

Aligning Your Business to Customer Journeys

A Definitive Guide to Customer Journey Mapping – Part 2

Dr. Janne Ohtonen



DR. JANNE OHTONEN

ALIGNING YOUR BUSINESS TO CUSTOMER JOURNEYS

A DEFINITIVE GUIDE TO
CUSTOMER JOURNEY
MAPPING – PART 2

Aligning Your Business to Customer Journeys:
A Definitive Guide to Customer Journey Mapping – Part 2
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4 BREAKPOINTS ALONG THE JOURNEY

4.1 INTRODUCTION TO BREAKPOINTS

Breakpoints have many names. They may also be called Internal Handovers or Employee Journeys. Two following names are probably more self-explanatory so, let's start with the first name. Breakpoint reminds us of those things that can go wrong internally in the organisation. When people (or systems when it comes to that) are supposed to hand something over to someone else, for example to a colleague, things can go wrong. This is where Breakpoints have their origin. If an organisation has business processes mapped out (or a desire to do that), then Breakpoints can be replaced with the process maps. Let's go through these different scenarios to see how they work.

Breakpoints are a human-centric way of understanding how Customer Experiences are produced along the Journey. Machine-based interactions are better described through more technical process maps, and that's why we mainly focus on the human aspects. Breakpoints occur in any situation where there are employee-related interactions within the company. If the interaction involves the customer, then it isn't a Breakpoint, but a Touchpoint. We'll go into more details on how Breakpoints are exactly identified in the next chapter.

Business process maps are another alternative way of looking at the internal workings. They are usually much more detailed than Breakpoint maps. If your organisation already has process maps available, then this is an excellent opportunity to align them with Customer Journey. Doing that gives the benefit of first mapping and then optimising both internal (business) and external (customer) processes.

In the next few chapters, we'll go through the details of creating a Breakpoint map. Aligning business process maps will also be discussed shortly. However, instructions on how to create a business process map are excluded from this book since there are many great books on that already.

4.2 IDENTIFYING BREAKPOINTS

Identifying Breakpoints can be fun. It brings visible all the work done behind the scenes for each Journey Step. We hear quite often in Customer Journey mapping workshops phrases like *"I didn't know we do that!"* And this only makes sense since most of the companies are

organised in a tayloristic way (i.e. departments that don't genuinely co-operate but work like factories, each focusing on their task only). A lot of work is duplicated and unnecessary, but also hidden and unproductive. It is a bold claim, but our workshops produce 20–80% efficiency improvements, proofing the point. You can receive these results also by following the instructions from this book!

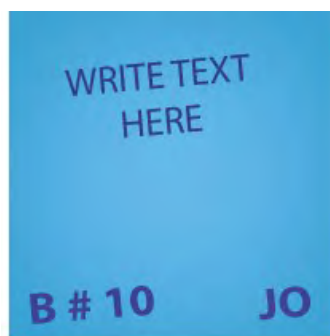
How can we get started then? Same way as with Customer Interactions, we will identify all relevant, internal handovers and work done for each Journey Step individually. We can ask questions like:

- Who is involved in this Journey Step?
- What is done behind the scenes?
- What is handed over between people and departments?
- What processes are related to this step?
- What needs to be done with tools, systems, etc.?
- What needs to be done with partners, suppliers, etc.?

Remember that if the work involves the customer, then it is a Touchpoint instead of a Breakpoint. Or if the job requires making a definite decision or choice, it is a Business Rule instead. Each Breakpoint is described with a blue sticky note. They should have a short and precise title, which states the work or task. You can add more details later when documenting the breakpoints. Additional information could include:

- Longer description
- Risk level for the customer
- Risk level for the organisation
- Frequency/occurrence
- Owner

Here is an example of a Breakpoint sticky note (without additional information):



Picture 20. Example Breakpoint

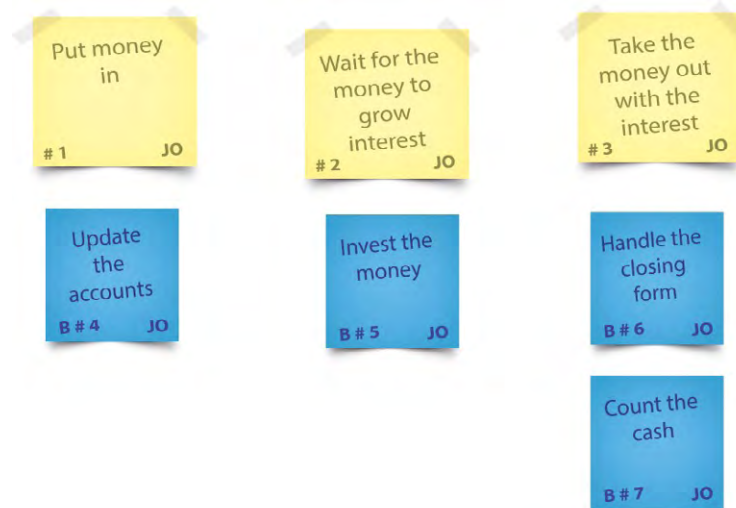
4.3 ALIGNING BREAKPOINTS TO CUSTOMER JOURNEY MAP

Breakpoints are aligned to Customer Journey in very similar fashion as Interactions. The first step is to identify the Breakpoints and then second is to map them under each Journey Step. For the sake of our purpose here, you will receive a lot of benefit from having each Breakpoint aligned to the Journey and optimised. Depending on the level of details required and the industry, a process flow type of mapping of Breakpoints may give more opportunities to understand the Employee Journey.

Let's use the previous simple example of a bank to map out the Breakpoints, too:

1. Put money in
B4) Update the accounts
2. Wait for the money to grow interest
B5) Invest the money
3. Take the money out with the interest
B6) Handle the closing form
B7) Count the cash

Here is an example picture of Breakpoints aligned to the Journey Steps:



Picture 21. Example Journey with Breakpoints

4.4 ALIGNING BUSINESS PROCESSES TO CUSTOMER JOURNEY MAP

As previously mentioned, aligning business processes and Customer Journeys together may be very beneficial for optimising the organisation both from internal and external perspectives. Let's first shortly discuss what business processes are and how they differ from Customer Journeys. In my doctorate thesis (Ohtonen, Business Process Management Capabilities, 2015) it is shown that there is no one clear, the widely accepted definition of business processes and their management. Typically, it refers to managing work from start to end with specific inputs and outputs from the environment. In this book, we refer to processes as 'all the work done to create an outcome'. Internal processes mean all the internal work done to create successful customer outcomes. External processes mean the Customer Journey the customer has to take to achieve the desired result.

This may sound a bit scientific, but it is essential for us to mean the same things. It will affect your success. Now that we know what business processes and Customer Journeys mean in this context, we can start aligning them together. Naturally, the first step is to have both a Customer Journey Map and a business process map available. If you are following the steps in this book, then you will have both available through the Journey and Breakpoint mapping exercises. In case you have already Journey Maps, but no process maps, then it makes sense to start with the Breakpoint mapping (it is much lighter approach than a proper business process mapping). In case you have process maps, but no Journey Maps, then you need to complete the Customer Journey mapping first.

Now that we have both Process and Journey Maps available one way and another, we can start aligning them.

Step 1. Identify start and end points from both maps and see how well they match.

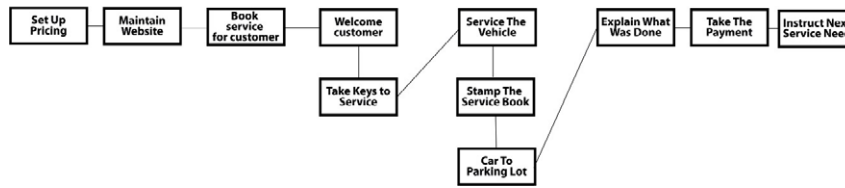
It is unlikely that the maps match perfectly, so you can have the Customer Journey Map as a master and then see how the process map fits into that. Let's use a car service experience as an example. Below you can see the separate pictures for a Customer Journey and business process map that we need to align.

Customer Journey Steps:



Picture 22. Customer Journey Steps

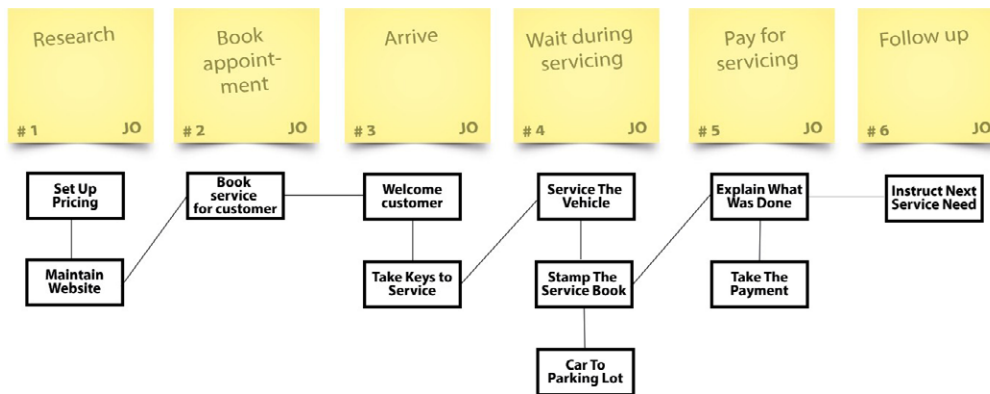
Business process map:



Picture 23. Business Process Map

Step 2. You probably need to dissect the process map into Customer Journey Step specific chunks.

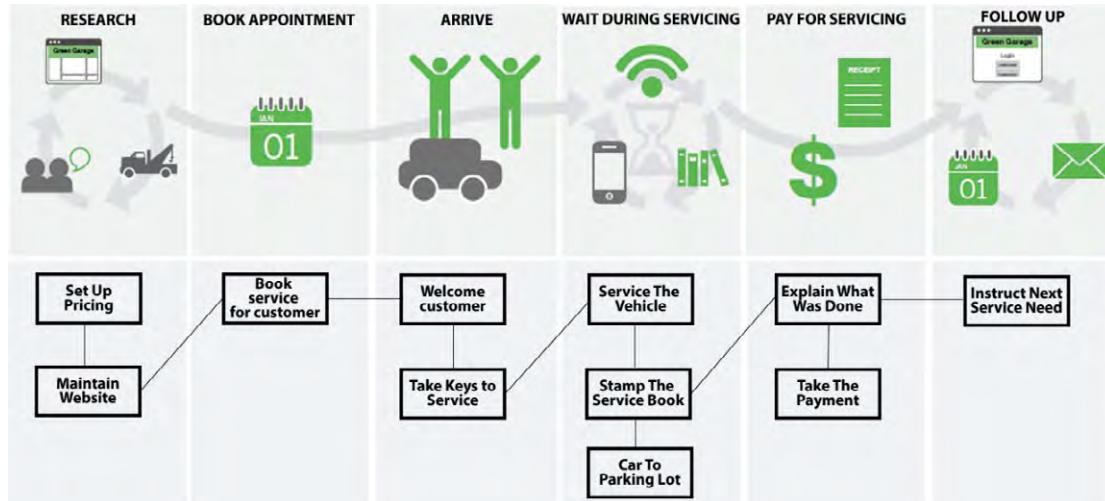
In other words, you align the process to Journey map one step at a time.



