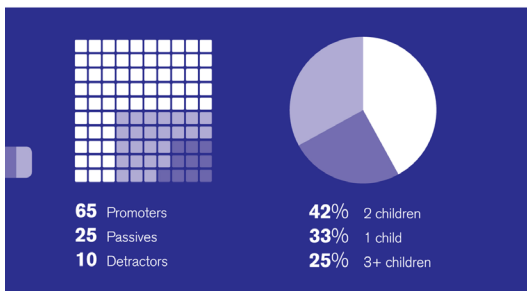
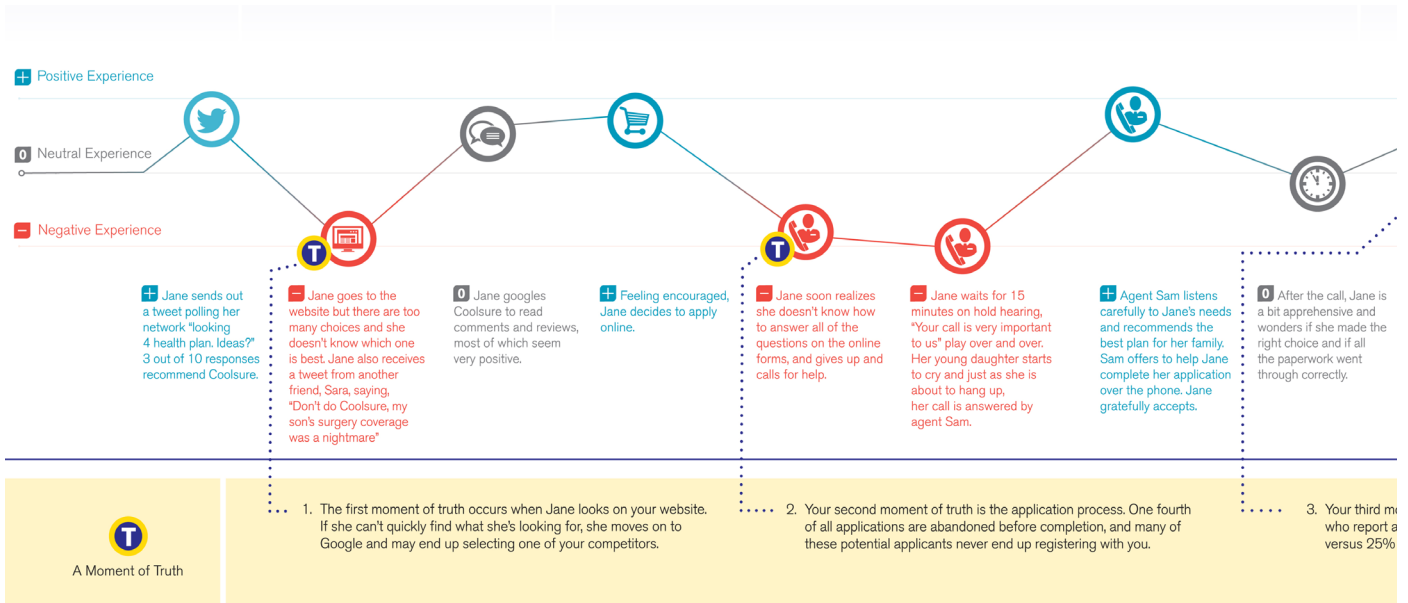




Heart of the Customer



WHAT YOUR CUSTOMERS HAD TO SAY

+ "I love the short emails that come every month with healthy tips. They help me stay on track."

- "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."

0 "Your phone support is terrific – they always help me out. I just wish I didn't have to call them so often."

- "The only problem is there are so many choices. There is a lot to think about and I felt it was hard to figure out what was best."



JOURNEY MAPPING TOOLKIT

Discover the Moments that Matter



Introduction

Journey maps are an innovative way to explore your customers' interactions with your company, and reveal the best ways to boost customer loyalty, revenue, and brand engagement.

