



# Customer Journey Mapping

Dayton ASQ Workshop  
August 20, 2016

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# Introductions

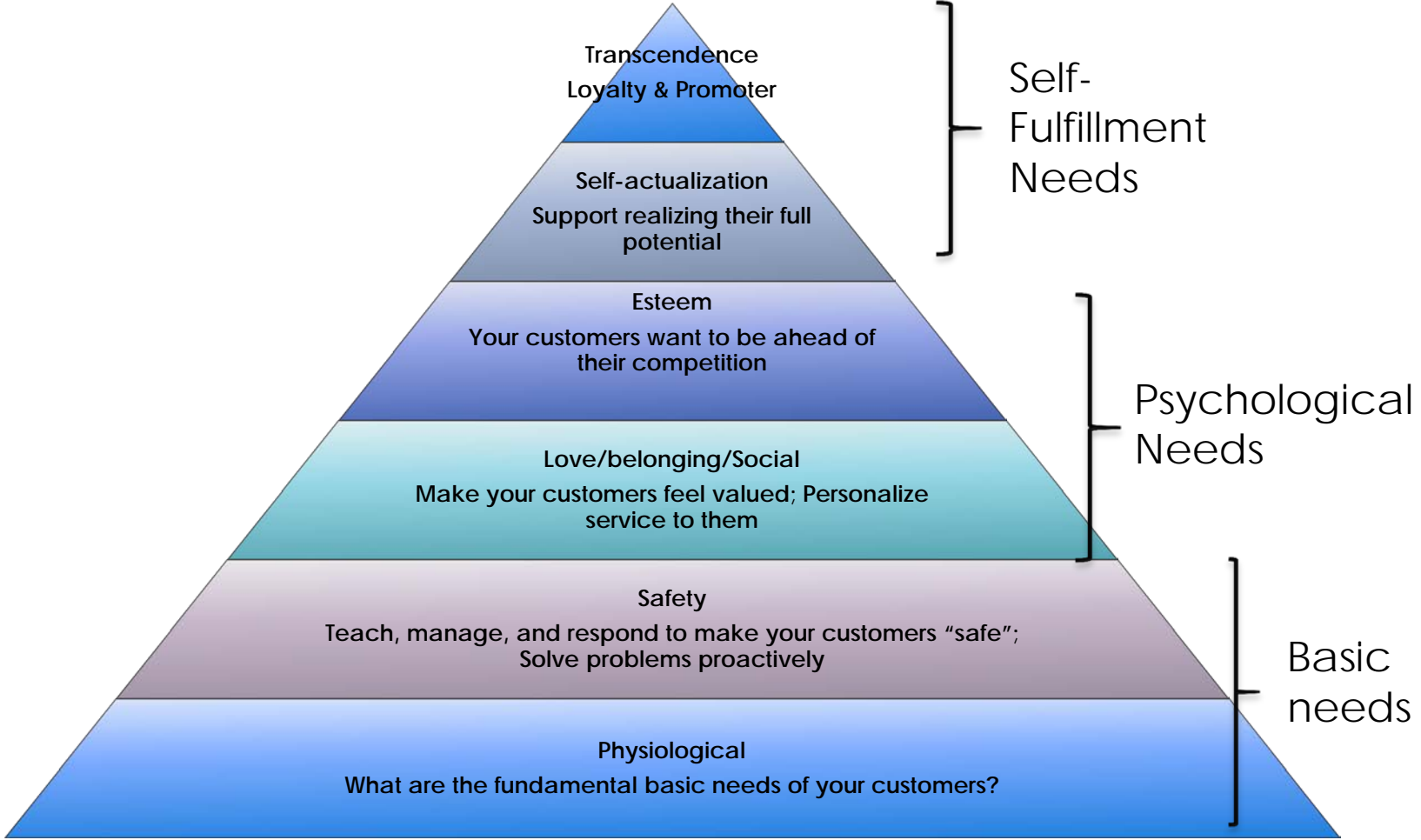
- Your Name
- Tell us a little about yourself.
- Why did you decide to spend your Saturday morning in this workshop?
- Relate a good experience you had as a customer.
- What was one of the worst experiences you had as a customer?