Picture 24. Journey with Process Steps

Step 3. Finalise the map and make it easy to read.

The example below shows how you can describe the Customer Journey with images instead of sticky notes. This could be done for the business process also.



Picture 25. Aligned Customer Journey

The final output can be used in various ways. It will give both, business and technical people a way into how the processes relate to Customer Journey. The map can also be used to optimise the processes by identifying the areas with development needs and alignment gaps (Journey Steps not addressed at all or too heavy-loaded Steps).

4.5 CASE WWJD: BREAKPOINTS MAP

It is time to add Breakpoints to our WWJD Journey Map. We'll be using the same Journey Steps as in the previous WWJD exercise. Before you look at the example answer below, map out the Breakpoints to your own WWJD exercise map first.

Here are the example Breakpoints:

1. Preparing the meeting materials
 - No Breakpoints
2. Find a place to print the materials online
 - B6) SEO – Search Engine Optimisation
3. Call to print house to arrange the printing
 - B7) Call duty to answer customer calls
 - B8) Checking the work queue for today
 - B9) Find contact details for another branch

4. Hold the meeting
 - No Breakpoints

5. Follow up with the meeting participants
 - No Breakpoints

And in sticky notes format:



Picture 26. Example Journey with Breakpoints

As you can see from the picture above, this Customer Journey is quite heavy related to calling to print house and arranging the materials to be printed. The same is evident from the Touchpoint perspective also in the previous WWJD exercise. If you did model also the Journey Step on visiting the branch to pick up the materials, that is very likely to be heavy on Touchpoints and Breakpoints also. Since the WWJD is not involved in preparing the documents or giving out the presentation, there are no Breakpoints (though there are Touchpoints with the materials they produced).

5 BUSINESS RULES SHAPING THE JOURNEY

5.1 INTRODUCTION TO BUSINESS RULES

Business Rules also called as Decision-making Points, are an exciting concept. What comes to your mind, when you think about them? Is it perhaps something boring? Or difficult? Many times that may be very true. It is also a fair challenge, what are business rules used for besides compliance, controlling and managing? Many times, not much. You probably have figured out by this far, customer related topics are not typically that bureaucratic, because we look at things from Outside-In, emphasising the customers in everything we do. This should be the case for Business Rules also.

What other, customer related, uses they could have then? One good option is to use Business Rules for ensuring a consistent customer experience across the organisation. This way the Rules will become more empowering than restricting. They can help us to become the Starbucks or the Macdonald's of our industry. It is easier for customers to engage with something that they can trust to perform over time. And it is easier for employees to deliver against clear expectations.

Another good use, more related to Business Rules mapping, is to optimise the rules. We are much keener to add new rules than removing the old ones. Most organisations don't even know what Business Rules they have. In the past ten years, I have seen thousands of rules being set, but at least I have never heard anyone proactively to say, we need to get rid of many of existing Business Rules (that is outside those people who have been exposed to our optimisation methods). Even in projects, where we mapped out rules for automation, no one challenged the existing rules, but just automated them. AS an example, an organisation had implemented an ERP solution using an SAP platform a few years back. The challenge they had was a too long claim process, which took 18 days from claim to pay-out. This was too slow compared to market standard. The reason was relatively easy to find after the Business Rules exercise described in this book. There were eight days waiting time after the claim was recorded in the system and before it was processed. This was set as a rule in the system. It was effortless to fix by removing the rule (shortening the customer journey from 18 days to 10 immediately). However, more exciting part of the story is how that rule ended up in there. Can you guess the origin?

It goes almost hundred years back. All the way back to a time when insurance claims were handled on paper and ink (no it was not some early version of an iPad, but proper ink that needed time to dry up). One day was used for the ink to dry properly. Then it took seven

days for a courier to take the documents from the branch to head office with horse and a carrier. Hence eight days between the claim and the start of processing it. When in late 1970s computer processing started to come in, this same eight days' delay was factored in. When the platform was renewed in the 1980s, and again in late 1990s, the rule was passed on. In 2012, when eligibly smart SAP consultants came in, they didn't add customer value through optimising the rules but modelled them in as they were. And that is how close to hundred years old business rule lingered in the company until removed due to alignment between the Rules and the Customer Journey. What are your own stories on ridiculous rules that hinder creating remarkable customer experiences?

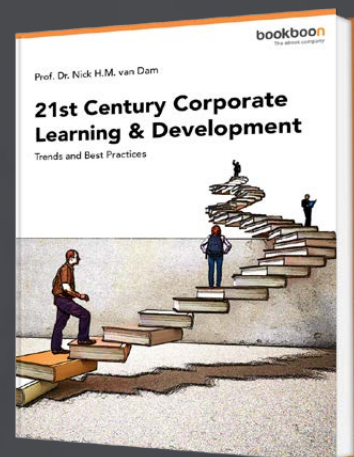
5.2 IDENTIFYING BUSINESS RULES

Identifying Business Rules have a little bit similar challenge in identifying them as Customer Interactions. What constitutes a Rule? There are various fancy methods for Business Rules mapping, which is excellent, but most of them have an inside-out view, which isn't necessarily contributing to our customer agenda. Therefore, we will map the rules from a customer perspective. For customers, the Rules are any decision points that shape the Journey. That could be a choice or set limitations. Let's discuss few examples to clarify.

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Business Rule can be a situation where a choice has to be made. Perhaps the customer can choose whether they want milk with their tea or not. Then they could decide what kind of milk they want (skimmed, semi-skimmed, and soya). These are all rules that give the customer a choice. At the same time, they also set limitations, which make sense for business and the customer. Having ten thousand different kinds of milk to choose from would be expensive for the company to deliver. It could be complicated for the customer also to choose from. So, not all rules are wrong!

When we identify Business Rules, we can ask for each Journey Step, “*What decisions, choices or limitations we have for this Step?*” Then write down each Rule on to a green sticky note. The information you should record in minimum is a short and precise title for the Rule. Later when you document the Rules, you can add more details such as more extended description.

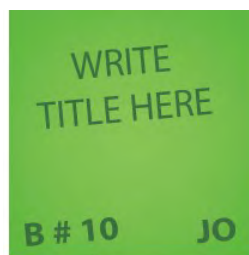
Examples of bad Business Rules stickies would be:

- Selection of coffee beans and milk depending on the weekday
- Coffee can be sold only to people who pay for it and take it away
- Price of the coffee depends on the size of the mug, type of coffee and any available discount

Why are these bad Rules? They have too many different things in one Rule. Good ones would read something like:

- Coffee beans available depends on the weekday
- Milk available depends on the day
- Coffee is given out only against payment
- Coffee is sold just as a takeaway

It is useful to keep in mind that we don't judge or evaluate these Rules at this point, we just document them. The goal is to have each Business Rule on the map for each of the Journey Steps.

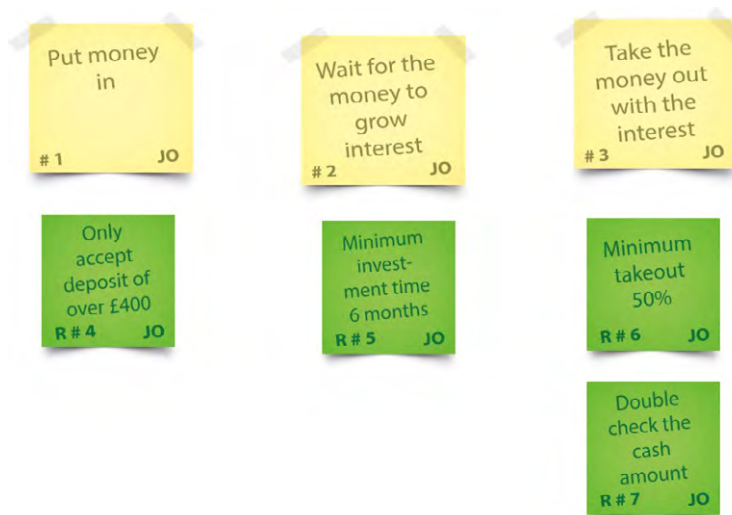


Picture 27. Example Business Rule

5.3 ALIGNING BUSINESS RULES TO CUSTOMER JOURNEY MAP

Business Rules are aligned to Customer Journey in a very similar way than other additional information for each Journey Step. Following the instructions from the previous chapter, your team can identify the Rules for each Journey Step individually. Whether you want to continue the same approach as with Journey Steps and first write the relevant Rules separately and then form the complete picture together is up to you. When making that decision, you should consider the available time whether the individual members of the team will have enough different information. Usually, this exercise is best done together.

If the organisation has already Business Rules identified, then it is possible to use that information as a basis. It will give exciting data how many of those Rules fit the Customer Journey and how many not. While mapping out the Rules one way or another, it is again important not to judge the Rules since at this part of the process we are just mapping them.



Picture 28. Journey with Business Rules

As the picture above shows, we map each Rule under specific Journey Step. This way we can see the Journey Steps that have more Rules impacting them. The previous advice is easy to apply in situations, where you are mapping around existing journey and business. If the goal is to create new journey and business around it, then the questions are a little bit different. In that case, our question would be “*What is the minimum viable set of rules we need to have in place to ensure consistent customer experience?*” This question will come handy also when we optimise existing Journey Maps.

At the end of this Business Rules mapping exercise, you should have a Customer Journey with all the relevant Business Rules identified for each step.

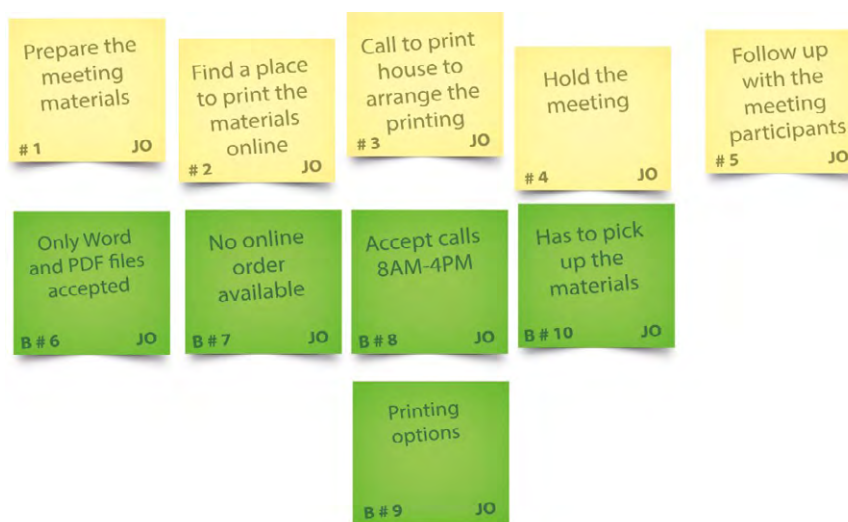
5.4 CASE WWJD: BUSINESS RULES MAP

Let's continue adding details to our WWJD Journey Map, this time with Business Rules. We'll be using the same Journey Steps as in the previous WWJD exercises. Before you look at the example answer below, map out the Business Rules to your own WWJD exercise map first.

