THE COMPLETE GUIDE TO CUSTOMER JOURNEY MAPPING

Your Guide To Designing Exceptional Customer Experience

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An Introduction To Customer Journey Mapping

Brands have lost control of the paths, or journeys, that consumers follow to choose when and how they purchase and who they will purchase from.

Touch-points have exploded to extend well beyond the marketing department and with them the points of friction for a consumer and risk of defection to a competitor have also intensified. The journeys are increasingly fluid, personal and less predictable with Marketing departments struggling to adapt; acquisition and conversion are seen as distinct activities from nurturing and building loyalty.

Customer Journey Mapping is an increasingly important process for understanding consumers and their attitudes, needs and pains across their interaction or potential interaction with your business.
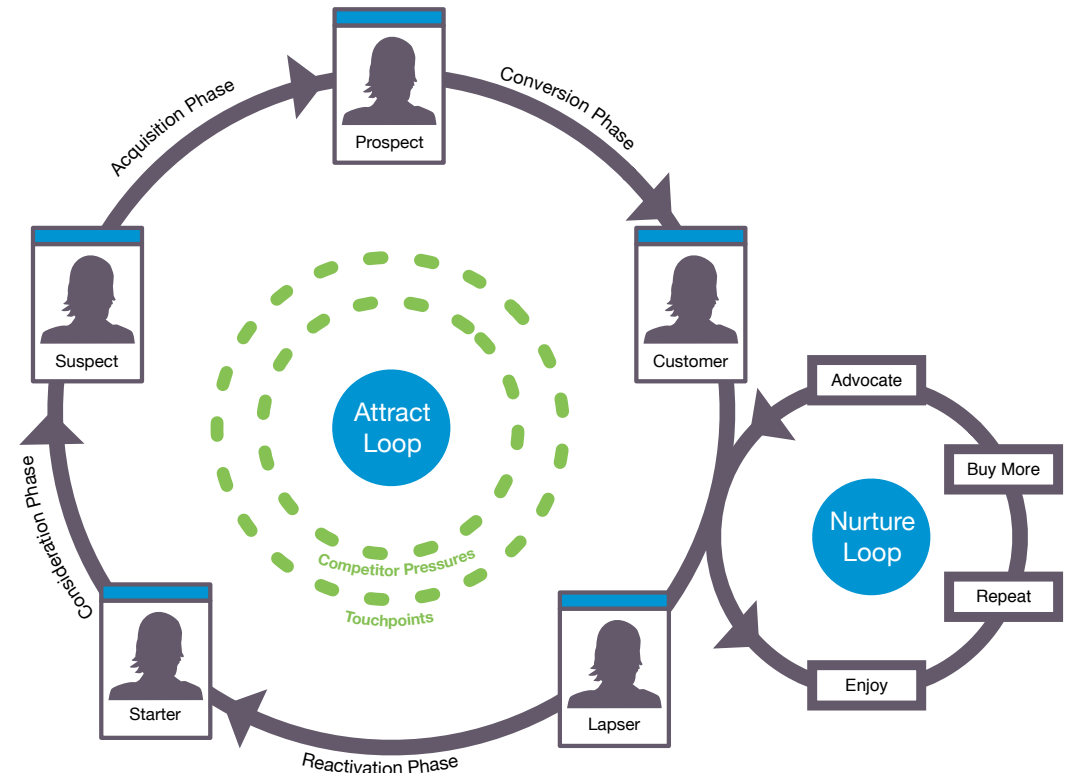
Done well, it gives marketers the foundations to design and communicate customer-centric products and services, alleviate moments of pain and deliver better customer experiences.

The commercial rationale is compelling: better customer experience mean more loyal customers and better customer lifetime value.

This Guide aims to move beyond the jargon and provide a simple framework for building and embedding Customer Journey Mapping with your organisation.