# What we'll cover today

- Core principles and concepts of Customer Experience
- What is a Customer Journey Map (CJM)?
- Some terminology
- Why develop CJMs?
- Basic steps to develop a CJM
- Putting it into practice



# Maslow's Hierarchy of Needs



# 3 Elements of Customer Experience

- **Success:** *How well do experiences **meet customers' needs**?*
- **Effort:** *How **easy** is it for customers to do what they want to do?*
- **Emotion:** *How do customers **feel about** the experiences?*

# 2016 is the “Year of the Customer” (Forbes)

- Customers are smarter than ever.
- Customers are connecting with companies in more ways than ever.
- Big Data gets bigger. We have access to so much data in the form of direct feedback from customers as well as analytics we pick up from monitoring trends and buying patterns...The new hot phrase in customer experience and marketing is *cognitive analytics*.
- Micro Data gets smaller...A customized experience will help create a connection with the customer that brings them back to do business with you.
- When a customer has an amazing experience, they share it...Social media is here to stay.
- Self-help customer service is a powerful solution.
- Value trumps price.
- Customers want and expect to be appreciated.

Source: <http://www.forbes.com/sites/shephyken/2016/01/02/the-year-of-the-customer-16-customer-service-and-experience-cx-trends-for-2016/#1272a1135e04>

# Customer Journey mapping – what it is

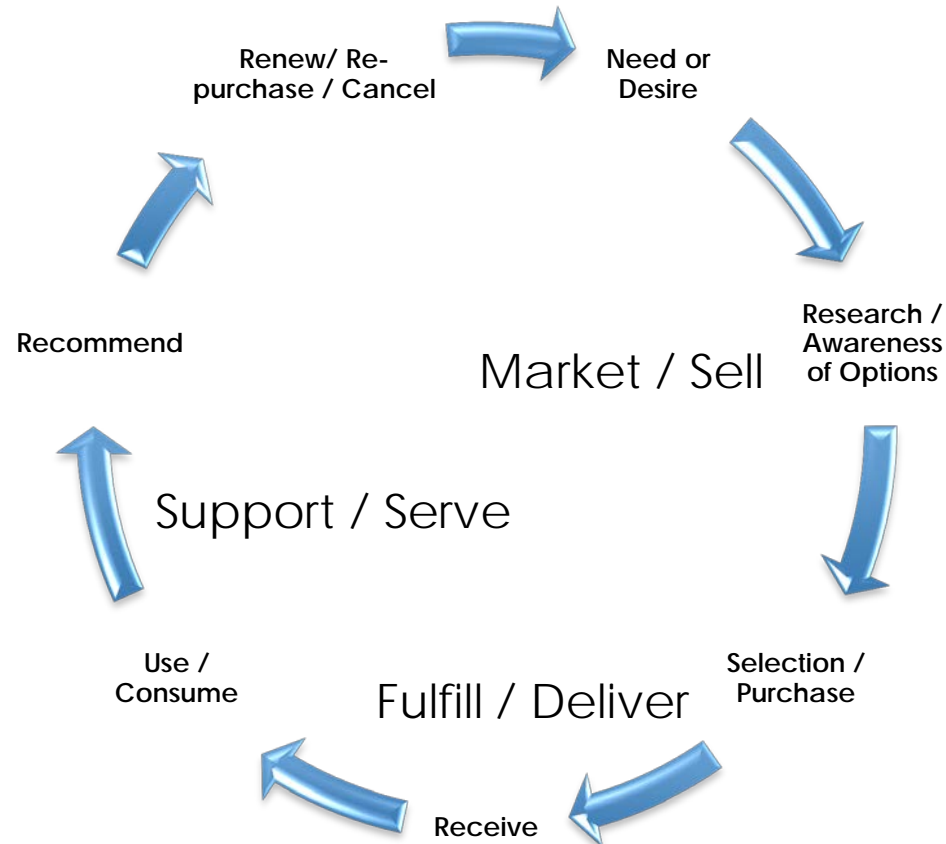
- Every customer decision is the result of a series of actions, emotions, and interactions, some more important than others
- Journey maps are detailed visualizations of these customer experiences
- Maps include behavioral as well as emotional data points



# Customer Journey mapping – some terminology

“Customer lifecycle” is a term used to describe the progression of steps a customer goes through when considering, purchasing, using, and maintaining loyalty to a product or service.