Journey Maps offer a detailed visualization of the customer experience that you're providing – exposing the good, the bad, and the ugly – to form the heart of an effective customer experience program. By highlighting what customers do, and the emotions they feel while they're doing it, journey maps pinpoint the changes you can make to realize the greatest impact in the most efficient way.

Fortune 500 companies and start-ups alike now look to Heart of the Customer's proprietary processes and journey maps for insights on how to gather and utilize customer-focused results. Read on to find out how our journey maps are created, and how they can be used to equip your leadership, staff, and marketers with the tools they need to drive change.

“By taking the time to truly understand how your customers view their experience, you can discover the moments that matter to create customers who love your brand.” —Jim Tincher, Mapper-in-Chief



About the Author

Heart of the Customer Founder and Lead Consultant Jim Tincher sees the world in a special way: through the eyes of customers. This passion – along with more than two decades of experience spearheading customer engagement initiatives for Best Buy, Gallup, UnitedHealth Group, and other new and established companies – has led to his recognition as an industry leader in using customer research to identify unmet needs, develop new products, and improve customer service. Heart of the

Customer's unique emotion-centric journey maps have come to represent the gold standard in the field.

Jim is also a nationally-respected keynote speaker, whose industry expertise has earned him the elite designation of Certified Customer Experience Professional. He is an active member of the Customer Experience Professionals Association (CXPA), and serves as one of their CX Experts, providing advice to members worldwide.

This toolkit is one in a series of informative ebooks offered by Heart of the Customer. Visit www.HeartoftheCustomer.com for other titles available to download..



What Is a Customer Journey Map?

Effective customer journey maps are the first step in a customer experience program. They provide a clear call to action by capturing in graphic format the entirety of your customer's experience through a defined process that includes customer and employee interviews, focus groups, and supplemental workshops and research.

Every customer decision is the result of a series of actions, emotions, and touchpoints . . . but some of the steps on the path to a decision carry more weight than others. Journey maps explore a customer's experience from beginning to end, highlighting those "moments that matter" to illustrate and address what you're doing right, and areas where you can do better.

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

—The Truth about Customer Experience, Harvard Business Review

Heart of the Customer's proprietary journey maps not only identify when those key moments occur, they explore why. The behavioral and emotional data we collect and analyze allows you to make the changes that will have the greatest impact on customer satisfaction, brand loyalty, and revenue, while also reducing customer churn.

There is no limit to the kind of journey that can be mapped. Some maps show the entire customer life cycle, from pre-sales to renewal or exit. More frequently, a journey map will focus on one specific phase of the cycle. Heart of the Customer has mapped everything from purchasing to invoicing to memberships, for industries from healthcare to software to nonprofits, addressing both B2B and B2C transactions.

Heart of the Customer doesn't believe in squeezing your customized data into a standardized template, so our journey maps are tailored to serve their primary purpose: illustrating the steps your customer takes, through your customer's eyes. Beware of providers who try to sell you journey maps that address only the behavioral steps of the journey, or those that are created through employee workshops. These maps run the risk of institutionalizing employee biases, and don't genuinely reflect the thoughts and feelings of your customer. Heart of the Customer's multi-layered process relies on extensive qualitative research to avoid those hazards. We gather the most useful data — and lots of it — to ensure valid results and keen, accurate insights.

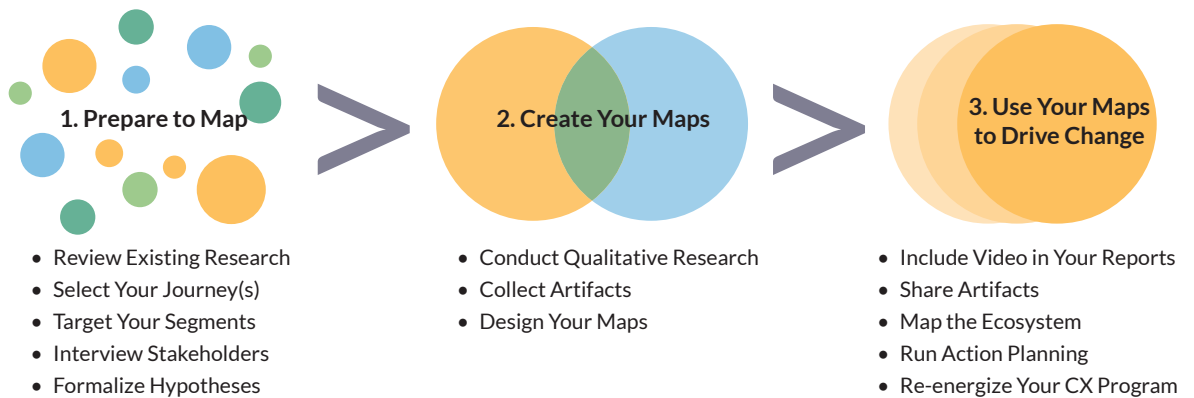
Why Do Journey Mapping?

