Andrew Reise

The Ultimate Guide to Customer Journey Mapping

As customer expectations reach a fever pitch, organizations can no longer get by with adequate customer experiences. To grip customers and build long-term devotees, brands need to understand the customers' journey, identify their needs, and launch a strategy to wow them.

Customer journey mapping is the ultimate tool to help a brand reach into the customer's experience, identify pain points, anticipate needs, and craft experiences that set companies apart. By employing customer journey maps effectively, brands can boost customer experience, fortify brand loyalty, open new cross-selling and upselling opportunities, and unlock substantial growth.

That's why we've designed this ultimate resource on customer journey mapping. We dive into the ins and outs of customer journey mapping and pinpoint the secrets to mapping strategies that engage and draw in more customers.

What is customer journey mapping?

Customer journey mapping is a strategy that organizations can use to identify a customer's needs, values, desires, and friction points across different touchpoints.

These insights can inform a broader customer experience strategy and reveal growth opportunities. It's important to note that successful customer journey maps are not designed from the viewpoint of company leaders or brand managers. Instead, they peer into the perspective of the customer to plot out their experiences, frustrations, and needs.
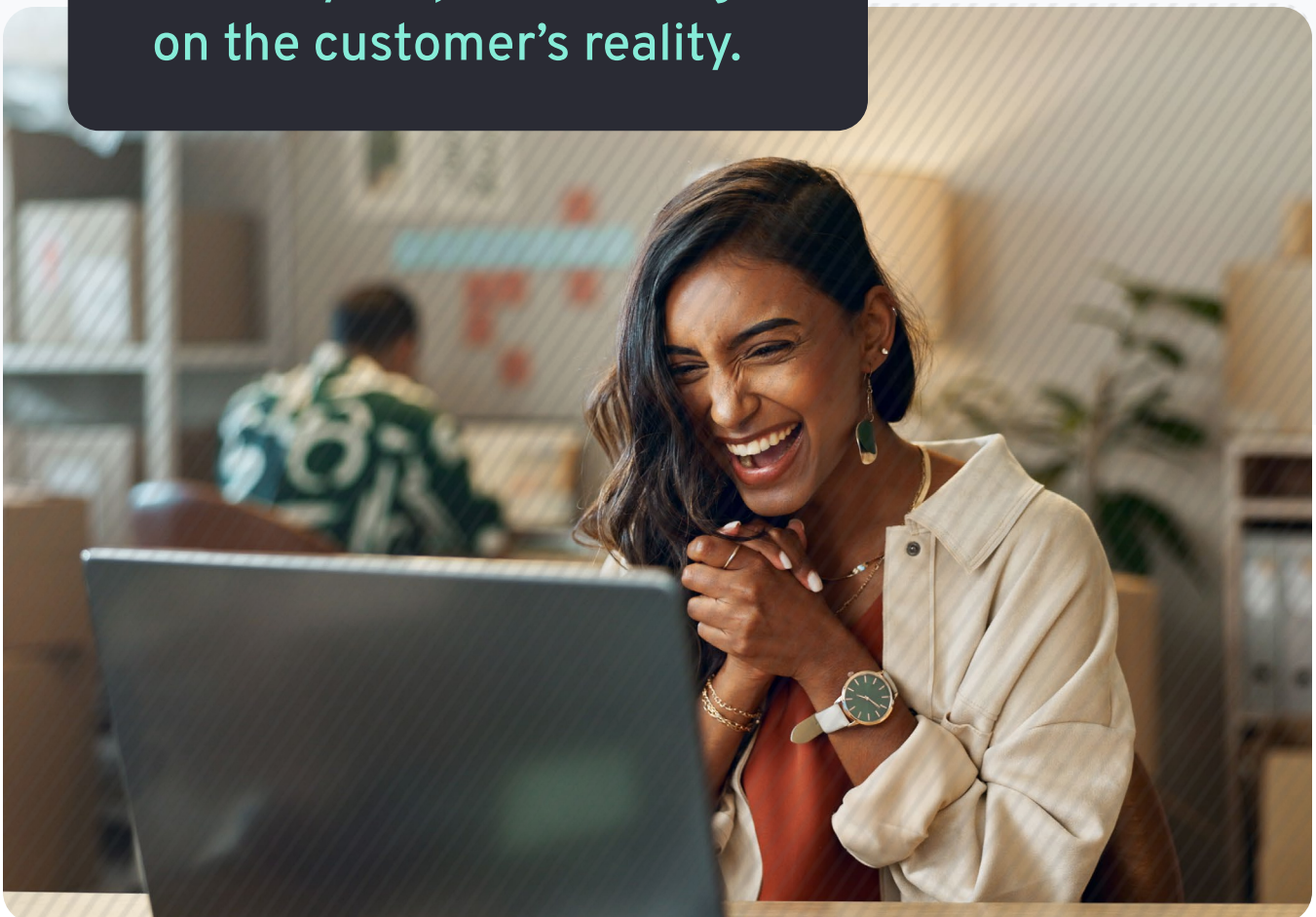
Why is customer journey mapping important?

