


JOURNEY *Mapping*



Journey mapping:

The goal of this eBook



Journey mapping involves creating a visual representation of a typical customer's journey with you, your product, services and any partners involved

It involves identifying 3-5 stages in the typical customer relationship and the interactions within each stage (all of which are potential opportunities to measure satisfaction too)

It does not have to be massive or onerous

Think of it like a 'mystery shop' that never ends...

Why journey mapping is so important right now

Journey maps have changed

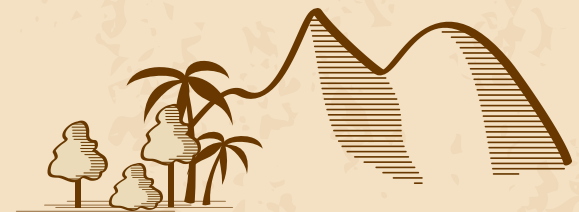
- Regular customer touchpoints have been disrupted; customer journeys may no longer match their original design
- Digital customer interactions will increase by 40% (Forrester, 2020)

Customer behavior has hardened against poor experiences

- Understanding customers and delivering a great experience has become more important than ever
- Three in five consumers have switched who they buy from, as new priorities in service, value and availability empowered them to exercise greater choice (McKinsey, 2020)

The new post-Covid reality demands you take stock and develop longer-term strategy

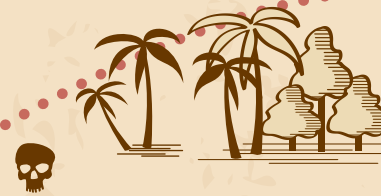
- Rapidly introduced digital touchpoints are unlikely to default back to the old touchpoints they've replaced
- 42% of US online adults said they would not return to shopping in stores once stay-at-home restrictions are lifted (Forrester, 2020)



Every customer's experience is important

80% of customers consider their experience with a company to be as important as its products

Salesforce, 2019 Research



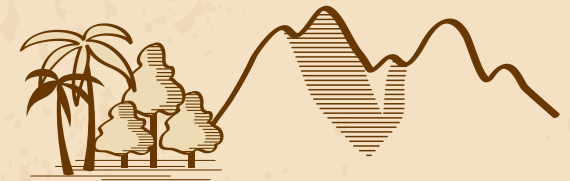
Almost half of consumers are budgeting and choosing more carefully since the pandemic began

McKinsey, 2020

75% of organizations have proved that customer satisfaction leads to revenue growth through increased customer retention or lifetime value

Gartner, 2020

How does journey mapping and improvement increase LTV?



- Understanding customers better enables cross-selling and upselling success
- Building a customer-centric service reputation attracts new customers
- It all begins with mapping all the touchpoints within the customer journey so you can use each of them to garner feedback to act upon and make a difference...

Using feedback insights to increase customer LTV:

- Reflect customer insights in advance of contract renewals / business reviews
- Target customer needs with appropriate propositions
- Design new services based on what customers ask for
- Showcase benefits of additional services through real case examples
- Respond quickly to new technical requirements
- Respond quickly to new business challenges

Remember: Touchpoints are manifold



- You needn't manufacture a reason for customers to provide feedback
- 'Asking for feedback' can hitch a ride on one of your many existing customer touchpoints
- Map the customer journey to uncover them all

Asking for feedback...

- Is like asking a favour, so make it a small one (one question at a time)
- Shouldn't fatigue your customers, so make it quick and easy to do
- Shows you're listening, so ensure a rapid response
- Needs questions that fit into the context of each touchpoint

Your existing regular interactions are a good start



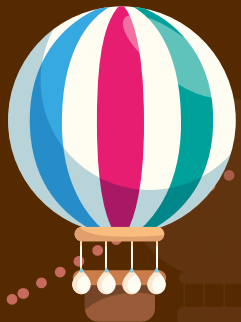
- Customer service teams and expert support centres are increasingly applying feedback mechanisms at the close of each interaction
- These provide valuable snapshots, but not the whole picture
- There are lots more opportunities to garner and utilize customer feedback to support your business goals

Customer feedback can be used to:

- Attract new customers
- Optimize the sales process
- Improve onboarding efficiency
- Increase customer success and LTV
- Maximize NPS
- Minimize staff churn
- Drive product development, marketing and other business processes

Tip:

Examine all your *digital* touchpoints



- More and more companies are already relatively 'digital'
- But don't take it for granted or assume things are fine
- These channels have been supplemented with F2F up to now
- How do you market, sell, service and support 100% from afar?

