



# THE ESSENTIAL CHECKLIST FOR CUSTOMER JOURNEY MAPPING

A game-changing CX tool to help communications professionals increase impact

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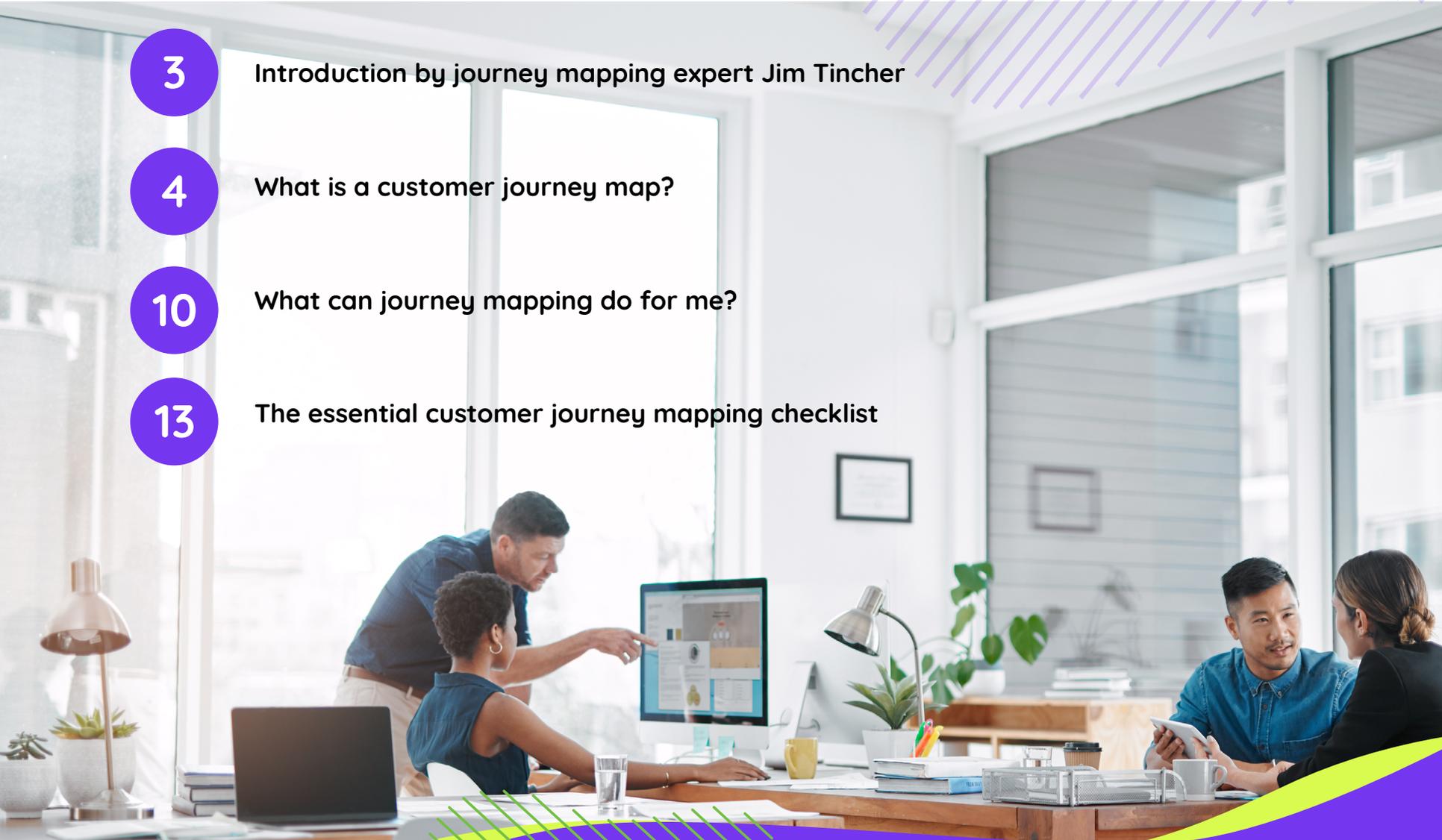
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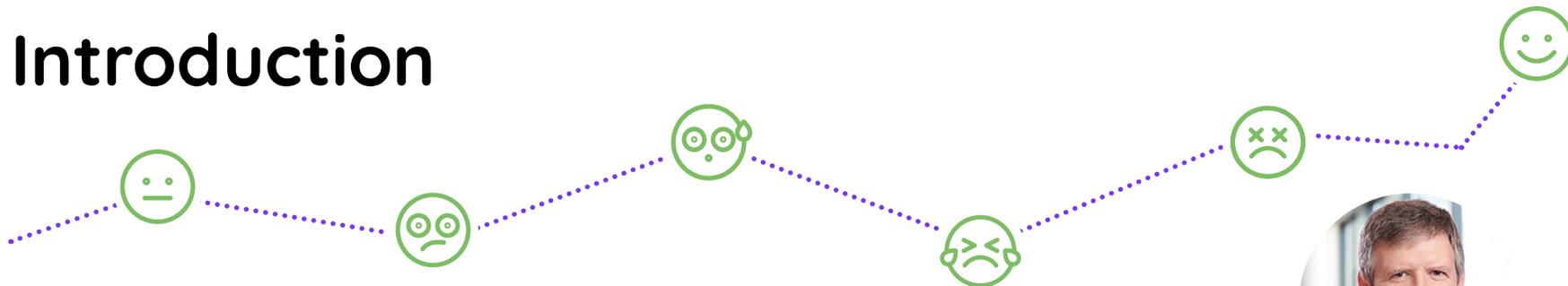
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# Introduction



