Creating a Customer-Focused Customer Experience Journey Map

10+4 Principles to Capture Your Customer Experience

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A customer journey map charts your customer's experience and helps you target improvements with the greatest return. By identifying those steps in the customer experience with the greatest impact, your journey map becomes a centerpiece to your customer experience planning process.

This White Paper will explain what a customer experience journey map is, introduce the Guiding Principles of great journey maps, and will show examples of their implementation.

Journey Maps: The Foundation for Planning Your Customer Experience

Customer experience journey maps go by different names, such as customer experience maps, journey maps, and touch point maps. A map is a visual means to identify the steps a customer goes through as they experience your product or service. See pages 5 and 6 for examples.

Journey maps are used for different reasons, with the two most common being:

1. **Understand Touch Points.** Touch Point Maps show each customer interaction within a larger experience—whether a consumer or business customer. A primary goal is to understand which touch points are used, and how each assists or interferes with the process. Many experiences include touch points outside of a company's direct control, such as friends and family, social media and third-party websites. Each has an impact on the journey and needs to be understood.
2. **Understand Emotional Impact.** Every journey has an emotional impact on your customer, even in a business-to-business relationship. Whereas Touch Point Maps identify which interactions exist in an experience, Emotional Impact Maps target a specific phase and how each interaction builds or destroys value in your customers' eyes.

As visual artifacts these are powerful tools to teach you how the journey impacts your customers. They are also effective ways to unlock the secrets to improve loyalty and avoid defection.

Guiding Principles

Heart of the Customer uses ten guiding principles to create Customer Experience Journey Maps:

1. **Maps represent your Customer's perspective.** Your journey map needs to represent the interactions as your customer experiences it. For example, when studying the shopping education process for a retailer, we discovered that most of the shopper education was complete before they ever visited that retailer or their website. This directly impacted how the retailer went to market, as they realized they needed to influence these other sites' content.
2. **Measure your brand promise.** A journey map begins with your brand promise, and identifies how it is supported by your customer experience. If your brand promise is to have an experience that is effortless, highly customized, or unique, then your journey map needs to show whether your customers feel you are meeting that goal.
3. **Require qualitative research.** Qualitative research focuses on the why. Depending on the scope, the mapping process can involve interviews or ethnographies. Surveys can complement these with a broader perspective, but are not sufficient by themselves.
4. **Represent your Customer segments**. Different segments experience your products and services very differently. In a project for a service company we found that one segment spent two hours researching the category while another spent over six weeks doing the same, using very different tools. Trying to combine these very different experiences creates a diluted map that applies to no one.
5. **Include your Customer goals.** A great journey map shows what your customer is trying to accomplish at each stage of the process. Goals change as the process unfolds.

6. **Communicate your Customer emotions.** Emotions are critical to any experience, whether B2B or B2C, and the best customer journey maps clearly communicate these emotions and how they change as the experience unfolds. Some maps use smiley and frowny faces to communicate the customer's emotional state. At Heart of the Customer we prefer to use satisfaction scores and colors to show the relative state of your customer.
7. **Document your touch points.** Many customer journey maps are built to demonstrate the order and type of touch points. The best maps show the emotional impact of each touch point.
8. **Highlight your Moments of Truth**. We define a Moment of Truth as a touch point with high impact to the rest of the process. Some interactions matter more than others. Great maps identify those critical Moments of Truth. For example, a bad hospital check-in taints the rest of the patient experience.
9. **Include your Customer time progression.** The length of your customer experience can vary, which is critical to understand. Does your customer's typical call last 30 seconds or 10 minutes? Did shoppers spend 20 minutes or 40 hours deciding on a product? Does this vary by segment?
10. **Ditch the PowerPoint.** Why limit yourself to PowerPoint for something as important as your customer experience? Your map should be an oversized creation that can become the focal point for conversations – not something projected in a dark room.

