

# Introduction to Customer Journey Mapping

A Definitive Guide to Customer Journey Mapping - Part 1

Dr. Janne Ohtonen



DR. JANNE OHTONEN

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# **INTRODUCTION TO CUSTOMER JOURNEY MAPPING**

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Introduction to Customer Journey Mapping:  
A Definitive Guide to Customer Journey Mapping - Part 1  
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# ABSTRACT

Customer Journeys are the modern version of customer processes. They describe how customers will travel from a desire to an outcome. If you want to put the customer at the heart of your business, ensuring long-term success, Customer Journey Mapping is something you will have to do to get there. This book gives you one of the best methods in Customer Experience Management industry to do that. And the advice in this book will not just “*get you there*”, it will place you right in the top against the competition doing Journey Mapping.

In case you want to increase financial success of your organisation by growing revenues, the world-class approach presented in this book will give you a robust method for identifying missed revenue opportunities. Companies using this approach have seen revenue increases of 20-80% in just a few months.

Lastly, if you want to decrease costs or increase profitability, the optimisation technique presented at the end of this book can do that for you efficiently. The worst result we have received using this method has been around 20% optimisation against the current base, but typically we have seen cost effectiveness improving anything between 20–80%. The elegance of this approach is that you can choose how much effort you put into it and therefore get out from it. This makes it easy to balance the right level of return on investment.

This book is a recommended reading for anyone dealing with customer experiences or business processes. It is also suitable for those who want to learn how to optimise business using customer-centric techniques. Here are some of the benefits the Customer Journey Mapping can bring to your organisation:

- Finding new revenue opportunities
- Optimising work based on customer-centric approach
- Minimising waste in processes
- Improving customer experience and satisfaction
- Identifying the areas that are most important for customer (critical drivers for business)
- Decreasing customer churn
- Enhancing customer metrics, such as Net Promoter Score and Customer Effort Score
- Maximising customer lifetime value
- Improving employee and customer engagement

The author of this book, Dr Janne Ohtonen, is an experienced customer experience and business process management consultant, with 15 years of experience in challenging business situations. He has worked with companies like British Telecom, Pfizer, Apple, IAG Group, Avios Group Limited, RM Results, Bristol Myers-Squibb, UK Broadband, British Airways, Iberia, Vueling, Openet and Satmetrix. Dr Ohtonen has also published several books on customer-centric business process management and capabilities.

THIS BOOK HAS BEEN DIVIDED INTO TWO PARTS. THIS IS PART 1.

# DEDICATION

The author has dedicated this book to all those brave people who go across the traditional business approaches to creating something far better.

# ACKNOWLEDGEMENTS

Many business leaders had influenced and prepared a way for one of the most effective business optimisation methods presented in this book. I will share some great, relevant books for reading at the end of this book for you to enjoy also.

I want to thank my family who has supported me for decades on this road to better business methods. The information shared in this book has taken thousands of hours to trial and countless of nights away from home. Thanks to my family and friends.

Thank you for my business and life mentors who have helped me to grow not only as subject matter experts but also as a person. There are too many of you to name all, so here are few that I want to mention on this occasion in no particular order: Anthony “Tony” Robbins, John C. Maxwell, Robin Sharma, Hank Brigman, Colin Shaw, Ian Golding, Harri Kulmala, Anthony Pearmain, Mark McGregor, Forrester Research, Gartner Research, Professor Ranjay Gulati, Bain & Co, BPTrends, Richard Branson, Barbara E. Bund, Business Process Management Initiative, Jan Carlzon, Customer Process One Council, Dr. William Edwards Deming, Peter Drucker, Tony Hsieh, Ipapi, Dr. Joseph M. Juran, Richard Normann, Merriam-Webster Online Dictionary, Open Group, Object Management Group, PMI, Terry Schurter and CVCI.

Thank you for Bookboon for publishing this electronic book. Final and most enormous thank you goes to my Lord and Saviour, Jesus Christ, who makes all this possible.

# WHY SHOULD YOU READ THIS BOOK?

If you want to put the customer at the heart of your business, ensuring long-term success, Customer Journey Mapping is something you will have to do. This book gives you one of the best methods out there to do that. And this advice will not just “*get you there*”, it will place you right in the top against the competition and others doing journey mapping.

If you want to increase financial success of your organisation by growing revenues, the approach presented in this book will give you a robust method for identifying missed revenue opportunities. I can't say how much exactly it will be for you, but we have seen revenue increases of 20–80% in just a few months as the case stories through the book will show.

Lastly, if you want to decrease costs or increase profitability, the optimisation technique presented in this book can help you to do that. The worst result we have received has been about 20% optimisation against the current, already optimised, base but typically we have seen cost effectiveness improving anything between 20–80%. The elegance of this approach is that you can choose how much effort you put into it and therefore get out from it. This makes it easy to balance the right level of return on investment.

Your business makes money off customers. By aligning the organisation better to customers will ensure higher relevance, loyalty and satisfaction amongst your clients. This will lead to previously described benefits in a sustainable way, not just as a fancy economic trick. This will also protect your company against market changes and economic downturn. Hopefully, these will be enough reasons to do few workshops, discuss with your people and change few things around to get such an impressive return on your invested time!

# 1 INTRODUCTION TO CUSTOMER JOURNEY MAPPING

## 1.1 THE IMPORTANCE OF JOURNEY MAPPING

Without Customer Journey Maps it will be challenging for an organisation to understand the world of the customer holistically. Without the maps, we have a lot of preconceptions about the customers and what they want to achieve. The gut feeling may or may not be right, but who knows? Once we have the maps on the wall (or in some electronic system), at least we have one agreed model of the customer world. However, it is essential to keep in mind that the map is not the territory, as they say in NLP (Neuro-linguistic Programming). In other words, no matter how great Map we have, it will always have some degree of disconnection to reality. For this reason, it is essential to be specific on what we are mapping, for who and why. Customer Journey Mapping is not a one-off project, but a continuous process is seeking a deeper understanding of implementing Successful Customer Outcomes.

