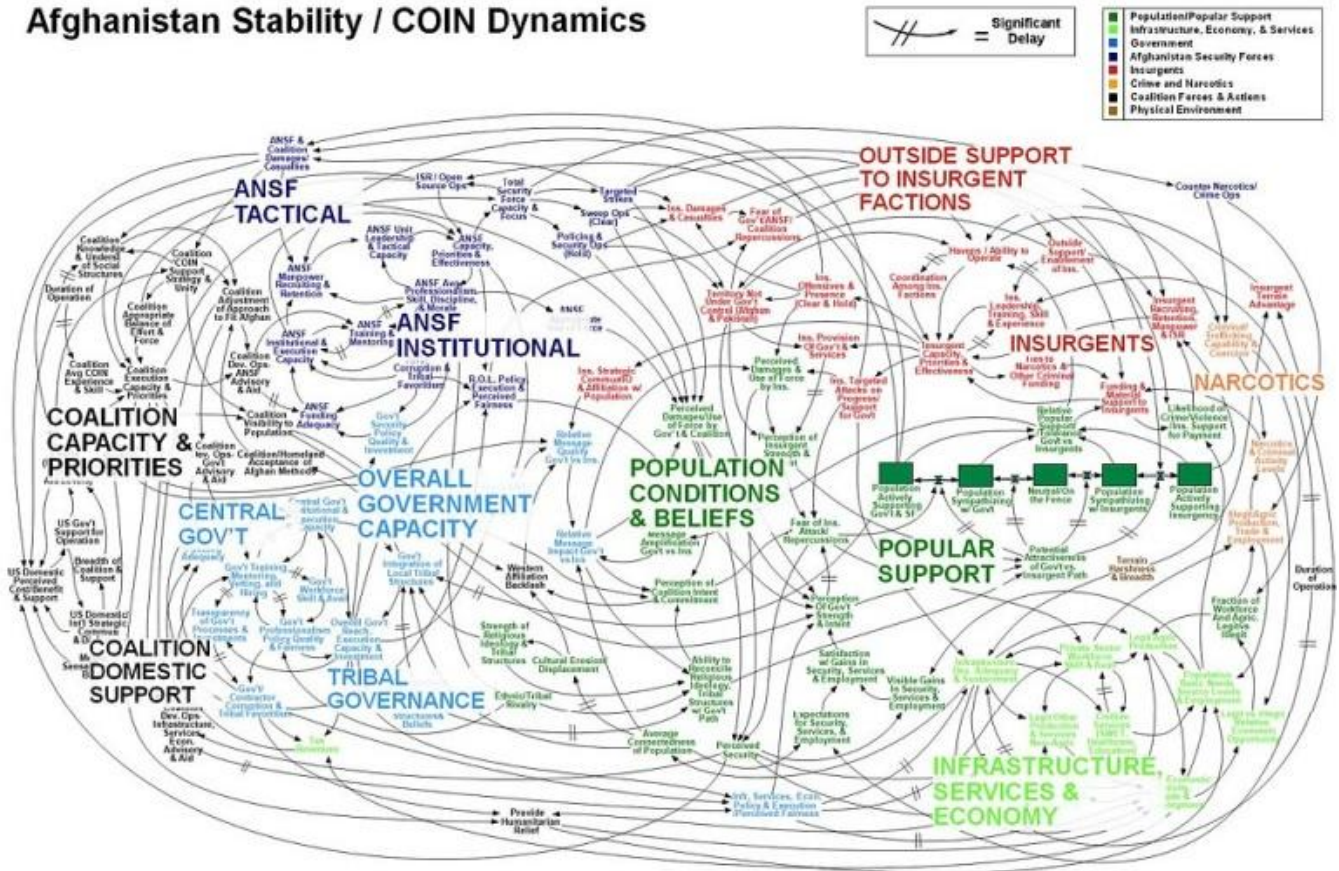
Figure 2: Example of Horizontal Customer Journey Map



A Customer Journey Map should be simple and easy to understand. Perhaps the best example of an overly complex map comes from the American engagement in Afghanistan. In 2010, General Stanley McChrystal, the US and NATO force commander was presented with a complex process map of the engagement in Afghanistan, shown here in Figure 3. Upon seeing the map, General McChrystal is said to have remarked, 'When we understand that slide, we'll have won the war.'