Within this framework we will explain techniques to get closer to customer needs and provide hints, tips and typical pitfalls to make your Customer Journey Mapping as effective as possible.

Customer Journey Mapping is a process that you can't afford to ignore. Read on to equip yourself with a framework to really understand how you can deliver remarkable customer experience.

Your Guide

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What's Customer Journey Mapping & Why Is It Important?

Customer journey mapping should be the backbone of your CRM process but for many marketers it can feel a bit nebulous and it's difficult to know where to start.

This Guide will provide you with a complete view of what a customer journey is, how you can map it and why we think it's such an important thing to get right.

What's A Customer Journey?

A customer journey is the path that consumers take to becoming a customer and (hopefully) becoming a regular, recurring customer for your business.

In today's hyper-connected world it is very likely that consumers will become your customers through a multitude of touch-points, both online and offline, and may well churn or go through periods of inactivity during their relationship with you.

Customer journey mapping is the process of documenting this: capturing the journey as it is now and specifying how you want it to look in the future. It provides the basis for understanding your customers, their needs and expectations and then specifying the marketing activities that you want to undertake and the processes and resources that you need to make them happen.

Why Is It So Important?

There has been an explosion of consumer touch-points across their lifecycle with your brand.

From someone researching potential solutions to a given problem to a customer purchasing a new product, there are a plethora of touch-points - some of which you will have control over (for example, the messages and navigation on your website) and others that you will have no control over (such as review sites, blogs and competitor promotions).

And even for the touch-points that your brand can control, some may well not be within your direct control.

Having a robust map of the customer journey therefore supports your ability to close the loop on your marketing, by helping you:

- To set your marketing objectives through identifying where most value is being gained or lost and setting your strategy and business case accordingly;

- To maximise the lifetime value of a customer by only investing in acquisition channels that recruit customers who could become 'good' and mitigating the risk of customers lapsing;

- To get buy-in from the wider business to support and deliver better customer experience;

- To set the marketing KPIs that will give you direction on whether your marketing is working.

Where To Start?

The most important thing is to recognise that you need to map your customer journey.

Then it's a case of breaking things down so that you can keep them manageable and make a start.

On the next page we will introduce a framework to map your customer journey and, just as importantly, start to turn it into a tool that supports your marketing.
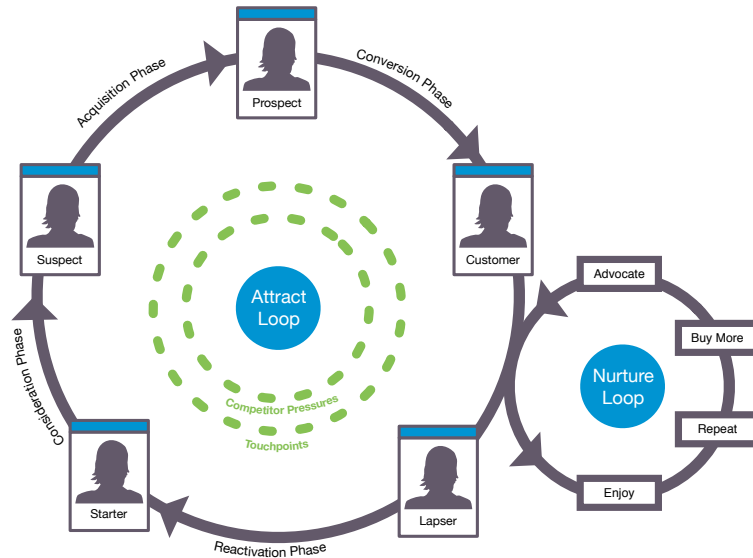
Getting The Basics Right

This is the framework that we advocate using.

Generically the customer journey can be broken into 4 phases:

- **Attract** – how consumers become aware that they have a need, research possible solutions and identify you as a potential provider;

- **Convert** – how consumers then identify themselves to you and move to a conversion (typically the point at which they commit financially to you);

- **Nurture** – the early stages of the customer relationship where you will want to ensure good service delivery and that you meet expectations;

- **Keep** – the process of customers enjoying and benefiting from your service and starting to become interested in additional services.

