ICMI empowers organizations worldwide to optimize the efficiency, effectiveness and strategic value of their contact centers.
Session Pre-3

Customer Experience Journey Mapping

Jim Tincher, Heart of the Customer

Hashtags: #ICMI #CX
How to show everything that really matters to your company’s success

Using a whole bunch Of Post-It Notes® Made in Minnesota!
Today's Topics

- The Importance of Customer Experience
- What is a Journey Map?
- Leading a Journey Map Workshop
- Creating Change through Maps

All contents © Jim Tincher, Heart of the Customer
WHO’S JIM?

Customer Experience Consultant, Blogger and Speaker

• Heart of the Customer Blog
• Keynote speaker, consultant and trainer on customer experience
• Ran customer experience programs at Best Buy and UnitedHealth Group
• Former Senior Consultant at Gallup

For today: Hashtags: #ICMI #CX
JOURNEY MAPPING BACKGROUND

Author: Top 10 Requirements for a Journey Map

• Viewed by over 30,000 customer service and customer experience professionals

Presenter at CXPA: *Best Practices for Creating a Customer-Focused Journey Map*

Frequent speaker on the topic
TODAY’S TOPICS

The Importance of Customer Experience

Leading a Journey Mapping Workshop

What is Journey Mapping?

Creating Change through Mapping
WHAT IS CUSTOMER EXPERIENCE?

The perception that customers have across all of their interactions with your organization.
6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012

Source: Watermark Consulting
BUSINESS CASE FOR CUSTOMER EXPERIENCE

6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012

Forrester CX Index Leaders
- 43.0%

S&P 500 Index
- 14.5%

Forrester CX Index Laggards
- 33.9%

Source: Watermark Consulting
Good Customer Experience Generates Revenues

Additional revenue over three years from a modest improvement in customer experience (10 percentage points on Temkin Experience Ratings) for a company with $1 billion in annual sales

($ millions)

- Hotel Chains: $308
- Airlines: $289
- Retailers: $287
- Banks: $258
- Credit Card Issuers: $257
- Personal Computer Makers: $248
- TV Service Providers: $247
- Investment Firms: $239
- Internet Service Providers: $238
- Wireless Carriers: $219
- Insurance Companies: $194
- Health Plans: $179

Source: Temkin Group research report “The Customer Experience-Loyalty Connection”

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What is a Journey Map?

The hypothetical journey map examines Jane, a Millennial who frequently volunteers for local non-profits. She discovers Be The Match at a recruitment event. It measures her experience as she moves through her relationship with you.

Jane attends a recruitment event and sees how she can help somebody in need, so signs on as a donor.

Weeks later, Jane receives her first communication, and goes through registration.

As communications come in, Jane often reads them, but less so over time.

Jane's friend organizes a team for a Walk+Run event, and Jane re-engages and offers to volunteer at another event.

The NMDP reaches out—Jane is a match! She's nervous, but proud to be able to help.

Moment of Truth—a critical point in the journey when members can become more engaged, or drop out of the process altogether.

Jane enters the hospital, nervous but proud to be able to make a true difference.
You work for Coolsure

Hot new health insurance company

Great product features, good pricing

But individual customers are not signing up like you expect

“Coolsure won our latest review of health plans in [your state]. Their plans are comprehensive, and their pricing is the best.”

– Consumer Reports
Your boss heard that journey mapping can help

You can’t go home until you understand how
First Question: What’s a Journey?

A journey is your customer’s end-to-end experience.

Companies have long emphasized touchpoints... But the narrow focus on maximizing satisfaction at those moments can create a distorted picture, suggesting that customers are happier with the company than they actually are. It also diverts attention from the bigger—and more important—picture: the customer’s end-to-end journey.

- The Truth about Customer Experience, Harvard Business Review
Journeys typically involve multiple departments and touch points.

- Signing up for cable service
- Refinancing a home
- Signing up for a new cell phone service
- Buying a new dishwasher
So, What's a Journey Map?