Questions to ask yourself:


- What does BRILLIANT look like?
- Have you made any proactive improvements to your digital channels since lockdown?
- What if you could never see a customer F2F again?
- What will you get feedback on if you're succeeding?

Get the team involved

- Select a tiger team for this challenge, ideally including those who:
 - engage with customers every day
 - advocate and champion your brand
 - manage customer engagement processes
 - understand your organization's underlying business objectives
- Set objectives for CSAT measurement
- Create simple customer personas
- Pitch in major steps and touchpoints
- Identify where it makes greatest sense to gather feedback (and where tech makes it easiest to do so)



Now you're ready to map the customer journey



Understand and map every customer touchpoint; physical and virtual

Identify the stages of the customer journey and where it makes sense to measure satisfaction

Look out for key events, customer motivations and areas of possible friction

4 steps to create your journey map

1

Outline the stages of the customer journey

2

List all the likely customer touchpoints for each stage

3

Come up with a sample question you would ask the customer at each touchpoint

4

Plot the systems governing each touchpoint (e.g. CRM, ITSM, etc.)

A standard customer journey has 4 stages:

- Pre-sales & sales
- Onboarding
- Usage, support & service
- Renewal & growth

It will look something like this

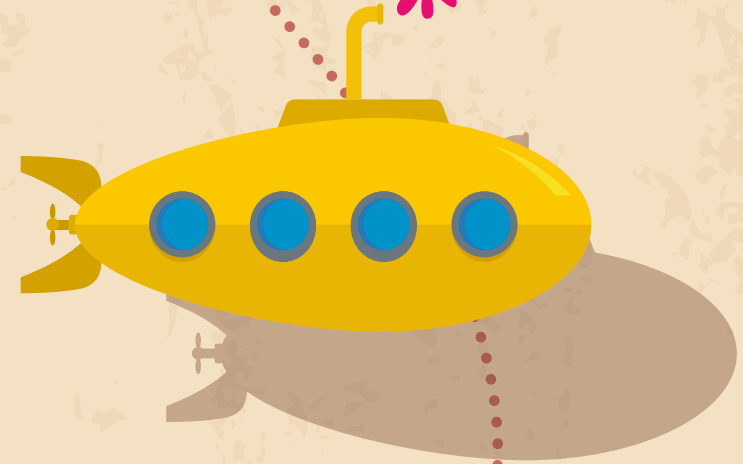


With the
output being
simple actions
for every kind
of customer
response

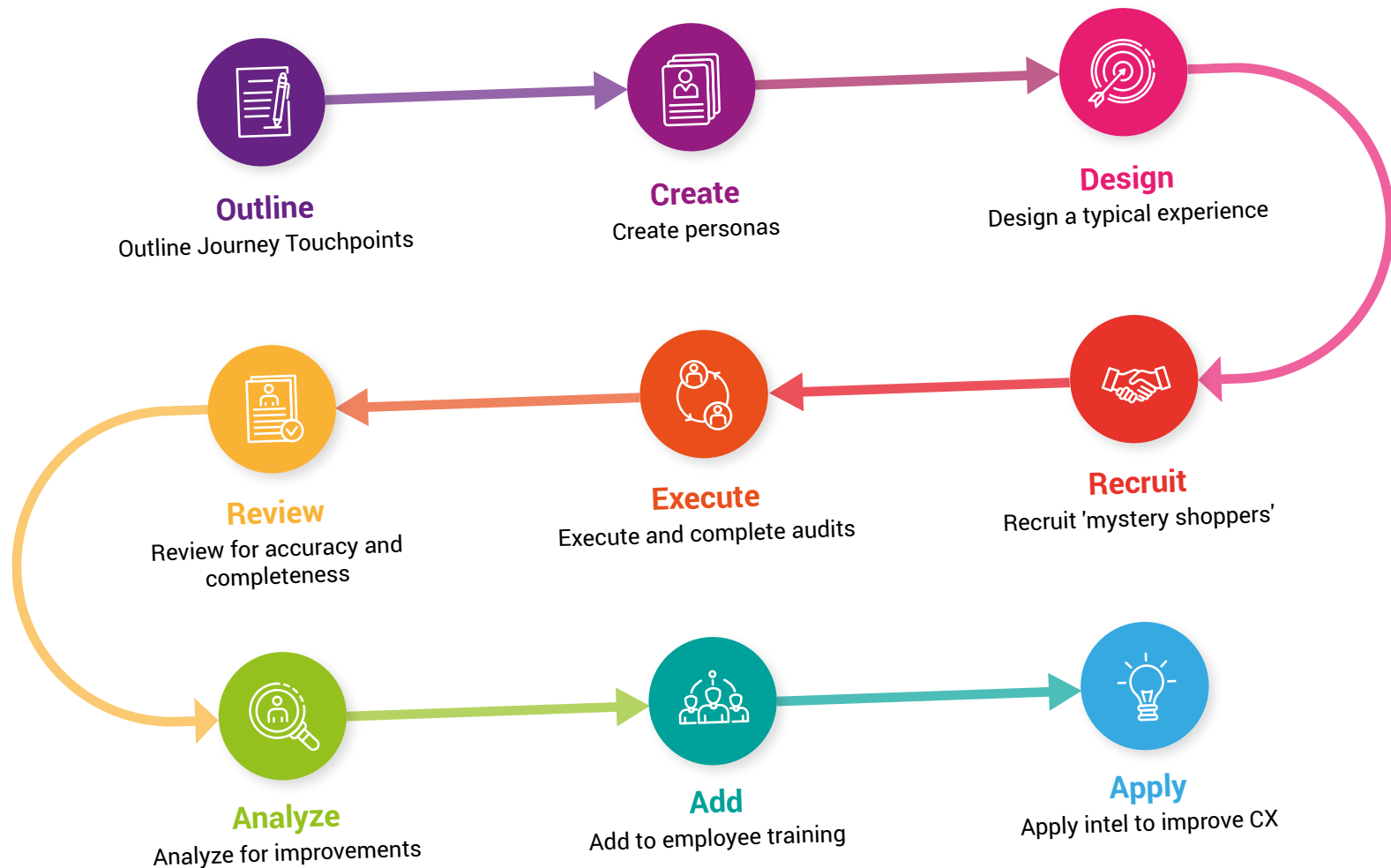


Journey mapping and the magical mystery shop

- Taking a mystery shopper approach adds value to customer journey mapping
- Apply a mystery shopper to each touchpoint in the customer journey
- Delve deeper into the customer experience
- Probe for opportunities for friction, difficulty, delay, dissatisfaction and disengagement



Steps to journey mapping success





Breaking down the stages

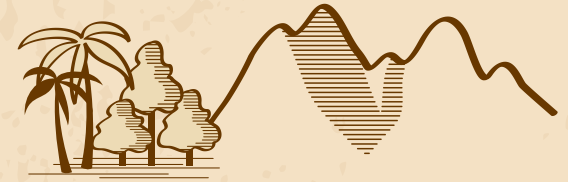
Starting with stage 1:

Pre-sales and sales

Attracting new customers



Feedback drives value



Outbound

- Sales emails
- Marketing promotions
- Newsletters

- Fine-tune marketing investments
- Do more of what's working

Inbound

- Onsite widgets
- Case studies
- Reviews sites

- Externalize what happy customers say
- Demonstrate you listen and care about customer experience