Here are example Business Rules:

1. Preparing the meeting materials
 - R6) Only Word and PDF files accepted
2. Find a place to print the materials online
 - R7) No online order available
3. Call to print house to arrange the printing
 - R8) Accept calls 8 AM–4 PM
 - R9) Printing options
4. Hold the meeting
 - R10) Has to pick up the materials
5. Follow up with the meeting participants
 - No Business Rules

And in sticky notes format:



Picture 29. Example Journey with Breakpoints

6 DETAILS ABOUT THE JOURNEY

6.1 MAPPING SYSTEMS AND TOOLS

Adding Systems and Tools into Customer Journey Map is done in very similar fashion as other information discussed before. You can use orange sticky notes to record a title and a unique ID number for each System and Tool that are relevant to the Customer Journey.

In our context, a System means a set of principles or procedures according to which the Customer Journey is realised; it is an organised scheme or method. This can also include any Information Technology (IT). Typically, in the modern information age, each Customer Journey tends to have several relevant systems such as invoicing, booking, etc. We also include any tools, which means devices, especially ones held in hand, used to carry out a particular function along the Customer Journey. This could include for example power tools on home building or nail polisher in the beauty business.

In one real-world case, where we were mapping out a Customer Journey related to invoicing, it was identified that four different systems were used during that short journey. Using the information from the Customer Journey Map, it was clear that the company would benefit from optimising the systems. By mapping out Customer Journey, Interactions and Emotions, we can see how they relate to the systems that are used during the journey. For example, if the customer feels like they have been let down by the system, but the system or data says otherwise, who's right? A customer of course, because they have the power of making your systems obsolete (by taking their business elsewhere). The case company ended up combining two of the systems and removing one to be able to improve Touchpoints and Emotions the systems generate. The ROI (Return on Investment) for the project was around £200k roughly six months later.

Here is a simplified, example version of a Journey Map with Systems and Tools mapped on it:

- 1) Utilise the company's services
 - S4) Invoicing system
 - S5) Invoice mailing system

- 2) Pay for the services
 - S6) Payment system

- 3) Account the receipt
 - S7) Accounting system



Picture 30. Example Journey with Systems

In this real-life case example, systems S4, S6 and S7 were combined into one new system. Mapping out the different systems for each Step made it visible, how much there was extra complexity in the Journey. This was doing both, causing expenses for the company as well as degrading customer experience. As it is already evident, Systems and Tools have a strong connection not only to Customer Interactions but also to Breakpoints. Therefore, mapping out Breakpoints can improve both, Customer and Employee Journeys.

6.2 MAPPING RESOURCES AND CAPABILITIES

Resources and Capabilities are mapped in very similar fashion as other details on the Journey Map. You can use for example purple sticky notes to describe the Resources and Capabilities you want to map. Whether you need to do this at all depends on how Resource or Capability heavy your business is. Let's go briefly through, what we mean with both Resources and Capabilities in this context.

Resources are stock or supply of money, materials, staff, and other assets that can be drawn on by a person or organisation to deliver the Customer Journey efficiently. It is advisable to map Resources that are directly related to the Customer Journey. For example, in logistics business, this could mean the forklifts and pallets used to move the customer goods around.



Picture 31. Resources

The capability is an expression or an articulation of a capacity, materials and expertise an organisation needs to perform the relevant functions along the Customer Journey. For example, in consulting business, this could mean the people who perform the consulting activities as well as any unique skills they may require.



Picture 32. Capabilities

The information to record for each Resource and Capability will highly depend on the business you are in. It makes sense to register different information about forklifts than you would about consultants. However, for the sake of our purpose here, it is enough to give each recorded sticky note a clear and precise title for what it is and then document any additional information to another document. Also providing a unique ID (for example a running number) may help to connect the stickies to any further information elsewhere.

6.3 MAPPING STAKEHOLDERS

Stakeholders are any persons who have an interest in the Customer Journey or parts of it. They could be employees related to Breakpoints, customers related to Touchpoints or for example a CEO who is interested in the financial results the journey produces. Whether you want to map the Stakeholders along the journey will depend on the purpose of the map. Also how you will use that information is an essential factor. If the objective is to proactively manage stakeholders along the journey, including Stakeholder mapping will be highly useful.

The simplest way to map out the stakeholders is to choose a different colour sticky note for them. In this book, we will use magenta. Then you just add one magenta sticky note per shareholder for each Customer Journey Step. Write the title or some other identifier for each of them. It is not recommended to add names of individual people because they might leave the organisation or transfer to another journey, which would then cause need to update the map. Also, some roles may need to be involved with many Journey Steps, or even the whole journey. It is up to the team decide whether they will add only one sticky note covering all Steps or one sticky per Step. If the latter is done, when optimising the Journey, it is easier to question whether the role has to be involved in all those Steps.

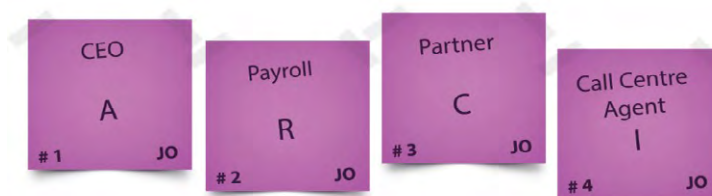


Picture 33. Stakeholders

It is possible to add more details to each Stakeholder sticky note. It could be useful to map their Emotions, for example. Using the same round green and red stickers as earlier, it is easy to indicate what each Stakeholder feels about each Step they are involved with.

Another, communication related, detail could be using the RACI method to indicate the type of communication the role has in that Step. The acronym RACI stands for the following letters:

- R – Responsible: Stakeholders who do the work to realise the Journey Step. This person or team has responsibility for getting the work done or a decision made. This Stakeholder is connected to Breakpoints and Rules related to a specific Journey Step. Typically, one person or a team.
- A – Accountable: A Stakeholder who is accountable for the correct and thorough completion of a Journey Step. This usually is one person who approves work for whoever is Responsible.
- C – Consulted: These are Stakeholders who provide information for the work related to Journey Step and with whom there is two-way communication. This can involve several people or teams, often subject matter experts.
- I – Informed: These Stakeholders are kept informed about progress and with whom there is only one-way communication. These are Stakeholders who are affected by the outcome of the work (Breakpoints, Rules, etc.), so they need to be kept up-to-date with information.



Picture 34. Stakeholders with RACI

Other variations of RACI model are:

- RSI with the 'R' standing for Responsible, 'S' standing for Sponsor and 'I' standing for Informed.
- RACIS with the 'S' standing for 'Support'.
- RACIO with the 'O' standing for 'Out of the Loop' or 'Omitted'.
- RACI-VS with the 'V' standing for 'Verify' and the 'S' for 'Signatory'.

Do choose the variation of RACI (or any other communications model you prefer to use) based on what best fits the purpose of the Customer Journey Map.

6.4 CASE WWJD: DETAIL MAP

Let's continue adding details to our WWJD Journey Map, this time with additional information we have discussed in this chapter. We'll be using the same Journey Steps as in the previous WWJD exercises. Before you look at the example answer below, map out the additional details to your own WWJD exercise map first.

Here are example details:

1. Preparing the meeting materials
 - S6) PowerPoint
 - T7) Computer and software
2. Find a place to print the materials online
 - S8) Web server
 - SH9) Web administrator
3. Call to print house to arrange the printing
 - S10) Phone system
 - SH11) Call agent
 - C12) Sales Skills
4. Hold the meeting
 - T13) Hand-out
 - C14) Presentation skills
5. Follow up with the meeting participants
 - SH15) Meeting participants

And in sticky notes format:



Picture 35. Journey with Details



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7 EMOTIONAL IMPACT OF THE JOURNEY

7.1 INTRODUCTION TO CUSTOMER EMOTIONS

When is the last time you discussed with your colleagues on how something that you are working on might make the customers feel? I would be surprised if that were anytime soon. Looking at the business world, it almost seems like emotions are banned as a discussion topic. Or maybe they just don't interest enough? It could be that most of the leaders focus so much on hard numbers and forget that people are emotional and customers will judge the company based on their emotions elicited through the journey. Why questions such as how much something costs get so much focus, while a matter of how does it make customers feel is forgotten? Some statistics show that people make their purchase decisions up to 80% based on emotions. So why most of the focus is put to that 20% then?

Emotions are a critical component of successful end-to-end Customer Journeys. Sure, they are hard to fit into KPI spreadsheets, but they can cause big problems with customers, if not appropriately managed. The most prominent benefits will come from repeat business, customer loyalty and better retention rates. This is because the emotions can either drive or destroy the value of the Customer Journey (as Colin Shaw has said). Any feelings that destroy value in the journey will take the customer further away from the organisation. Positive emotions will enable the journey to continue. Most positive emotions can turn the customer to become a promoter for the business and get others involved too.

Let's take Apple as an example. Is it really because they offer the best computers with the most affordable prices for consumers that so many buy them? If the decision were based only on logic, then this would have to be true. However, we all know that there are many PC's out there that are technically much more capable. We also know that they are more affordable. So, why buy Apple computers then? Because of emotions. It makes us feel like part of something. It gives us the feeling of purchasing "the best" though based on technical specifications that wouldn't be true. The more hard-core fan of an Apple someone is, the more emotional the decision has to be. Personally, I like Apple because their products make me feel that I won't need to do so much operating system maintenance as with Windows. Looking at the number of updates and problems related to Bootcamp and many other things that may not be logically true.

Another great example, if not one of the best, are movies. If logic would determine whether people buy movies, the only movies that would be sold are documentaries and non-fiction.

Same would go with books and music. But as we know, that is not the case. Imaginary movies, books and music sell more than well. And that is because they can make people feel many things. They elicit emotions.

Why then people try to make all the business decisions with logic when emotions impact the business anyway? Why not just admit that the feelings are part of the company and use them as one tool to create more value for customers? It may be because people are used to running companies mainly based on numbers, logic and analysis. And there's nothing wrong with that. We should use the previously mentioned approaches to using customer emotions too as one of the ways we can add value. We can't afford to step into the trap of heartless numbers only and ignore emotions completely! The world has changed too much, which is why we include Emotions mapping as part of Customer Journey. We know that successful emotional engagement with our customers will lead to better business.

A great example of this is a hotel which has a sign under the bed that says *"Yes, we clean here, too!"* Another story from that hotel shows practically, how they want to elicit emotions (and fantastic marketing stories): A young boy lost his long-time sleeping friend, a teddy bear, while on a trip to the hotel. The parents called the hotel reception to ask whether the cleaning staff has found it. Luckily it had been found. Instead of doing what most hotels would do and just mail the teddy bear back to the parents, they decided to do something different. They made a story about teddy bear's special sleepover at the hotel. They quickly created a photo album with pictures of the teddy bear relaxing by the pool, sunbathing on the beach, and heading out in a golf cart to play mini golf. Finally, the teddy bear and the photo album telling the story were sent back to the young boy. Can you imagine the number of emotions this has created? And consequently made them more loyal customers, probably they also ended up telling the story to many friends and in several books.

7.2 IDENTIFYING EMOTIONS IN A CUSTOMER JOURNEY

As discussed earlier, there are many ways to determine customer emotions from simple to very complex level. For our purpose of optimising Customer Journeys, we won't need a doctorate in psychology; much more straightforward approach will already give excellent results.

We can start by identifying both positive and negative Emotions along the Journey and name them. This will give us an Emotional map. You may ask, *"Why don't we also identify neutral Emotions?"* and you can! What we have found in our workshops is that neutral Emotions don't impact the Customer Journey as much as strong Emotions (whether positive or negative).