A journey map can cover the whole lifecycle or a specific portion.



# Customer Journey mapping – some terminology

- “Line of visibility”
  - Customer journey is “above the line” - the things the customers sees and experiences directly.
  - “Below the line” are the internal company processes, tools, policies, structure, etc. that impact the customer but are not visible to the customer. Process maps are more applicable than journey maps in this context. Sometimes called “backstage”

# Customer Journey mapping – some terminology

- Customer or CX “Ecosystem”
  - Complex interdependencies of customers, employees, and operating environments
  - Context around the customer journey

# Customer Journey mapping – some terminology

- “Personas”
  - Fictional believable archetypes of target customers
  - More than just general segmentation
  - Give them individual name and stories that reflect characteristics – needs, motivations, attitude, pain points, communication preferences, etc.

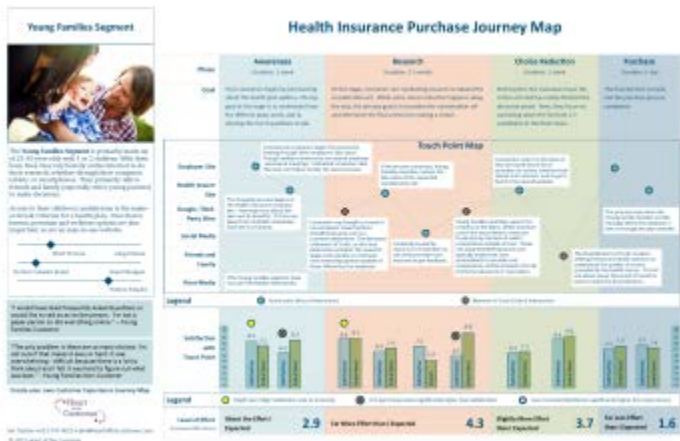
# Customer Journey mapping – some terminology

- “Moments of Truth” or “Moments that Matter”
  - An instance of contact or interaction between a customer and a firm (through a product, sales force, or visit) that gives the customer an opportunity to form (or change) an impression about the firm. [Source: *businessdictionary.com*]
  - Journey maps help us idea when these moments occur and why

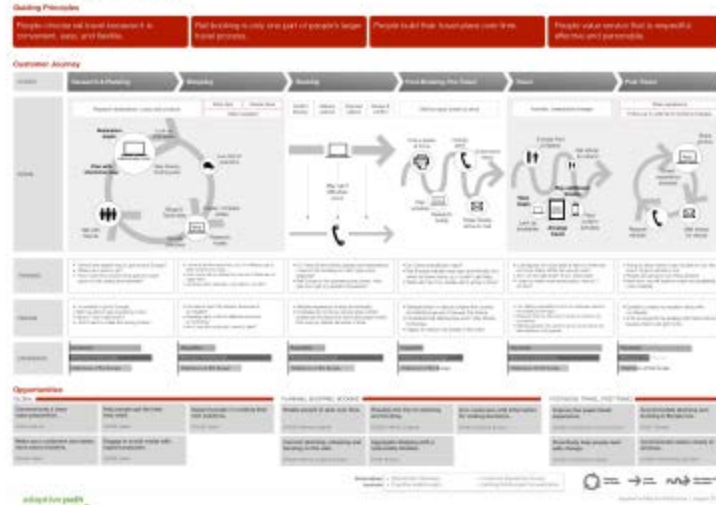
# Why develop journey maps?