There was a time, not all that long ago, when brands controlled their customer relationships almost entirely through marketing, direct sales and service. Customer journeys were straightforward along limited channels.

Options are much broader now ... but so are customer experience management (CXM) solutions.

Today's customers expect seamless, personalized, omnichannel experiences. They have the power to choose how and when they engage with your business. And they can easily defect from one brand to another when their needs aren't met.

Businesses, meanwhile, face significant challenges in meeting those needs. Luckily there are also pioneering solutions that empower organizations with tools that help them satisfy (and exceed!) rising customer expectations.

Customer journey mapping is the foundation of these holistic CXM strategies, which also include journey monitoring and management to help optimize the experience for your customers.

Innovative customer journey mapping platforms allow companies to integrate systems across the

entire organization, monitoring financial, operational, and behavioral data in real time to provide a deep, actionable, visual understanding of the customer journey.

These "living journey maps" lead to the ability to customize interventions at key journey touchpoints and pivot as journeys evolve to create continual improvements that increase revenue and reduce costs. These maps can also be shared easily, which helps you spread the voice of the customer throughout your organization and break down silos to align around customer needs.

Just remember: Always keep your end goal top of mind.

While the point of journey mapping is to gain a better understanding of customer behavior, the goal, ultimately, is to create loyal customers eager to do more business with your brand.

The power of journey mapping lies in how you use the information you discover to move from understanding to action. Today's journey mapping platforms help you make that transition more quickly and with less effort than ever before.



## JIM TINCHER

Nationally recognized CX expert Jim Tincher, CCXP, wrote the book on customer journey mapping—literally. His authoritative journey mapping guidebook, *How Hard Is It to Be Your Customer? Using Journey Mapping to Drive Customer-Focused Change*, is considered a must-read for CX-focused leaders, and Heart of the Customer, the cutting-edge CX consultancy he founded, is known for empowering companies to drive change, optimize customer journeys, and boost revenue.

# What is a customer journey map?



Understanding and empathy are the well-established foundations of a market-winning customer experience (CX) strategy. Visualizing your customer journeys with sophisticated customer journey mapping tools is how you gain the insights needed to execute on that strategy.

To learn how customers experience your brand—and more importantly, their perception of that experience—you need to walk a mile in their shoes. Customers expect you to know their situations, goals and preferences. So you need to discover what they are thinking, feeling and doing at every touchpoint ... including the steps they take before they even interact with you.

A customer journey map is a visual representation of those interactions as your customers see it, bringing key data points together to show their journey in its entirety.

Journey mapping also helps you determine precisely where you're delighting your customers and where you're falling short. Once you have that information, you can leverage analysis that takes you far beyond a find-and-fix mentality. You will be able to prioritize the most impactful touchpoints to improve upon, and design and personalize next best actions that elevate your customers' experience and boost your bottom line.

You can't create a customer journey map without talking to customers! Don't rely on internal teams to determine what matters most—too often, their hypotheses are incomplete, tainted by organizational biases, or just plain wrong!