You are undoubtedly familiar with negativity and negative people since they are all around us. However, that is not what we are focusing here. We want to identify any negative emotions or thoughts specifically related to the journey (or a detail around the journey such as Breakpoint). These negative feelings destroy the customer value and experience. They will cause a business to lose money because the customers will stop doing business with it. Think about a situation when you were outraged because of some company and the way you were served. What happened? Why did you feel so irritated? Was it something that went wrong accidentally or perhaps something they did systematically? Let's take few examples. I was once really disappointed when I took my shirt to a dry cleaner. I got it back clean, but it was missing two buttons. Losing one would have been still manageable situation since there is one spare button sown into the shirt. But two buttons missing means I will have one button missing after replacing the other. The dry cleaners denied any responsibility. I claim it is a systematic issue, caused by their machine. They won't get any business from me anymore. By the way, did you start feeling a bit irritated by thinking about your story and reading mine? Negativity catches like a disease. Do you want it to spread within your client base?

Here is an example list of potential negative emotions the customers may go through along the journey (feel free to add more, there are hundreds of them):

Annoyed, Angry, Anxious, Ashamed, Bored, Confused, Deceived, Disappointed, Discouraged, Disgust, Drained, Embarrassed, Exhausted, Fearful, Frustration, Grief, Helpless, Hopeless, Humiliated, Impatient, Inadequate, Inferior, Insecure, Intimidated, Hate, Overwhelmed, Pressure, Rage, Rejected, Buyer's Remorse, Resentment, Trust, Uncertain, Unfulfilled, Unmotivated, Unsatisfied, Vulnerable, Worthless, Worried

Positive emotions are very different because they create value and make people happy. Enough positivity will make sure the customers give repeat business and increase their satisfaction. When the customers become positive towards your business, it leads to all the way turning into a promoter! Let's test this again. Think about a situation when a company made you feel almost euphoria. What positive emotions did you feel? Why were they so strong? How long did that feeling last? Or is it still going on? Concentrate on your story, pause the reading for a moment and dwell on the situation. How does it make you feel? I bet great again if you did it...

Here is an example list of potential positive emotions the customers may go through along the journey (feel free to add more, there are plenty of these too):

Abundant, Attractive, Awe, Comfortable, Compassion, Confident, Connected, Contentment, Ecstasy, Enthusiasm, Euphoria, Energised, Entertained, Excited, Freedom, Fulfilled,

Grateful, Happy, Harmony, Hopeful, Inspired, Interested, Joy, Love, Motivated, Optimistic, Passionate, Peaceful, Powerful, Productive, Proud, Relaxed, Safety, Satisfied, Serenity, Strong, Successful

How do you identify the emotions then? Technically speaking of having red and green round stickies with the feelings written on them. In some cases, you will find that very easy and in others difficult. We will discuss this in the next chapter.

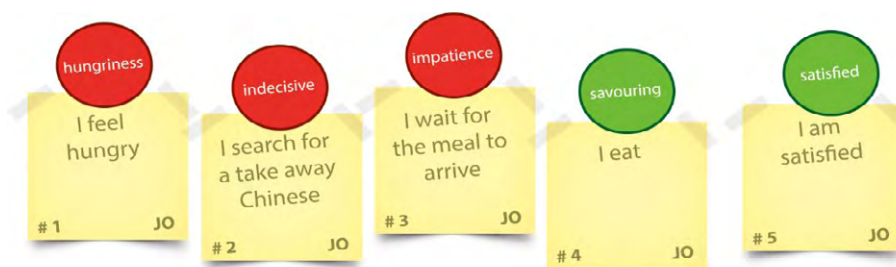
7.3 ALIGNING CUSTOMER EMOTIONS TO JOURNEY

Let's get started with the simple things. You can map the emotions same way as other information, but with one difference. This time you align each emotion to a specific detail in the customer journey. So you can attach the emotion stickies on to any Journey Step, Customer Interaction, Breakpoint, and Stakeholder and so on. You don't have to, but you can, if it makes sense. This is an excellent way of bringing emotional colour to your map. Simply take the round red and green stickies with the name of the emotion written on them and place them on to the journey and the details. You should do this as the last step of mapping so that you can then set these emotions on all aspects of the map. Start from the journey and work forward from there. At a minimum do the Journey Steps and Interactions and then rest if suitable.

For example, for Customer Journey Steps we could attach emotions like this:

1. I feel hungry: negative emotion of hungriness
2. I search for a take away Chinese: negative emotion of indecisive
3. I wait for the meal to arrive: negative emotion of impatience
4. I eat: positive emotions of savouring
5. I am satisfied: a positive emotion

And same in sticky notes format:



Picture 36. Journey with Emotions

At this point, you will notice that some of the Steps may not have any emotions related to them, and that's OK. You may also see that some Steps will have several feelings (even opposite) attached to them. That's all human life. We can be happy and cry at the same time. Or say "go away" and still feel love. That is what makes us so complicated and unique.

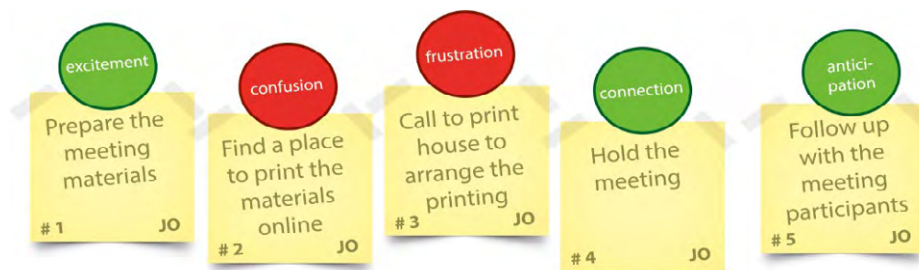
How do you find the Emotions of each Customer Interaction then? Are you just supposed to know them? We'll actually yes, sort of. Everyone involved in the mapping has to put themselves into customer shoes and try to feel the feelings the customer would. Sure it is not 100% accurate, feelings never are. But it will give you a rough Emotional map you can start working with. Which parts of the journey cause a lot of positive or negative emotions? Which won't move customers emotionally? It is all great insight. If needed ask customers to come into the mapping workshop and tell about their feelings.

7.4 CASE WWJD: EMOTIONAL MAP

Let's continue adding details to our WWJD Journey Map, this time with Customer Emotions. We'll be using the same Journey Steps as in the previous WWJD exercises. Before you look at the example answer below, map out the Emotions to your own WWJD exercise map first.

Example Customer Emotions for the WWJD case:

- Prepare the meeting materials: positive feeling of excitement
- Find a place to print the materials online: negative feeling of confusion
- Call to print house to arrange the printing: negative feeling of frustration
- Hold the meeting: positive feeling of connection
- Follow up with the meeting participants: positive feeling of anticipation Same in sticky notes format:



Picture 37. Journey with Emotions

Please, do note that some of the Steps (or any other details on the map) could potentially have several emotions. Though we could come up with a long list of potential emotions, it is best to stick with the main or most common ones.

8 FACILITATING CUSTOMER JOURNEY MAPPING WORKSHOPS

8.1 INTRODUCTION TO WORKSHOPS

Customer Journey Mapping workshops are exciting events with the purpose of capturing a Customer Journey on to a map. Though these maps are useful tools for conveying the information within the organisation, the workshops have their own meaning also. Typically, the people participating the workshops will have the best understanding of how the journey unfolds from beginning to the end. This is also why it is beneficial to have the person who will prepare the final documentation in the workshop.

Evidently, planning an excellent Customer Journey Mapping workshop is a lot of work. If you spend time thinking through the details, everyone will get the best value from the session. The workshop's goal to produce more profound understanding of a Customer Journey should be at the centre of all your planning. The workshop contains engaging and creative exercises, which will get everyone involved if facilitated correctly.

For the workshop to be successful, it needs a facilitator. Workshop facilitation is about helping the group to do the mapping. Facilitation is not really about being in charge of the session. Actually, you do not even need to be an expert in the industry or the business the mapping is done for (although it can often help). The key to excellent workshop facilitation is that the facilitator and the participants are equals, sharing the responsibility to create a great learning experience. The facilitator needs to know the Customer Journey Mapping method presented in this book like his/her own pockets. The facilitator also needs skills to help the participants to think outside the box. For this reason, the facilitator should be in the role of facilitation rather than subject matter expert.

Some success factors for Customer Journey Mapping workshop are:

- Relevant, cross-team participants
- Positive and open communication without judgement
- Creating a shared understanding of the journey
- Focus on the outcome rather than the outputs
- Commitment to improvement and action

Following the instructions presented in this book and practising will ensure Successful Customer Journey mapping workshops.

8.2 WHO SHOULD PARTICIPATE

Besides being adept at Customer Journey Mapping approach and preparing properly for the workshop, a right selection of cross-functional participants is vital to success. One side of the coin is that they represent different, relevant teams across the journey and another side is that they are right kind of participants regarding personalities. Also, no one group or department should be over-represented in the workshop by the number of people (unless that is beneficial in your unique situation).

The hardest part is to identify the relevant people to participate. It will help to think about the Customer Journey from end-to-end and all the various teams along the journey. Usually, various business units and front-line teams are easy to identify. However, we should not forget the teams who are working in the back office (doing non-customer facing work) either. They are often more educated on the Breakpoints, and Business Rules than the front-line is.

As an example, people from the following teams could be good candidates for an in-store Customer Journey mapping:

- Store Manager
- Marketing Manager
- Retail Coordinator
- HR Manager
- Finances Manager
- IT Manager
- Call-centre Manager
- Inventory Controller

The main thing is to aim to represent all the relevant teams for an end-to-end Customer Journey. The second point is to have right kind of personalities in the room. It should be a delicate balance of people who can openly voice out their thoughts, but who will let others speak also. Thinking out loud is a big part of these workshops, and people should be comfortable with it. Also, having a healthy sense of thinking outside the box, but without criticising others is essential. The final Journey map should be a consensus of knowledge and thoughts represented in the room. Workshops are not a great place for extreme behaviours such as overly silent or talkative though it is part of the facilitator's job to balance the discussions between all the participants.

8.3 AGENDA FOR THE WORKSHOP

An essential part of Customer Journey Mapping workshops to succeed is having a well-planned schedule. It is easy to get misdirected or miss the objective of the workshop, if the facilitator doesn't keep track of time and what needs to be achieved.

The agenda for a workshop will depend on various variables such as available time, number of participants and the scope of the map (bigger map takes more time). Also need to focus on some areas of the map more than others is something to consider. If the Journey Steps are already mapped, then there is more time available for Interactions mapping for example. When making a map first time for any Journey, it is best to focus on Journey Steps and Interactions before moving into other details.

One more important thing to consider with the agenda is, how familiar with Customer Journey Mapping the participants are. If they haven't read this book nor participated these workshops before, the facilitator has to get them on the same page first. This usually is achieved best by giving the instructions to participants and completing them one step at a time.

Here are some example agendas that can be modified to your needs:

1-hour lunch and learn

This is an informational session with the purpose of increasing awareness around Customer Journey Mapping. It needs to be tailored to the audience and the purpose of the session. Typically, it contains a short introduction, benefits and approach to mapping. Then it calls for action (which could be one of the other session types introduced in this chapter).