Choosing the right target customer group being mapped is vital because one size will not fit all. Journey Maps are customer group (or segment) specific, and that is why one organisation very likely will end up having many maps. This emphasises the importance of an organised approach to Customer Journey Mapping. Many times, corporations treat their customers as if they were all the same. Customer specific Journey Maps will show the individual differences and the gaps business has in serving them. This creates a vast opportunity for finding missed revenue and areas of optimisation (from a customer perspective).

Here are some of the benefits the Customer Journey Maps can bring along:

- Finding new revenue opportunities
- Optimising work based on customer-centric approach
- Minimising waste in processes
- Improving customer experience and satisfaction
- Identifying the areas that are most important for customer (critical drivers for business)
- Decreasing customer churn
- Enhancing customer metrics, such as Net Promoter Score and Customer Effort Score
- Maximising customer lifetime value
- Improving employee and customer engagement

To bring these benefits to life, here is a story from one of our consulting assignments. We once met a soon-to-be-ex CEO of an IT services company. The company had grown dramatically in the past ten years from 20 people to over 250 with close to the 10-fold revenue increase. Such results would make any CEO proud of his accomplishments, right? Now the board wanted the growth to continue, and the company could not find ways to achieve those goals with existing approaches. They already dominated the slowly growing core market, and there were no more easy wins available. The CEO faced making a decision: whether to continue the same way as before or to transform. He chose to keep the same way since it had worked well for them so far. What he missed was the market situation change. We did a market analysis from a customer perspective and reported back to him that the company will start to decline in the next 6-12 months because they were offering sub-standard customer experience and the market was saturated. We were let go as consultants for that company since the proposal to focus on customers didn't make sense for the CEO. Three months later the declining started and was at a good speed within six months. The CEO was fired nine months later from our engagement. We were hired back by the new CEO, and the Customer Journey Mapping exercise started soon after, leading to a renewed 3-year customer-centric business strategy. The company turned around about 18 months later from the initial presentation to the new CEO. All this time was a missed opportunity and lost revenue for the company, because of lack of customer-centric culture and proper framework for Customer Experience Management. Going back to Peter Drucker (1973), *“there is only one valid definition of business purpose: to create a customer. It is the customer who determines what a business is. It is the customer alone whose willingness to pay for a good, or a service converts economic resources into wealth, things into goods. The customer is the foundation of a business and keeps it in existence.”* How's your business doing on that currently?

Customer Journey Maps are essential from financial, strategic, operational and psychological perspectives. By aligning the business to Customer Journeys, it enables the organisation to identify missed revenue opportunities. By understanding the outcomes and processes customers go through, the organisation can make better strategic decisions on where to focus. As the previous case example of the car factory highlighted, it is one thing to receive operational efficiency through business optimisation and another through customer alignment. Customer Journeys also contribute to various psychological aspects of business such as employee empathy. For many, their work feels meaningless and part of a bigger machinery. Journey Maps can be used to show the significance of any particular work in the grand scheme of things for the customer.

Without aligned Customer Journey Maps, the organisation will not stand a chance of becoming customer-centric. Though that being said, the Maps themselves won't do much good. It is the process of creating those Maps as well as how they are used afterwards. We will discuss later in this book from different organisational perspectives, how the maps can specifically be used by various business functions.

## 1.2 CUSTOMER JOURNEY MAP VS. OTHER BUSINESS MAPS

As in navigation, there are various mapping methods available in the business world, too. Usefulness of these multiple Maps will highly depend on the *'fit for purpose'* as well as what the company wants to achieve with the Maps. As you wouldn't use a roadmap to navigate on the sea, the same way we have to use the appropriate Maps in the business. For example, if you want to improve your IT infrastructure, you may want to use architecture and system maps. We will discuss in this book mainly those Maps that are most relevant from Customer Journey perspective.

As discussed earlier, business process maps are one of the most common and useful maps; an organisation may already have. It is good to notice that they may not be called such in the business though. They may be called workflow descriptions or quality manuals, for instance. These are maps that give details on how something should be done in an organisation. What many times gets missed is that customer experiences are born from the way the things are done in an organisation. This creates a link between the business processes and customer experiences. Still, the emphasis on these maps is different. Usually, the customer is not included in the process map at all, or they are described with fewer details. And that's OK, process maps are for improving internal work arrangements and fit well for that purpose. When organisations align business process maps with Customer Journey Maps, they become a powerful combination of understanding both internal and external perspectives of the business.

Stakeholder mapping is a quite common business activity also. A stakeholder map contains information on who are the relevant stakeholders for various aspects of the business. Even though these Maps may capture some of the interaction between the organisation and the customer, it is not as detailed as a Customer Interaction map would be. It is relatively easy to align a stakeholder map to Journey Map if the stakeholder map has already been aligned with existing processes. What stakeholder mapping can add to Journey Mapping is a deeper understanding of which stakeholders connect to specific Journey Steps.

Extending our view on maps, the good old Kaplan's Balanced Score Card (BCD), is a map of one sort. It measures the business from various perspectives. However, it rarely includes metrics from genuinely customer-centric view. Usually, it weighs the internal work from a 360-degree angle and customer view from 0-degree. What we can do, is to use the Customer Journey Map to define the key metrics from a customer perspective and to make it a genuinely Balanced Score Card from both, Inside-Out and Outside-In perspectives.