Sales process

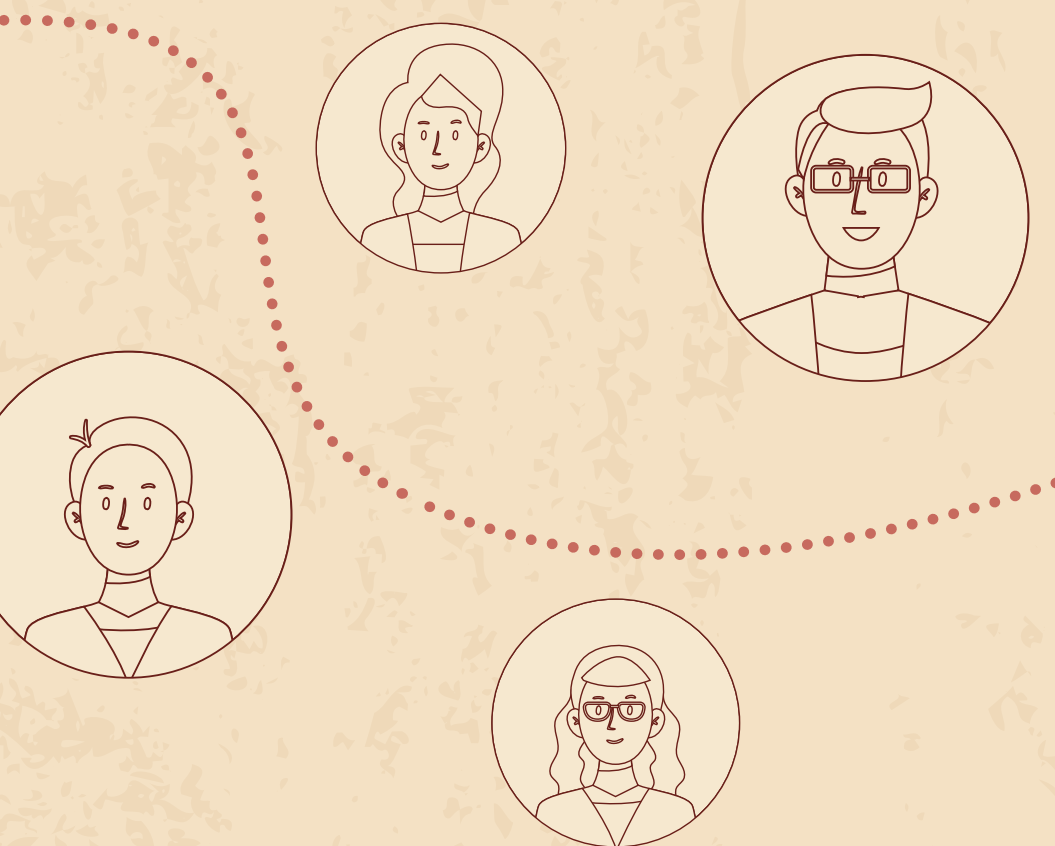


Personas are vital

- Gain a better understanding of your customers
- Know who you shouldn't market to(!)
- Target employee knowledge
- Help map journey points
- Guide product decisions



Developing personas



- Demographics – age, occupation and decision-making responsibilities
- Who are their target audiences?
- What's important to them and what are they looking for in a supplier?
- What are their goals?
- What are their needs?
- What are their challenges?
- Which brands are they using?
- How are they interacting with those brands?
- Content preferences?

(many of the above have changed in the last 6 months)



Feedback for a more efficient sales engine



Shorten Sales Cycle

- Call upon appropriate references quickly
- Demonstrate up-to-the-minute/ trending satisfaction of customers just like them
- Share answers from customers to the questions they're asking
- Get feedback on proposals and how sales reps operate

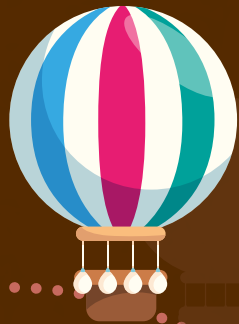
Close Deals

- Highlight your customer delight framework as a differentiator
- Show how you review performance/run QBRs
- Create a welcome pack for customers

Tip: Create a welcome pack

- If you leave behind a welcome pack after your first sales meeting, or when new customers join you, then why not add your customer feedback program into that pack so that customers know what to expect and when to expect it?
- We've many customers who show prospects an image of their Customer Thermometer survey during the pitch/quotation stage. When they are quoting a new customer, they can explain how they can guarantee ongoing satisfaction.