Journey maps provide a baseline for current performance, and can guide future initiatives. Maps also help rally the troops. By illustrating where friction occurs for different market segments, they make clear to employees the role they play in customer satisfaction, and clarify what steps they can take to make things run more smoothly and more profitably. Lastly, journey maps help you define the most effective parameters for metrics, by showing what truly matters in your customer relationship. Why waste resources monitoring policies or devising improvements that don't really matter to your customers?

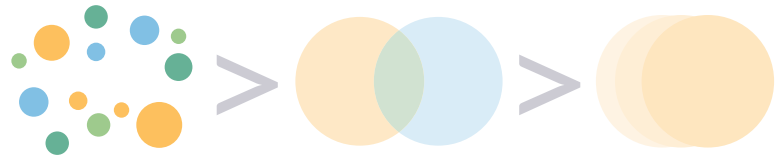


How Do You Create Journey Maps?

Methods vary among providers, but at Heart of the Customer, we use a three-stage process:



We'll explore each step in more detail on the following pages.



1. Prepare to Map

We begin by assembling a series of teams, typically comprised of project managers who oversee the day-to-day execution of the project, an executive team that takes action on the results, and project sponsors who are critical to the successful implementation of the results.

Review Existing Research

Journey maps don't exist in a vacuum. Reviewing earlier research — including customer surveys, focus group results, segmentation data, and more — allows us to build on what is already known, and distinguish between isolated incidents and recurring problems.

Select Your Journey(s)

Defining the scope of your customer journey map can be challenging. Define it too narrowly and you miss crucial inputs. Define it too broadly and you miss the detailed emotions needed to fully understand your moments of truth. One common approach is to start with an end-to-end journey map. This will show where your customers experience the greatest friction, and from there, you can decide which of the more challenging sub-journeys to explore.

Target Your Segments

Identifying customer segments, or personas, is critical to any journey mapping project. Different types of customers have very different journeys, so segmentation research is a key input. If your customer personas are not already established, we create them as part of the project, then map each distinct journey.

Interview Stakeholders

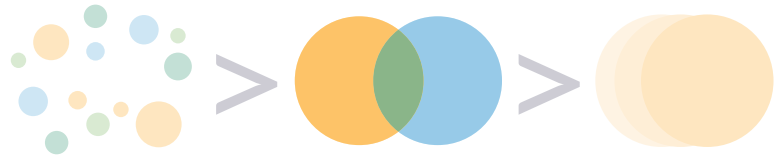
Customer-facing problems often stem from internal conflict. Stakeholder interviews allow us to uncover discord that relates to the problems discovered during our initial research. Employee focus groups also help us assess the current state of the organization.

Formalize Hypotheses

The Preparation phase concludes with team members gathering for a Hypothesis Mapping workshop, where smaller groups theorize about the customer experience. This leads to useful discussions that often reveal the different perspectives and opinions of different departments. We compile and review the results, then proceed.