— JIM'S EXPERT INSIGHT



When you integrate customer insights from journey mapping with journey management capabilities—including journey analytics and orchestration technologies—you bring the customer journey to life and get a 3D view of customer behavior and needs.

Gaining and leveraging these insights takes the guesswork out of your CX initiatives and yields results faster and more efficiently.

Going one step further to integrate these powerful journey management tools with customer communications management (CCM) systems provides a transformative ability to improve customer—and business—outcomes. This game-changing strategic CXM approach is getting a lot of buzz. Those who don't adopt it will be left behind. (Don't let that be you!)

A "static" journey map represents a fixed point in time. It can be hung on the wall for reference and used as a guide as you work toward creating an ideal future-state journey. A digital "living" journey map will update continually as your journey improves and evolves, documenting your progress over time. We focus on that map format here.

— JIM'S EXPERT INSIGHT

# These are the essential elements to include in your living customer journey map:



## Validated research & accurate data

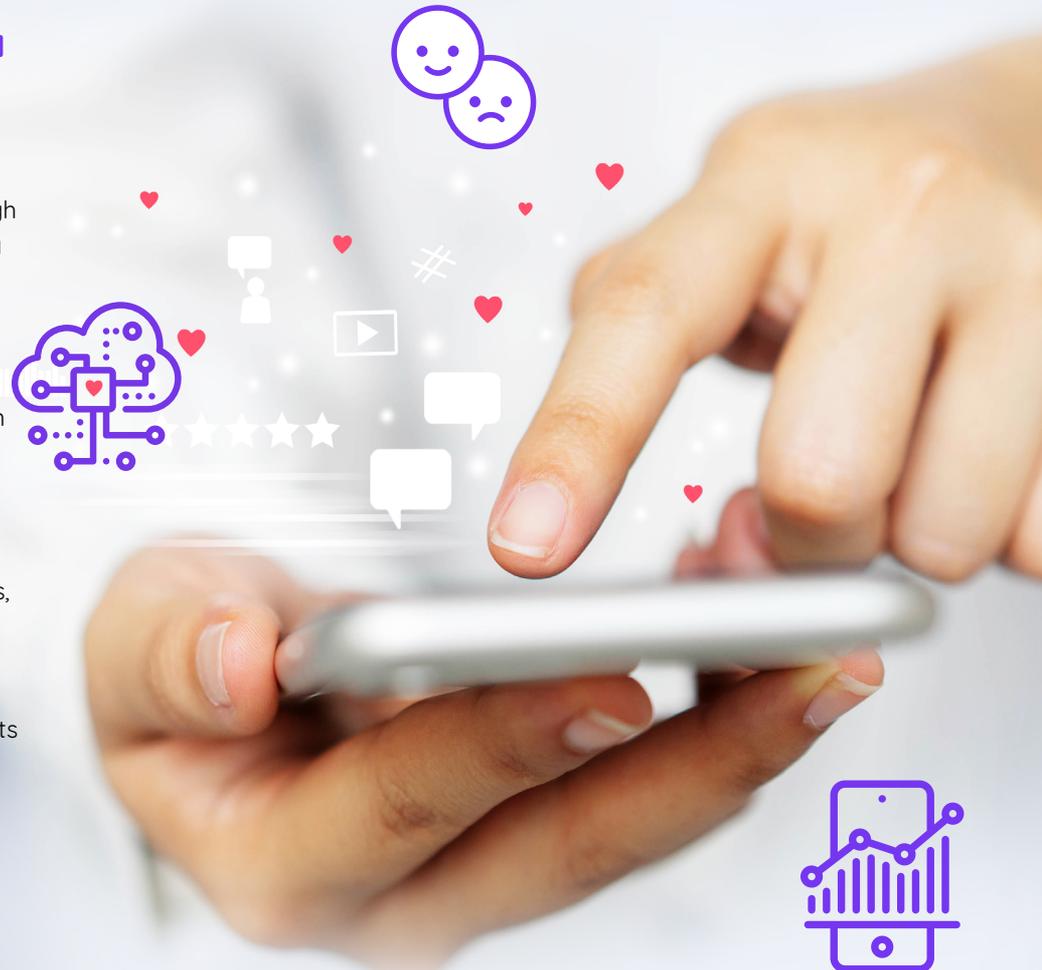
Journey maps are only as reliable as the data you feed into them, so solid data is a must. And you want to be sure you include every step of the journey you aim to map, keeping in mind customers may interact with you in multiple ways through a variety of channels. (Interactions with your competitors may be relevant to the journey, too.)