Breaking down the stages

Stage 2:
Onboarding

Onboarding



Feedback gets onboarding right 1st time

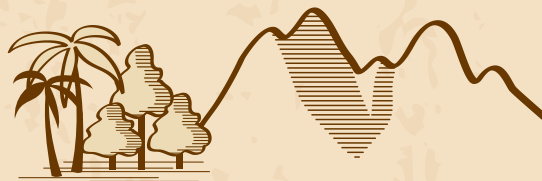


Touchpoints

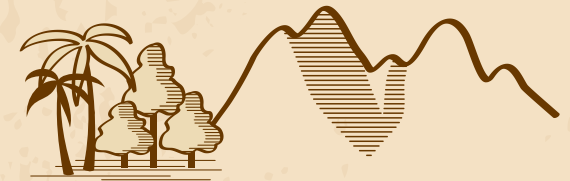
- Discovery Audits
- Billing Initiation
- Switchover Day
- Training

- Tell customers why feedback is important before you start collecting
- Fuel continual improvement of onboarding process
- Are they getting what they expected?
- Are they getting what they need?
- What else can you do to make them happy?

Customer success

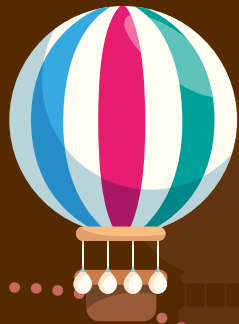


Prepare to respond to feedback optimally



- Work out how you'll respond to different kinds of feedback with a feedback response planner
- Ask simple, non-disruptive questions
- Make customers feel valued for the feedback they give
- Ensure integrations are in place between feedback tools and CRM, service desks, dashboards, etc.

- Get senior leadership buy-in on the value of customer feedback
- Develop a culture of learning from the 'voice of the customer'
- Incentivize and reward any employees who garner great feedback



Breaking down the stages

Stage 3:
Usage, support
and service

Customer support & service



Maximize responses to the service and experience provided

- Support and Ticketing
- Monthly Pulse
- NPS
- Post-Cancellation Surveys

Take action in real time

- Route positive feedback to 'thank you' and 'how could we improve further?'
- Route negative feedback to apology, factfind and remedy
- Accelerate escalation wherever possible

Improve performance

- People
- Process

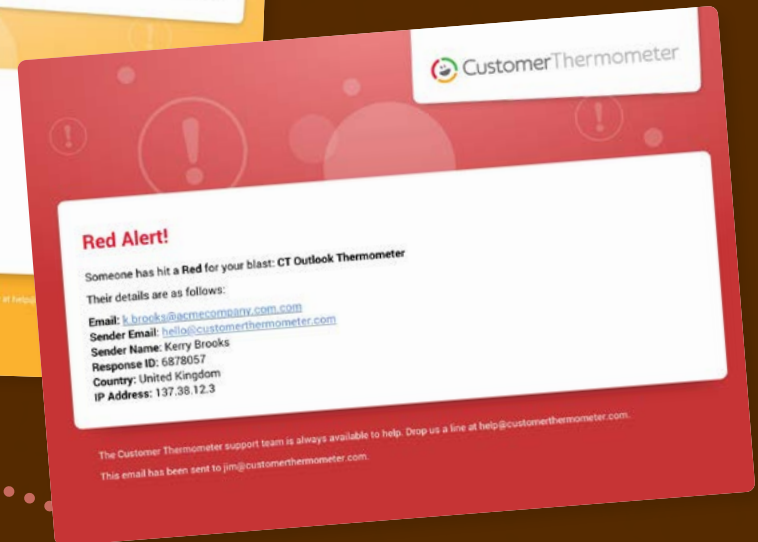
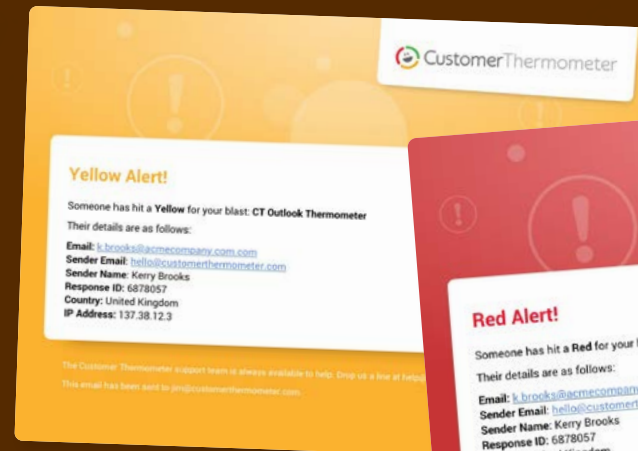
Gather data outside of critical events, not just post-ticket