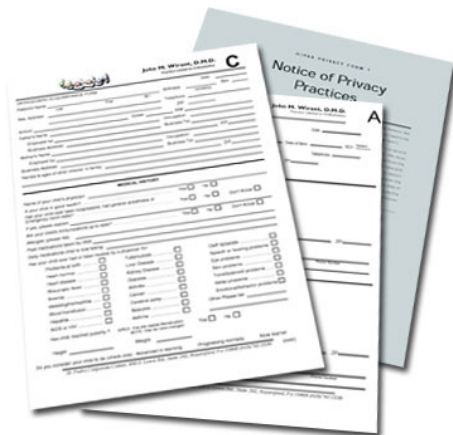
2. Create Your Maps



Here is where the real fun begins, as we start hearing directly from your customers, and seeing how that data compares to the hypotheses generated in the preparation phase.

Conduct Qualitative Research

Your customers' views are the heart of your journey map, and the most valuable information is that which you don't already know. So while internal workshops may play a role in mapping, it's critical to engage customers themselves to gain insights into their experience. It's also useful to interview non-customers and those served by your competitors, so we do that, too. Depending on the journey, we might use focus groups, ethnographic research, in-depth interviews, customer journaling, or other methodology. To further ensure accurate results and protect against bias, we follow up by scientifically mining behavioral and emotional responses.