Some optional principles to consider:

1. **Break the experience into phases.** In a longer experience, customers are accomplishing different things at different times. For example, early shopping phases typically involve trying to figure out what questions to ask, whereas later phases are more transactional. Shorter transactions may not require phases.
2. **Bring in Customer Verbatims.** While not strictly required, verbatims bring the customer experience to life. If not used in your journey map, then definitely include them in the surrounding education.
3. **Include Non-Customers.** In a pre-sales journey, non-customers may be following a different path to make a decision. One of our research projects showed how non-customers were far more likely to use in-person meetings to make a purchase decision – which our client did not offer. This gap directly impacted their customer experience strategy.
4. **Incorporate your other Voice of the Customer components.** Rather than being separate from other research, the journey map should reflect components of your Voice of the Customer program (NPS, Satisfaction, the Customer Effort Score) to link it to your other efforts.

These 10+4 principles will ensure you have a rich document that can serve as the foundation for your customer experience efforts.

Applying the Principles

Heart of the Customer uses these principles to create two primary types of maps: the Touch Point Map and the Emotional Journey Map. Let's look at each in turn.

Using the Touch Point Map

The following touch point map (the XYZ Company Purchase Journey Map on page 5) shows the journey the Young Families segment uses to purchase a home theater. Notice that this version focuses on the Young Families segment – the process looks very different for the Digital Enthusiast or the Middle-Aged Music Lover.

The most visible spot on the map is the photo representing your customer segment. That is deliberate, in that it focuses the reader on that customer to learn more about the segment first. The eye is then drawn to more information about the segment, including the verbatims below.

Since the purpose of this map is to understand the research and analysis journey, those touch points form the center of this map. Depending on the experience, In-Depth Interviews, Ethnographies, or Online Journaling can be used to collect the data behind your Customer Experience Journey Map.

We also use the Customer Effort Score to understand the opportunities to lose customers as they go through the journey. This score compares the level of effort to the amount of effort the customer expected. The Customer Effort Score has a critical link to loyalty, in that experiences that require more effort than expected lead potential customers to drop out of a process before your sales channel has the opportunity to intervene.

Using Your Touch Point Map to Drive Change

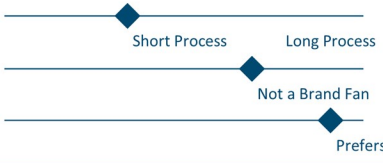
This map facilitates organizational discussions about how each touch point contributes to your customer's experience. How would your strategy change if you knew each of these about your customer's purchase journey?

- **Friends and family are far more likely to kick off a research process than is advertising.** Seeing your product category at a friend's house creates the curiosity necessary to begin the research process. How does this change your marketing and branding strategy?
- **The two highest-impact moments occur outside of your control,** when potential customers look at review sites and other third-party sites. How are you engaging third-party sites to make certain the products you carry are included and reviewed fairly?
- **The one Hot Zone is your web site's research functionality.** A Hot Zone is an area with high importance and low satisfaction. Fortunately, purchasing at your retail store is a Bright Spot, with high customer scores. How will this knowledge impact how you deploy your resources?
- **The Research Phase has a high Customer Effort Score,** meaning it takes far more work than your customers expect. Can you gain market share if you can simplify this process for them?

Young Families Segment

The **Young Families Segment** is primarily made up of 25-35-year-olds with 1 or 2 children. With their busy lives, they rely heavily on friends and family (particularly other young parents) to discover new opportunities, and use the Internet to do their research. Most do not have the time to visit a store, preferring to use the Internet and their smartphones for research. However, when they do visit a store they expect to be served immediately by a knowledgeable representative.

Most Young Families members purchase via the website, but about 1/3 purchase in the retail store.



"I would have liked Frequently Asked Questions or would like to talk to an online person. I'm not a paper person so did everything online." – Young Families Customer

"The only problem is there are so many choices. I'm not sure if that makes it easy or hard. It was overwhelming - difficult because there is a lot to think about and I felt it was hard to figure out what was best." - Young Families Non-Customer