Alert flatlining customers, even when the flatline is 'good/ok'

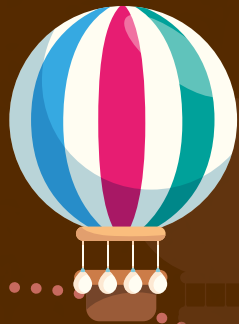


Tip:

Have a 'disappointed customer' process



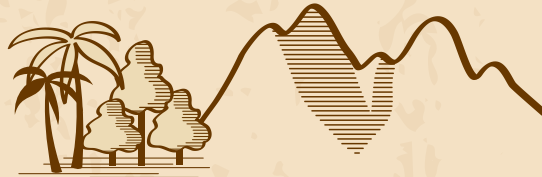
- Ensure you are instantly alerted to customers who have hit a negative response. Many businesses build a red and yellow alert process into their business, so that they make sure they call the customer to find out more about the problems they are facing and fix it on the spot.
- This process might include internal targets such as “a director will call every red or yellow customer within 2 hours.”



Breaking down the stages

Stage 4:
Renewal
and growth

Monthly/ quarterly QBRs



Control the agenda for change



Demonstrate value

- Put standard metrics into context with how they've said it went
- Show how you fixed, responded and improved
- Have more to talk about than the very latest issue that they will have front of mind

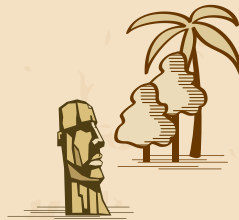
Be less defensive

- Good feedback should mean no surprises
- Get agreement that their feedback is accurate, and rectify if it isn't
- Show where you mean to improve, even if satisfaction is high
- Spend more time building the case for upselling/cross-selling

Using CT across the journey map



Operational surveys



For using straight after an event/service interaction

Avoid missing disgruntled customers impacted by a negative event

Benefit from the service recovery paradox

- Where customers are more satisfied after a failure you fixed than if the failure never happened

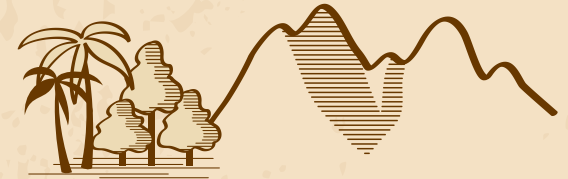
Build into QBRs

Benchmark and improve

89% of customers would be open to changing providers right after a poor experience

Labtech.com

Lifecycle surveys



Milestone, rather than event driven

- Onboarding
- Renewal
- Service Upgrades
- Cancellation

Chart changing customer perception throughout lifecycle

Remove emotional bias for feedback scores

Optimize LTV

Evaluate the
relationship
NPS, not just the
transactional
NPS

A simple recipe for optimum service CSAT



Boost Brilliant Basics

A program to make the customer experience easier

- Is your day-to-day interaction process seamless for them?
- What else can you do to reduce friction or hassle?
- Are you asking them to complete online forms repeatedly?
- Make unnecessary calls?
- Repeatedly log in?

Magnify Magic Touches

A program to get talked about and remain memorable

- To add enjoyment and a smile to their day
- This could be something as small as adding a chat system that supports Giphy, or sending welcome packs with candy in at the start of engagements.
- Work out what makes sense for you and your brand.

