

Journey Mapping Toolkit

Discover Your Customers' Moments of Truth



Contents

- | | |
|--|---|
| 1 Introduction to Journey Mapping | 4 Heart of the Customer's Journey Mapping Process |
| 2 What Is a Customer Experience Journey Map? | 9 Summary |
| 3 Why Map the Customer's Journey? | 10 More Information and Ways to Contact Us |

Introduction to Journey Mapping

Customer experience journey mapping has become the cornerstone of successful customer experience programs for companies of all sizes.

To transform the way you do business, you need a journey map that gets at the heart of what drives your customers' behavior and prepares your organization to act on the findings. Are all maps created equal? Unfortunately, no, and 65% fail to drive any significant action.

Heart of the Customer's journey mapping process is specifically designed to deliver customer-focused change. We rely on tried-and-true best practices to help our clients find the best ways to boost satisfaction, loyalty, and revenue.

To reap the rewards of journey mapping—and they are considerable—it's not enough to create a journey map that shows what your customers do. You also need to determine

why your customers do what they do. Their thoughts, needs, and emotions are what really drive their decision-making, and friction during the journey is what drives them away.

The ripest opportunities to ease friction and make the journey more satisfying come from Moments of Truth—those critical interactions that have a disproportionate impact on a customer's overall perception of the experience.

Effective journey maps enable you to identify those moments and mobilize your teams to develop customer-centric initiatives that actually make a difference, so you avoid wasting resources on programs that won't provide a return. Win those critical moments and you win the journey.

Our Three-Phase Process



DISCOVERY



CUSTOMER IMMERSION



ACTION

Heart of the Customer's proprietary journey mapping process efficiently and effectively mines customer behavior. We enable organizations of all sizes to optimize their customer experience and become the preferred brand by helping them embed the voice of the customer in their decision-making.

What Is a Customer Experience Journey Map?

Journey maps provide a baseline for current company performance and guidance for future initiatives.

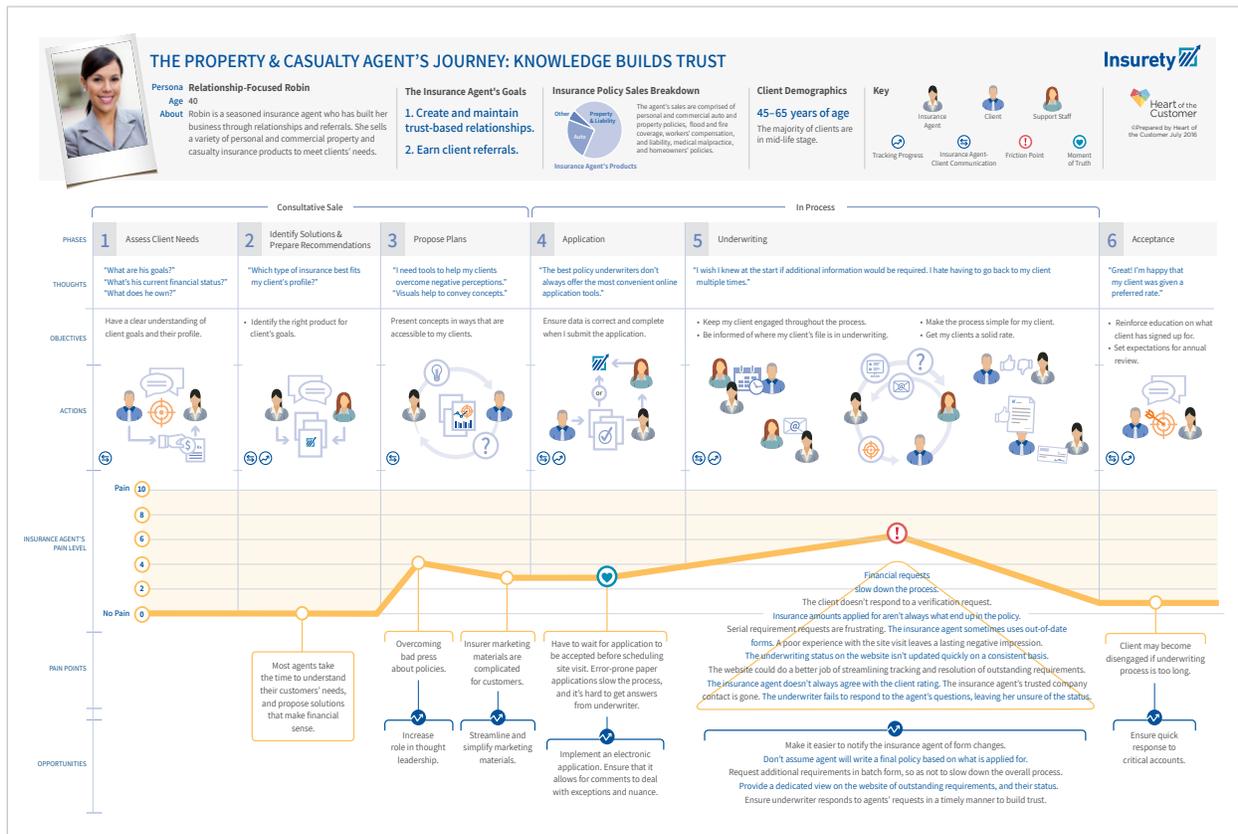
A journey map is a graphical representation of your customer's interactions with your company. By illustrating the customer journey from beginning to end, maps provide a detailed visualization of the experience that you're providing. When done correctly, maps show what you are doing right, highlight where you can do better, and provide clear calls to action.