Collect Artifacts

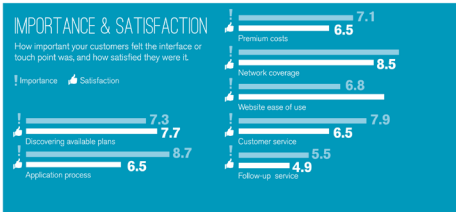
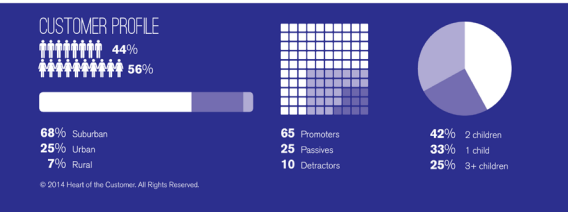
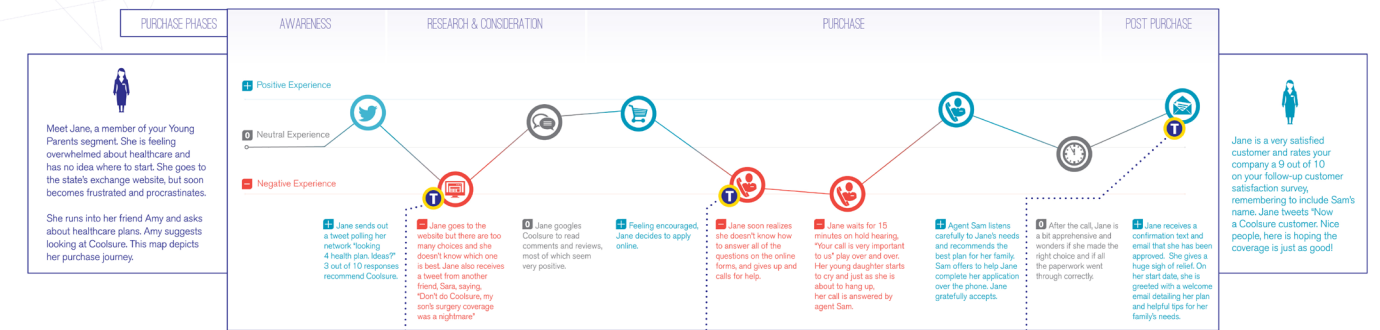
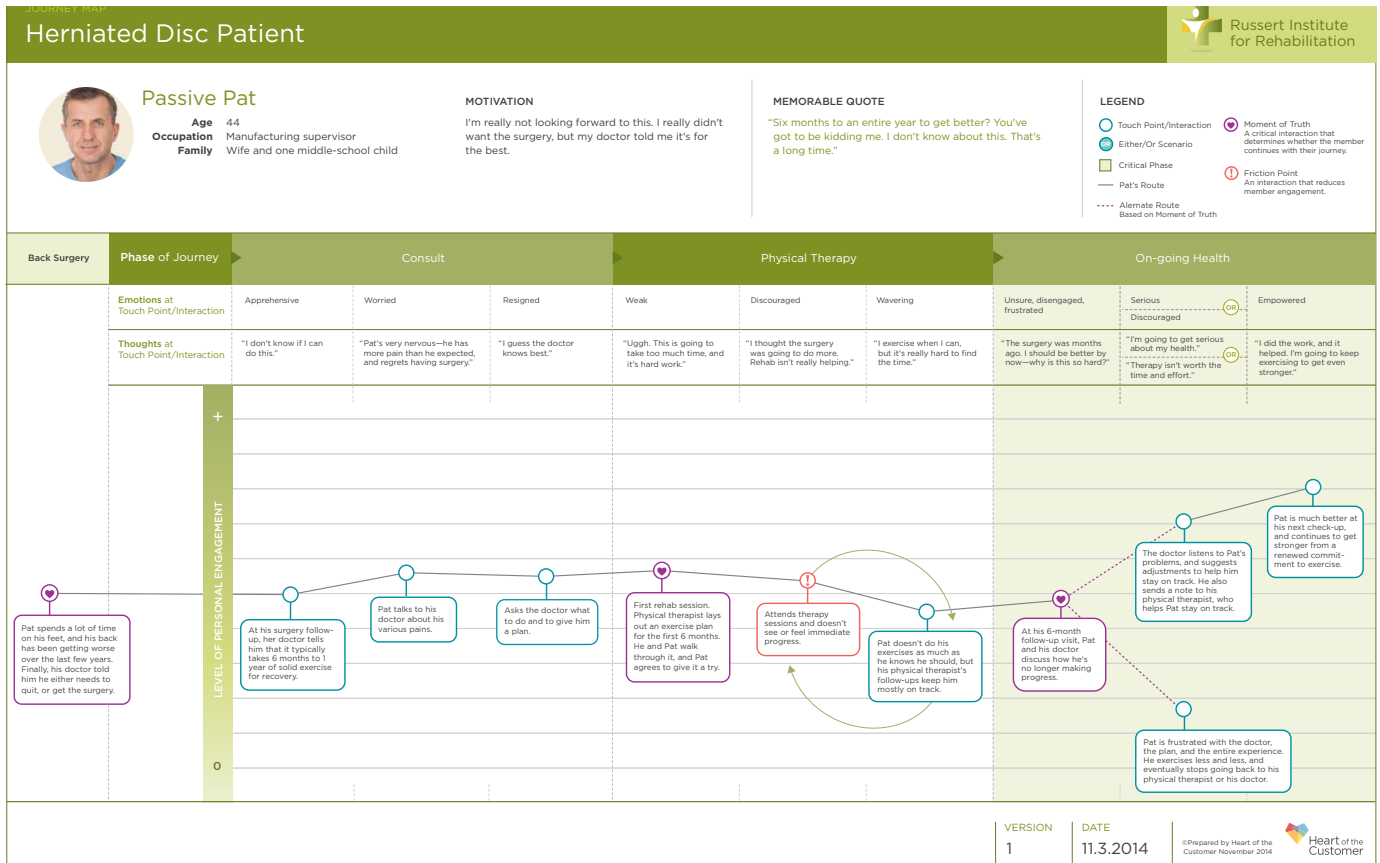
Complicated paperwork, poorly-designed and confusing signs, and screenshots of hard-to-navigate web pages can all help communicate what is happening to the customer during a journey. We collect artifacts from the experience to help bring it to life afterward. Asking participants to bring in and explain artifacts also yields important information.

Design Your Maps

Journey maps can be linear, circular, made of sticky notes, or cleverly illustrated. Our white paper, *Creating a Customer-Focused Customer Experience Journey Map**, lays out industry best practices. We always use professional designers to create our maps, and no two journeys will map out the same. Clean design makes them easier to understand and repurpose. Ugly maps turn people off and limit buy-in. It's just that simple, so it really pays to get it right. Recently, we even produced a three-foot, fold-out journey map, specifically designed so that employees could carry it around with them. The design possibilities are endless.