2 hours' workshop

- Welcome, introductions, objectives and agenda – 20 minutes (mins)
- Instructions for mapping customer steps – 10 mins
- Writing the journey steps individually – 10 mins
- Mapping the customer journey together – 20 mins
- Instructions for mapping customer interactions – 10 mins
- Mapping the customer interactions together – 20 mins
- Validating the journey map together – 10 mins
- Agreeing on the next actions – 10 mins
- Questions, wrap-up and conclusions – 10 mins

Naturally, you can replace both journey steps and interactions mapping in the agenda with other components to map if you already have done them.

Half-day workshop

- Welcome, introductions, objectives and agenda – 20 minutes (mins)
- Instructions for mapping customer steps – 10 mins
- Writing the journey steps individually – 10 mins
- Mapping the customer journey together – 20 mins
- Instructions for mapping customer interactions – 10 mins
- Mapping the customer interactions together – 20 mins
- Instructions for mapping customer emotions – 10 mins
- Mapping the customer emotions together – 20 mins
- Coffee break – 15 mins
- Instructions for mapping breakpoints – 10 mins
- Mapping the breakpoints together – 20 mins
- Instructions for mapping business rules – 10 mins
- Mapping the business rules together – 20 mins
- Instructions for mapping other information – 10 mins
- Mapping the other information together or in small groups – 20 mins
- Validating the journey map together – 10 mins
- Agreeing on the next actions – 10 mins
- Questions, wrap-up and conclusions – 10 mins

As you can see from the agenda, these shorter workshops require sharp focus and excellent timekeeping. Again, it is possible to focus on fewer things and give more time to map them.

Full-day workshop

- Welcome, introductions, objectives and agenda – 20 minutes (mins)
- Instructions for mapping customer steps – 15 mins
- Writing the journey steps individually – 10 mins
- Mapping the customer journey together – 30 mins
- Instructions for mapping customer interactions – 15 mins
- Mapping the customer interactions together – 40 mins
- Coffee break – 15 mins
- Instructions for mapping customer emotions – 15 mins

- Mapping the customer emotions together – 30 mins
- Instructions for mapping breakpoints – 15 mins
- Mapping the breakpoints together – 40 mins
- Lunch break – 60 mins
- Instructions for mapping business rules – 15 mins
- Mapping the business rules together – 30 mins
- Instructions for mapping other information – 20 mins
- Mapping the other information together or in small groups – 40 mins
- Coffee break – 15 mins
- Validating the journey map together – 15 mins
- Agreeing on the next actions – 15 mins
- Questions, wrap-up and conclusions – 10 mins

Typically, the full day workshop is the most optimal timescale for mapping out an end-to-end Customer Journey. It is possible to ask relevant people to come in for specific sessions only. Still, it is advisable not to change all the people in any group or you will need to do the introductions, welcome, etc. again.

2 days' educational workshosp

The longer workshops are usually highly tailored to specific needs. The most common way of using two days' workshops is to add educational information into the session. When shorter workshops are more about getting the map done, longer ones also have the adjacent purpose of knowledge sharing. The role of the facilitator would be expanded to educator also (or alternatively another trainer is brought in). These persons need to be proficient both in facilitation and training Customer Journey Mapping method.

8.4 LOGISTICS

Preparing adequately for the workshop will ensure smooth running even when some things won't go as planned. Luckily regarding logistics, Customer Journey Mapping workshops are quite light to conduct. We can divide the logistics into two categories: what you need to bring and what you need to do.

What do you need to bring?

You pretty much can guess the first one: sticky notes! We have never run out of them. Then you need proper pending like Sharpies to write on the notes. Rest will pretty much sort itself out through great facilitation. Here's a complete list of things to bring to the workshop:

- Yellow sticky notes: 1 pack per participant
- Red sticky notes: 2 packs
- Blue sticky notes: 2 packs
- Green sticky notes: 2 packs
- Purple sticky notes: 2 packs
- Orange sticky notes: 2 packs
- Pink sticky notes: 2 packs
- Magenta sticky notes: 2 packs
- Red/amber/green small dots: 2 packs
- Sharpie or equivalent pens: 1 per participant and 5 extra ones
- Flipchart papers or electromagnetic whiteboard wallpaper: 2 packs
- Adhesive tape: 1 roll



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- 1 Camera or a mobile phone with a camera
- Presentation PowerPoint for the Customer Journey Mapping process
- 1 Video projector and laptop, if electronic materials needed
- 1 hard copy with space for notes

What do you need to do?

The most important thing is to prepare for the facilitation. Make sure the facilitator is on top of the agenda, logistics and who will be in the room. Pack everything ready the day before, so you have still time to pick up anything missing. Make sure the facilitator is on time and available when a session is scheduled to start.

Other logistics

Make sure the agenda isn't entirely packed. There should be enough room for introduction in the beginning and coffee breaks in the middle. Also, lunch should be provided in full-day sessions. Make sure people have refreshments and fresh water available at all times.

8.5 PARTICIPANT INSTRUCTIONS

Preparing to participate a Customer Journey Mapping workshop can start days before the actual session. This could include gathering useful documentation and information to use in the workshop. If possible, discussing with customers about their journeys can be helpful. Also, travel arrangements, accommodation and such will take a bit of time.

These workshops are professional events, so when it comes to rules, same ones will apply as in your work normally. Usually, there is no need for many rules, but to respect others' opinions and to be open-minded. This is especially important in these workshops, because we are about to map journeys and details we are not familiar with or may not always agree with. Challenging other participants is OK, but it should be done only in constructive manner, with the purpose of creating a better map.

Participants should come prepared both mentally and physically. Having a heavy pub night or drinking the night before is not a good idea. These workshops require a lot of energy, so sleeping well and having a proper breakfast is essential. Also during the session, it is highly recommended to drink plenty of water. Some research suggests that dehydration can block brains from functioning in full capacity.

Mobile phones and computers are quite disruptive in many events today. These workshops require active participation and listening to others in order provoke own thinking. For this reason, it is best to arrange the time reserved for the workshop just for that. It will impact the level of contribution you can give if emails or calls are forcing your brains to context switching.

In general, these sessions tend to be simple, but challenging events. They mainly require high energy, positive thinking and loads of customer empathy. Don't worry about it too much, just go with the flow and the prize in mind.

8.6 SESSION RULES

This chapter is designed to help you plan your workshops. We are not in favour of any rigid approaches to running workshops. In most of the cases, you don't even have to read this specific chapter. However, if you feel like having some ground rules in place would help to run the workshop, feel free to come up with your own rules or choose some from the list here. Choose 3–5 session rules that you find most important for your target audience and communicate them before and at the beginning of the workshop.

Here is the list by Ellen Gottesdiener (Chapter 6 in *Requirements by Collaboration*, Addison-Wesley, 2002):

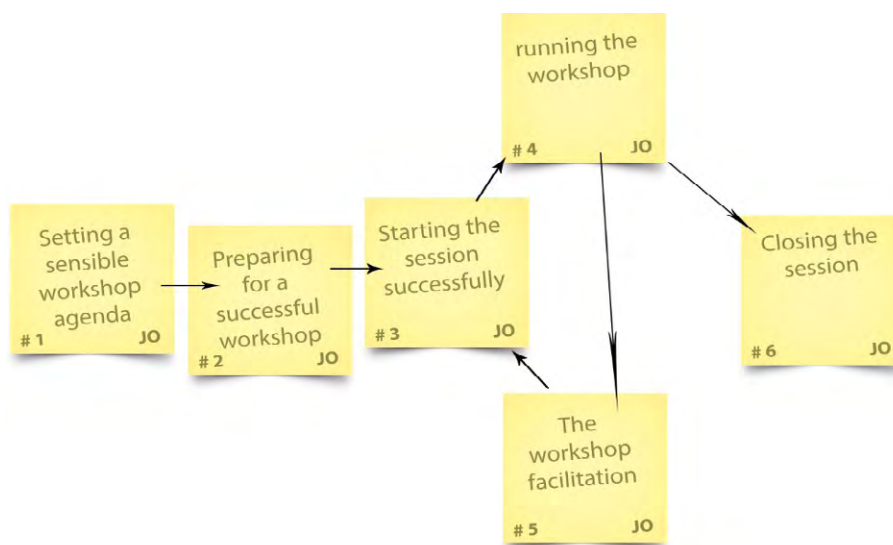
- Share all relevant information.
- Everyone's input is equally valued.
- Everyone must be on time throughout the workshop.
- Only one conversation will go on at once (unless subgroups are working on a topic).
- Respect each speaker: Don't take part in side conversations; listen and ask clarifying questions.
- Keep jargon to a minimum.
- Cut to the chase.
- The group is responsible for the deliverables.
- Signal when we are going off-track.
- Off-target discussions are limited to five minutes and then recorded as issues.
- Spend time on other issues only if the deliverables are completed, and everyone agrees there is value in addressing the issue.
- Every issue identified in the workshop will have a follow-up.
- Discussions and criticisms will focus on interests, not people.
- No idea is bad.

- All members are expected to participate in all phases of the process (if you leave the room, you are responsible for getting filled in and agree to support any group decision).
- Encourage other team members.
- Respect differences.
- Don't discount the ideas of others.
- Be supportive rather than judgmental.
- Share your experiences.
- No phone calls are allowed during the session.
- Use the parking lot for off-track topics.
- Critique or evaluate the session when asked.
- Support everyone's right to be heard.
- Keep phones and pagers in silent or vibrate mode during the session.
- Be open to new concepts and ideas.

This list is here just to give you ideas on potential session rules. Don't have too many rules, just pick the few of the most relevant ones for your target audience.

8.7 FACILITATION SECRETS AND GUIDELINES

Simply put, the success of a workshop will depend on the success of the facilitation. If you are not familiar with facilitating workshops, we recommend taking a course on it to get practice. This book will only lay out basic introduction and tips for more experienced facilitators. The process picture below will give you an idea of the main components to manage for a workshop session.



Picture 38. Process for Workshop

Sensible agenda. Plan the workshop agenda as carefully as possible, including any alternative plans necessary. If the actual timing goes quicker than planned, what additional things you can do? If you start running late, how will you catch up and avoid running over time?

Preparing for a successful workshop. This Customer Journey Mapping workshop chapter has been written for you to have the critical information for arranging successful workshops. After reading this chapter, you can get plenty more advice in facilitating workshops from YouTube, Slides are and other sources.

Starting the session successfully. Beginning of the workshop is really important because it will set the tone for the whole session as well as manage the energy level of the participants in the session. Here are some guidelines for ensuring a successful start for the Customer Journey Mapping workshop:

- Set up the venue so that everyone can take part and see each other. Ensure everyone can hear and contribute without hindrance. Check the sound levels if needed, though you should not need one anyway. These are small group sessions rather than mass events.
- Set the tone right from the moment people arrive. Welcome them friendly and help them feel comfortable. Break the ice right in the beginning by creating a casual environment.
- Have people introducing themselves. Explain who you are, what the objective of the workshop is and practical details about the venue (e.g. what to do if there is a fire, where the toilets are, where to get fresh water, etc.).
- Ask the group to set their own ground-rules for the workshop. This could include: respect others' opinions, be open-minded and one person talk at a time. You can suggest some other rules mentioned in this book too, but don't have too many rules.
- Get participants involved and interacting with each other as soon as possible. Give them a chance to relax and get to know each other in the beginning. Avoid any lengthy, formal introductions and include fun introductory activities (e.g. ask what the best customer experience they ever had is). Remind that we are here to learn from each other.