- Understand and diagnose customer needs and experiences
- Maintain customer-centricity: If we do not interact directly with customers, can disassociate from them and focus more on everyday processes and widgets. Journey maps bring the customer back to the center.
- Identify issues and opportunities to improve customer experience – what's getting in the way or impacting our ability to meet our customer s' needs
- Innovate and design solutions that deliver both customer and organizational value

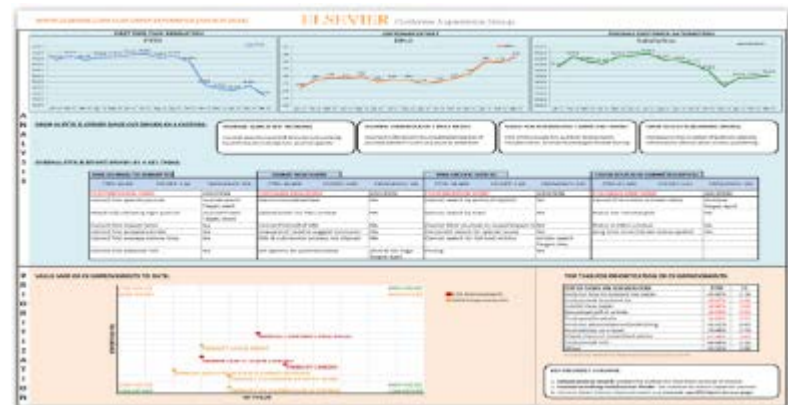
# Substance is more important than form



## Rail Europe Experience Map



Customer process	Internal Process	Experience	Improvements and key learnings
<p><b>Navigate website</b></p> <ul style="list-style-type: none"> <li>Arrive at website</li> <li>Navigate for help section</li> </ul>	<ul style="list-style-type: none"> <li>Internal process example</li> <li>Internal process example</li> </ul>	<p>Examples of positive experience</p> <p>Examples of negative experience</p>	<ol style="list-style-type: none"> <li>1. Improvement, or learnings to maintain high performance?</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol>
<p><b>Visit FAQ section</b></p> <ul style="list-style-type: none"> <li>Look for relevant question</li> <li>Look for topic answers</li> <li>Search for contact numbers</li> </ul>	<ul style="list-style-type: none"> <li>Internal process example</li> <li>Internal process example</li> </ul>	<p>Examples of negative experience</p> <p>Examples of negative experience</p> <p>Examples of negative experience</p>	<ol style="list-style-type: none"> <li>1. Improvement, or learnings to improve poor performance?</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol>
<p><b>Submit a request</b></p> <ul style="list-style-type: none"> <li>Find query form</li> <li>Enter personal details</li> <li>Find account number</li> <li>Submit query</li> </ul>	<ul style="list-style-type: none"> <li>Internal process example</li> <li>Internal process example</li> </ul>	<p>Examples of negative experience</p> <p>Examples of negative experience</p> <p>Examples of negative experience</p>	<ol style="list-style-type: none"> <li>1. Reduce the form down to Improvement, or learnings to improve poor performance?</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol>
<p><b>Follow up from customer service</b></p> <ul style="list-style-type: none"> <li>Wait for call back or email from customer service</li> <li>Can it be dealt with, or about it need to be referred?</li> </ul>	<ul style="list-style-type: none"> <li>Internal process example</li> <li>Internal process example</li> </ul>	<p>Examples of average experience</p> <p>Examples of average experience</p> <p>Examples of average experience</p>	<ol style="list-style-type: none"> <li>1. Reduce the form down to Improvement, or learnings to improve average performance?</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol>
<p><b>Resolution</b></p> <ul style="list-style-type: none"> <li>Problem is solved by customer services</li> </ul>	<ul style="list-style-type: none"> <li>Internal process example</li> <li>Internal process example</li> </ul>	<p>Examples of positive experience</p> <p>Examples of positive experience</p> <p>Examples of positive experience</p>	<ol style="list-style-type: none"> <li>1. Improvement, or learnings to maintain high performance?</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol>



# 10 Steps to Develop a CJM

1. Select a customer persona and a journey.
2. Research to understand the experience – interview stakeholders; collect artifacts; engage customers through focus groups, interviews, customer journaling, etc.; interview competitors' customers if possible.
3. Outline the journey stages.
4. Define the customer goals / needs for each stage.
5. List the steps the customer takes. Identify the touch points.
6. Add customer emotions, and attitudes.
7. Identify the “moments of truth”.
8. Map the ecosystem – what’s happening backstage or “below the line of visibility”.
9. Identify what is working well and also problems and opportunities. Use the “moments of truth” to prioritize action.
10. Have a transition plan so that stakeholders take ownership to drive business decision and initiatives.