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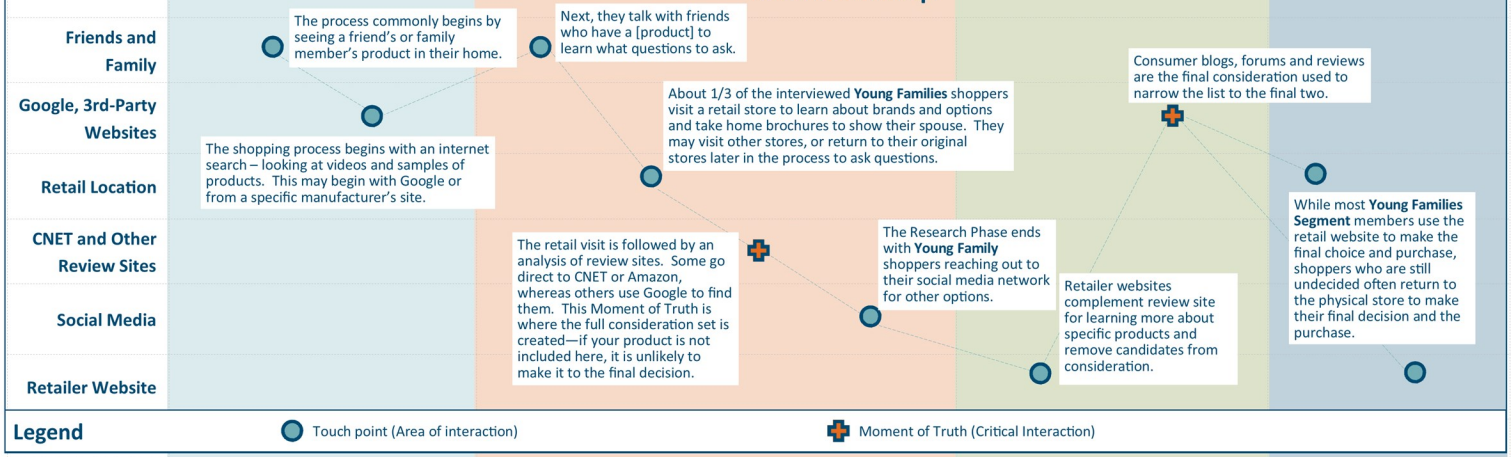
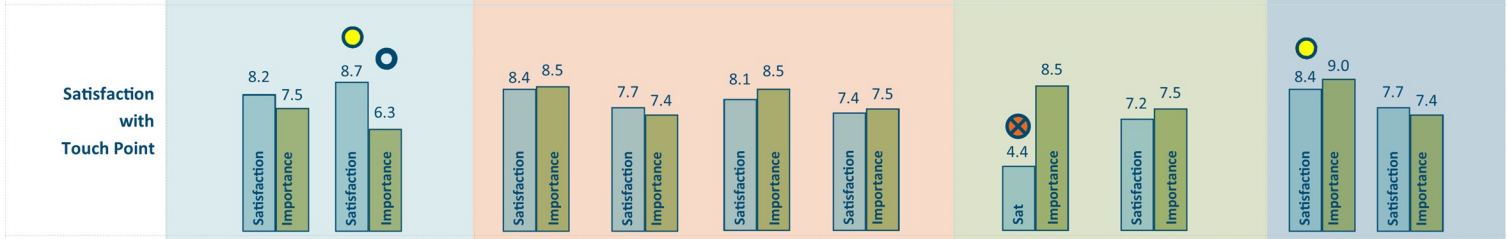
Home Theater System Purchase Journey Map

Phase	Awareness	Research	Choice Reduction	Purchase
	Duration: 1 week	Duration: 2-3 weeks	Duration: 1 week	Duration: 1 day
Goal	Your consumers begin by just learning about the product marketplace. The key goal at this stage is to understand what possibilities exist, and to develop the list of questions to ask.	At this stage, consumers are trying to learn more about what products exist. While some choice reduction happens along the way, the primary goal is to broaden the consideration set and determine the final criteria for making a choice.	At this point, the consumers have the criteria set and has mostly finished the discovery phase. Now, they focus on narrowing down the list to 2-3 candidates.	The final decision is made, and the purchase completed. While it may be purchased at a retail location, **Young Families** prefer to buy online.