Customer journey mapping is critical to align an organization's mission with customers' needs, desires, and expectations.

On a more granular level, here are a few ways that customer journey maps sharpen a view of the customer's perspective and elevate the customer experience (CX):

▶ **Gather in-depth customer intelligence:** Customer journey maps dig deeper into the customer's experience than traditional survey approaches. As a result, they reveal the moments that are important to customers and unearth instances that impact their perception of the brand.

▶ **Pinpoint inconsistencies and friction points:** Journey maps can highlight disjointed touchpoints, silos, and potential inconsistencies in the customer experience. With those wrinkles in sight, it's easier to iron out a smoother, more connected experience.

▶ **Separate intentions from reality:** Company leaders may make strategic moves with the intention of improving customer experiences, but their actions often impact customers differently than the company intended. Journey maps shine a light on the customer's reality.

▶ **Understand customer feelings:** Journey maps shed light on customers' emotions and provide context behind their actions. That builds empathy for the customer and makes it easier to understand—and deliver on—their needs.

▶ **Pinpoint opportunities:** Customer journey mapping highlights the moments when an organization excels and lays out new customer experience opportunities.

> Journey maps shine a light on the customer's reality.

Getting Started: 3 Types of Customer Journey Mapping Plans to Target

When organizations first start digging into the customer experience, leaders often assume there's only one type of customer journey map. But customer journey maps are not created equal. Here are three types of customer journey maps, and how each works:

▶ **Customer lifecycle:** These maps provide a broad assessment of the customer's experience throughout every moment of their buying journey. They dig into different touchpoints, channels, and pain points that the customer encounters at each buying phase. They give a solid overview of a customer's experience and help to nail down reasons customers are churning, turning into advocates, or especially engaged at different stages.

▶ **Moment of truth:** These customer journey maps identify important customer interactions and drill deep down into those instances. This may mean conducting ethnographic research, uncovering the customer's biggest needs in these critical moments, and searching for opportunities to use these critical interactions to elevate the customer's full experience.

▶ **Experience capability:** These journey maps track the customer's experience alongside back-office processes and company touchpoints. They analyze how behind-the-scenes actions—such as back-office work—influence the customer. They also search for opportunities to boost CX by refining processes or improving CX delivery systems.

Advanced maps, like those created at Andrew Reise, use these general formats as a starting point. To build in-depth maps, professionals will dig down into a series of important customer areas, including:

▶ Lifecycle phases / journeys

▶ Micro journeys

▶ Mindset articulation

▶ Touchpoints

▶ Pain and gain points

▶ Moments of truth

▶ Voice of the customer

▶ Emotions

▶ Operational, channel, customer score, and performance data

▶ Opportunities

Steps to Building a CX-Focused Journey Map

Wondering how to develop customer journey maps that zero in on the customer's experience? These are the steps to building a CX-focused journey map:

Plan

The first step towards crafting a customer-focused journey map is to determine what shape the map will take. In this stage, identify who will use the map and how they'll use it. It's important to lay out clear objectives during the planning stage. Also, be sure to consider how this map will relate to other planned journey maps.