Another commonly used map, sometimes called a calendar, is a Communications Map. It shows what messages, campaigns, etc. go out to the customers and when. What is surprising is that they are rarely aligned with Customer Journey, asking “*what would the customer like to receive at this stage of the journey?*” Instead, companies focus on the traditional question of “*what should we push out and when?*” Yes, this might be a little-oversimplified description of what usually happens when communication calendars are planned, but surely it is easy to see the value of aligning customer communications to their Journeys through this example?

The purpose of this chapter was to give few simple ideas to show, how Customer Journey Mapping can be complementary and valuable alongside with any other business maps your organisation may have. The goal should be to use any available or necessary maps to increase understanding of how to create more value.

### 1.3 MAIN COMPONENTS OF A GREAT CUSTOMER JOURNEY MAP

In this chapter, you will learn what the main components of a great Customer Journey are. Before we discuss the actual components, it is good to think about, how a great or bad Journey Map could be defined. Isn't it something that is entirely subjective? That's true, depending on how you look at things. Luckily in a business context, we have already some borderlines, which can be used to narrow the definition of ‘*greatness*’ for Journey Maps. These could be things such as company values, objectives and strategies. It is worth the effort to assess, how they could affect the Journey Mapping initiative and requirements for it. Another angle is to think about the ‘*fit for purpose*’. What is it that you want to achieve with the Journey Map? The practical aspect is something to consider also: there is no point in making a map just for the sake of having it (this should not be a ‘*tick the box*’ exercise). The map should have some practical impact on the business and how it is conducted. An excellent Customer Journey Map gives insight that isn't available before. Also, it should be used to improve the way the business serves its customers dramatically.

Let's familiarise us with main components of an excellent Customer Journey Map:

- Customer Journey Steps
- Customer Interactions
- Breakpoints, a.k.a. Employee Journey
- Business Rules and Decisions
- Systems and Tools
- Resources and Capabilities
- Stakeholders
- Emotional Journey

Each of the components is introduced in more details in the following sub-chapters. The greatness of any Customer Journey Map should be determined in the light of its fit for purpose for the organisation. Also, being able to take action based on the map to improve the business should be considered highly valuable. Customer Journey Map must contain at least Journey Steps to be called a Customer Journey Map. Other components in the map should all be aligned to the Journey Steps. Now, let's discuss all these elements shortly in more detail.

### 1.3.1 CUSTOMER JOURNEY

Let's start with Customer Journey Steps, which are the most critical components of a map. The steps define the details of an end-to-end Journey the customer takes to achieve the desired outcome. One of the most common questions around this topic is about the right level of details for a Customer Journey Map. This comes back to the previously discussed matter of what you are using the map for. What you need to ask is "*How much do we need to know, to know that we know enough?*", as someone once said. Any level of detail on the map have different uses for them. Higher level maps are useful for strategic work and lower level for more specific process and system work. We will discuss universal – and customer particular – level maps more in detail later in this book.

### 1.3.2 CUSTOMER INTERACTIONS

Customer Interactions are the second most important component for a map. Well, that being said, it again depends on what you want to use the map for. Still, assuming your goal to be an overall improvement of Customer Experiences, Customer Interactions, also called touchpoints or Moments of Truth, are essential. They describe all the interactions your organisation has with customers at any Customer Journey Step. Customer Experience is the total sum of all the interactions your company has with a customer. That makes all these touchpoints very important. Example of a touchpoint could be a person browsing a website. Or customer reading a brochure or using a product. We will later go into details of identifying and mapping Customer Interactions.

### 1.3.3 EMPLOYEE JOURNEYS

Breakpoints, or Employee Journeys, are the other side of a “*touchpoint coin*” (coins have two sides in them, same applies to journeys we are about to map). Breakpoints are all the internal handovers done in the organisation. This is where most of the mistakes affecting Customer Journey origin. It is also where the magic customer sees comes from. That depends on how well, consistently and reliably those internal handovers happen (or not). Hence the name Breakpoint. Examples of Breakpoints could be Mary asking John to take a cup of coffee to a customer’s table. Maybe John remembers to do it or perhaps not. It could also be a database administrator updating customer records. Or a boss asking an employee to do something.

### 1.3.4 BUSINESS RULES AND DECISIONS

Business Rules and Decisions are a part of Customer Journey that affects its course consistently. To think of it, it is almost funny how many rules companies have that people are not even aware of. Some of them may be formally expressed, some not. It is crucial to know where these Business Rules origin from and whether they are still valid. Would it be too harsh to estimate that many of the Business Rules in your company are unknown, outdated or obsolete, also? Based on my empirical experience with many businesses, there is a good chance for that, at least. Example of a Business Rule is a situation where the customer has to pay an extra charge for using a credit card. Another example is when a customer is required to provide the company with three different proofs of address. The secret with Business Rules is not to evaluate whether they make sense for the business, but for the customer.

### 1.3.5 SYSTEMS AND TOOLS

Systems and tools are an essential part of delivering customer experiences as part of a journey. If the employees have the right and efficient IT systems as well as tools available, it makes it easier to serve the customer. How many times has someone told you that they would love to help you, but they can’t because of the systems? That is an example of a situation, where the Systems and Tools have not been aligned with Journey and the successful customer outcomes. Systems and Tools shape the journey through enabling and limiting what the organisation can do for the customer. To be more exact, it is the way these systems have been designed and implemented that limits us. This could also be through having underinvested in upgrading and improving these tools over time.