In turn each phase should be broken into a series of stages.

As we explain on page 6, your mapping of the customer journey shouldn't be just a flow diagram of a customer's interactions with your brand; it is critical that you start to build layers under each phase of the customer journey.

When considering the phases it can be helpful to think about the desired response - the actions that you want the customer to take next, why and what role do you play in facilitating that process.

The framework should be populated for each customer segment or product area depending on your marketing objectives and plan.

So let's work through each layer and explain what you need to do.

1. Marketing goals & objectives	2. Customer needs	3. Contact strategy	4. Performance	5. Making it all happen
Attract **Convert** **Nurture** **Keep**	**Customer drivers** Customer jobs Customer gains Evidence **Customer barriers** Customer pains Pain severity **Value propositions** Gain creators Pain relievers Products, services, solutions	**Contact rules** Behavioural triggers Prioritisation Compliance **Channels** Channel selection Attribution Optimisation **Offers & content** Segmentation Push vs pull **Business case** Cost/benefit analysis Justification	**KPIs** Results mapping Measure discovery & feasibility Dashboard architecture **Measurement & monitoring** Test & learn Tuning	**Data** Data strategy Data audit Data governance **People** Roles & responsibilities Skills Governance & ownership **Processes** Roadmap Programme management Supplier management **Technology** Requirements specification Solution selection

The 5 Layers Of Great Customer Journey Mapping

The following 5 themes should be layers within your customer journey mapping.

It's important that you work through these layers sequentially and in the order that they are listed below.

Layer 1 - Customer Needs

Always start with the customer.

At every stage in the customer journey you should consider 3 things to ensure that you are taking a customer-centric approach:

- **Customer Drivers** - what your prospects or customers want, why and what are the benefits are for the customer?
- **Customer Barriers** - are there specific pain points at key stages of the customer journey and how serious is the pain? Understanding pain severity will help you to identify your key moments of truth.
- **Your Value Proposition** – how do you create benefit for your customers and do you relieve their pains or add to it? Be honest and think about the products, services and solutions that you offer and promote across the customer journey.

This should all be evidence-based. If there are gaps in your knowledge then capture and try to fill them at this stage; if it's going to take a while to get the answers then capture the requirements and plan them as a project while you progress with the next steps.

Layer 2 - Marketing Objectives

So now you have a customer journey map complete with a sound understanding of your customers' needs.

The next step is to overlay your marketing objectives and goals.

Are you trying to acquire and convert new customers or to retain and reactivate lost ones?

Layer 3 - Contact Strategy

With your customer needs defined and a focus on the stage of the customer journey that meets your objectives you are in a position to start designing your contact strategy.

The 4 components of your contact strategy should be:

- **Contact Rules** – the triggers and business that ensure you are communicating with the right customers at the right time in their individual journeys and that you have the right governance in place;
- **Communication Channels** – what channels you will use and how you will select them;
- **Offers and Content** – that you will make available to specific customers or segments;

- **Business Case** – to quantify the value that you expect your contact strategy to contribute to your customers and your business

Layer 4 - Performance Measurement

This is essential to monitoring your customer journey and the impact of your marketing.

In part this is about setting the right KPIs and targets. But it's also about testing and learning so you are continuously optimising.

Layer 5 - Enablers

At this point, your focus should be on execution and there are 4 components to this:

- **Data** – how you will obtain, share, apply and maintain the data that you need to deliver your customer journey framework;
- **People** – the roles, responsibilities and ownership needed to deliver and optimise the framework;
- **Process** – the roadmap you will manage to deliver the programme of activities;
- **Technology** – specifying the requirements and selecting and technical solutions that you need.