Not sure where to start? Here are a few guiding questions to carve out a plan:

▸ What is this map's purpose?

▸ Who are the key users?

▸ Which customers are being targeted?

▸ What is already understood about these customers?

▸ What segments should be included?

▸ What time period will the map cover?

▸ Where will the map live? Will it be digital only, presented as a visual image in a conference room, or take another form?

Gather Research and Data

Once the map blueprints have been created, it's time to gather the raw materials to build it. That means collecting customer information. Start by identifying which customers need to be included, as well as which customers can speak to an experience at specific parts of the customer journey.

During this critical stage, it's important to gather interviews, analytics, past surveys, and other customer data that can provide insight into customers' experiences. Here are a few examples of general questions to ask during the interview process:

▶ How did you feel when … ?

▶ What's most important to your purchase decision?

▶ What's going well?

▶ What's missing?

▶ What took too long or was harder than it should have been?

▶ What has been critical to your experience?

▶ What steps are repetitive or unnecessary?

▶ What would you change?

In addition to listening to customers, it's important to gather input from key stakeholders. These figures can help identify sensitive areas or opportunities in the customer experience that deserve a deeper look.

Build Map and Moments of Truth

The next step is to build the map and plot critical moments. During this stage, build out the map's wireframes and gradually fill these frames in with touchpoints, channels, and pain points with customer experience data to add insights to the journey. Throughout the process, it's important to identify how customers started their journey and note any clear steps or interactions that emerge from the findings.

After customer paths and interactions are charted, search for moments of truth. These are those critical instances that define the customer's experience, and ultimately are most impactful to a customer's decision to purchase, engage, or stay with a brand. Choose carefully. Moments of truth should be interactions that have the power to make or break the customer's experience and bring the brand to life.

Identify Opportunities to Take Action

Next, start uncovering opportunities to seize upon. That means researching the company's products, services, channels, and communication methods. It's important to detail these opportunities as clearly as possible.

Another critical task at this stage is identifying what resources are needed to take advantage of these opportunities. Here are a few questions to consider:

▸ How many people will be needed to seize this opportunity?

▸ What processes need to be changed?

▸ What technology changes are needed?

Socialize

The final customer journey mapping step is to socialize. The socializing stage is an opportunity to educate stakeholders and show them the customer's perspective. In this final stage, include stakeholders from all levels of the organization and gather input whenever it's possible. This will help improve maps and secure buy-in.

How to Wring the Most Value Out of Journey Maps

Once journey maps are designed, it's time to start using them to deliver a memorable customer experience. At this stage, there are ways to pull more value out of mapping and drive more lasting results. These are a few creative tactics to wring more out of journey maps:

Tying Customer Journey Maps to Key Metrics

Customer behaviors can shift, and one of the best ways to keep up with those changes is to connect customer journey maps to metrics—for instance, gathering ongoing feedback about customers' preferred digital channels or methods of communication. With this info in hand, the organization can adjust to and keep up with changing customer preferences.

Create Visual Graphics

Another way to amplify journey maps' messages is to distill takeaways into visual graphics. This breaks down the customer's full journey in an easily digestible way during onboarding. It's also a useful way to pass messages on quickly to multilingual global staff members.

Using Journey Analytics to Supercharge Strategy

The best journey maps aren't stagnant. They're living documents that shift alongside customers' needs and organizations' goals. That's why journey analytics is so important. Measuring journey figures can identify what's working, how customer experiences are changing, and new opportunities to propel growth.

Here are some of the best areas to focus on to set up an effective journey analytics program and polish customer journey maps:

Customer Understanding

This is an essential jumping-off point for any journey analytics program. It's meant to break down essential touchpoints, channels, interactions, and other experiences that impact customers the most. Some ways to begin with this element are to chart moments of truth and build out personas.