An excellent Customer Journey Map takes any relevant Systems and Tools into consideration. They can be mapped to each Journey Step and used to evaluate whether the current systems and tools are sufficient for ensuring smooth Customer Journeys. As an example, how many times have you visited a coffee shop that accepts only cash? It is very likely that they have not invested in appropriate systems to be able to take card payments.

### **1.3.6 RESOURCES AND CAPABILITIES**

You can map other resources and capabilities as part of the Customer Journey Map as it makes sense for your business. Highly specialised firms may especially benefit from mapping the critical resources. Examples of this kind of Resources or Capabilities could be social skills for handymen entering customer premises (their behaviour at the site is part of the journey as well as one crucial touchpoint).

Also, mapping stakeholders can be useful for businesses where there is an extensive cross-departmental cooperation required to serve customer journeys. This will bring visible any potential gaps in collaboration and communication both internally and externally.

### **1.3.7 EMOTIONAL JOURNEY**

Customer Emotions are typically a less talked about a component in the Journey Maps. Still, they are one of the most important ones too (besides touchpoints). We people are emotional beings. We continuously have various feelings guiding us. Every Customer Journey evokes some emotions whether we wanted or not. Even not having any particular feelings in some situation is a feeling (replacing some other feeling the customer could have at that time with indifference). Why this is important for the Journey Mapping is because we want to understand and evoke desired Emotions instead of random ones. For example, Starbucks wants to make you feel like home when you go in. Apple invokes creative and significance feelings in their customers. Avios can give you a feeling of earning a holiday while doing everyday shopping. All these emotions are essential for the customers along their journey to reach the desired outcome.

## 1.4 BENEFITS OF JOURNEY MAPPING

One of the most significant questions to ask before getting down to Customer Journey Mapping is that what benefits it can offer. As always in business, the effort has to bring forward positive return on the investment. It is a shame that most of the real benefits of Journey Mapping are hard to put into everyday financial terms. However, this doesn't mean that there wouldn't be many.

For example, how much is it worth for your company to be relevant for customers? Or what financial value can you claim on new, innovative revenue sources that are waiting to be found? Or cost efficiency that stems out from optimising the business from a customer perspective, instead of traditional cost efficiency? What's the price tag on the garment of shared culture amongst all employees? Or understanding of the meaning of one's work about the successful customer outcomes?

### **It Is Priceless!**

Don't take me wrong. This isn't a perfect excuse for some fluffy mapping exercise. On the contrary. You should already know, or at least have some idea of, how the Customer Journey Mapping will shape the company when you start it. I have written it before and will say it many times again, mapping for the sake of mapping is useless. But mapping to understand the customer better, aligning the business to market and innovating is very useful.

Here are some examples of what is going on in the world currently regarding Customer Journeys and Experiences:

- Close to 80% of companies plan on dedicating significantly more or somewhat more effort to improve their experience. (Source: Temkin Group)
- Over 60% of customers switched service providers due to poor customer experiences. (Source: Accenture)
- Close to 90% of customers would pay more for a better customer experience, but only 1% of them feel that organisations consistently meet their expectations. (Source: Forbes)

Benefits of Customer Journey Mapping are highly context dependent. What you will get out from it will depend on what you put into it and what you want to get out of it. Some of the typical benefits include:

- Shaping the company culture to more customer-centric.
- Improving customer service and experience.
- Standardising the language used in the organisation.
- Finding the common denomination for all the departments in the business.
- Aligning customer metrics to journey, making them more relevant.

Customer Journey Mapping is not the panacea for Customer Experience Management, but it indeed is one of the leading components to be successful at it. We will discuss the benefits of Customer Journey mapping in more detail from specific departments' view in the next sub-chapters.

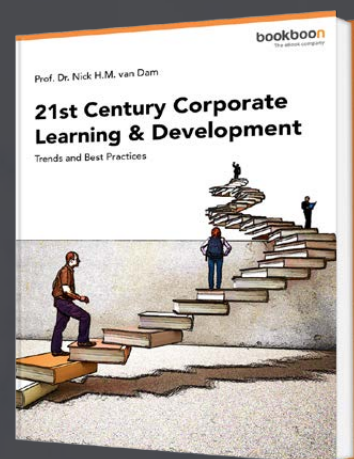
#### 1.4.1 FOR FRONTLINE STAFF

There are plenty of benefits for front-line employees to be engaged with the Customer Journey. Let's discuss two of them in more detail: understanding the end-to-end Customer Journey (and the related outcomes) and the Next Problem Prevention (NPP). These both are contributing to proactive, long-term customer value, but they are rarely considered from this angle. That is mainly due to most companies being more organisation- than customer-

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centric. Since you are reading this book that is already a great show of desire to become customer-centric and therefore successful!

Let's start with the understanding of the end-to-end Customer Journey and the related outcomes. When working with customers, it is beneficial to know how that specific Journey Step relates to the whole Journey. It puts the Customer Interaction into the right perspective. Maybe the current Interaction is just a small thing, a hygiene factor, or perhaps it is one of the most critical parts of the Journey. Being aware of this helps to handle the situations appropriately. To ensure remarkable Customer Experience, the front line staff should know how this part of the Journey impacts the desired outcome. This makes both, the work and the customer, feel more meaningful. The employee is not just a cog in the corporate wheel anymore. For example, a customer wants to look affluent and comes into a clothing store. Sure, we'll sell them fancy clothes, but we could also offer hairdressing and other services (e.g. through our partners). This way we are serving the customer outcome more holistically by addressing the desire to look more affluent beyond what we do as our core business only.