The workshop facilitation. This is the part of the process where people leading skills are needed. Success workshop will keep the participants focused on the task at hand. It will also be able to bring out all relevant information visible on the map, including tacit knowledge. The workshop facilitation will also require capturing that information for further use.

While running the workshop, the facilitator needs to be very sensitive to group dynamics. By following the advice here, it is likelier that you won't run into problems while in the workshop. And that happens through proactive group dynamics management. Most rare, but essential technique is to eliminate any dysfunctional behaviour. Sometimes this means having a short chat with someone specific during the break. Once we had to ask one person to leave in the middle of session since he took several calls while in the room.

Building a consensus is very important also. In Journey Mapping there rarely is one right answer, so it is better to find solutions that most can relate to. Finally, as mentioned a few times already, a big part of successful group dynamic is to be able to keep the energy high throughout the session. The facilitator has to be able to be sensitive to the people's energy levels at all time. The worst thing to happen would be that the facilitator runs out of energy! So make sure that the facilitator is able to add his/her own energy at any time. With right facilitators that's not a problem, they receive energy from running the workshop itself and being with the people.

Closing the session. One would think that it doesn't take much to close a workshop session. But that is one of the great facilitator secrets to be able to do that efficiently. It is an excellent opportunity for creating momentum for the next steps. Depending on the objectives and the appetite, it is possible to set up accountabilities for people. This is an excellent time to get buy-in for the upcoming change. You know that the workshop went well when people leave happy and full of enthusiasm to make things better.

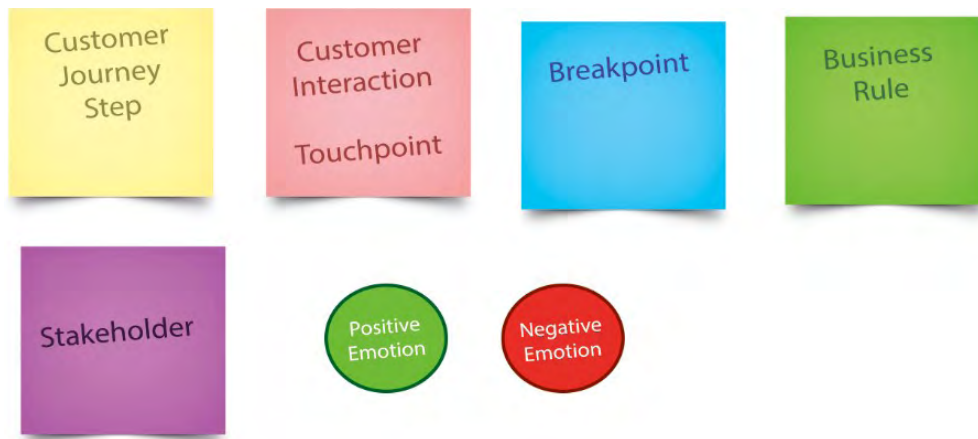
8.8 ABOUT STICKY NOTES

This may sound a bit funny, but it has to be said: the colour of the sticky notes doesn't really matter! It is only for the purpose of consistency in this book that we'll use the same colours for various things to avoid confusion. You can use any colour that you wish. For the sake of the clarity and easiness of documenting, it is highly recommended to use different colours for different matters (but you don't have to).

In this book we are using the following colours:

- Customer Journey Steps: yellow
- Customer Interactions/Moment of Truth: red
- Business Journey/Breakpoints: blue
- Business Rules and Decisions: green
- Systems and Tools: purple
- Resources and Capabilities: orange

- Emotional Journey: pink for details and red/amber/green small dots for emotion types
- Stakeholders: magenta



Picture 39. Sticky Notes

There are two kinds of sticky notes: regular and extra sticky. It is recommended to use the latter ones. Depending on the wall material you are putting the stickies up to, they may fall quickly. Therefore, it is better to use always the extra sticky notes.

Size of the sticky notes is really a matter of taste and wall space available. We tend to use bigger yellow sticky notes for the journey steps, regular size for interactions, breakpoints and rules and then smaller ones for the rest of the information. Depending on the level of details you will go for the customer emotions, you may use little dots for emotion types (positive, neutral and negative).

The wall material for the stickies to be put on is important. Some wall materials (e.g. coarse or oily) will not hold the stickies. In most of the cases, it is advisable either to cover the wall with flip chart papers or electromagnetic whiteboard paper to ensure no hindrance from falling sticky notes.

Pens that are used to write on the stickies are also important for documenting the results. It is advisable to use black marker which is thicker than an ordinary ballpoint pen but not too thick like whiteboard markers are for this purpose. When choosing the pens, take into consideration the documenting requirements and visibility of the text on the sticky notes in the workshop.

8.9 FOLLOW UP AFTER THE SESSION

The Customer Journey Mapping workshop isn't really over once it has ended. Now we have the fantastic maps done, and it is vital to keep the momentum up. There is still a way to go to change the organisational culture from here. Let's discuss from two different perspectives about the follow up after the session: the participants and the organisation.

Let's start with the participants. The first natural thing to do is to thank them for the contribution. And doesn't mean just a casual "*thanks*" for coming in, but a clear and short message on how their participation has helped the organisation to move forward with this key piece of work. Make it specific and real, showing that it wasn't just another workshop.

Next vital matter to attend is sharing the outputs with the participants. This could be just sending the raw photos or cleaning up the documentation and sharing that. Hopefully, you have already agreed in the workshop which platform and medium you will use to share the outputs amongst the team.

Then remind the participants about the next steps you agreed at the end of the workshop. Make it clear who was supposed to do what and by when. Offer help (if relevant) to hold them accountable. Remember to schedule in any new meetings you have agreed as part of the process.

Now that we have followed up the workshop participants let's also consider the broader organisation (i.e. those who weren't in the workshop). The first thing to decide is when is the right time to communicate the outputs and in what format. There is no point reporting on a workshop that was held a couple of months back. Depending on how long it will take to prepare the communications, you may need to give heads up and inform about the schedule when more will be shared.

It is essential to start with explaining the context and the purpose of the Customer Journey Mapping effort. Others might not be aware why you are doing it and what the benefits are. Explain the roadmap from mapping to taking action and your current position in it and schedule for advancing.

Then present the outputs in short and clear format. It is unlikely that you need to share all the outputs from the workshop since that might be too many details. Report on the key findings and make a simple representation of the map that a Yong can understand. You could share just the Journey Steps and mention the numbers of details underneath with relevant narrative. Remember, others might not know what Touchpoints, etc. are.

As you keep the communications for the wider organisation short, you can give access to more details for those want to understand the details also. This could be simply a link to where rest of the information is. Also, provide contact details to the person responsible for the maps and workshop so anyone interested can connect to for further discussion. If people do not have access to enough information, it may lead to rumours and sharing false information.

These instructions here are here for giving you ideas on what kind of approaches are possible for following up after a workshop session. The most important thing is to do a follow up not to disappear into oblivion after the workshop has been concluded.

9 COMMUNICATING THE RESULTS

9.1 WHEN IS A CUSTOMER JOURNEY MAP READY?

This chapter is here for ‘*Frequently Asked Questions*’ reason. People get really involved with creating the Customer Journey Maps, and they may end up having an ‘*analysis paralysis*’. As we have already discussed, the map is not the territory. It is always a subjective snapshot of something what we hope to be as close to the territory as possible. Therefore, it is only sensible to ask, ‘*how much do you need to know to know that you know enough?*’ Begin with the end in mind and the mapping exercise will come to its natural conclusion.

Another answer to this common question is that a Customer Journey Map is never really ready. It will require regular updating as the customer needs, competitive journeys, market conditions, new technology or anything else that has an impact on the journey changes. The key points are ‘*fit for purpose*’ and taking action to improve.

You can read a story about a media company later in this book, which had hundreds of journeys mapped out without any actions coming out of it. What a waste. We have done tens of consulting cases where the focus is on a specific part of a Journey and the mapping can be conducted reasonably quickly. And that takes us to a real hurdle: implementation of the future (i.e. optimised) journey. That is where the most challenges will emerge. And this might mean that the organisation needs a Journey Map, implementing the future Journey in phased stages. Such efforts can make Journey Maps highly volatile.

9.2 DOCUMENTING THE CUSTOMER JOURNEY MAP

Documenting the Customer Journey Map is an essential post-workshop activity. It enables to keep the map on top of people’s minds and to update it as the world changes. There is no single right way to document the Journey, so you need to find the way that best works for your organisation. As with everything, you need to start with the end in mind (if you are not familiar with that concept, search Simon Sinek from YouTube). How will the map be used? By whom? When? And what’s the best way to communicate the workshop results to the intended audience? Here are suggestions for various ways we have used to document our workshops for tens of organisations:

One possibility is to have a dedicated room or place for keeping the physical Journey Map available for employees to access. Upsides of this approach are that it is easier to modify the original map and it looks more “*self-made*”. This can help to make a mental connection

with the map easier and to talk around it with others (e.g. having meetings in the same room). One great example of this comes from one of our clients: they painted one wall in the company cafeteria with the blackboard wall paint and then used different coloured chalks to draw the Customer Journey map there. This caused the employees to discuss and think about the customer more often. Some other clients have dedicated walls from meeting rooms for this purpose. Some of them have hired professional graphics designers to create beautiful printouts, too.

By far the easiest and cheapest way is to take photos and share them via email. It is also the most unclear way to communicate the map. Still, I recommend taking pictures from every workshop just in case something happens to the map. In one of our workshops, the cleaning lady had cleared the wall between the two workshop days. So we started again on the second day. In another occasion, the only camera that had the photos for later documenting was broken and the photos lost. For these reasons (and a bit of paranoia), we take photos with two different cameras nowadays, just in case.

Quite a common way to document workshop outputs is to write the Journey into Microsoft Word, Excel or PowerPoint (or their better alternatives). All of them have their pros and cons. The upside is that it doesn't require any special software, but the downsides are the

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limitations set by this software. Potentially Word is most preferred when the description texts for Journey Steps, Interactions, etc. are long. However, Word won't be able to show the map properly in a visual format. Therefore, using text documents as a supplement to actual map makes more sense. Excel enables more spreadsheet type of document, which is great for categorised and calculated information related to the map. Excel could be used to present financial figures, cost estimates, etc. for each Journey Step. This can significantly aid building a business case for improving the Journey. PowerPoint is great for focusing on specific details around the Journey Steps and Information. Perhaps you will have a meeting to discuss Touchpoints, and you could use PowerPoint to guide the conversation.

Best way to present the map itself may be with a modelling or graphics designing software (such as Microsoft Visio or Adobe InDesign). In the hands of the right person, an enormous pile of sticky notes on the wall may turn in to the stunning visual presentation. And believe me, it does matter. Having a visually engaging form of the map will inspire people to use the map. Quite many people are visually oriented and can process information better through pictures (thanks for decades of watching television). Potentially you will need several versions of the map for various purposes (e.g. executive, front line, back office and detailed versions).

It is perfectly OK to improve the map over time. Use whatever you can to get started and build more Customer Journey Map assets as you go along.

9.3 SHARING THE CUSTOMER JOURNEY MAP

Sharing the Customer Journey Maps with others is pretty important. Though the process of creating the maps has value in itself, sharing the final outputs with a broader audience will help everyone in the organisation to align themselves to the customer.