Figure 3: Map of The American Engagement in Afghanistan¹

Afghanistan Stability / COIN Dynamics



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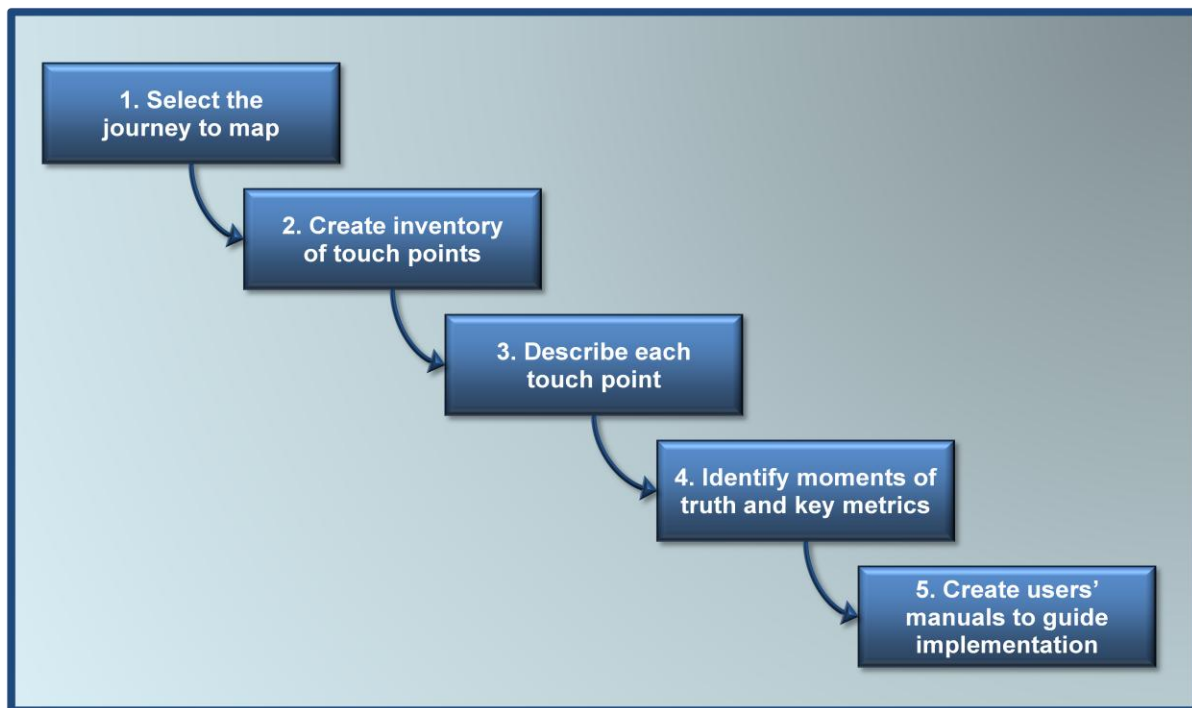
In the next section, we will describe how to develop these maps.

¹ The map can be found in numerous places online. This is from The Guardian's website, at <http://www.guardian.co.uk/news/datablog/2010/apr/29/mcchrysal-afghanistan-powerpoint-slide>.

How Do You Create a Customer Journey Map?

This section describes the five step process involved in creating Customer Journey Maps, and provides templates to use at each stage of the process. The five steps, listed in Figure 4, include selecting the journey to map, creating an inventory of touch points, describing each touch point, identifying moments of truth and key metrics, and creating Users' Manuals to guide implementation.