The second significant benefit for frontline staff from the Customer Journey Mapping is the Next Problem Prevention (NPP). This means that we can anticipate some potential challenges the customer may face next and work to prevent those proactively. As an example, a customer wants to communicate better and increase their availability. As a solution, she decides to acquire a new unlimited calls SIM card for her iPhone. She goes into a telecommunications online store and orders the new mobile subscription. It will come through the mail in the next couple of days. The Next Problem Prevention based on the Customer Journey could look something like this: assuming that she is only switching the SIM card and not the phone, we could ask whether she has that small pin to eject the old SIM out or whether we should include a new one. Or to make the journey even more straightforward, we could just add it to the package. Otherwise, we may run into a service call from her asking how to switch the SIM. This is just a simple example, but hopefully gives you ideas on how the NPP works in principle along the customer journey. The Next Problem Prevention could also be turned into Next Opportunity Creation and offer adjacent value that would be highly relevant to the customer. Building on the previous example this could be for instance adding an offer for a new phone cover.

#### **1.4.2 FOR BUSINESS OPERATIONS**

Business operations refer to all those people who work in the organisation to produce value for the customers. There are several benefits for business operations to be gained through Customer Journey Mapping. They are not only around understanding customers better, but also around optimising the work from customer view.

Let's start with the customer understanding. It is surprising how much of a workforce may be disconnected from the customer. Many employees are not in direct contact with the customers and therefore feel like customers do not matter as much as the internal dealings do. This is dangerous for the business especially if this happens at the top management! The late Nokia mobile phone manufacturer is an excellent example of such. They had the technologically best mobile phone in the world, but it wasn't relevant for the customers and therefore ended up being bought by Microsoft and later closed down. When Apple came to market with its first iPhone, which was technically much more inferior, they still overtook the market because they had understood the customer outcomes way better (thus being relevant). This shows that you may have the best processes and products in the world, but you still can go out of the business by not being aligned with customer outcomes properly.

Customer Journey Mapping can give business operations both the reason and the way. While conducting hundreds of Customer Experience Innovation workshops, we have noticed that organisations tend to be operations heavy on some parts of the journey and light or non-existent on others. While this may make sense in some cases, it is more desirable to have consistent delivery of all journey steps. This makes some of the traditional management views obsolete that claim the company should identify its core business and get rid of everything else. For example, a car, service business would do just that and would not wash cars. However, this view isn't valid anymore (if it ever was). Today customers value more holistic value chains that can address their needs with one-stop solution. Of course, there are still some customers who have price as the primary motivator and are willing to tolerate higher effort. And this is a good reason to align operational efficiency to customer outcomes; ensuring both great price and relevance.

Aligning business processes into Customer Journeys will show which parts of the journey are under or over-served, where the opportunities for revenue and profitability growth are and where the true cost-effectiveness is hidden. We will discuss later in this book how this can be done. In one case example, we were able to generate close to £800k for one of our customers in just four months. This was possible through mapping out the Customer Journey and aligning the internal processes to it. Looking at that map, it was evident that there was a long piece of the process, which was unnecessary from customer value perspective. By removing that work, the Customer Journey became faster and saved around £70k per month in costs. No one even noticed that this piece of the process was removed since it didn't contribute to anything. How many redundant processes do you reckon your organisation has?

### 1.4.3 FOR SUPPORT FUNCTIONS

One of the most common misconceptions is that the back office, or support functions, don't have much to do with customers. Let's make it clear: customer experiences are everyone's job! Even though the support functions might not be in direct touch with the customers every day, what they do impacts the customer indirectly anyhow. As an example, you wouldn't think a cleaning lady has much to do with the customers in a software programming team, would you? As it once happened, one of the teammates accidentally tipped over his coffee mug. He did his best cleaning the table, trying to save some sticky notes from the previous planning session. Later an evening came, and the cleaning lady (could have been a man too as far as I know) did her work. Next morning the programmer returned to work, and to his amazement, the table was spotless clean... Including all the sticky notes from the day before. He relentlessly searched all the rubbish bins and contacted the cleaning company. But it was too late. The bins had gone out to be collected and were probably at the local landfill already. So the programmer had to spend a great deal of time to speak to various stakeholders to reconstruct the plan.

The previous real-life example may be a bit extreme, but it does highlight the point. Underestimating the importance of support functions' contribution to Customer Journey is not a good idea. It may make sense to go through the Customer Journey Maps with them to do discuss, which parts of the journey they have the most impact on and where they could help even more. We will come back to this later in this book while discussing taking action based on the Journey Maps.

### 1.4.4 FOR FINANCES

Finances and business planning should be well connected to end-to-end Customer Journeys. Being aligned with customers may alleviate many challenges related to budgeting, financial year planning, invoicing, and debt collection and so on. Also understanding the economic linkage between any potential suppliers (or subcontractors) and the customer will help to optimise resources.

Companies are great at creating rules, and many of them come from the financial processes. Therefore, it is usually a good idea to include people from the financial department especially into Business Rules mapping exercise, which will be discussed later. We once consulted a small private hospital chain with six hospitals in their invoicing process. It didn't take long to the Customer Journey and Business Rules mapping exercises to see that the Rules were not aligned with the optimal Customer Experience.

The existing processes were imposing too many restrictions that caused not only high customer dissatisfaction but financial loss for the company, too. After aligning the Rules to Customer Journey and streamlining the invoicing process, they saved over £200k in costs for the first year. Also, customer satisfaction increased since the financial operations were better aligned to their needs.

Third exciting point for financial departments is to use the Journey Maps to identify any missed revenue and profitability opportunities. Many times economic processes are designed around cost optimisation, and it gives a new view into financial planning to be able to work on the possibilities also. As an example, improving customer satisfaction requires the organisation to make an investment. It is possible to calculate the cost of that investment as well as the ROI (Return on Investment). This aids in making the decision based on financial outcomes for the business.