There's no limit to the kind of journey you can map.

Some maps show the entire customer life cycle, from presale to renewal or exit. More frequently, a journey map will focus on one specific part of the cycle (a "sub-journey").

Heart of the Customer has mapped everything from purchasing to invoicing to memberships, for industries from health care to software to nonprofits, for both B2B and B2C transactions.

Packed with information, our journey maps are visually appealing and intelligently designed, allowing the journey to register instantly with the viewer. They distill our analysis of the customer responses we collected to spotlight valuable insights that point toward the changes that will result in the greatest ROI.



A well-designed map helps readers quickly intuit the goals, thoughts, actions, and frustrations of the customer—in this case, an insurance agent—at each stage of the journey.

Why Map the Customer's Journey?

By taking the time to truly understand how your customers view their experience, you can discover the Moments of Truth and create customers who love your brand.

—Jim Tincher | Heart of the Customer Founder & Mapper-in-Chief



By involving cross-functional teams in the customer journey mapping process, silos are broken down and the entire organization can align their efforts to reach the same goal—an improved customer experience.

Journey maps are valuable tools—key deliverables that document the journey. But it's the journey mapping *process* that will educate and align your teams, and drive the customer-focused change that leads to increases in customer loyalty and company profitability.

It's critical to involve cross-functional teams. Employees who are invested in the process gain a better understanding of their role in helping customers achieve their goals, and the

steps they need to take to make things run more smoothly. Many companies now map the employee journey too, because optimizing the employee experience improves your team's ability to provide world-class service to customers.

Taking these steps leads to a shift in company culture that places customer needs at the core of all decision-making. That results in increased customer loyalty and better business outcomes.

Heart of the Customer's Journey Mapping Process

Our three-phase mapping process starts with strategic preparations that set the stage for success and get your organization excited about taking action once the mapping is completed.

Our Three-Phase Process



DISCOVERY

- Select the Right Journey and the Right Customers
- Hold a Kickoff Meeting
- Review Existing Customer Data
- Interview Stakeholders
- Conduct a Hypothesis Mapping Workshop



CUSTOMER IMMERSION

- Engage with Customers
- Collect Artifacts From the Journey



ACTION

- Design Your Maps
- Create Immersive Reporting
- Lead an Action Workshop

Phase I: Discovery



Assemble a series of teams.

Include a day-to-day Project Execution Team, an Action Team that decides what needs to be done, and Project Sponsors, whose buy-in and approval are critical for implementing action once the customer journey mapping process is completed.

Select the Right Journey and the Right Customers

Defining the scope of your customer journey map can be challenging. Define it too narrowly, and crucial inputs are missed. Define it too broadly, and detailed emotions needed to fully understand Moments of Truth get lost. The business problem you are trying to address should guide how the mapping process proceeds.

One common approach is to start with an end-to-end journey map. This will reveal where your customers experience the greatest areas of friction. After that, any problematic sub-journeys can be explored.