Figure 4: Five Steps to Creating a Customer Journey Map



Underlying these five steps are five design principles that apply to each step:

1. **Take the customers' perspective:** The CJM should describe the customer experience from the customer's perspective, using customer-friendly terms. Jargon, including any term that is not familiar to or not used by customers, should be banned from the map.
2. **Be emotional:** The CJM should incorporate and reflect the emotional, experiential, and functional elements of the customer experience. The emotional refers to how a customer is feeling, experiential refers to what a customer experiences, and functional refers to the logistics of how it happens.
3. **Be universal:** The CJM should be universal, applying to all customers. Later, use cases can be used to build CJMs for specific segments or distribution channels.
4. **Keep it simple:** The CJM should be easy to follow and colorful. It should be appropriate for a wide variety of levels and functions.
5. **Gather lots of input:** The CJM should be built with input and involvement from the multiple departments that touch the customer's interaction with the company. Gathering input from these departments will require a series of interviews and workshops throughout the process.

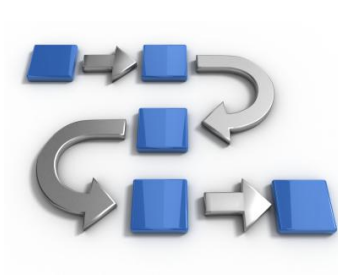


We will now describe the five steps involved in creating a Customer Journey Map.

Step 1: Select the journey to map

The first step in the process of developing a Customer Journey Map is to select the journey to map. The journey selected must be small enough to map, yet large enough for relevance to a significant proportion of customers. The experience mapped will likely cut across functional or departmental boundaries, and should be an experience with:

- **Importance:** The experience is important to customers, meaning that it occurs frequently or has a significant impact on customer satisfaction when it does occur.
- **Opportunity:** The experience provides significant opportunity for improvement.
- **Availability:** Technical experts, departmental specialists, and other staff are available to provide input.

Step 2: Create an inventory of touch points.

The next step in the process is to create an inventory of all the touch points in the process. A touch point is a place where the customer interacts with the company. It is easy to identify a customer touch point, because a touch point can usually start with the phrase, “I want to...”.

For example, in our example of a cell phone carrier, a customer might say, “I want to ask questions”, so “ask a question” is a touch point. Similarly, a customer might also say, “I want to cancel”, making “cancel my service” another touch point.

The statement “I want to” ensures that the process focuses on activities relevant to the consumer, and representing activities that the customer actually wants to accomplish. Some touch points, such as checking on a monthly billing balance, may be relatively simple, while other touch points, such as obtaining new service, may be more involved.

The best way to identify all relevant touch points is through a workshop involving knowledgeable staff from the functions, departments, or processes involved in the customer experience being mapped.

Using a framework similar to that presented as Figure 5, the staff identify all the potential touch points as activities that the customer may wish to undertake. In many service organizations, touch points frequently address steps such as asking questions, checking billing balances, checking on service availability, changing service, cancelling service, fixing equipment, and other activities.

Figure 5: Framework for Customer Journey Mapping Workshop

	Touch Point	Touch Point	Touch Point	Touch Point	Touch Point
Description					
Customer Activities					
Customer Emotions					
Method of Interaction					
Wants and Expectations					

Step 3. Describe Each Touch Point:

The third step in the process is to describe each touch point. The best way to gather information to describe each touch point is to interview experts throughout the organization who are familiar with the touch point.

This will likely require the project team to conduct a series of interviews with technical experts, who can describe the specifics of each touch point, focusing on how the customer interacts with the company at that point. The experts may also be able to provide items such as copies of communications sent to the customer, market research studies, and other descriptive metrics.