#### 1.4.5 FOR HUMAN RESOURCES

Human resources are in critical position for a company to succeed in its endeavours to improve Customer Experiences. As today many enterprises provide human-to-human services (and even all the products are at the end provided by humans one way or another), the organisation needs the right kind of employees. Customer Journey Maps can give information on what kind skills, personalities, etc. are necessary along the Journey to provide customers more value.

As we all know, HR usually deals with matters such as job descriptions, recruitment, training, employee evaluation, remuneration and promoting. Often, these activities are done from the organisational perspective rather than a customer. The challenge in that it will make the gap between the desired workforce behaviour (and skills) and the customers bigger. If HR were to complete the previous actions from a more customer-centric angle, then they would steer the organisation in the right direction by what they do. HR should ask for every decision they make, how does it impact the Customer Journey and especially successful customer outcomes.

One commonly used term is an '*internal customer*'. We do not support using that term, because it may easily misdirect the HR people to think that the employees are customers. Unless the employees pay for the company (usually it is another way around), also HR should save the term '*customer*' for paying customers and use the word employees or equivalent instead. Though the good side of that '*internal customer*' term is the previously described idea of HR enabling employees to serve the actual customers.

### 1.4.6 FOR INFORMATION TECHNOLOGY DEPARTMENT

One of the most significant gaps between the customers and the organisation are many times created by the information technology (IT). This shows painfully often as various limitations and bugs (or features as Microsoft calls them). Don't take me wrong; this is not an attempt to accuse IT people of lousy work. Quite often they won't have any connection to customers. Typically, business departments translate the customer needs into business cases, which are then converted into software implementation. No wonder what the customer wanted initially and received eventually are so far from each other?

I can still remember an IT project where the team was forbidden to speak to the customer. All communication had to go through the appointed internal project manager only. There were many situations where the software was shown to the customer, and it was “*all wrong*” according to the customer. It leads the project to run over the original budget four times. The project manager was replaced several times, but the process not. Finally, the customer was so frustrated that they took the company to court. Two years later the project was given to another firm. They started using an agile project management approach and made the project ready in six months. They placed the whole IT team on customer premises to make sure there is unhindered communication between all the relevant stakeholders. Also continuous delivery of parts of the software for review ensured that the customer received the value they wanted.

What does this have to do with the Customer Journey Maps? Think about all the gaps the traditional waterfall software development leaves compared to agile approach:

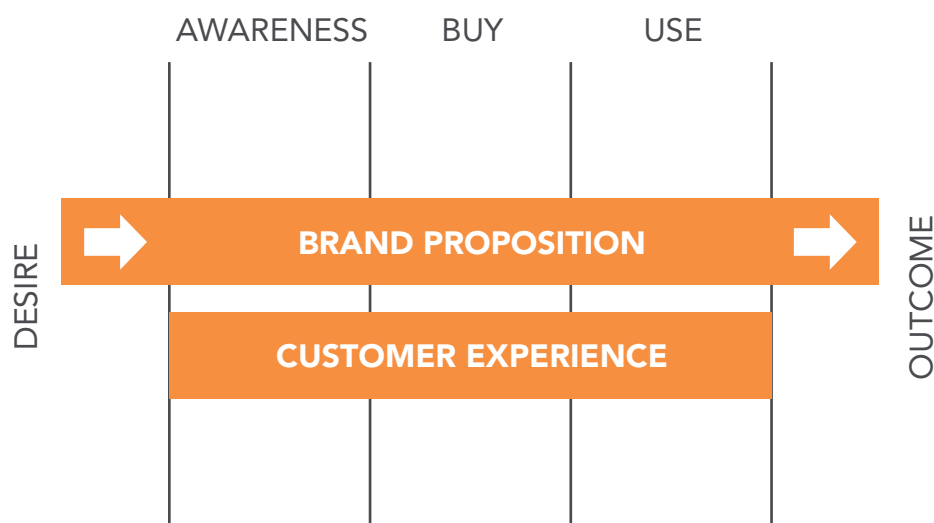
- Disconnection between the implementation team and the customer
- Big software bundles, which are hard to test and improve
- Inflexibility of change process
- Difficulties in forecasting progress

By connecting the information technology people and the customer outcomes, they had to produce what was relevant to the customer. This made the Customer Journey smoother and increased the success of the project. It only makes sense when you align the Customer Journey Steps to Breakpoints and see how the two support each other.

### 1.4.7 FOR MARKETING

The connection between marketing and Customer Journeys seems like quite self-evident. Still, it is relatively rare that marketing departments use the Customer Journey Maps to understand more in-depth, how they could add value. In the old world, which is 10 or more years back, people weren't so severely saturated by various messages as they are today. How many days do you feel like you are receiving too many emails? How many times do you pay attention to all the posters and billboards all over the city? I would suspect, not often. This is why marketing is losing its meaning in the traditional sense. Luckily, Customer Journey Maps can come to the rescue (at least partly)!

What if we turned the whole purpose of marketing upside down? It wouldn't be any more about pushing messages out, but it would be a meaningful way of having valuable conversations with the customers. This kind of approach would add so much value for customers that instead of trying to deflect your messages, they would be craving for them. To get to that position, your marketing would need to be highly relevant to the target audience. It would need to give something that is asked for and needed. This is where the Journey Maps can shed some light in to.



**Picture 1.** Brand Proposition

One key role for the brand proposition is to manage expectations of the customers. We can assume that either the customers already have a desire for some specific outcome or we can use appropriate marketing to create one (unrecognised desire). Think groceries vs the latest Apple iPad. Everyone has a constant craving for food (with the outcome of staying alive), but one wouldn't buy the newest iPad unless there was some desire, either born from the environment or aroused by marketing (e.g. authors to be able to write a book while commuting to the office). Still, not everyone would buy an iPad, so it has to be somehow relevant to the customer's desires, needs or outcomes.