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1. Customer Needs

2. Marketing Objectives

3. Contact Strategy

4. Performance Measurement

5. Enablers

The Critical Role Of Personas

As we have said, you should always start with the customer.

Persona development is the first step in the customer journey mapping process. It equips you with a robust understanding of *who* you are mapping the journey for and keeps you focused on the customer.

Personas are a tool for building customer-centric services and products and they play a pivotal role in customer journey mapping.

However, there is always a risk that they become pen portraits or customer segments – these are valuable marketing tools (and also play a later role in customer journey mapping) but they are very different to personas.

We define a persona as:

An archetype of your customer groups that focuses on every interaction with the brand and helps you develop better insights to enhance services, products and communications.

Personas are just a tool but are a powerful way to:

• Communicate knowledge about your customers;
• Understand the activities, interests, influencers, goals and pain points of different customers;
• Designing personas can be used for research, for marketing strategy, communications planning, data requirements and analytics – all key components of good customer journey mapping.

When developing your personas, be aware that:

• **Personas aren't customer segments**. Personas focus on the motivations, behaviours, needs and pains of your customers and prospects. These are the attributes that will help you design better services. Segments are a tool to support strategic marketing planning, personalised communications and marketing campaigns;

• **You can't make personas up**. They are evidence-based and data-driven. Personas typically use research and data profiling and you should also leverage the internal knowledge of customer-facing resources.

• **Personas should be a translation of consumer goals**. By 'goals' we mean the customer's motivations and what they are trying to achieve. Implicit within these goals will be the interactions that customers have and want and the pains that they encounter;

• **Persona development is not a quantitative process**. Qualitative and experiential analysis should be the foundation that provide deep insights and better focus on customer goals. This doesn't mean that you have to commission new or lengthy research – it may well be that they insight already exists within your organisation.

You can download our free persona template here.

The 3 U's Of Good Customer Journeys

1. Useful

Make your journey map useful and personal to your customers.

Your map should be totally customer-centric with a laser focus on your customers and how you deliver useful and personally relevant experiences, now and in the future.

This will allow you to concentrate on your customer needs, their pain points and your value proposition.

2. Usable

This is really a question of formatting.

A lot of the mapping process may take place on a whiteboard but it's easy to end up with something that is messy, confused and open to interpretation.

This is a good place to start but ensure that you allow time to design and format the journey so that it is readily understandable and can be used by your wider audience.

Consider breaking your map down by:

- Journey stage. Typical stages will include Attract, Convert, Nurture and Keep and you can then sub-divide within.

- Persona. The journey will look very different for the customers you are mapping it for. Design and documenting it for one will make your output significantly more usable.

- Product. As with personas, the journey and internal audience can be very different depending on the product.

3. Used

You need to think about your internal audience and how you make your map useful to them.

This requires a focus on who your audience is, their sphere of influence and why the customer journey should be important to them.

Don't map your customer journey in a silo. Engage some of your audience and get them to help you develop it.

Then think about the governance and ownership of the journey. Ultimately, who owns the relationship with your customers?

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The Role Of Data

As we have seen, research and staff knowledge are critical inputs into the process but so is your data.

Here are five roles that your data and customer journey analysis should play in your mapping process.

Role 1 – Who Are You Mapping The Journey For?

The customer or prospect should be absolutely central to mapping the customer journey and it's highly unlikely that there will be a vanilla version of the journey that applies to all customers.

Your data should play a key role in getting close to the profile of your customers and inform the development of customer personas.

And when it comes to thinking about a contact strategy to support the journey then segmentation will play a significant role.

Role 2 – What Stage Of The Journey Are You Focusing On?

Mapping the entire journey should be your ultimate aim but think about your marketing objectives and where you should start.

A sound understanding of your performance should be derived from your data analysis and the metrics that you have in place.

If your focus is on customer acquisition and onboarding then take these specific phases and start here. Conversely start with nurturing if your focus is more on retention and activation.