Tip:

Assume customers need more help



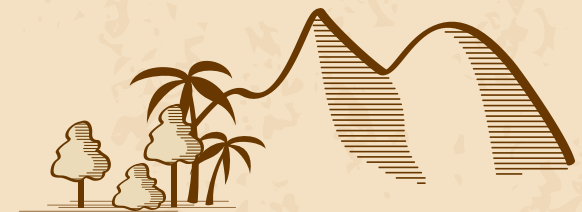
- Many people are still at sea - spell things out & do more for them proactively
- Remove uncertainty. Customers used to know how to deal with you, maybe now they aren't so sure
- Help customers feel supported and safe.
- "Covid-approved"

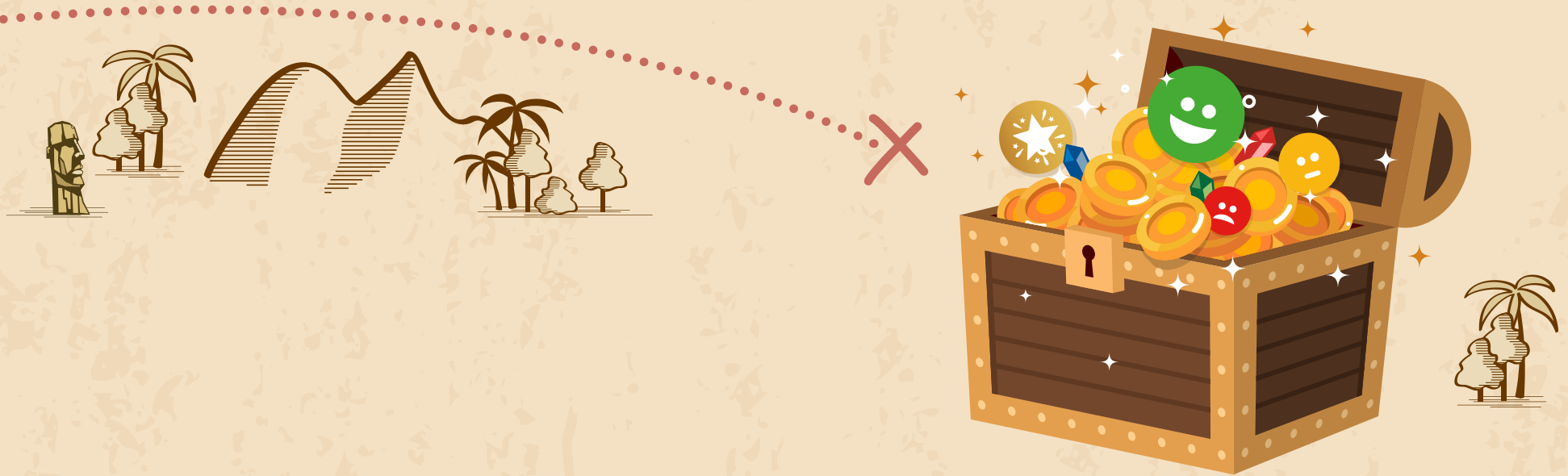
Questions to ask yourself:

- Have we examined the prospect - > customer -> advocate funnel and worked out where people are getting stuck?
- Are we creating self-help guides, videos and content that are easy to access from home?
- Are we providing training that's easier to consume and share?
- How will we know if customers are finding us responsive to deal with?

Further reading for your journey mapping journey

- **Good Services: How to design services that work** by Lou Downe
- **Blue Ocean Strategy** by W. Chan Kim and Renee Mauborgne
- **This Is Service Design Doing: Using Research and Customer Journey Maps to Create Successful Services: Applying Service Design Thinking in the Real World** by Marc Stickdorn and Markus Edgar Hormess
- **The Journey to WOW: The Path to Outstanding Customer Experience and Loyalty** by Shaun Belding
- **The Design Thinking Playbook: Mindful Digital Transformation of Teams, Products, Services, Businesses and Ecosystems** by Michael Lewrick and Patrick Link
- **The Ten Principles Behind Great Customer Experiences** by Matt Watkinson
- **Finding Gold Dust: How To Create Exceptional Customer Experiences** by Gavin Scott





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