A journey map is typically one of two things:

Research to understand your customer experience

A workshop to document your customer experience
MOST ARE LINEAR, SOME ARE CIRCULAR
BUT THEY ALL HAVE SOME THINGS IN COMMON

1. Measure touch points along the journey
2. Capture your customers’ attitudes and emotions
3. Help you see your experience through your customers’ eyes
4. Shows your experience across touch points
5. Focus on your customer’s true needs
RESEARCH-BASED MAPS

Maps that represent qualitative conversations (interviews, focus groups, journals) with your customers
Meet Amanda

Amanda is a freelance graphic designer with two kids. Her husband Mike recently lost his job, and their health insurance is about to run out. Amanda needs to find a plan that will protect her kids and ease her mind. She’s never shopped for health insurance before, and finds the thought of it overwhelming.

They don’t have a lot of money but it’s very important that she has the right healthcare for her kids, especially Jacob, who suffers from asthma.

Low Cost Plan  
Comprehensive Offering

Researches Online  
Prefers Personal Contact

Quick Research  
Thorough Research

“Before we had a plan a few years ago that didn’t cover Jacob’s inhaler. It was terrible. That my insurance company didn’t think it was important. Of course we paid for it. But I hate having to make these kinds of choices about my kids’ health.”

“When I shop for auto insurance it’s really easy. I put in my information and up pops three quotes. But choosing health insurance is a job—and one I don’t enjoy!”

Create your own Customer Experience Journey Map

Heart of the Customer  •  jlt@HeartoftheCustomer.com  •  612-747-4021

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Sarah's Broadband Provider Journey

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.

Thoughts & Feelings

Emotional Experience

Phases of the Journey

Inquiry

Description
The Inquiry phase features the reasons people are shopping around for new service. These are usually related to moving and relocation, an upgrade to existing service or hunting down new deals. Moving is the biggest reason.

Recommendations
Design homepages with separate, targeted call-out areas lying above the fold, tailored for residential and tech-savvy customers. Internal product areas should include basic, plain-English product descriptions and large price points with a clear call to action. Bullet points should include keywords that summarize options and features typically found in product datasheets.

Comparison

Description
The potential customer comes into the Comparison phase usually armed with the right info and tech jargon and is looking for the lowest cost. Customers tend to be brand agnostic, if they can't find the right price or the right services, they may leave and go back to Inquiry.

Recommendations
Use IP location services to geo-locate customers – removing the current service address roadblock. This allows users to configure services before adding them to the cart and reflects bundled price discounts in a clear and obvious manner.

Purchase

Description
The Purchase phase involves the provider requiring quite a bit of personal info. The order flow tends to be complex, and the process can be all over the map. There is a sense of delayed gratification – waiting on service installation and activation.

Recommendations
Reduce the amount of information required by streamlining and improving any areas that contain form fields, using industry best practices. Work on setting expecta-
tions for the installation phase with phone customer service reps to improve the overall experience with your brand.

Installation

Description
The Installation phase is the handoff from customer service to the installer. There are usually scheduling conflicts among all parties involved. This phase can be somewhat painful for the customer in dealing with the installer.

Recommendations
Many factors converge to make this phase of the customer journey unpleasant. Providing accurate arrival times, courteous technicians and clear instruction materials during installation can help alleviate the negative experience in this phase. Also, consider having leave-behind customer comment cards so customers feel empowered to give feedback into the process.
**BENEFITS OF RESEARCH-BASED MAPS**

- Unbiased view of your journey
- Go across touch points
- Capture your customer’s emotions

**DISADVANTAGES OF RESEARCH-BASED MAPS**

- Harder to internalize
- Can be academic
- Just another research report
JOURNEY MAPPING WORKSHOPS
## Journey Mapping Workshops