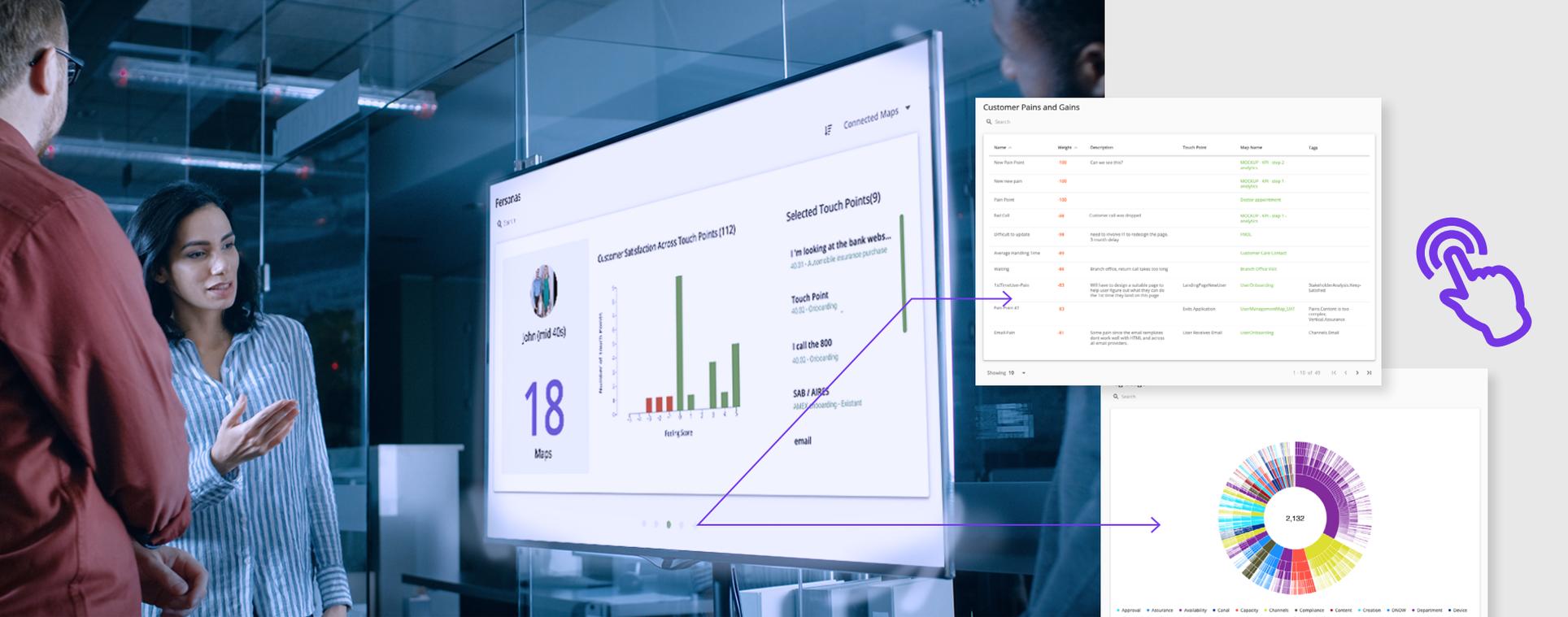
Qualitative customer research will give a detailed picture of customers' emotional responses, as well as reveal pre-purchase steps you might otherwise be unaware of (e.g., when prospective customers ask friends for recommendations or check out your website).

Once you've compiled that information (perhaps in a static journey map), feed the steps, emotional outcomes, pain points, and key touchpoints into your living journey map.

Including data from IT, Operations, Sales, and other departments—when you can get it—adds depth to your insights and helps you establish baseline measurements.

Having all this data in one central display helps align your teams, gain buy-in from leadership and break down silos that have departments working at cross-purposes. It allows everyone to see the journey from the same perspective: your customer's.





## A versatile digital display

Make sure your journey map is visually compelling and appealing, so that viewers are engaged with and understand what they're looking at. Those are the qualities that make journey maps such an important change management tool.