Touch Point Map



Legend Touch point (Area of interaction) | Moment of Truth (Critical Interaction)



Legend Bright Spot (High Satisfaction area to promote) | Hot Spot (Importance significantly higher than Satisfaction) | Over-Invested (Satisfaction significantly higher than Importance)

Level of Effort (Customer Effort Score)	About the Effort I Expected	2.8	Far More Effort than I Expected	4.3	Slightly More Effort than I Expected	3.6	Far Less Effort than I Expected	1.6

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Sample Customer Experience Touch Point Map

Seniors Segment

The **Seniors Segment** is made up of 65+ year-olds. Many are retired, so have time to schedule check-ups during the day. The majority prefer to schedule their visits over the phone, talking to a scheduler in person. They will wait until their "regular" doctor is available, even when sick.

While this is changing, older seniors do not typically utilize their health records online, preferring to keep paper copies.

Flexible sched- uling — Specific time needs

Uses multiple ser- vices — Narrow range of services

Face- to-Face — Technology-Enabled

"When I call my doctor, I watch how quickly they answer the phone, how knowledgeable, professional and friendly the people were. If I see they weren't really interested in me and take the time to see that I'm satisfied, then I know it's time to choose another doctor."

"I love my doctor! He always takes time to ask how I am doing, and gives me my paperwork before I go, so I can keep them in my file. My other doctor was in such a rush that I hardly got to see him."

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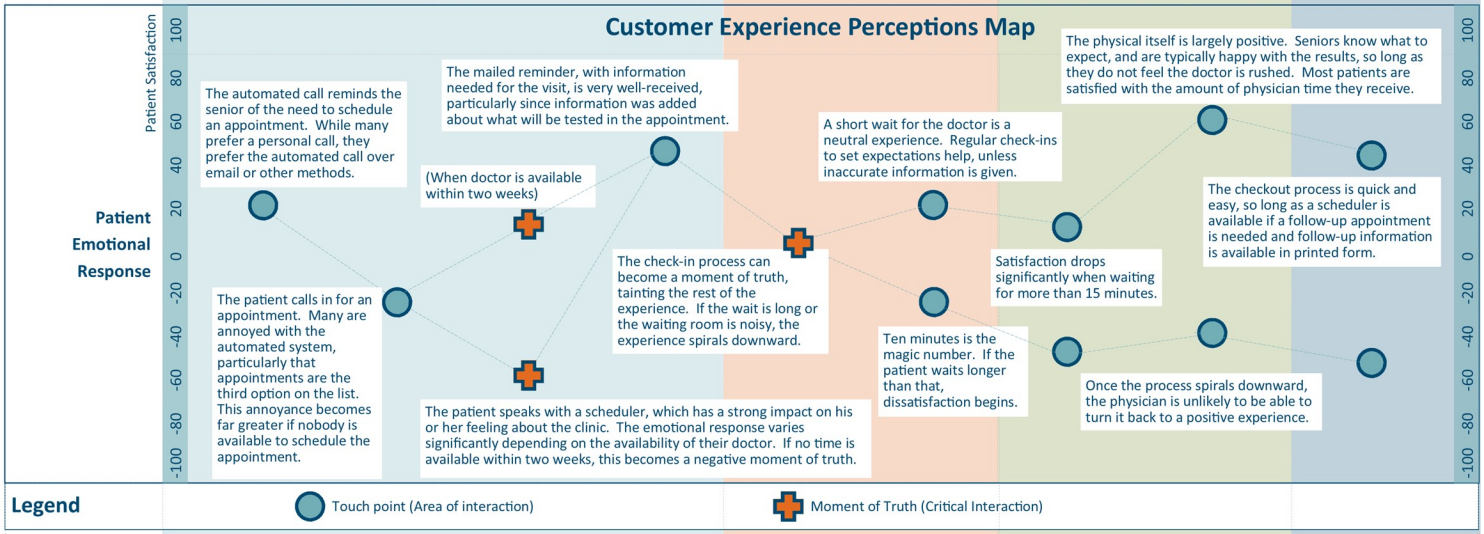
Scheduling Physical Appointment (no blood work) Journey Map

Phase	Schedule Appointment Goal: No more than 2 weeks	Check-In Goal: 10 minutes	Physical Goal: 30 minutes	Checkout Goal: 3 minutes
Goal	The patient calls in to schedule an appointment. The Senior segment strongly prefers to talk to a representative in person. This also includes the appointment information, such as the need to fast before an appointment.	The Check-In and Waiting Room typically have small impacts on Seniors' satisfaction, unless there is a substantial delay.	Most Seniors have had enough physicals that they know what to expect. Waiting is the biggest issue for most.	The patient is released with any instructions, and schedules any future appointments.