<table>
<thead>
<tr>
<th>Usually full-day sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bring in your teams to map out your customer journey</td>
</tr>
<tr>
<td>Most create what’s called an Ecosystem Map</td>
</tr>
<tr>
<td>They’re even better when you bring in customers!</td>
</tr>
</tbody>
</table>

Ecosystem Map: a map that goes beyond your customer to show all the parts of the company involved with the journey.
BENEFITS OF MAPPING WORKSHOPS

Create a shared view
Immediate internalization
Easily applied to your business

DISADVANTAGES OF MAPPING WORKSHOPS

Customers not included
Loudest voice can win
Can just reinforce existing work
The Question?
Research-Based Maps
OR
The Answer
Mapping Workshops
COMPREHENSIVE JOURNEY MAPPING

Road to Success

Hypothesis Workshop

Research-Based Maps

Journey Mapping Workshops
START WITH A PERSONA

Personas represent segments of your customers.

They help you visualize the customer you’re designing for.

Different personas often experience your product or service very differently.
Meet Amanda

Mother of two

Son Jacob has asthma

Millennial

Freelance graphic designer

Husband recently lost his job
COMPREHENSIVE JOURNEY MAPPING

Road to Success

Hypothesis Workshop

Research-Based Maps

Journey Mapping Workshops
STEP 1: BUILD A HYPOTHESIS MAP

Lay out a typical customer journey with your teams
BUILD A HYPOTHESIS MAP

Start with a persona

Document that person’s steps in their experience

Add their attitudes at each step
BUILD A HYPOTHESIS MAP

Start with a persona

Document that person’s steps in their experience

Amanda
Write one step per yellow sticky note. Have one person from your group go first, then have a second person add additional steps.
Build a Hypothesis Map

Start with a persona

Document that person’s steps in their experience

Amanda

Add their attitudes at each step

Customer Googles Health Plan
Uncertain
Neutral
Neutral
Positive

Goes to state exchange website
Uncertain
Neutral
Neutral
Positive

Researches at specific health plan websites
Neutral
Neutral
Neutral
Positive

Selects a plan

Goes back to state site to register
Neutral
Neutral
Neutral
Positive

Fills out paperwork
Neutral
Neutral
Neutral
Positive

Waits
Neutral
Neutral
Neutral
Positive

Receives enrollment kit in the mail
## Best Practices in Hypothesis Mapping

<table>
<thead>
<tr>
<th>Who do I include?</th>
<th>Be inclusive! Invite whoever you need to drive your customer-centered change. Product management, marketing, operations, etc. Try for a mix of leadership and individual contributors.</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many people?</td>
<td>10-12 is ideal. More than 20 and you’ll want to do multiple groups, either on the same topic or perhaps with related experiences or different personas.</td>
</tr>
<tr>
<td>How long should it go?</td>
<td>1-2 hours for the hypothesis map, depending on the number of participants and complexity of the journey.</td>
</tr>
</tbody>
</table>

The skills and setup required to run a Hypothesis Workshop are the same as for the Journey Mapping Workshop, which we’ll spend most of today on.
COMPREHENSIVE JOURNEY MAPPING

Road to Success

Hypothesis Workshop

Research-Based Maps

Journey Mapping Workshops
BUILD A RESEARCH-BASED MAP

Meet Amanda

Amanda is a freelance graphic designer with two kids. Her husband Mike recently lost his job, and their health insurance is about to run out. Amanda needs to find a plan that will protect her kids and ease her mind. She’s never shopped for health insurance before, and finds the thought of it overwhelming.

They don’t have a lot of money but it’s very important that she has the right healthcare for her kids, especially Jacob, who suffers from asthma.

“A week ago we couldn’t find a plan that included Jacob’s inhaler. It was terrible that my insurance company didn’t think it was important. Of course we paid for it. But I hate having to make these kinds of choices about my kids’ health.”

“When I used to shop for health insurance it’s really easy. I put in my information and up pops three quotes. But choosing health insurance is a job—and one I don’t enjoy!”

