Best Practices in Journey Mapping
Driving Customer-Focused Change

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Heart of the Customer

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Agenda

Who we are
Why journey mapping
What makes journey mapping successful
Case study: Meridian Health
Who is Heart of the Customer?

We are a focused journey mapping firm.
This is what we do. It’s our focus and our mission.

96% of our business comes from journey mapping.
Recent Thought Leadership

Jim Tincher shared one of his favorite journey maps to give us a better idea of how to bring his 10 steps to life. Yes, it’s profoundly more sophisticated than previous examples we reviewed. It should be. This is a grid approach that works well as it provides an in-depth overview of people and the context and relationships…”

– X: The Experience When Business Meets Design

Seeking to identify specific ways to boost loyalty and referrals among its radiology patients, Meridian Health reached out to the customer journey map experts at Heart of the Customer.”

Mapper-in-Chief, Jim Tincher, and his team worked with [Meridian] to identify several key customer personas to focus on…”

– Mapping Experiences, page 270

Cover article on YMCA case study, Quirk's Magazine, April 2017

Cover article on Journey Mapping, Quirk's Magazine, October 2015
Why journey mapping?
Managing the Overall Journey is Critical

A journey is your customer’s end-to-end experience as they see it.

Companies have long emphasized touch points...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 are 30% more strongly correlated with business outcomes [than measuring individual touch points.]”

- McKinsey Consulting
Journey Mapping is Becoming Indispensable

88% of customer experience professionals are mapping their customers’ journeys*

60% of customer experience professionals are increasing their journey mapping efforts**

Journey Mapping **ROI is strong**

ROI advantages for companies with a journey mapping program vs. those without

- Improvement in customer service costs: +23%
- Improvement in average sales cycle: +16%
- Employee engagement: +14%
- Return on marketing investment: +10%
- Revenue from customer referrals: +10%
- Revenue from cross-sell and up-sell: +5%
- Number of positive social media mentions: +4%

Source: *Customer Journey Mapping: Lead the Way to Advocacy*, Aberdeen Group
But it’s easy to get it wrong

Thinking of your last journey mapping project, how successful was it?

- Very successful: 20%
- Not at all successful: 2%
- Too soon to tell: 30%
- Somewhat successful: 15%
- Somewhat unsuccessful: 28%

The overwhelming reason?

A lack of action taken.

2/3 rated their journey mapping as unsuccessful
What makes journey mapping successful?
What elements are most critical to success?

- Executive sponsorship
- Graphically designed/visually appealing maps
- Involving broad cross-functional teams
- Involving customers in the process
- Running a project quickly
- Sales/field involvement
- Selecting the right journey to map
- Use of customer personas
Most critical factors for **Success**

Practitioners: What do you see as most important for a successful journey mapping initiative?
(select up to three) n=53

- Involving broad cross-functional teams: 60%
- Involving customers in the process: 53%
- Selecting the right journey to map: 43%
- Executive sponsorship: 32%
- Use of customer personas: 25%
- Customer verbatims: 17%
- Sales/field involvement: 8%
- Graphically-designed/visually appealing maps: 8%
5 Critical Journey Mapping Questions:
1. What is the business problem or opportunity?
2. What is the right journey?
3. Who is the right customer?
4. What is the right approach?
5. Who’s on the team?
You can’t drive ROI without a clear target
3 Common Categories for CJM Business Problems or Opportunities

- **Something is broken**
  - Loyalty issue
  - Negative feedback
  - Survey drivers

- **New opportunity**
  - New development
  - Website update

- **New CX capability**
  - New CX program or leadership
  - New survey platform
Select the Right Journey to Create the Right Change
Most participants mapped multiple journeys

Which types of journeys did you map?
(select all that apply) n=57

- End-to-end customer journey: 60%
- Setup/onboarding: 54%
- Product/service usage: 42%
- The purchase process: 37%
- Customer support: 35%
- Pre-sales/awareness: 16%
Who is the Customer?

A Journey Map of Everybody Sometimes Tells You About Nobody
Role of personas

Practitioners

- Had existing personas/segments we used for JM: 38%
- Developed personas/segments as a part of the JM process: 31%
- No, we did not use personas/segments: 27%
- Don't know: 4%

Vendors

- Developed personas/segments as a part of the JM process: 83%
- Clients had existing personas/segments we used for JM: 15%
- No, we do not use personas/segments: 3%
- Don't know: 4%
5 Critical Journey Mapping Questions

Use the right research methodology to discover the true experience

What is the approach?
Peak-End Rule

“The Peak-End Rule: the [experience] rating was well predicted by the average of the level of pain reported at the worst moment of the experience and at its end.”
Who experienced more pain?