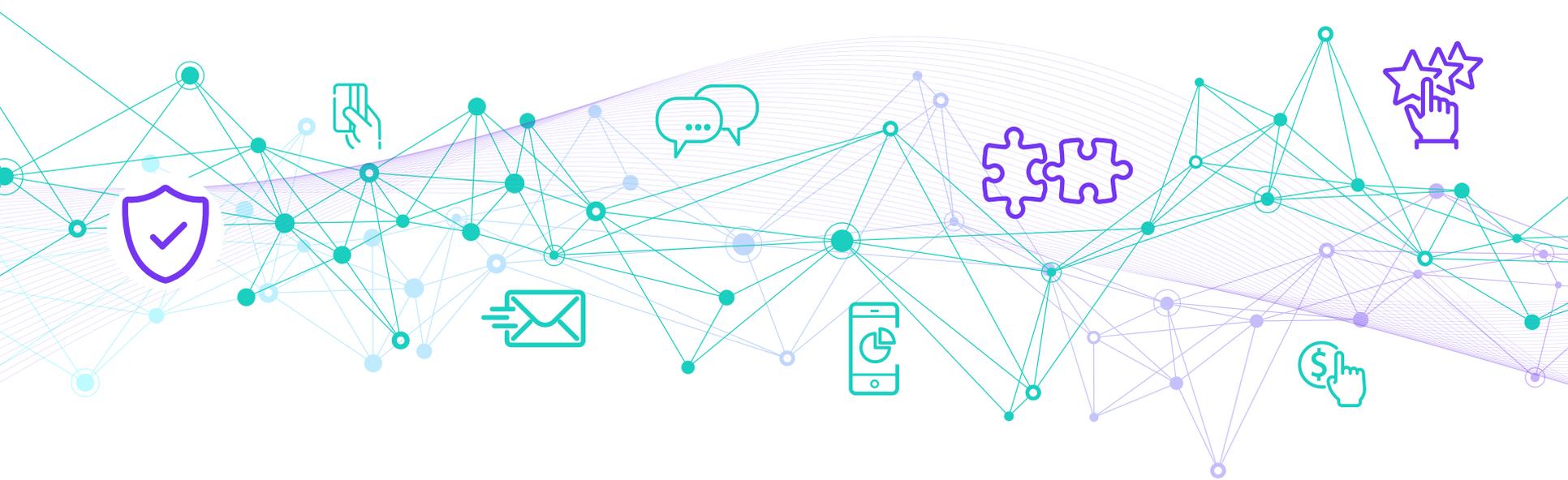
A well-designed journey map doesn't just monitor and display data. It helps every employee see the role they play in improving the experience for customers. That's critical to your end goal, which—remember!—is taking action to increase customer loyalty.

Make it easy to share the journey map and clearly indicate how you are tracking journey performance over time. When all stakeholders across an organization can access this view of the

journey, teams are better able to coordinate their efforts and executives are better able to understand the need for action and the potential benefits for the business.

Provide a query-able view of individual journeys in real time, over time. You can also designate data-driven segments or personas for customers that share characteristics, though often engaging on an individual level is more powerful.

Your map display should make it easy to visualize each journey's touchpoints, feelings, outcomes, and insights. Being able to compare customers can provide additional insight about where interventions may be needed.



## Secure systems integration & compatibility

The most effective journey maps update seamlessly, so your journey map should not be a static, standalone creation. Integrating your data across systems is imperative. You must have compatibility features that will allow you feed in data from, for example, customer communications and relationship management platforms. Digital tools will also enable you to add documents and media as needed.

This will also set the stage for your next steps. Once you've created your journey map, you're going to want to access other systems to execute journey improvements. These might include sending an email to a customer who is stalled in their journey, following up on an open support ticket, or creating social media content. It's easy to see how journey mapping can take response-based marketing to the next level.

System integrations and compatibility mean you won't need to rely on (or wait for) post-experience surveys to know, or intervene with, what is happening during the journey. If you add artificial intelligence (AI) features to the mix, you'll ultimately gain the ability to predict and avoid churn and other issues before your business takes a hit.

But the benefits of shareable data must never outweigh security concerns. Your customer journey mapping capability should meet the highest standards for protection and privacy to safeguard your organization.