Identifying which customer segments (personas) to map is also critical. Different types of customers can experience the same journey entirely differently on an emotional level. Grouping all of your customers together to create a map that represents *everyone* pretty much ensures that you'll please *no one*. Mapping is about really getting to know your customers, so don't settle for an imprecise "average."

Hold a Kickoff Meeting

We assemble your Action Team at a Kickoff Meeting to review the steps and objectives of the mapping initiative, and ensure you are aligned, engaged, and informed.

Review Existing Customer Data

Journey maps don't exist in a vacuum. By reviewing earlier research and any documentation that applies to the journey being studied, we can build on what is already known and distinguish between isolated incidents and recurring problems. This data may include:

- **Net Promoter Score (NPS)** or other customer satisfaction surveys, including verbatims.
- **Call center reports**, including top call types and data relating to the journey being mapped.
- **Past market research**, including win/loss studies or segmentation.
- **Sales training or customer-facing documents**, such as brochures, sales or implementation training documents, and process documentation.
- **Relevant business KPIs**, such as on-time delivery, customer attrition, error reports, etc.

By reviewing this information, we become immersed in your company culture, so we can better understand your operating style and objectives, and build enthusiasm with your teams for the adventure ahead.

Phase I: Discovery (continued)

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. They also provide an opportunity to engage with your stakeholders and fortify their support, which is critical for the success of your journey mapping initiative. To that end, we also provide regular updates for stakeholders throughout the mapping process.

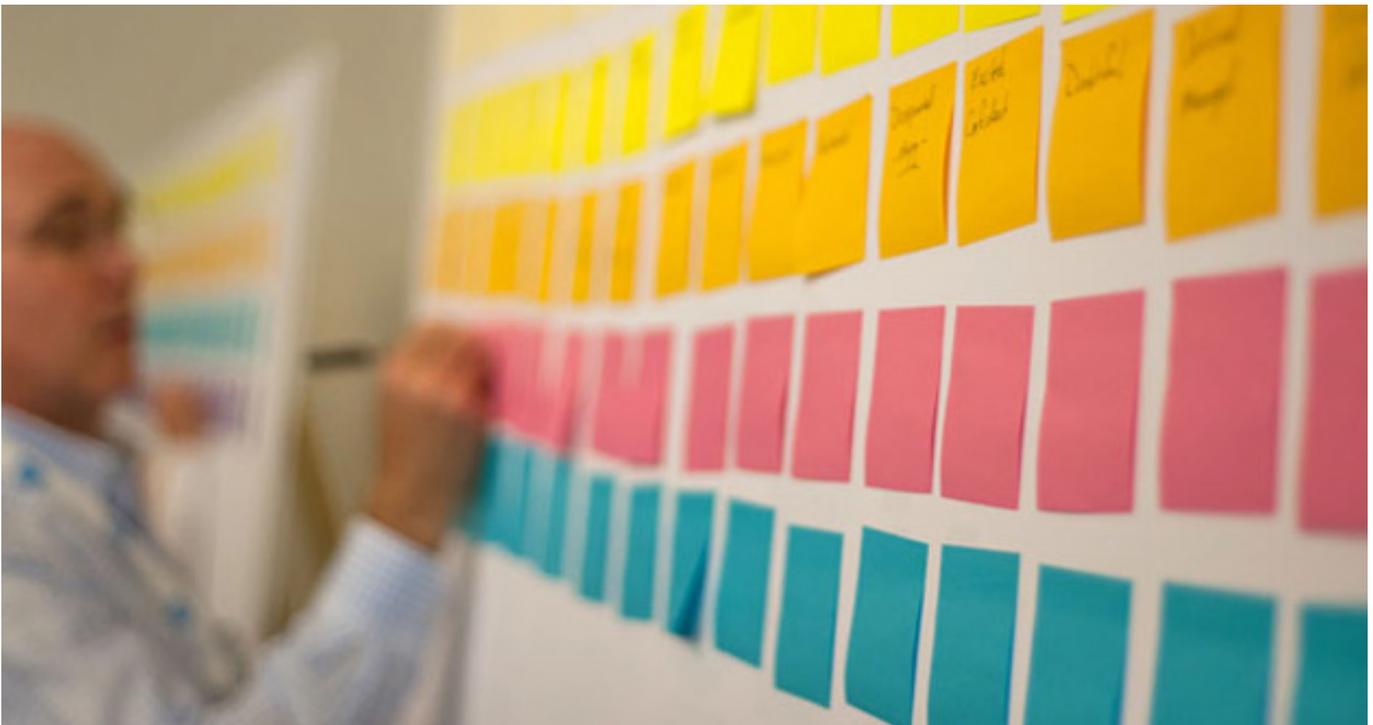
Conduct a Hypothesis Mapping Workshop

We conclude the Discovery phase by conducting a Hypothesis Mapping Workshop, where we gather team members to theorize about the customer experience. This leads to useful

discussions that often reveal differing perspectives and opinions between departments.