Having a company-wide centralised Customer Journey Map repository is beneficial. This could be merely a folder in network drive with all the maps in it. It can also be a shared area within the company intranet. How the maps are documented may also affect the choice of sharing platform. It will be easier for broader audience to update the maps if a standard software is used compared to specialised ones. Also, it is worth the time to think about the process of updating. Can anyone update the maps or is there some kind of approval process?

Having roadshows in the organisation can help those people who have not been in the workshops to understand the maps better. This is also a great way of collecting more feedback on the maps to develop them even further. As you know well, just emailing the maps and asking for feedback will not have the same level of engagement.

9.4 KEEPING THE MAP ON TOP OF MIND

Customer Journey Mapping is not a one-off project; it is a process of continuous learning, value creation and improvement. This is why the maps should not be buried in a cupboard in the office or in the file-sharing folder on the intranet. They need to be readily available and visible to all employees. The maps need to be easily accessible in any meeting as required.

It is relatively easy to get employees excited over the new maps when they come in. But the excitement will fade away quickly. If the mapping is done as a regular exercise (to create new maps and to update the existing ones), it shouldn't be done once a year, always at the same time. This will lead mapping to be a tick-a-box exercise. Instead, the maps should be integrated as part of any planning, design and other activities that form how the organisation works. This will ensure that the maps are both used and regularly updated as they are connected to actual work.

It is best to discuss with your Customer Team, Internal Communications and Human Resources on what is the best way to keep the maps on top of mind in your unique situation. Perhaps this will include training the employees regularly on the maps. It could consist of writing blogs from cases where the maps are used to support decision-making. Some companies prefer to have the maps spread around the office walls and meeting rooms.

Keeping the maps on top of mind and embedding them into organisational culture will require active management of activities to make this happen. There should be a responsible person who drives these actions. Also, there should be a strategy on how the maps are connected to various parts of the organisation. It all takes a bit of effort but is worth it.

And one more thing to consider is how to make the Customer Journey Maps alive. There is no reason to bore the employees to death with them. Have someone capable of making the maps inspiring looking. Create explainer videos that show the journey in action. Interview customers and experts who give relevant insight into what to focus on.

9.5 UPDATING THE MAP

Any map is a snapshot of a current situation. The nature of Customer Journey Maps is such that it is impossible to keep the map always updated. And it is a subjective view anyway. However, conducting the mapping exercise as one-off doesn't give the best benefits either. A media broadcasting company had started a project on Customer Journey mapping two years ago. They had mapped over 400 journeys, and we're about 40% ready. They consulted us on what they should do with the project. We asked the question of how many of those

journeys were still up to date? That was around 20%. Then we asked whether any tangible action had been taken based on the maps to improve business? The answer was no. Would you recommend continuing such project? Neither did we. So, the project was closed, and a new one started. That project began by defining the purpose of the mapping exercise, the budget for taking action and an explicit action-oriented approach to change was adopted. Six months later the company had done new, less granular journey maps and generated cost savings close to £200k.

The frequency of updates on the map isn't an exact science though it is important. Updating the map every two years would be too slow in most of the journeys. Updating the map too often may be too expensive on the other hand. Also, maturity and completeness of the map affect how often it makes sense to update it. On average, updating the map once a year works quite well. Smaller updates can be made throughout the year as needed.

The organisation should have someone responsible for keeping the maps up to date. Many times collective responsibility will lead to no one taking the responsibility. That person can coordinate the efforts to arrange any necessary workshops and updates. If the organisation has a customer experience team, then that would be a natural place for the responsibility. If not, then perhaps marketing.

9.6 CASE WWJD: THE FINAL MAP

Here is the final Customer Journey Map for the WWJD case example we have been using in this book:



Picture 40. Example Journey Map

As you can see, the details for a Journey Map start to build up fairly quickly. Therefore, it is essential to define what the purpose of the map is and then to limit the details on those that are useful for achieving that purpose.

10 EVALUATING CUSTOMER JOURNEYS

10.1 FINANCIAL IMPLICATIONS

Customer Journey Map doesn't only have economic implications, but it is the core of how the organisation makes money from taking customers from a desire to an outcome. Companies spend most of their time worrying about their own internal processes when customer processes are the ones where the value produced by the company will be consumed. You don't see that amount often in yearly reports, do you? Here are some examples of financial implications Customer Journeys and Experiences are known to have:

- A 5% reduction in the customer defection rate can increase profits by 5–95% (Source: Bain & Company)
- A 50% reduction in customer base would occur if left alone over a 5-year period (Source: Bain & Company)
- It costs 6–7 times more to acquire a new customer than retain an existing one (Source: Bain & Company)
- An average company loses between 10–30% of its customers annually (Source: McKinsey)
- 55% of current marketing spend is on new customer acquisition and only 12% of ongoing marketing spend is on customer retention (Source: McKinsey)
- A customer is 4 times more likely to defect to a competitor if the problem is service related than price or product related (Source: Bain & Company)
- 68% of customers leave because they were upset with the treatment they received while speaking to customer services (Source: US Chamber of Commerce)
- The probability of selling to an existing customer is 60–70%. The possibility of selling to a new prospect is 520% (Source: Marketing Metrics)
- For every customer complaint, 26 other unhappy customers have remained silent (Source: Lee Resource)
- 96% of unhappy customers don't complain. However 91% of those will simply leave and never come back (Source: 1st Financial Training services)
- A 2% increase in customer retention has the same effect as decreasing costs by 10% (Source: Leading on the Edge of Chaos, Emmet Murphy & Mark Murphy)
- Customer profitability tends to increase over the life of a retained customer (Source: Leading on the Edge of Chaos, Emmet Murphy & Mark Murphy)

We have seen many of the matters described above be true in our client organisations, too. Many times their numbers are even more extreme than here. We can safely make the conclusion that Customer Journeys have financial implications for any business with customers.

10.2 JOURNEY EFFICIENCY

The most significant benefits from evaluating the Customer Journey efficiency comes from identifying the gaps between the customer and employee journeys. Typically, this offers both quick and big wins. The quick wins will come from fixing any immediate mismatches between the two journeys. This could mean stopping doing some unnecessary work or realigning some of the work. Big wins will come from balancing all the work between each Journey Step. Also, starting to serve previously unserved Journey Steps may generate new revenue sources.

To improve Journey Steps efficiency, you can ask questions such as:

- How can we optimise the Customer Journey Steps?
- How well aligned are customer and employee journeys?
- How can we validate the Journey Steps with real customers?
- How will we measure our performance on this Customer Journey?
- Where are the immediate quick wins to improve?
- What would change the journey to significantly better?

Second place to get journey efficiency improvements are the Customer Interactions, aka Touchpoints. There are two steps to optimising the Touchpoints. First is to eliminate as many of them as possible. Yes, you read correctly. Fewer customer Touchpoints is better. So, remove any unnecessary and non-value creating Interactions. Step two is to standardise the ones left. Don't worry, standardising Interactions does not mean that the standards are exactly same for all customers. They are more like "*golden rules*" for engagement. For example, call centre agents can discount the products they sell 15% to 20%. Customer Interaction standards can also limit options, such as offer the customer the choice of one, two or four days' delivery. As you can see, this also creates a connection between Customer Interactions and Business Rules.

To improve Touchpoint efficiency, you can ask questions such as:

- Which Touchpoints we can eliminate?
- How will we standardise the Touchpoints we can't eliminate?
- What customers need, want or value at each Touchpoint?

- How each Touchpoint is aligned with our organisational values?
- What does each interaction make the customer feel?
- What is the best way to implement each Touchpoint?
- How can we create a WOW experience with each Touchpoint?

Third place to improve is the employee journey. The simpler it is, the more efficient. We already discussed aligning the customer and employee journeys. In one telecommunications company, we were able to achieve a cost saving of £800k within four months by doing this. We mapped the Customer Journey and then aligned their process maps (i.e. employee journey) to that. It revealed several areas where there was too much work done for specific Customer Journey Steps. That work was removed, and they could save costs fairly easily (and probably quickly). If you are familiar with Lean and Six Sigma approaches, you can apply them also to the employee journey. Quicker way (and many times more efficient) is to do the same for employee journey as you would do for Touchpoints. First, eliminate as many as you can and then standardise the rest.

To improve the employee journey (Breakpoints) efficiency, you can ask questions such as:

- Which Breakpoints we can eliminate?
- How should we standardise the Breakpoints that are left?
- How can we improve the Breakpoints to give maximum value with minimum effort?
- What does each Breakpoint make the employee feel?
- What is the best way to implement each Breakpoint?

Fourth place to focus on finding efficiency is the Business Rules map. They are a little bit different compared to how we handle Touchpoint and Breakpoint efficiency. The quick win in Business Rules efficiency is to identify those Rules that are still in place, but obsolete. It is very likely that at least 20% of Rules along the Customer Journey is not needed anymore. Then you can do the same as with Touchpoints and identify the ones that can be removed (potentially causing some changes). At this point, you can also think about whether some new rules are needed for standardising the customer or employee journey on a sensible level.

After you have optimised all the previous, it is time to think about rest of the details. Use the same elimination, improvement approach we used previously. Then the final thing to consider is the Customer Emotions. Which negative emotions can be turned into positive? And what positive feelings do you want to evoke in customers?

Now you should have looked at the journey from different perspectives be able to take action to create a new Customer Journey Map, which will be much more efficient than the current one.

10.3 CHOOSING WHERE TO FOCUS

The whole point of mapping Customer Journey is to find out the key areas to focus on. This will make our discussion in this book somewhat generic regarding what to focus on specifically in your business. Still, some things deserve to be focused on regardless of the organisation, so let's go them through.

The primary focus on a Customer Journey should be around inconsistencies. One of the most common challenges with Customer Journeys is the inconsistency of the experience. Rockefeller Corporation did a research on why customers stop doing business with companies and found that almost 70% leave because they feel that the company doesn't care about them. This is a result of failure to engage customers emotionally along the journey. When working with Customer Journey Maps, we need to balance the Journey itself, Touchpoints, Breakpoints and Emotions to offer an optimal Journey. Therefore, the focus should be on aligning as well ensuring consistency across the whole end-to-end Customer Journey.

Your focus on Touchpoints should be in the outcome of the interaction. At the end of the day, the customer will behave based on one of these options: either they say (or write) something good, bad or say nothing at all about the organisation or its products (or services). Logical probability forecasts that the more exceptional Touchpoints the business delivers, the higher the chance the customer will feel great and say positive things about the organisation and its products or services. Focus on removing and improving those Touchpoints that will lead to bad comments or to none at all. This will have massive impact on your NPS (Net Promoter Score) also if you happen to use it.

There are two more key areas to focus on: Breakpoints and Emotions. Breakpoints are the source of costs for the business. Basically, the more you have Breakpoints, the more work is done to realise the Customer Journey and the more it will cost. So, it is best to focus on minimising and optimising the employee journey, i.e. Breakpoints.

Customer Emotions are the cherry on the top. Today's customers expect price, logistics, features and such matters to be on an acceptable level. This leaves the emotions to play the much bigger part than in the past. Actually, this is one of the most significant market environment changes in the past decade that has been missed by many companies. Focusing on creating a positive emotional journey, will directly impact the bottom line through customer engagement, especially repurchase and continued use of services provided by your organisation.