Create your own Customer Experience Journey Map

Heart of the Customer

Jim Tincher  •  612-747-4021  •  jim@HeartoftheCustomer.com

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Selecting a Health Insurance Plan Journey with Coolsure Health Insurance

<table>
<thead>
<tr>
<th>Phase</th>
<th>Initial Research</th>
<th>Deeper Research</th>
<th>Application</th>
<th>Approval and Onboarding</th>
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<tr>
<td>Goal</td>
<td>Your potential customers gather ideas. In this stage, businesses are discovered and discarded until 1-3 are left to consider. Losing here takes you out of the picture the rest of the way.</td>
<td>As this phase, your customer researches 1-3 companies to find the best match. About half use social to help with their decision-making.</td>
<td>The application process is a moment of truth—if this fails, it has long-term impact on your relationship. Some members quit complicated processes and go elsewhere.</td>
<td>The onboarding process sets the stage for membership. Positive experiences help members make the best use of their plan, setting the stage for renewal. Negative experiences result in attrition.</td>
</tr>
<tr>
<td>Time</td>
<td>Typical time: 1 day to 1 week</td>
<td>Typical time: 1-2 weeks</td>
<td>Goal: 30 minutes</td>
<td></td>
</tr>
</tbody>
</table>

Customer Experience Perceptions Map

Positive Experience

- Amanda goes to Jacob’s soccer game and talks to her friend Jane. Jane recently went through a similar experience purchasing healthcare. Jane suggests she look at Coolsure plans.
- Amanda sends out a tweet. “Looking for health plan ideas?”
- 3 of 10 responses say Coolsure is a good company.
- Amanda Googles “Coolsure reviews.” Overall comments are very positive.
- Encouraged, Amanda decides to apply.

Neutral Experience

- Feeling overwhelmed, Amanda Googles “Health insurance plans. She has no idea where to start, so begins clicking through sites.
- Amanda wonders. “I don’t know how to answer some of these questions. I’d better call for help.”
- “Mmm. I don’t know which one is best.” Amanda goes to Coolsure Website.

Negative Experience

- She goes to her state’s exchange website. “Wow—so many choices!”
- In frustration, Amanda procrastinates and decides to do something else.
- Amanda gets a text from her friend Sarah. “Saw your tweet. Don’t do Coolsure. Had nightmare getting Danny’s surgery covered.”
- Amanda waits 15 minutes on hold, hearing, “Your call is very important to us.” Right, she mumbles.

Legend

<table>
<thead>
<tr>
<th>Level of Effort</th>
<th>About the Effort I Expected</th>
<th>Far More Effort than I Expected</th>
<th>Far Less Effort than I Expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-point scale</td>
<td>2.9</td>
<td>4.3</td>
<td>3.7</td>
</tr>
<tr>
<td>1.6</td>
<td>Far Less Effort than I Expected</td>
<td>Slightly More Effort than I Expected</td>
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</table>

Customer Experience Perceptions Map

- We had a plan a few years ago that didn’t cover Jacob’s inhaler. It was terrible that my insurance company didn’t think it was important. Of course we paid for it. But I hate having to make these kinds of choices about my kids’ health.
- When I shop for health insurance it’s really easy. I put in my information and up pops three quotes. But choosing health insurance is a job—and one I don’t enjoy!”