When describing a touch point, a company might use a Customer Activity Grid, such as that described in Figure 6, which includes the following elements:

Figure 6: Customer Activity Grid to Describe Touch Points

	Customers want to...						
	Shop	Buy	Ask	Change Plan	Complain	Renew	Cancel
Description							
Customer Activities							
Customer Emotions							
Method of Interaction							
Customer Wants and Expectations							

- Description: What does the touch point do? What is the customer trying to accomplish?
- Customer Activities: What is the customer doing during the touch point?
- Customer Emotions: What are the emotions that the customer is typically experiencing during the touch point? For example, does the customer experience fear, doubt, or not much emotion at all? What emotions do we want the customer to experience at the end of the touch point?
- Method of Interaction: How do customers interact with the company at each touch point, and how would they prefer to interact? For example, would they prefer customer service over the telephone, or self service?
- Wants and Expectations: What is the customer attempting to accomplish?

Some companies also find it useful to develop a matching Company Activity Grid, to describe the company's activities or underlying processes. For each touch point, the Company Activity Grid describes elements such as company objectives, activities, departments or groups involved, and standards or metrics to measure the activity.

When developing Customer Journey Maps, it may be useful to consider "use cases", which describe interactions with a company from the perspective of a particular type of customer or type of interaction. For example, in our cell phone example, the journey map for a corporate business customer who travels frequently may be different from a small business owner or a college student. They may buy through different channels, have different needs, and expect different levels of service. For many companies, the journey map for a frequent or high-volume customer is different than that of other customers.

Step 4: Identify moments of truth and key metrics/goals.

The fourth step identifies the key moments of truth and the key metrics and goals for each step. Moments of truth are the most important interactions from the customer's perspective, as they matter a great deal to satisfaction and retention.



Moments of truth can be identified in a variety of ways, such as:

- Ask management: In some companies, managers already know the moments of truth. When asked to identify the mission-critical touch points for customers, they can confidently and accurately point to the specific moments that matter most.
- Ask customer-facing staff: Often, customer-facing staff in functions such as customer service, claims, or sales know which steps tend to be hot buttons for customers, and which are not.
- Consult marketing research: Marketing research reports often describe moments of truth by identifying those interactions that are most highly correlated with outcomes such as overall satisfaction, likelihood to recommend, or likelihood to renew.
- Review customer retention data: Customer retention data may point to those steps where customers cancel service or stop buying, or those that are cited most often by customers who are in the process of renewing or cancelling.

- Analyze customer satisfaction data: Many customers gather customer satisfaction data overall and at each step or touch point. These data can be reviewed to determine which steps have satisfaction measures that are most highly correlated with outcomes such as overall satisfaction, likelihood to renew, or likelihood to recommend.

After identifying the moments of truth, each moment should be associated with metrics that provide guidelines for the company's performance at each key touch point. The question of objectives is particularly important, and links directly to the allocation of attention and resources. Movement in some measures may cause profound changes in the customer experience, while movement in other measures may not make much difference.

The question of objectives forces the organization to think carefully about where the judicious application of resources can make the most difference. Questions that could be helpful in this process include the following:

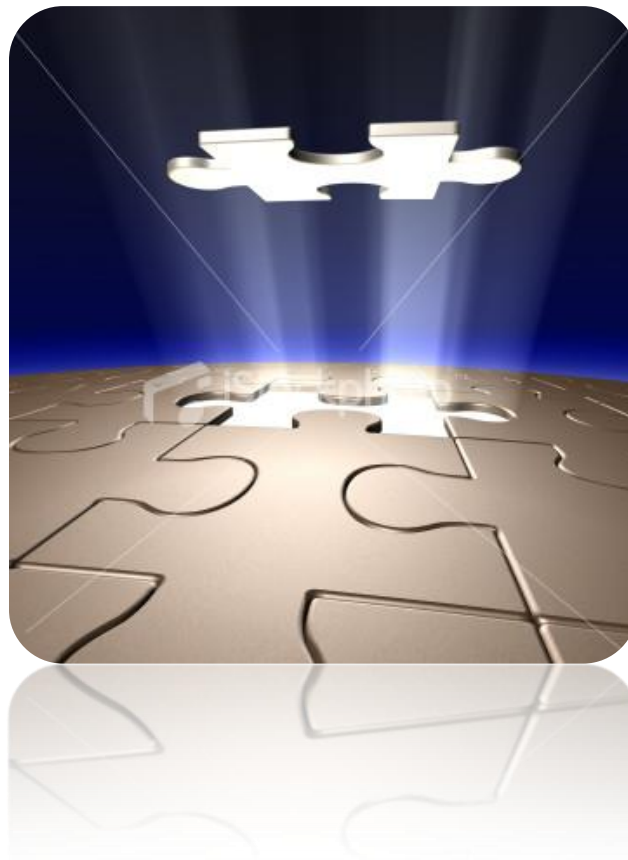
- Current Measures: What measures are gathered that relate to each individual touch point? How are the measures gathered, and what do they show today?
- Objectives: What should the goals be for each individual moment of truth on each key measure?