Touch Points used in this phase	Phone system Scheduler Reminder information	Waiting Room Kids Area Check-In Desk Check-In Staff	Appointment Room Nurse Doctor	Scheduler
Information sought in this phase	Date Requirements (e.g., fasting) for physical Paper is the most effective format for the Seniors segment	Length of wait. Accurate information about the estimated wait time helps reduce the impact of long waiting time.	Patients quickly lose patience when left unattended. Delaying the nurse's routine for 5 minutes can actually help satisfaction, since it spreads out the waiting time.	Paper is critical for Seniors. Directly calling the patient's pharmacy also helps the patient follow the prescribed regimen.
Level of Effort (Customer Effort Score)	**About the Same Effort as Expected** **3.1**	**Far More Effort than I Expected** **4.6**	**Slightly Less Effort than I Expected** **2.7**	**Slightly Less Effort** **2.3**

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Sample Customer Experience Emotional Impact Map

Using the Emotional Impact Map

Contrast the Touch Point Map to the Emotional Impact Map on page 6. This map involves scheduling a physical exam for members of the Seniors Segment.

The center focuses on the customer's emotional levels. Touch points are still included and moments of truth are called out – but the focus is on your customer's emotions as they travel through the experience. Understanding this emotional impact typically requires ethnographies or journaling, combined with quantitative surveys to collect the scores.

Using Your Emotional Impact Map to Drive Change

This map facilitates organizational discussions about how customers experience the journey, and how each touch points improves or degrades the customer's emotional response. **How would your strategy change if you knew:**

- Two weeks is the magic time for appointment availability – patients who have to wait longer than two weeks are far less satisfied with the process, and are more likely to leave your practice altogether.
- The mailed reminder engages seniors, and is very well-received, whereas other segments have a neutral or negative response. What will you do when budget pressures threaten to cut this offering?
- The speed of check-in is a moment of truth that impacts the rest of the experience. Loud rooms or waits beyond ten minutes cause a negative reaction that lasts for the rest of the physical.
- The Check-In Process requires far more effort than Seniors expect from this process, receiving a Customer Effort Score of 4.6. Other segments have lower scores, suggesting that Check-In is a particular pain point for the Seniors Segment.

Understanding the B2B Customer Experience Journey

While both of these examples represent B2C customer experiences, we apply the same tools to business customers.

In fact, mapping the B2B customer experience is often more critical, since the loss of a single customer has significant impact on your business. We regularly analyze the customer experience through Opportunity Studies, which focus on understanding the purchase process and why customers select you or a competitor.

There are three primary reasons to map your B2B customer experience:

1. **The cost of a new customer acquisition is increasing dramatically.** This makes it even more important to understand your existing purchasing experience, to improve your win rate. It also makes it critical to measure your existing loyalty, as the cost of replacing each customer is increasing.
2. **The research has an immediate ROI.** Similar to B2C Customer Experience Journey Maps, the research results often lead to both long-term and short-term responses. Most of our customers find they can implement immediate action that more than pays for the research costs.
3. **It is an opportunity to show the prospect you care.** Our customer's customers regularly provide feedback on how much they appreciate that the company is asking about their business, which improves loyalty.

In addition to uncovering the reasons you win or lose, we also identify the process that is used to make a decision, helping you to better uncover opportunities.

About the Author

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Jim Tincher is the principle Customer Experience consultant at Heart of the Customer. Jim has more than 20 years of experience in driving customer engagement and intimacy from small business to Fortune 500 companies. Jim's Voice of the Customer expertise has led to engagements as far-reaching as developing consumer tests at Best Buy, creating a Customer Insights capability at UnitedHealth Group, and consulting with clients ranging from global fast food companies to utilities to international manufacturing and service companies. Jim is a dynamic keynote speaker, passionate about building a world-class customer experience that results in customers who come back time and again.

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