And that's where real change starts to take hold. In many cases, these teams were siloed and never interacted, much less collaborated. Here, departments begin to understand that they may inadvertently have been working at odds, but can now work together to improve the customer experience.

After we compile and review the results of the workshop, we move into Customer Immersion. But we never share hypothesis maps with the customers we're going to interview — it would taint and limit their responses, and we want them to speak freely.



Phase II: Customer Immersion



Hear directly from your customers.

The most valuable information is the information that only your customers know. Using the methodology that best allows us to capture your customer journey, we gather data that is later compared to the hypothesis map generated in the Discovery phase.

Engage with Customers

While internal workshops have a place in journey mapping, it's critical to engage actual customers to gain accurate insights into their experience. Depending on the journey, it might also be useful to interview non-customers and those served by competitors.

To gather data, we use digital ethnographies, customer journaling, in-depth interviews, or other methodologies, capturing video and audio wherever possible. To ensure accurate results and protect against bias, we follow up by scientifically mining behavioral and emotional responses.

This phase also offers your teams a chance to go out in the field and hear from customers firsthand, on their home turf. We find this very impactful, particularly for B2B companies, where many employees never interact with end customers.

Collect Artifacts from the Journey

Complicated paperwork, poorly designed and confusing signs, and screenshots of hard-to-navigate webpages 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 insights.



Phase III: Action



Bring it all together.

Even while we're focusing our efforts on creating your map and reporting the results, we keep the goal of the process top-of-mind: finding the best, most cost-effective ways to increase customer loyalty.