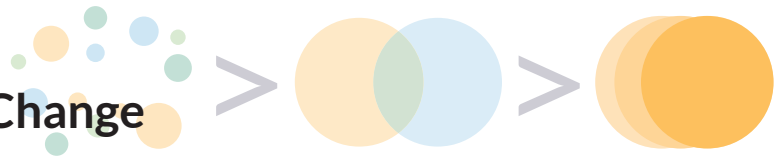
* *Creating a Customer-Focused Customer Experience Journey Map* can be downloaded at <http://www.heartofthecustomer.com/customer-experience-journey-map-the-top-10-requirements>

Sample Heart of the Customer Journey Maps





3. Using Your Maps to Drive Change



While creating your map and reporting the results is fun, we never lose sight of the goal of the process: helping you find the best ways to increase brand attachment.

Include Video in Your Reports

Rather than creating yet another yawn-inducing 80-page PowerPoint presentation, we use video to highlight the themes of your report and show your actual customers sharing the victories and frustrations of their experience. We find their voices are far more compelling than ours. Multi-media elements also break up the rhythm of the presentation, helping to keep your audience engaged while so much important information is being conveyed. There's no denying videos are much harder to create. But the increased impact is definitely worth it, and they make effecting change — the primary goal of journey mapping — that much easier.

Share Artifacts

You collected artifacts during your research, right? Now is the time to share them. Combine them with the video presentations for even more impact. If you're studying a physical journey, such as a visit to a retailer, you can also take utilize photos of the site.

Map the Ecosystem

Ecosystem Mapping workshops enhance your journey map by layering in data from customer-facing employees and systems, and backstage activities. We ask employees to document what they were doing while the customer was at each particular touchpoint in the journey, and we align the results to form a more complete picture. Learn more about how we run these workshops at www.heartofthecustomer.com/customer-journey-mapping-easy-way.

Run Action Planning

The journey mapping process reveals quick wins, as well as areas that require longer-term investment. Once they have time to internalize the journey maps, employees come to Action Planning workshops filled with ideas. The process ends with a complete customer-focused plan to remove friction from an experience to enhance customer satisfaction.

Re-energize Your CX Program

The journey mapping process itself does not increase revenue or boost customer loyalty — it's the projects that it inspires that provide the steady return on your investment. Journey maps help you prioritize opportunities, such as fixing barriers to customer loyalty, increasing B2B sales, developing employee training programs, or changing your company culture.



Customer Journey Map Case Study: Purchasing Health Insurance

With the advent of the Affordable Care Act (ACA), Heart of the Customer was asked to research how a client's customers purchased health insurance.

We identified seven distinct segments in the client's customer base, and determined that focusing on four of those – ranging from young and healthy participants to the elderly and retired—would bring the greatest ROI.

In-depth interviews were held with about a dozen customers and non-customers in each segment, and we discovered that the journey varied significantly between segments. One group of customers used only four steps to research and purchase health insurance over a period of a few days. Another needed more than a dozen steps and two whole months to make a decision, and along the way, they interacted with the website, call center, brokers, and retail locations. For another, pharmaceutical coverage drove their decision-making process.

Not surprisingly, our research also determined that each segment experienced different “moments of truth” in their journeys. Moments of truth are those steps or interactions that have a disproportional impact on the rest of the journey. In this case, those moments were where participants eliminated certain insurance providers from consideration. One segment relied on “trusted advisors,” so if a company wasn't recommended by someone they knew personally, they didn't make an effort to find out more about it. For another, the quality of the phone support caused a provider to be eliminated.

Important factors in selecting a plan varied significantly between customer segments, with one focusing on the advice of friends, one basing their decision solely on price, and one focusing on actual plan details.

Most tellingly, the journey maps revealed that only one segment focused on actual plan details, which, until that point, was where our client had been focusing its resources.

Our advice? Plan details are important, but providing the right amount of detail at the right time is even more important, especially when segments are interacting with the company in such different ways. The journey maps helped our client understand the futility of treating all customers the same, and provided insight on how best to serve each segment's true needs. The maps also revealed why our client was having trouble selling to one particular segment—a group that wanted more personal interaction. Once that service issue was addressed, sales to that segment steadily increased.

Note: Client confidentiality is a top priority for Heart of the Customer. Therefore, identifying information and other details in the account above have been altered.