Role 3 – Touchpoint Mapping And Optimisation

Of course, your data will inform the interactions (touchpoints) that a customer has with your brand and their sequence. Think of your touchpoints in terms of your content and offers, transactions and the channels that are used.

It's also worth measuring engagement levels and the triggers at each touchpoint - were they something that you pushed or that the customer pulled? And did the customer actually engage (for example, receiving an email has a very different level of engagement to opening and clicking an email link)?

Role 4 – Identifying Barriers & Pain Points

Mapping the journey is one thing but understanding the 'Moments Of Truth' and your value proposition for different consumers at these points is where you start to get value from the process.

There are two types of moment of truth:

- Moments of Pain - the times when customer expectations are low or when things go wrong (when you don't deliver the service expected).
- Moments of Glory - the times when your brand exceeds expectations or relieves a key customer pain point.

Data analysis will help you uncover these moments, quantify their occurrence and their impact (on future customer behaviour, on costs to service).

Role 5 – Building The Business Case For Change

Your mapping process will inevitably identify risks and opportunities. If your data has played the four roles above then it should be straightforward for you to build a business case to change the status quo.

Your data should allow you to quantify the impact (benefit) of making changes by understanding the volume of customers affected and the likely change in their behaviour (in terms of frequency and spend) as well the costs that you will incur (the volumes of offers, messages and development that you will have to provide).

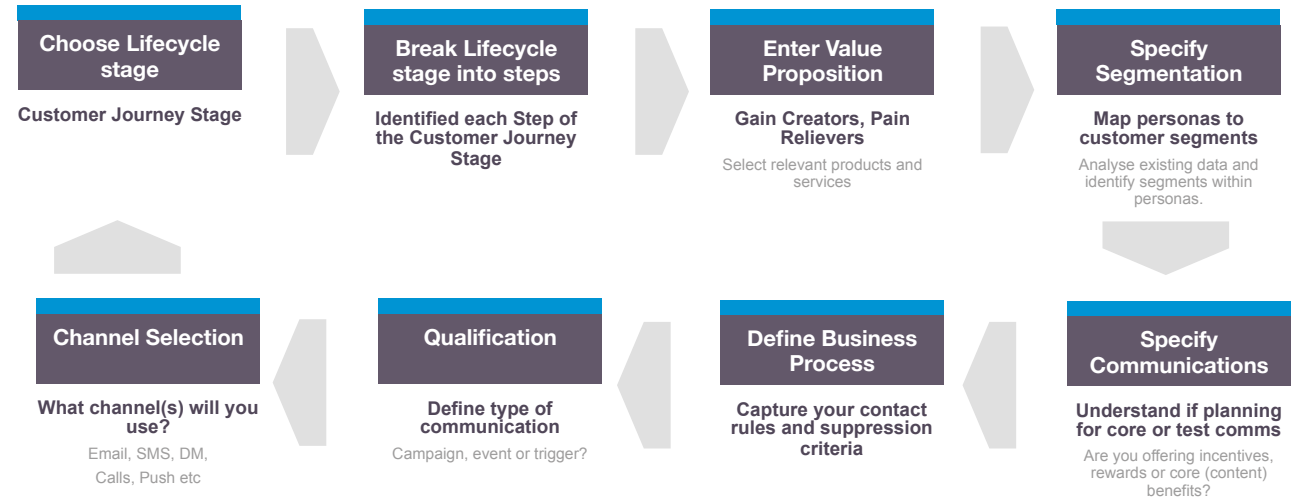conduit

Connecting Theory To Practice

A contact strategy is a core component of any customer marketing programme - it's where you design, build and govern how you will deliver personally relevant communications to your customers across the customer journey.

A contact strategy specifies how you will contact and communicate with your customers and prospects. Its purpose is to deliver the right message at the right time to a customer. And it should include how you will measure and optimise these communications over time.