Patient A

Patient B
Use the appropriate research methodology

Research varies depending on the journey and the customer.

<table>
<thead>
<tr>
<th>Methodology</th>
<th>Best for</th>
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<tbody>
<tr>
<td>Guided in-office interviews</td>
<td>Great for B2B</td>
</tr>
<tr>
<td>In-home contextual interviews</td>
<td>Powerful consumer-focused methodology</td>
</tr>
<tr>
<td>Virtual interviews</td>
<td>Work well for either B2B or B2C</td>
</tr>
<tr>
<td>Digital or mobile ethnographies</td>
<td>Most common for consumers, but also in specific B2B journeys</td>
</tr>
<tr>
<td>Focus groups</td>
<td>Typically used only as a secondary methodology</td>
</tr>
<tr>
<td>Surveys</td>
<td>Often used in healthcare and financial services</td>
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</tbody>
</table>
5 Critical Journey Mapping Questions

Who’s on the team?

Use the right research methodology to discover the true experience
Who was on the journey mapping team

- **Customer experience**: 78% in-house, 82% consultants
- **Customer service/technical support**: 67% in-house, 71% consultants
- **Marketing**: 61% in-house, 82% consultants
- **Operations**: 59% in-house, 73% consultants
- **Sales/field representatives**: 54% in-house, 75% consultants
- **Customer insights/market research**: 46% in-house, 86% consultants
- **IT**: 30% in-house, 59% consultants
- **HR**: 7% in-house, 37% consultants
Turning journey mapping insights to action
A deliberate process ensures success

<table>
<thead>
<tr>
<th>Discovery</th>
<th>Research</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discover what is known today</td>
<td>Uncover the heart of your customer experience</td>
<td>Drive customer-focused change</td>
</tr>
<tr>
<td>Kickoff</td>
<td>Protocol development</td>
<td>Journey map(s)</td>
</tr>
<tr>
<td>Review existing research</td>
<td>Research (methods vary)</td>
<td>Research report</td>
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<tr>
<td>Stakeholder interviews</td>
<td></td>
<td>Action planning</td>
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<tr>
<td>Hypothesis Workshop</td>
<td></td>
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<tr>
<td>Typically 3-5 weeks</td>
<td>Typically 4-8 weeks</td>
<td>Typically finishes in 3-4 weeks</td>
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Engage Your Patients and Stop the Leakage

Case Study from Mapping Experiences
Situation at Meridian

Faced with significant leakage in their advanced radiology services, Meridian reached out to Heart of the Customer to better understand today’s patient journey, and to identify opportunities for improvement.

**Discovery**
- President interviews
- Review existing research
- Hypothesis Journey Map Workshop

**External Insights**
- Protocol Development
- Diary Study
- Physician Interviews
- Office Lead/Coord. Discussions
- Patient Immersion

**Validation**
- Follow up validation via Meridian Sounding Board online panel

**Action**
- Final report
- Journey Maps
- Action planning
Seen-It-All Stanley

“Focusing on two of the journey maps HotC created for Meridian – those representing patients on either end of the experience spectrum - illustrates the unique value of customer journey mapping. On one end, there’s Seen-it-all Stanley, a heavy healthcare user whose familiarity with ‘the system’ tempers both his expectations and his anxiety level. He knows to leave a little extra time for parking, can relax and enjoy watching TV in the waiting room until he’s called in, and knows when he can expect his test results. Minor inconveniences or delays don’t faze him because he knows he’s in good hands. Meridian has already earned his loyalty, and needs only to maintain the high level of service it already provides to keep it.” – from Mapping Experiences
Newbie Natalie

“On the other end of the spectrum is Newbie Natalie, who is ‘learning the ropes’ as she navigates Meridian’s Radiology services for the first time. Understandably, Newbie Natalie is more nervous, which magnifies the negative impact of friction during any touchpoint in her journey. Parking difficulties get her visit off to a bad start, and not knowing when to expect her test results unnecessarily adds to her already elevated anxiety level. As a result, even though she is satisfied with the treatment she receives, and even though those kinds of problems are unlikely to recur on subsequent visits, they negatively impact her overall experience.”
“That finding was key to determining where to focus future customer engagement efforts, because Natalie won’t be a Newbie for long. If her first experience is peppered with uncertainty and inconvenience, regardless of how minor, she will have little incentive to choose Meridian next time around. So therein lay Meridian’s greatest opportunity: meet Natalie’s needs today, so that she can transition into a loyal, satisfied Seen-it-all Stanley tomorrow.”

- Mapping Experiences
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