Selecting a Customer to Map – Guidelines to Consider

A successful journey mapping initiative requires deliberate thought as to which customer to map. While some journeys include all customers, most remove at least some customers from the equation. Below are some considerations for this critical decision.

Some clients prefer to start with the journey, whereas others find it more intuitive to begin with the customer first (if you prefer to start with the journey, see “Select a Journey to Map – Guidelines to Consider”).

# Mapping All Customers

You should only select all customers when one of the two following is true:

* You are mapping a specific journey, as opposed to the end-to-end experience.
* You want to create customer segmentation, and use their end-to-end experience as a lens.

You must have a direct sales model to successfully map all customers. Many companies consider both their distribution (e.g., retailers or independent agents) AND the end customer (e.g., the consumer) as customers. Mapping the end-to-end experience for multiple types of customers leads to one of two outcomes: either it is at such an elevated level of abstraction that it is useless to drive action, or it takes so many resources and time that it does not provide timely feedback to the business.

If mapping the end-to-end experience, you typically need to focus on a specific customer subset and map that first, then come back to another customer type.

# Considerations

Multiple considerations come into play when selecting which customers to map:

## Sales Channels

If using an indirect model, select one layer to focus on. For example, when we did two journey maps for a financial services company, our first map focused on the independent agents’ experience signing up a new client, and the second studied the onboarding experience for a new client – slightly different journeys, each focused on a separate client.

## Geography

Consider whether the experience is the same in all geographies, or if you should select just one area. We recommend removing areas with known problems in the journey, such as those experiencing high turnover, or those with abnormally positive experience ratings.

## Tenure

Think carefully about whether to select new customers, or those who have been with you longer. For a bank, we focused on customers who had been with the bank for six months to twelve years, avoiding those who were being onboarded, as well as those top 25% in tenure.

## Touch Point Experience

For some journeys, you may want to specifically include or exclude customers who have contact customer service, have registered complaints, or have registered for your website and/or your email newsletters.

## Generations (B2C)

Many journeys focus on specific generations. Retirement products (such as in healthcare) have found Baby Boomers to be very different than their preceding generations, while others have focused on the Millennial experience.

## Customer Size (B2B)

You may wish to focus on or exclude your largest or smallest customers, as they typically have different sales and operational models. For example, when studying how home builders create developments, we only studied the top 10 home builders. When studying how banks purchase software, we zeroed in on mid-size banks.

# Customers to Exclude

In addition to those considerations above, you may wish to avoid:

* Customers experiencing ongoing customer service issues
* Top-tier customers, who may have a separate sales and service channel
* Customers up for renewal (often in B2B)
* Members of your Customer Advisory Board

# Checklist

Select the items in each criterion to consider for your map:

|  |  |
| --- | --- |
| Sales Channels: |  |
| Geography: |  |
| Tenure: |  |
| Touch Point Experience: |  |
| Generations (B2C): |  |
| Customer Size (B2B): |  |
| Other: |  |
| Other: |  |

**After reviewing the options, document your selected customer to map:**