Your contact strategy should be a direct consequence of your marketing strategy and marketing objectives.

With lots of communication channels, customer segments and ever-changing, more complicated customer journeys, it can be a daunting strategy to develop.

Follow these 8 steps to simplify your approach and build a contact strategy that will have a measurable effect on customer experience.

Choose Lifecycle stage

Customer Journey Stage

Break Lifecycle stage into steps

Identified each Step of the Customer Journey Stage

Enter Value Proposition

Gain Creators, Pain Relievers

Select relevant products and services

Specify Segmentation

Map personas to customer segments

Analyse existing data and identify segments within personas.

Channel Selection

What channel(s) will you use?

Email, SMS, DM, Calls, Push etc

Qualification

Define type of communication

Campaign, event or trigger?

Define Business Process

Capture your contact rules and suppression criteria

Specify Communications

Understand if planning for core or test comms

Are you offering incentives, rewards or core (content) benefits?

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8 Pitfalls To Avoid

Too often customer journey mapping can become an academic exercise or produces a deliverable that is difficult to get internal agreement on.

Eight pitfalls can typically affect customer journey projects.

By being aware of the potential pitfalls you can ensure that you don't fall into the same traps.

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01

Not Enough Detail

It's easy to build a 1-dimensional map but make it too simplistic and it's unlikely to help you.

Consider splitting the journey by customer segment and/or product.

02

Too Much Detail

It's a balancing act however. Too much detail and you will spend forever trying to complete the project.

Be pragmatic. Focus on your objectives, how you will use your map and build so that it's fit for purpose.

03

Only 1 Journey Phase

It's tempting but risky to focus on only one phase of the customer journey.

Customer experience is a continuum and it's a mistake to not take an holistic view. A good customer journey map will help you optimise the whole of your marketing.

04

Spontaneous & Subjective

Getting a team in a room with a whiteboard can be a useful steps. But don't base you work on 'me-marketing' or supposition.

Leverage the data and insight that already exists within your business.

05

It's Just A Map

Don't be content with just creating a map.

At every stage, think about your objectives (the outcome you want), the desired response (the action you want the customer to take) and blockers (what could get in the way). This will give you a practical tool.

06

Being Exclusive

All marketing should be considered in your mapping.

Your customers touch or interact with your brand through multiple channels and your mapping must reflect this.

07

Only Marketing Touchpoints

Equally, your customers won't distinguish between function silos – their relationship is with your brand regardless of whether the journey phase is owned by customer service, marketing or operations.

Everyone is in the marketing department now.

08

So What?

Avoid an academic exercise.

Focus on your marketing objectives and what you want to do differently and then start the process. Not vice versa.

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Conclusion

Customer experience is the only differentiator that brands now have and those that are able to deliver something remarkable will have a significant competitive advantage.

Customer experience is the only differentiator that brands now have and those that are able to deliver something remarkable will have a significant competitive advantage.

Customer Journey Mapping is a key step in this process.

You should now have a sound understanding of what Customer Journey Mapping is and why it is some important. From a simple framework built around the customer, you now know how to think about consumer's needs, pain and expectations at each touchpoint in the journey.

Just as importantly, you should now be able to understand and articulate what this means for you – from the contact strategy that will support your customers to the data and processes that you need to enable and measure the impact of what you are doing – and some of the pitfalls to avoid.

Start simple, perhaps with one persona or product, and build your experience of Customer Journey Mapping.

For support or any questions please get in touch with us projects@conduithub.com or sign-up for a **free marketing assessment** where we will help you work out where to get started.

SIGN-UP FOR A FREE MARKETING ASSESSMENT

A PAIN-FREE ASSESSMENT OF YOUR MARKETING PRIORITIES AND HOW YOU ARE USING DATA TO OPTIMISE YOUR MARKETING PERFORMANCE AND DELIVER PERSONAL EXPERIENCE ACROSS THE CUSTOMER JOURNEY.

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