## Updating & testing capabilities

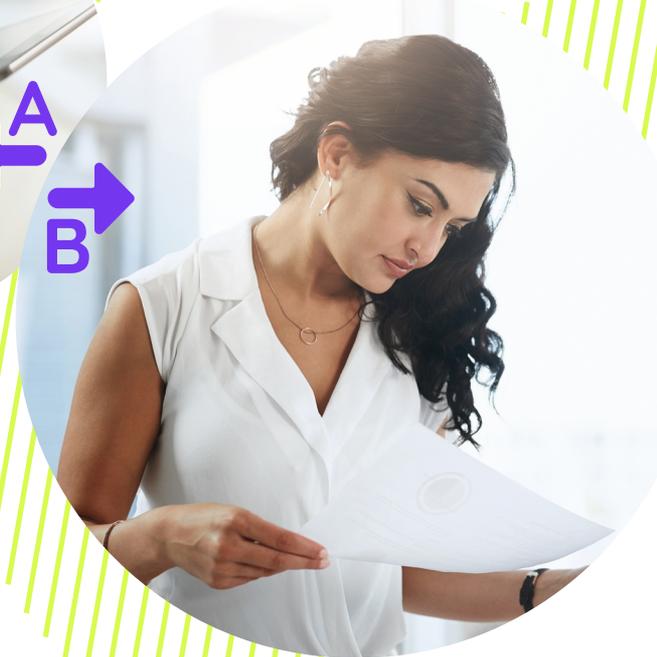
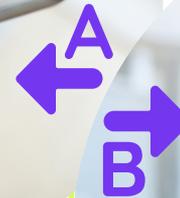
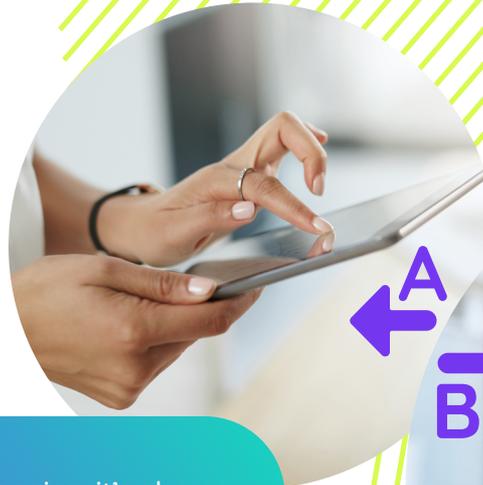
Creating a living journey map isn't a one-and-done project. The work is ongoing throughout the entire customer life cycle. So the greatest benefit of a journey map is its ability to evolve to reflect journey improvements and changing customer needs over time.

Another benefit of this flexibility is the ease with which you can plan, test, and implement proposed changes to your CX strategy. A/B testing used to be a costly, time-consuming undertaking. With today's journey mapping platforms, it can be as easy as a few clicks to determine which message or promotion is more effective, or which campaign will make the greatest impact. Then scale up.

While the potential payoff of journey mapping is game-changing, it's also obvious that getting it right requires a significant commitment.

Not only do you need to put in the work to get all the pieces in place, you need to simultaneously take steps to drive the organizational change necessary to implement your improvement initiatives. A journey map enables you to drive that change.

In the next section we'll explore just how your customer journey map can improve your business outcomes.





# What can journey mapping do for me?

A properly executed living customer journey map is a valuable and versatile tool that can lead to increased revenue and decreased costs, creating better outcomes for both your business and your customers on an accelerated timeline.

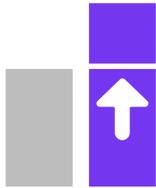
That's a natural outcome of looking at the journey from the customer's point of view and focusing on

building an emotional connection, rather than just making a sale. These days, the steps in the map (sometimes even your products!) don't matter nearly as much as the overall experience you provide and the relationship you build with each customer by providing an empathetic journey optimized to meet their individual needs.