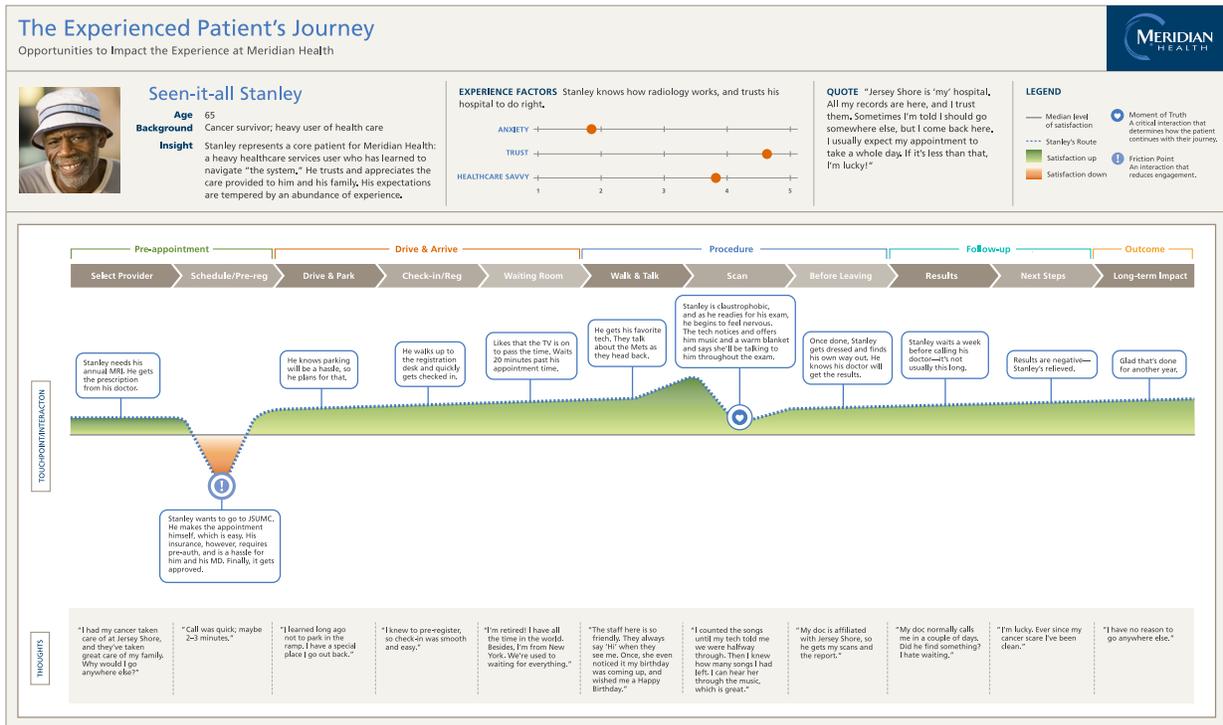
Design Your Maps

Depending on the particular journey, customer journey maps can be linear or circular, simple or elaborate, professionally illustrated or even interactive. What matters most is that the maps are catalysts for change.

Driving Change Through Journey Maps, a Heart of the Customer white paper, lays out industry best practices.

We use experienced professional designers to produce our maps, and no two journeys ever map out the same.

We start with visualizing your customer data during a white-board session. Then we ideate and refine, and apply your brand guidelines to design fully customized maps. Simple grid presentations don't engage readers, which limits accessibility and buy-in, so the payoff in getting this step right is significant.



Maps reveal vulnerabilities in the journey, even for customers who are relatively satisfied.

Phase III: Action (continued)

Create Immersive Reporting

We highlight the themes of your report by showing videos of your actual customers sharing the delights and frustrations of their experience in their own words.

Customer voices (and faces) are compelling, so your teams will stay engaged while we convey other key insights and findings from our research. The impact of customer videos makes effecting change—the primary goal of journey mapping—that much easier.

Lead an Action Workshop

After your teams have had time to internalize the journey maps and other customer data, we regroup for a two-day workshop, where the teams conceive and develop both short- and long-term ideas (Quick Wins and Strategic Ideas). Your teams leave the workshop with a complete customer-focused plan to strengthen the emotional connection with your brand. Idea “champions” are selected to bring the initiatives to fruition, providing accountability and structure to ensure that measurable change results.



Summary

Let us help you change the way you do business.

Throughout our three-phase process, we strive to help you see the journey through your customers' eyes. Armed with those key insights, you can act efficiently and effectively to simplify and improve their experience.

Every step of our mapping process is designed to fuel an inside-out transformation, from involving stakeholders and

employees at the earliest stages of the project, to regular reporting to keep teams engaged, to our lively workshops.

All of these measures ensure that long after the Post-its are packed away, you are still reaping the benefits from embedding the voice of the customer in your programming and decision-making.

Begin Your Journey With Us Today

Take the first step toward an improved customer experience.

Why wait to reap the transformative benefits of building a customer-centric culture? Contact us to discuss your business problem, journey mapping project, or customer experience goals, and find out how we can help.

For more detailed information about how we do what we do, pick up a copy of *How Hard Is It to Be Your Customer? Using Journey Mapping to Drive Customer-Focused Change*, the comprehensive new guide to journey mapping written by Heart of the Customer execs Jim Tincher and Nicole Newton.

You can also learn more about improving your customer experience by connecting with us via our newsletter, blog, or social media channels, and you'll find loads of useful resources and additional information on our website, at HeartoftheCustomer.com.

Contact Us

Email

info@heartofthecustomer.com

Customer Experience Blog

heartofthecustomer.com/cx-blog

Follow Us

You Tube

bit.ly/2Rp3FIb

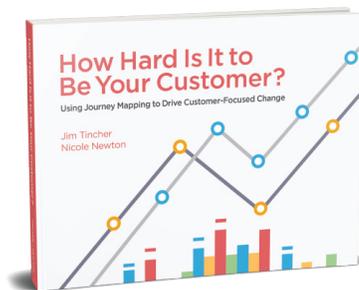
Linkedin

bit.ly/2Y1Q5g6

Twitter

[@CXJourneyMapHoC](https://twitter.com/CXJourneyMapHoC)

More CX



Order Our Journey Mapping Book via the Website

HowHardIsIttoBeYourCustomer.com

Heart of the Matter Newsletter

HeartoftheCustomer.com/home