# Tips to Keep in Mind

- Don't let perfection get in the way. Start with assumptions and then gather data to validate.
- Gauge organizational readiness – is your organization ready, willing, and able to adopt journey mapping?
- Focus on what the customers really want – the moments that matter.
- Remember that journey mapping is as much about driving culture change as about delivering value.
- Journey mapping should always be a cross-functional team effort. Engage your employees in the process. Keep the process collaborative.
- Journey maps are never “done” – CJM is an iterative process.

# 1. Select a Persona & Journey



- Jill
- 27 years old
- Lives in a Troy and commutes to Cincinnati for work daily
- Budget-conscious
- Environmentally minded
- Needs a new car



# Jane's Journey Stages

Awareness

Selection

Purchasing

Driving  
Home

Using the  
car



# Jane's Goals / Needs

## Awareness

- Needs a car to get to work

## Selection

- Not a gas-guzzler
- Compact
- Color, etc.

## Purchasing

- Clear no-haggle pricing
- Financing

## Driving Home

- Handles well; easy to drive
- Got what expected

## Using the car

- Fuel-efficient
- Easy maintenance



## Jane's Steps – Selection Stage

Visits  
Dealership  
A

Salesman  
greeted her

Explains  
what she  
is looking  
for

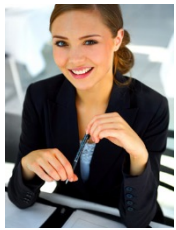
Browses  
the lot

Test drive  
1

Test drive  
2

Compares  
features  
and  
pricing

Chooses  
car 2



# Jane's Emotions and Attitudes

Visits  
Dealership  
A

- Anxious
- Unsure

Salesman  
greeted her

- Assured
- Respected

Explains  
what she  
is looking  
for

- Feels  
listened to

Browses  
the lot

- Disappointed  
with options

Test drive  
1

Uncomfortable

Test drive  
2

- Confident
- Safe

Compares  
features  
and  
pricing

- Sticker  
shocked

Chooses  
car 2

- Nervous  
about  
financing



## Jane's "Moment of Truth"

- Pricing – is the car in her needed range?
- Features – does it have the features she needs?

The moment of truth might be different for different personas. It is the moment that must go right in order to deliver on customer expectations.



# What is the ecosystem?

- Time of month /year impacting models available
- Sales in process impacting pricing
- Dealership ordering system
- Salesperson scheduling to ensure Sales ready to meet customers





# Opportunities

- Salesperson could talk about options not on the lot that could be made available
- Review options to mitigate cost
- Encourage more test drives



# Putting it into Practice

Group Journey Mapping  
Exercise

# Journey to Map

- **Becoming an ASQ member**
- Think about your journey with ASQ
- Why did you join?
- What was the process?
- What is the value you are looking for vs. receiving?
- Have your needs changed over time?
- Why will you or will you not renew?

# Personas – let's define 2 profiles of ASQ customers

1. Persona 1
2. Persona 2

# What are the journey stages?

- Sticky note exercise



# What are the goals for each stage?

- Sticky note exercise

# What are the steps and touch points?

- Sticky note exercise

# What are the customer's emotions and attitudes?

- Sticky note exercise



# What are the “moments of truth” and why?

- Sticky note exercise

# Ecosystem Considerations

- Sticky note exercise

# What works well? Where are opportunities?

- Sticky note exercise

# Transition and action

- Discussion – how could we take this back to ASQ for action?

# Unanswered questions

- Did you get what you wanted out of this workshop?
- What follow-up questions do you have?
- Future workshop topics of interest?



Thank you for  
attending!

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