Cross-Channel Support

It's best to build cross-channel support as early in the journey analytics process as possible. This is where to assemble a team across different channels and pull in information from different digital touchpoints and systems throughout the organization.
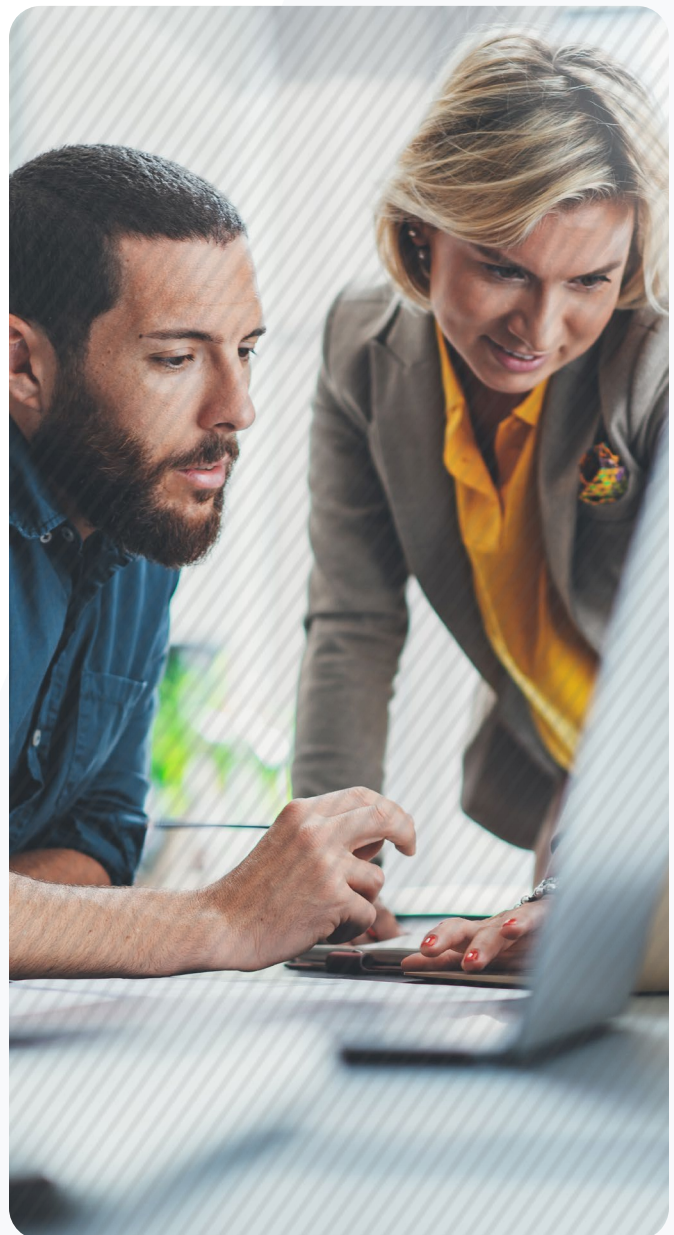
Common Goals and a CX Vision

In order to bring teams together and move forward, it's important to nail down a single CX vision. A CX vision will paint a picture of the optimal experience that the company wants to deliver. It needs to inspire, excite, and motivate employees to rally around a clear objective. This is an opportunity to improve the customer experience and push together towards that goal. After a CX vision is ironed out, branch off to broader objectives from there.

Technology

The more is invested in technology to pull in and manage journey analytics data, the less work there will be down the road. Look for new technology and ways to tweak the current tech stack so that data from surveys, calls, online transactions, and other areas flow as seamlessly into one place as possible.

Data Analytics

Raw data doesn't do much good by itself. To pull actionable information out of the collected data, make connections, piece together information, and transform insights into a customer story to drive change.

Stakeholder Management

Once there is a vision of the customer's journey, it's time to start digging into recommendations. That means bringing together stakeholders and weaving them into the process—from there, ROI is revealed.

Elevate a Brand's CX Capabilities

Elevate a Brand's Most Important Experiences
Customer journey mapping is an essential tool to understand
customers better, drive deeper connections, and pave a path to
growth. However, it is just one resource for brand leaders who want to
improve customer, employee, digital, or contact center experiences.

Want to take your brand's CX, EX, contact center,
or digital experience strategy to the next level?

Reach out to one of our consultants today.

Andrew Reise