Create your own Customer Experience Journey Map

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BUILD A RESEARCH-BASED MAP

Use customer research to capture actual steps and attitudes
This is a qualitative process – don’t use surveys

Focus groups
Customer interviews
Customer journaling
**BEST PRACTICES IN RESEARCH-BASED JOURNEY MAPPING**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whom do I interview?</td>
<td>Break your customers into segments and interview enough representatives of each to find common themes.</td>
</tr>
<tr>
<td>Why do I need segments?</td>
<td>Customers are different! Treating them all the same gives you a watered-down map that applies to no one.</td>
</tr>
<tr>
<td>Can I just use existing research?</td>
<td>Maybe, but existing research tends to focus on touch points, as opposed to an end-to-end journey.</td>
</tr>
</tbody>
</table>
MORE ON RESEARCH-BASED JOURNEY MAPS

Creating a Customer-Focused Customer Experience Journey Map

10+4 Principles to Capture Your Customer Experience

COMPREHENSIVE JOURNEY MAPPING

Road to Success

Hypothesis Workshop

Research-Based Maps

Journey Mapping Workshops
RUNNING A JOURNEY MAPPING WORKSHOP
YOU WORK FOR COOLSURE

Hot new health insurance company

Great product features, good pricing

But individual customers are not signing up like you expect

“Coolsure won our latest review of health plans in [your state]. Their plans are comprehensive, and their pricing is the best.”

- Consumer Reports
SETUP

Start with the basics

| One persona | One specific journey | Concurrent groups could map different combinations |

Invite 10-12 members to help with the map. Include:

| Those who interact with customers every day | Those who need to support the decision | Combination of leadership and front-line members |

Setup

| Allocate a full day | Have members research your journey ahead of time | Setup room with customer verbatims and stats |
Setup

Start with the basics

One persona  One specific journey

Amanda

Choosing a health plan
Invite 10-12 members to help with the map. Include:

| Those who interact with customers every day | Those who need to support the decision | Combination of leadership and line teams |

**FOR TODAY**

- Go to a mapping area
- Select a name tag and a role
- Read your role description
Review your hypothesis map

Start with a persona

Document that person’s steps in their experience

Amanda

Add their attitudes at each step

Customer Googles Health Plan
Uncertain

Goes to state exchange website
Uncertain

Researches at specific health plan websites
Neutral

Selects a plan
Positive

Goes back to state site to register
Neutral

Fills out paperwork
Neutral

Waits
Neutral

Receives enrollment kit in the mail
Positive
Review your research map

Meet Amanda

Amanda is a freelance graphic designer with two kids. Her husband Mike recently lost his job, and their health insurance is about to run out. Amanda needs to find a plan that will protect her kids and ease her mind. She’s never shopped for health insurance before, and finds the thought of it overwhelming.

They don’t have a lot of money but it’s very important that she has the right healthcare for her kids, especially Jacob, who suffers from asthma.

Low Cost Plan Comprehensive Offering
Researches Online Prefers Personal Contact
Quick Research Thorough Research

“We had a plan a few years ago that didn’t cover Jacob’s inhaler. It was terrible that my insurance company didn’t think it was important. Of course we paid for it. But I hate having to make these kinds of choices about my kids’ health.”

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Create your own Customer Experience Journey Map

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Positive Experience

Amanda goes to Jacob’s school game and talks to her friend Jane. Jane recently went through a similar experience purchasing healthcare. Jane suggests she look at Coolsure plans.

Neutral Experience

Feeling overwhelmed, Amanda Googles “Health Insurance plans.” She has no idea where to start, so begins clicking through sites.

Negative Experience

She goes to her state’s exchange website. “Wow—so many choices!” In frustration, Amanda procrastinates and decides to do something else.

Customer Experience Perceptions Map

3 of 10 responses say Coolsure is a good company.

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Amanda gets a text from her friend Sarah, “Saw your tweet. Don’t do Coolsure. Had nightmare getting Danny’s surgery covered.”

Amanda waits 15 minutes on hold hearing, “Your call is very important to us.” Right, she mumbles.

Legend

- Positive experience
- Neutral experience
- Negative experience

Level of Effort

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Time for Action!
STEP 1 – DOCUMENT YOUR CUSTOMER’S STEPS IN YOUR EXPERIENCE

Display the steps Amanda takes as she researches a health plan

Amanda first... She goes... Then she... After that...

TIP
You need to view your journey as your customer does, which is why research-based maps help. If you don’t capture your customer’s true steps here, the rest of the process will suffer.