Customer Journey Mapping sets a different purpose for marketing throughout the journey. At the beginning of the journey, it may be more about motivation (why do I desire the outcome?), awareness (what can I do?) and commitment (which will I choose?). Later it becomes more about learning and understanding the outcome. Then adoption and using, potentially also service. At the end of the life cycle matters like disposal of the product or ending the service contract may become more relevant. Marketing can add value throughout this journey by aligning itself with appropriate Journey Steps as the life cycle evolves for the customer personally. This makes the company more relevant for the customers, too.

The most prominent benefits of Customer Journey Mapping for marketing are:

- More relevant messages
- Better personalisation
- Increased timeliness
- Higher value for Customers
- Alignment to customer outcomes
- Efficient utilisation of marketing budget
- More precise targeting

#### **1.4.8 FOR SUPPLIERS AND PARTNERS**

The further we go from the customers in the value creation chain, the harder it gets to produce the desired outcomes. This is probably one reason why so many companies use Service Level Agreements (SLA). They try to ensure that the whole process from the external suppliers and partners is aligned with final customer outcome. Journey Maps will help to take this approach further than just SLA's. If the supplier understands their role better in the customer ecosystem, they can make more informed decisions on how to add more value. You can also make contractual demands for the suppliers or partners, which can address specific Customer Journey Steps.

Suppliers and partners can expand your value chain in many ways. As an example, Uber (the world's biggest taxi company) doesn't own any cars. It is all taken care of the Uber partner drivers. Another great example in the UK is the Vitality health insurance. They have partnered with Starbucks for coffee rewards and Cineworld for movies. If you exercise enough, record your progress with activity tracker and sync with your mobile, you can get free coffee and movie every week. That is not only a great example of Customer Experience Gamification but also about understanding the end-to-end Customer Journey and enriching it with partners. Who could your organisation partner with to create such an innovative customer propositions?

## 1.5 SUMMARY

You can map all the various Customer Journey Map components following the instructions presented in this book. That will give you an aligned, holistic Customer Journey Map. Another option is replacing the Breakpoints, Business Rules, Systems and Tools with a more traditional process map (e.g. using BPMN modelling notation). There are several ways to go about it. If the organisation already had process maps, then it is a matter of aligning them to the Journey Map. Another option is to do the Customer Journey and process maps separately and then combine later. The best approach depends on what maps the organisation already has, what is the goal for the mapping exercise and what is the nature of the business. We will discuss different maps in more detail later in this book.



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## 2 INTRODUCING CASE WWJD – WAVING WATCHMEN JOINING DESIGNERS

### 2.1 AN INTERVIEW WITH CHIEF OPERATING OFFICER

*“I am the Chief Operating Officer (COO) for WWJD, and my job is to run the operations of this company. The past five years have been a tough time for us due to the business downturn and decreasing need for traditional printing services. Our revenues have dropped to such an extent; we have not been profitable for the past couple of years. If our decline continues, it is likely that we will be out of business in the next 18 months.*

*We have hundreds of physical branches in cities both in USA and Europe, typically in demographics of cities where more than 40,000 people reside within a 15-mile radius. We pride ourselves on the quality of our work and the service we give our customers – after all customers are our lifeblood – without them, we would be nowhere. People can easily find us on the Internet, and we also advertise in local papers. Typically, they contact us by telephone and specify the print work they require, and we discuss a range of production options and binders, so they get a great end product. They email us the document they wish to have printed, and then they come and collect the finished product. We offer a number of turnaround options ranging from Gold-level, which is 1-hour order to PICK UP to Bronze-level, which is three days and cheaper pricing accordingly.*

*Our main offering currently consists mainly of following services:*

- Printing*
- Binding*
- Finishing*
- Direct Mail*
- Shipping*
- Packing*

*We are now so customer-centric that we also offer a delivery service to their work address although in reality this is rarely taken up as it adds quite a bit to the cost. The problem is people are spending less, because of the recession. New competitors have emerged who are undercutting our prices so we have absolutely no opportunity to increase rates or otherwise we simply won't get the business. I can't see the revenues rising in the current financial climate, so I need to reduce my costs by at least 25% to remain in business.”*

## 2.2 CUSTOMER STORY

Meet Peter Jones. He is a 43-years old businessman. He is a Business Development Director for a company that sells highly complex engine parts for wind turbines. Due to nature of his business, Peter has to explain what their products are and how they help wind turbine manufacturers to save money. He uses a wide variety of visual aids when he meets potential customers, and these materials are regularly updated to reflect the latest knowledge in the industry.

This time Peter is about to attend a small roundtable discussion in a city far away from his office base. This meeting is vital for Peter because it enables him to influence some key opinion leaders in this industry. He wants to make the materials he will use personal, which means that Peter needs to update some of the hand-outs he will give and can't use the ones that were ready-made in the office. He decides to make 13 copies of his presentation with personalised front cover for each participant. He wants them to look pristine, which glossy paper and proper bounding. The situation gets even more complicated when he receives new research insights the day before the presentation, and they are such remarkable findings that he needs to update the hand-out immediately. It does not leave him enough time to get the handouts printed in the place he usually uses.

He searches online for companies that could help him and finds WWJD. He gives a ring to them, and he is let known that they won't be able to do it on the same day. He is directed to call the closest branch to the place where Peter will do his presentation the next day. Peter contacts the other store and the friendly staff from WWJD give their email address for Peter to send the materials in to. They also promise to have them ready and waiting for Peter the next morning so he can go and pick them up.