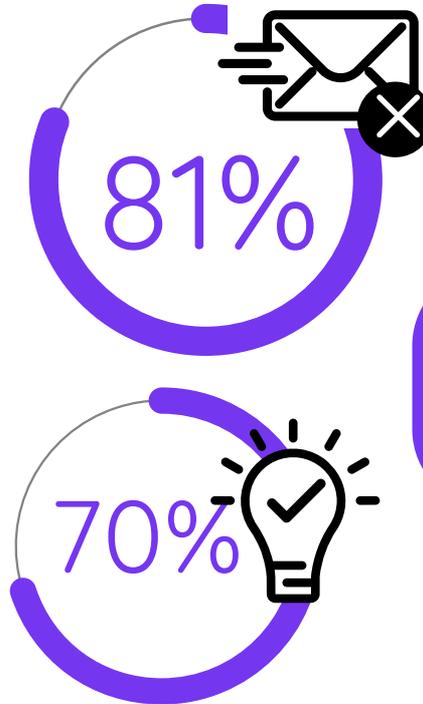
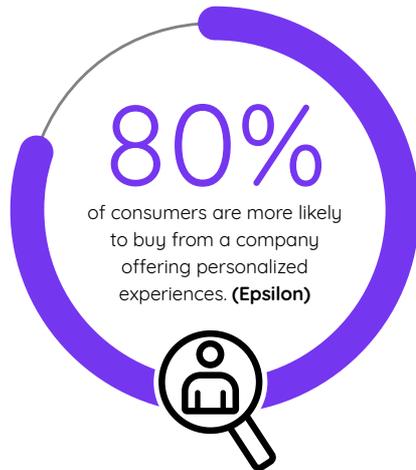
As the technology continues to evolve, journey mapping capabilities will only become nimbler and more effective. More advanced AI will propel some advances, the availability of more granular customer data others. The only constant is innovation. The danger lies in waiting too long to adopt this methodology, giving your competitors a lead that might be too large to overcome.

# There are two primary ways you'll see the benefits of journey mapping.

## 1 Journey optimization for more positive CX outcomes.



**CUSTOMER LIFETIME VALUE** increases by **1.6x** for CX-focused companies. (Forrester)



81% of customers want brands to understand them enough to know when to approach them and when not to.

(Postclick)

Companies focusing on personalization have increased revenue 15% on average. (McKinsey)

70% of consumers report a company's understanding of their personal needs and how they use the company's products is very important in deciding who to do business with.

(Salesforce)

A POSITIVE CUSTOMER EXPERIENCE ENCOUNTER CAN INCREASE SPENDING BY UP TO 140%—HAPPY, LOYAL CUSTOMERS ARE EAGER TO SPEND MORE WITH YOU. (DELOITTE)

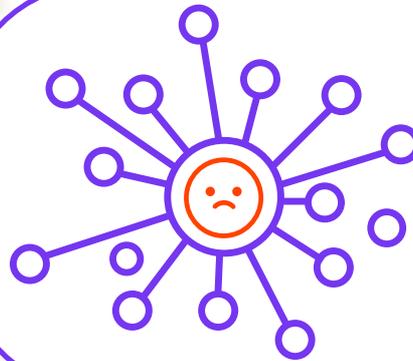




## 2 Journey interventions to avoid negative outcomes.

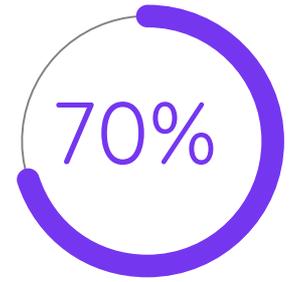
 **1 in 3 WILL LEAVE YOU AFTER ONE BAD EXPERIENCE;**  
92% after two or three. (PwC)

It costs about **5-25 TIMES MORE** to gain a new customer than retain an existing one. (Invesp)



72% of customers will share a positive experience with 6 or more people, but **13% share with 15 or more people when they're dissatisfied.**  
(Esteban Kolsky)

**72% of customers say they only engage with personalized messaging.**  
(SmarterHQ)



**70% of Millennials are frustrated with brands sending irrelevant communications.**  
(SmarterHQ)



**Loyal customers are valuable customers:**  
Increasing retention by just 5% can boost profits 25-95%.  
(Bain & Co.)

# THE CUSTOMER JOURNEY MAPPING CHECKLIST

Run through this checklist when starting a journey mapping initiative. Building a strategy and considering these questions at different stages in the undertaking will increase your chances of success!

## 1 STRATEGY

Taking the time to answer these four questions before you begin will focus your thinking:



**A. What is the business problem you're trying to solve?**

This helps you define the goals of your journey mapping efforts and gets you thinking about how you will measure success.



**B. What is the journey you're going to map?**

Use existing customer knowledge to narrow down your options: Are you going to focus on onboarding? Service? Companies often start with the end-to-end journey, then explore key sub-journeys based on what they learn.