Write one step per yellow sticky note. Have one person from your group go first, then have a second person add additional steps.
STEP 2 - DOCUMENT YOUR CUSTOMER’S GOALS

What is your customer trying to do at each step? Multiple steps may have the same goal.

**Experience Steps**
- Amanda first...
- She goes...
- Then she...
- After that...

**Customer Goals**
- Learn how the process works
- Discover possibilities
- Discard some vendors
- Choose 2 or 3 companies to research further

**TIP**
Represent the goal from your customer’s eyes. “Get a plan that doesn’t suck” or “Get something cheap” are actual goals for some customers.

Write your customer’s goals for each step on a green sticky note. Have one person from your group go first and place their ideas on goals below each yellow sticky note, then discuss and see if there is disagreement. Use your research journey map if available.
Step 3- Document Your Customer’s Attitudes and Emotions

How does your customer feel? Go beyond “Sad” or “Neutral” – what is she really feeling?

**Experience Steps**
- Amanda first...
- Learn how the process works
- She goes...
- Discover possibilities
- Then she...
- Discard some vendors
- After that...
- Choose 2 or 3 companies to research further

**Customer Goals**
- Ecstatic
- Frustrated
- Annoyed
- Thrilled

**TIP**
Effort leads to frustration. Things you think are simple drive your customers crazy – because they aren’t!

Write your customer’s attitude on an orange sheet under the appropriate green sticky note. Have one person go first, then see if there is agreement.
STEP 4 - WHO DOES YOUR CUSTOMER INTERACT WITH ON HER JOURNEY?

Document the people and groups your customer works with at each stage

**Experience Steps**

- **Amanda first...**
- **Learn how the process works**
- **She goes...**
- **Discover possibilities**
- **Then she...**
- **Discard some vendors**
- **After that...**
  - **Choose 2 or 3 companies to research further**

**Customer Goals**

- Ecstatic
- Frustrated
- Annoyed
- Thrilled

**Attitudes**

- **Sales person**
- **Call center**
- **Call center**

TIP
At this point you may discover you missed some Experience Steps – go ahead and add them to the top. That’s why we use Post-It Notes!

Document who your customer contacts to – either directly or virtually. There may be some steps without this line.
STEP 5 - WHAT OBJECTS DOES YOUR CUSTOMER INTERACT WITH AT EACH STEP?

Document the systems, paperwork and physical objects for each stage.

Systems and objects interacted with:
- Email
- Public Website
- Credit App, Website
- Phone

What physical or virtual objects do your customers interact with? Have one person put up a blue sticky note first, then have others add to it. You may find that some steps have multiple objects.
STEP 6 - WHERE ARE THE FRICTION POINTS?

Where is your customer feeling the pain? Where is the friction in your customer experience?

Amanda first...

She goes...

Then she...

After that...

Give each participant three dots. Put the dots where you see the most friction in your customer experience. Use your research-based map to help you, if available.
TIME TO MOVE

BACKSTAGE
Customer problems often originate backstage. Decisions made here can have dramatic impacts on your customers. Typical causes:

- Misaligned Incentives
- Solving your problems instead of your customer’s
- Lack of backstage teams’ knowledge about customer problems
Step 7 - Draw a line to separate your backstage processes.

Visually represent moving backstage:

- Amanda first...
  - Learn how the process works
  - Ecstatic
  - Sales person
  - Email
- She goes...
  - Discover possibilities
  - Frustrated
  - Call center
- Then she...
  - Discard some vendors
  - Annoyed
  - Public Website
- After that...
  - Choose 2 or 3 companies to research further
  - Thrilled
  - Call center
  - Credit App, Website
  - Phone

Use a ribbon, string, or just draw a line with a marker to show the separation between front-stage and backstage.
STEP 8 - DOCUMENT YOUR BACKSTAGE ACTIVITIES