Step 5: Create users' manuals to guide implementation

The final step in the process is to use the Customer Journey Map as a guide to allocate resources, organize across the Customer Journey Map, and measure the customer experience.

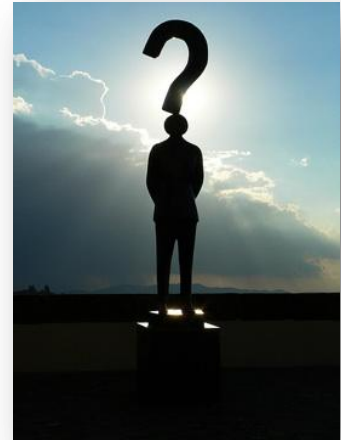
We find that the best way to do so is to create Users' Manuals that can guide the organization through these tactical steps. A Users' Manual organizes the learning from first four steps, describing specific action steps to allocate scarce resources, organize across the customer journey, and measure the results.



Here is a checklist of ten important questions to guide the process of creating a Users' Manual:

Resource Allocations:

1. Do certain touch points merit additional investment to increase customer satisfaction and/or retention?
2. Where will additional investments in customer-facing activities yield the most productive results?
3. Where can we decrease investment or attention, to free up resources for mission-critical activities?



Company Organization:

4. How should the various departments or groups involved in the customer journey organize so that customer experiences are seamless within and across touch points?
5. Are key resources divided between touch points or departments; if so, how can customers experience them as if they belong to one seamless company?
6. How can the organization improve the ability of departments to share information and processes?

Metrics and Measurements:

7. What metrics do we currently achieve at each touch point? Where do we stand on those metrics today?
8. What are the new objectives?
9. How will the new objectives be measured and integrated into scorecards and personal objectives?
10. What standards can we implement now and what new information must we gather to support the new objectives?

The complete Users' Manual could include the following materials:

1. **Customer Journey Maps** that describe customer interactions across touchpoints.
2. **Customer Activity Grids** that describe the customer experience, including customer objectives, activities, emotions, wants and expectations, metrics, and standards.
3. **Company Activity Grids** that describe the company's activities, such as company objectives, activities, owners, stakeholders, performance indicators, and standards.
4. **An information roadmap** describing areas where information exists, and areas where additional information is needed.
5. **Metrics**, including the measures for each touch point, as well as the goals to achieve.
6. **Other items**, such as materials addressing use cases involving key segments or customer types.



What Happens Next?

The Customer Journey Maps described in this paper can help a company improve the customer experience in a number of ways. Perhaps most importantly, the journey map provides a visual and comprehensive picture of the customer experience, incorporating both qualitative and quantitative information.



Once complete, the Customer Journey Map becomes a powerful tool to use across the organizations, in discussions with executives, managers, and staff, to describe and improve the customer experience.

About MMR Strategy Group

MMR Strategy Group is a full-service market research-based consulting firm. We help our clients grow by leveraging customer insight to develop marketing and sales strategies. In order to support critical business decisions, we combine the data gathering capabilities of a research firm with the business analytics of a strategic consulting firm.

For more information about Customer Journey Maps, please contact us at 818.464.2400 or email info@mmrstrategy.com.

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