11 SUMMARY

This book has been divided into 2 parts. This is part 2.

11.1 SHAPING THE ORGANISATIONAL CULTURE USING JOURNEY MAPS

Organisational culture can be quite a fluffy topic. In business dictionary (www.businessdictionary.com) it has been defined as “*the values and behaviours that contribute to the unique social and psychological environment of an organisation*”. They continue, “*organisational culture includes an organisation’s expectations, experiences, philosophy, and values that hold it together, and is expressed in its self- image, inner workings, interactions with the outside world, and future expectations. It is based on shared attitudes, beliefs, customs, and written and unwritten rules that have been developed over time and are considered valid.*” This fits well with what we include in the Customer Journey Maps. Breakpoints map the internal workings, Touchpoints map the external interactions, Business Rules map the valid rules and Journey Steps map the expectations.

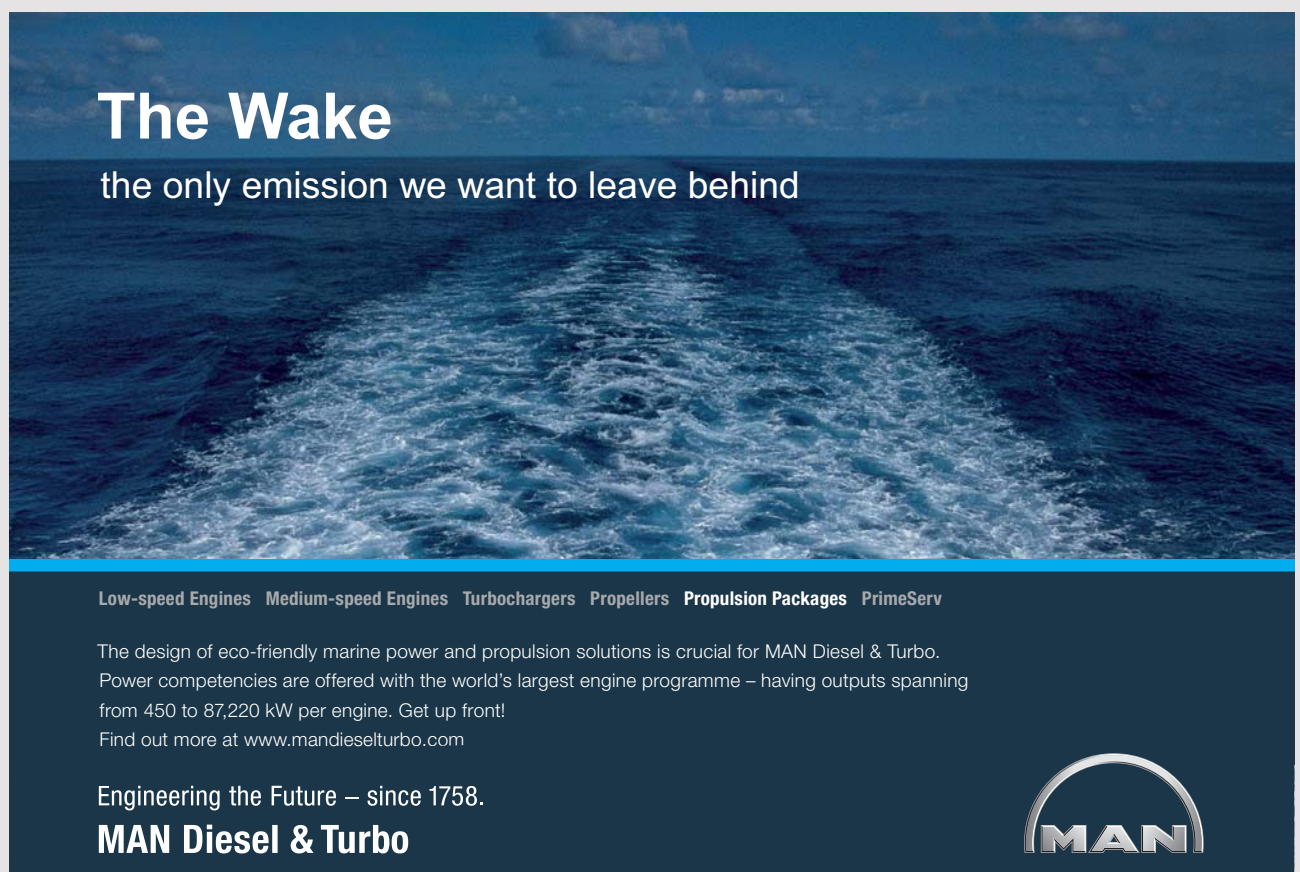
Organisational culture, brought visible by the Customer Journey Mapping, shows in many ways (adapted from the business dictionary):

- The ways the organisation conducts its business (Breakpoints), treats its employees, customers (Touchpoints) and the broader community (Stakeholders).
- The extent to which freedom is allowed in decision making (Business Rules), developing new ideas, and personal expression (Emotions).
- How power and information flow through its hierarchy (Journey Steps, Stakeholders, Breakpoints, and Touchpoints).
- How committed employees are towards common objectives (Breakpoints and Emotions).
- Shared language to discuss the customers and organisational alignment to producing value in effective way (Customer Journey Map)

Organisational culture is vital, because it impacts both productivity and performance. It is worth noticing, the corporate culture is unique for every organisation and one of the hardest things to change or copy from others. Great organisational culture is a valuable asset and competitive advantage. Since culture is what people collectively do together, we want them to think about the customer as part of their daily job. The change in collective mindset (i.e. the culture) has to become more customer-centric. Customer Journey Maps can help in doing it.

What is missing for most organisations is an “*Experience Culture*” – a culture for producing remarkable customer experiences with the products or services and the brand of the organisation. Customer Journey Mapping framework can provide a structure for defining and consistently efficiently delivering customer-centric touchpoints. The Experience Culture also emphasises understanding emotions and the importance of reaching a successful customer outcome in the most effortless way. Organisations should live for taking customers on a fantastic journey from un/recognised desire to a successful outcome.

Achieving an alignment between customers, employees and finances is vital to building a customer-centric culture. Unless all stakeholders have shared values, goals and expectations, it will show as a broken culture, inconsistent experience and silo working. Using the Customer Journey Maps regularly will impact the culture positively in long-term. People need tools such as this to make it practical. It enables them to make decisions based on the insight generated from the maps.




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11.2 TAKING ACTION TO IMPROVE

The Customer Journey Mapping method presented in this book has proven to be part of a most effective business optimising approach we have ever seen. We have been head to head with some of the best Lean Six Sigma experts in the industry and still come out of those projects as a clear winner. We have re-optimised already optimised projects with double-digit performance improvements. I don't say this to boast how great we are; I am doing it to say how effective this method can be when used to take action to improve. Though the scope of this book is mainly around the mapping itself rather than optimising the journey, we will still go through some principles that will get you started on taking action, too.

You can get started by identifying the right scope. That means selecting the customer journeys, steps and interactions with the highest value to your organisation and the customer. These could be the ones causing most negative emotions, having the highest number of Breakpoints or intuitive approach to fixing parts of the map that don't seem right.

Next focus on increasing value within the scope. Find out the ways you can identify and act upon the needs of your most valuable customers. We give you tools for this in our Customer Experience Blueprint method (available as our compliment to you at <http://udemy.com/customer-experience-blueprint>).

Then use prioritisation to get some quick wins and then big wins. Decide how to invest the resources of your organisation most efficiently, based on the insights generated by the Journey Maps. We provide you with an organised approach on this through our Customer Experience Innovation framework.

Though Customer Journey Mapping focuses on micro optimising the details in the map, having a clear vision of the bigger picture is much needed to ensure right decisions. Create and put into action a customer-centric business vision, whether this involves increasing customer value, becoming the premier provider of a particular product or service, or being perceived as number one in your industry by customers. Then design an operational strategy by optimising the Touchpoints and Breakpoints to differentiate your organisation on service and value, not just on products and price. Use every Customer Interaction to target and personalise your services. By using outcome-based segmentation, you can distinguish most valuable customers to provide more value to them. Find out what makes your customers engaged and manage that proactively.

Let's move forward. How do you take action to improve? Once you have completed mapping the existing state of the customer journey, ask these two critical questions for each detail (sticky note) on the map:

1. How can we remove this?
2. If we can't remove this, how can we improve it?

Write down all the answers and then use that information to create a future state Journey Map. Once you have that Journey Map approved, create a project plan to change the organisation from the current state to the future state. It really is as simple as that! But I am not saying it is easy... Sounds too simple to work? The results may surprise you.

11.3 YOUR JOURNEY MAP TO CUSTOMER SUCCESS

We are coming closer to the end of this book on making highly efficient Customer Journey Maps. As you have already learned, Customer Journeys touch all areas of business and require more than just a few sticky notes on the wall. Here are main steps for your macro journey on to customer success.

1. Start by defining target customers and understanding their needs across each step from a desire to outcome. Recognise their unique journeys as they interact with your company. Start by focusing on the most important ones for the customer.
2. Map Customer Journeys and Touchpoints and use them to identify and remove Breakpoints and barriers to customer progression. Learn how customers feel about interacting with your organisation by mapping out the emotions along the journey.
3. Align your systems and tools, data and processes with Customer Journeys, and leverage them to support successful customer outcomes across all channels.
4. Use the Voice of Customer as a way to improve the business. Do that by listening to customers regularly, acting on what you learn proactively and incorporating insights into decision-making that leads to action.
5. Engage executives, management and employees in making customer-centricity real by consistently communicating the importance of customer experience to all stakeholders. Become a customer-driven organisation instead of the shareholder.
6. Measure and improve organisational performance by using customer-focused KPIs, such as quality of customer experience
7. Engage employees. Incorporate employee ideas, feedback and insights into the on-going process of customer experience design and delivery.

The Final Conclusion

The journey to true customer-centricity isn't an easy one, and not all organisations achieve it. You will need to put conscious effort into developing critical new sets of organisational capabilities, like Customer Journey Mapping, to help understand how you interact with and serve your customers. Today is the right time to get started!

12 AUTHOR'S RECOMMENDED RESOURCES

Customer Experience Blueprint online training at
<http://udemy.com/customer-experience-blueprint>

Extreme Trust: Honesty as a Competitive Advantage (Penguin, 2012)

Touchpoint Power! Get & Keep More Customers, Touchpoint by Touchpoint – Foreword
by Peppers & Rogers by Hank Brigman

CRM, Managing Customer Relationships: A Strategic Perspective (Wiley, 2nd edition, 2011)



13 ABOUT THE AUTHOR



Dr Ohtonen has delivered dozens of challenging customer experience change programs, with double-digit performance enhancement in many of them. He holds a PhD and has contributed to a number of scientific research papers including developing organisation's business process management capabilities. His approaches are acknowledged as thought leadership and used in a number of organisations today. Dr Ohtonen is a regular contributor all over the world to C-level roundtables, MBA courses and international conferences as keynote speaker. He delivers expertise in Customer Experience Management, Business Process Management, principles of leadership, innovation and change.

Dr Ohtonen believes that the most dramatic changes to organisations effectivity and performance comes through an alignment of customer experience to business processes, enterprise architecture and innovation. That requires both leadership and commitment, which he is willing to offer for you.

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