Show what happens backstage for each front stage step

What happens backstage for each customer-facing step? Do you create invoices or generate a need for a call? Have one person put up a purple note first, then add from others. You may have multiple backstage process steps for each front stage Experience Step.
Show the groups for each backstage step

Backstage groups:
- IT
- Ops
- Finance

Show which groups or individuals are involved with each step – use pink notes again. You may find that front stage members may become less involved at this stage of the discussion, whereas IT, Finance and Ops may become more active. Avoid finger-pointing.
Show the systems used for each backstage step

Backstage processes

Create email
Schedule call
Send reminder to acctg
Make a phone call
Update purchase history

IT
Email system
CRM
SAP
Ops
Finance
CRM
SAP

Show which systems are used at each step – use blue notes again. It is critical to document systems used, as your systems often force processes that can break your customer experience.
Look at your map – what are you missing? Does your team feel this accurately represents your customer experience and ecosystem?
YOU'RE FINISHED!

With the map, that is. NOT with the job!
TODAY'S TOPICS

The Importance of Customer Experience

What is a Journey Map?

Leading a Journey Map Workshop

Creating Change through Maps
Now what?

Prioritize you must
SELECT ONE AREA OF FOCUS - AN INTERACTION TO IMPROVE
Use your Customer Experience Design Canvas to highlight one opportunity.

Thanks to Oracle at [www.DesigningCX.com](http://www.DesigningCX.com) for the inspiration for this Canvas.
START WITH YOUR EXISTING EXPERIENCE

Enter your existing experience into your Design Canvas. You can simply move your Post-It Notes, or use new ones.

### Existing Experience

<table>
<thead>
<tr>
<th>Customer Step(s)</th>
<th>After that...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Goals</td>
<td>I want to...</td>
</tr>
<tr>
<td>Attitudes and Emotions</td>
<td>Grrrr!</td>
</tr>
<tr>
<td>Front Stage Groups Involved</td>
<td>Call center</td>
</tr>
<tr>
<td>Front Stage Systems</td>
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</table>

### Existing Experience

<table>
<thead>
<tr>
<th>Backstage Processes</th>
<th>Update XYZ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backstage Groups</td>
<td>Finance</td>
</tr>
<tr>
<td>Backstage Systems</td>
<td>SAP</td>
</tr>
</tbody>
</table>

#### Existing Experience Table

<table>
<thead>
<tr>
<th>Existing Experience</th>
<th>Insight</th>
<th>New Attitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Step(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attitudes and Emotions</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Experience</th>
<th>Business Impact</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Step(s)</td>
<td></td>
<td></td>
</tr>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Backstage Processes</th>
<th>Change Needed</th>
<th>Clearance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backstage Groups</td>
<td>Procedures needed change</td>
<td>Process approval</td>
</tr>
<tr>
<td>Backstage Systems</td>
<td>Other teams impacted</td>
<td>Support teams</td>
</tr>
</tbody>
</table>
FOCUS ON YOUR CUSTOMER’S NEEDS

Enter your insights on your customer’s needs. Remember – describe these needs from her perspective. What does she need from the journey to fulfill her emotional needs?

Amanda needs to be able to...

Amanda needs to feel...
Brainstorm Ideas

What can you do to fulfill your customer’s needs?
Build out your new experience. If you have time, update your journey map with your new experience. If not, simply place the items here using new Post-It Notes.
What new attitudes/ emotions and behaviors do you want your customer to have?

New Attitude

Relaxed, and at ease feeling like I know what I’m doing.