**C. Who is the customer you're going to map?**

Trying to deliver a journey that is all things to all customers is a recipe for failure. By trying to delight everyone, you are likely to please no one. Define your customer group narrowly enough for effective targeting, but broadly enough that the improved journey will yield a measurable financial benefit.



**D. How will you gather the voice of the customer to put into the map?**

Basing the journey on internal beliefs is a sure way to make a wrong turn. How will you find out the true journey? Will you interview customers individually or talk to a customer advisory board?

Typically, the underlying opportunity in journey mapping is to fix something that's broken, support a new corporate initiative, or learn about an unknown journey.

— Jim's expert insight

## 2 PREPARATION

A. Have you reviewed existing data and research about your customers and the journey?

B. Have you spoken with customers to gather their perceptions of the journey?

C. What barriers might you face in implementing journey improvement initiatives?

## 3 EXECUTION

A. Does your map reflect all the channels that your customers use to interact with your company?

B. Does your map include non-customers and competitors' customers where appropriate?

C. Does your map clearly indicate friction points and critical “moments of truth” (those touchpoints that have a disproportionate impact on customers' perception of the journey)?

D. Are you using your customer journey map to break down silos and align teams across departments on journey improvements?

E. Do your employees understand your customers' journey and their role in improving the experience?

F. Do your executives understand the customer journey ... and the business impact improvements can make?

Customer experience has become a key differentiator, and businesses that compete on experience are surging ahead in the marketplace. If your competitors are delighting their customers, chances are your customers are going to find out. Take steps to keep them loyal before that happens.

— Jim's expert insight

## 4 REFLECTION

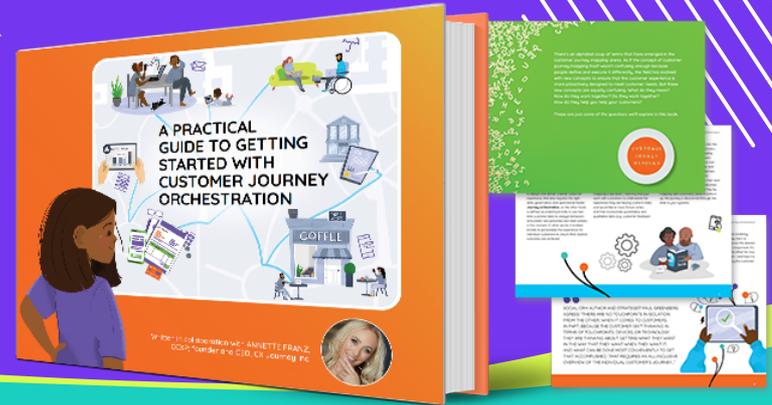
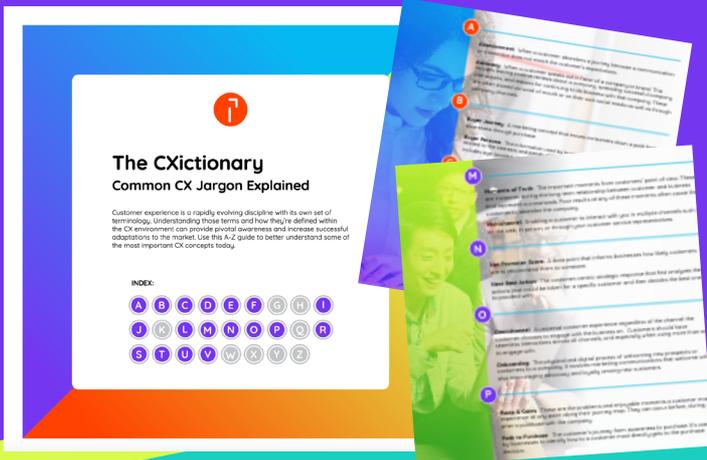
- A. Are there steps that can be removed to simplify the journey for your customers?
- B. Are handoffs between departments a source of friction?
- C. Do your customers believe the experience you provide is positively differentiated from your competitors?
- D. Are you taking steps to design an optimized journey, beyond just a find-and-fix mentality to address problems?

Making customers actively want to stay with your brand is different—and far more profitable—than merely preventing them from leaving!

— Jim's expert insight



Learn more about customer journey management and its critical role in delivering exceptional customer experience. Find these resources and more at: [www.quadient.com/experience](http://www.quadient.com/experience).



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