New Behavior

Quickly get through process, and tell my friends how easy it was. I have no reason to quit halfway through – it’s too easy!
## Calculate Your Business Impact

<table>
<thead>
<tr>
<th>Factor</th>
<th>Multiplied By</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call reduction</td>
<td>Cost/call</td>
<td>Cost savings</td>
</tr>
<tr>
<td>Additional purchases</td>
<td>Average purchase</td>
<td>New revenue</td>
</tr>
<tr>
<td>Increased loyalty</td>
<td>Revenue/month</td>
<td>Increased revenue</td>
</tr>
<tr>
<td>Additional Referrals</td>
<td>Revenue/referral</td>
<td>New revenue</td>
</tr>
<tr>
<td>Lower cancellations</td>
<td>Revenue/month</td>
<td>Increased revenue</td>
</tr>
<tr>
<td>Increased conversion rate</td>
<td>Average sales</td>
<td>Increased revenue</td>
</tr>
<tr>
<td>Fewer giveaways to angry callers</td>
<td>Reduced angry callers</td>
<td>Cost savings</td>
</tr>
</tbody>
</table>
**What is the business impact?**

Detail the business impact. Use dollar impact whenever possible to help create a customer-centric ROI.

---

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<td>Experience Need</td>
<td></td>
</tr>
<tr>
<td>Attitudes and Behaviors</td>
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<td></td>
</tr>
<tr>
<td>Customer Touchpoints</td>
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<td></td>
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<tr>
<td>Backstage Support Groups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Backstage Support</td>
<td></td>
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</tr>
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**Business Impact**

25% less customers will abandon the enrollment process, resulting in 2,000 new members each year, creating $94,000 in monthly revenue.
What needs to change?

Detail what changes need to be made to accomplish your change. Who do you need to reach out to? Ideally, they are on this mapping team.

Changes Needed

Systems/Processes needing change

We will need to create the Webinator, and update the website with it.

Process/Product Owner(s)

Bob, IT Director

Other Teams impacted

Product will need to be onboard; marketing will give input.
What needs to be done next?
Who will lead the charge?
Who will help?

Next Steps

Put together a funding request to start design of the Webinator.

Champion
Jill, Director of Product Management

Support Team
Betty from Product
Jack from Call Center
Cindy from Marketing
CREATE YOUR CUSTOMER-CENTRIC CHANGE CHARTER

Customer-Centric Change Charter

If we create:

This will solve/enable:

To do this, we need to:

Signed,
Create Your Customer-Centric Change Charter

Customer-Centric Change Charter

If we create:

Plan Picker

An automated plan picker (the Webinator) to help our customers understand our different plans

(Duration of your new experience)

This will solve/enable:

Discover possibilities

Frustrated!

This will accelerate the time needed to enroll in a plan, and provide our customers peace of mind.

(Your customer’s problems or opportunities)

To do this, we need to:

Update Website

Work with subject matter experts to create the Webinator, and program the picker in our website.

(People + Process + Technology)

As a result:

That was easy!

25% less customers will abandon the enrollment process, resulting in 2,000 new members each year, creating $94,000 in monthly revenue.

New attitudes/behaviors, and the business results behind it

Signed,
Today's Topics

The Importance of Customer Experience

What is a Journey Map?

Leading a Journey Map Workshop

Creating Change through Maps
BUSINESS CASE FOR CUSTOMER EXPERIENCE

6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012

Forrester CX Index Leaders:
- Forrester CX Index Laggards: -33.9%

S&P 500 Index, 14.5%

Source: Watermark Consulting
6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012

- Forrester CX Index Leaders, 43.0%
- S&P 500 Index, 14.5%
- Forrester CX Index Laggards, -33.9%

Source: Watermark Consulting
TODAY’S TOPICS

The Importance of Customer Experience

What is a Journey Map?

Leading a Journey Map Workshop

Creating Change through Maps
SUPPLIES

• Post-It Notes in six colors (recommend Office Depot Brand - http://www.officedepot.com/a/products/843796/Office-Depot-Brand-Self-Stick-Notes/)

• Sharpies for each person

• Colored dots

• Research-based Customer Journey Maps printed (preferably at 11x17)

• Design Canvas printed at 11x17

• Customer-Centric Change Charter printed at 11x17
Thank you for attending
Please complete your session evaluation