The following day Peter wakes up early to be on time to pick up the new hand-outs from the WWJD branch. He travels in time to be waiting behind the door to pick up the materials when the store opens. After 15 minutes of waiting at the store, they finally open up in the morning. It was a shame that this branch wasn't one of the many 24-hour outlets WWJD has. Anyway, Peter receives his materials and is happy with them. He pays the documents with his credit card and will claim it back later in company expenses.

Peter jumps back to his rental car that he picked up from the airport in the morning and drives quickly to the event venue. He places the materials on the table and makes himself ready for the soon to start roundtable discussion. The day goes well, the new research insights are received well, and Peter makes excellent contact for future talks with the key opinion leaders. Despite the busy morning, Peter does his job well and makes it home later in the evening.

# 3 END-TO-END CUSTOMER JOURNEY MAPPING

## 3.1 DECIDING WHOSE JOURNEY IS MAPPED OUT

The first thing to do is to define whose Customer Journey we are going to map out. This is the starting point for the whole exercise. What I have to point out is that the chosen customer cannot be just anyone nor everyone. The selected customer (or group) has to be specific. When selecting the customer group, it is good to take into consideration the various aspects related to your business and customers. These are things such as:

- Are you in a niche or mass market business?
- Do you have few or many customers?
- Are your customers very different from each other or similar?
- How well are your customer segments defined?
- Do you operate in the free market or in regulated?

After you have answered the previous questions (and any other you consider necessary), it may already start to be clearer where to start and who to focus on. Using an existing customer segmentation is a great place to start from. Most of the organisations tend to have at least some level of customer grouping, regardless of its level of sophistication. Something to consider here is whether you want to only focus on the existing customer base or would it be beneficial to identify new, potential customer segments also? This could help the organisation to innovate new ways to generate revenue from novel sources.

If the organisation doesn't have an explicit customer segmentation model, then another potential source for identifying target customer groups can be a customer feedback or a Voice of Customer Programme (VoCP). Using factoring and other statistical analysis it may be possible to find logical customer groups that could form a basis for the initial segmentation.

If the organisation doesn't have any of the previous resources available, you can use so-called quick and dirty approach and do the 'Who buys?'-exercise. It is as simple as it sounds! You just ask the question "Who buys from us?" and list all the customer groups you come up with. When we have been doing this exercise with various companies, we usually do the first round individually or in small groups and then pull together the master list from everyone in the second round. This way it is a little bit less likely that some teams get forgotten. The exercise shouldn't take more than one or two hours including the prioritisation we will discuss next.

Whichever way you use to get a list of customer groups; they need to be prioritised. If you have an existing advanced segmentation model, then it is very likely that the key customers are already identified. In case such information is not available, you can use various methods for ranking customers. One quick way to initial customer prioritisation can be achieved using a defined criterion. Here are examples of matters that can be used to give ranking to customer groups: creates most profit or revenue, costs most to serve, causes most significant problems and so on. You can use a scale low, medium and high and see which group gets the most highs and start from there. Even though this is a simplistic approach, it has turned out to be better than not doing it at all. It is always possible to go back to your model and improve it as you learn more about the customers.

	PROFIT	REVENUE	COST TO SERVE	RANK
Customer Group A	MEDIUM	HIGH	LOW	2nd
Customer Group B	MEDIUM	HIGH	HIGH	1st
Customer Group C	HIGH	LOW	LOW	3rd
etc...				

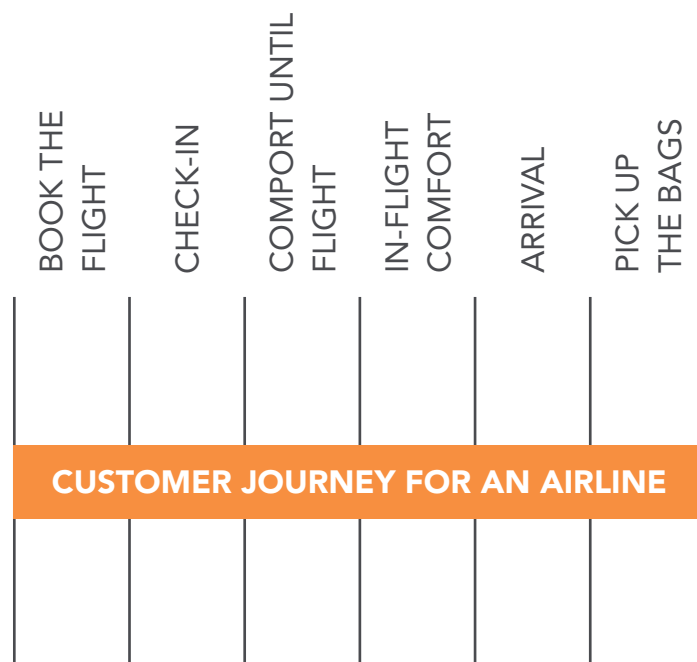
**Picture 2.** Customer Group

The ultimate goal is to map out all the journeys for all important customers and find any common denominators. Depending on the size of the organisation and complexities around the customers, this can take even several months to achieve. However, the mapping exercise shouldn't take too long, because it may go quickly out of date. One media broadcasting company had spent two years and over £400k to map close to 300 Customer Journeys. That is the merely unmanageable situation and will not bring benefits for the organisation. Like with everything, you should ask the question “*How much do I need to know to know that I know enough?*” and then maximise the results and minimise the effort.

### 3.2 UNDERSTANDING WHERE THE JOURNEY STARTS AND ENDS

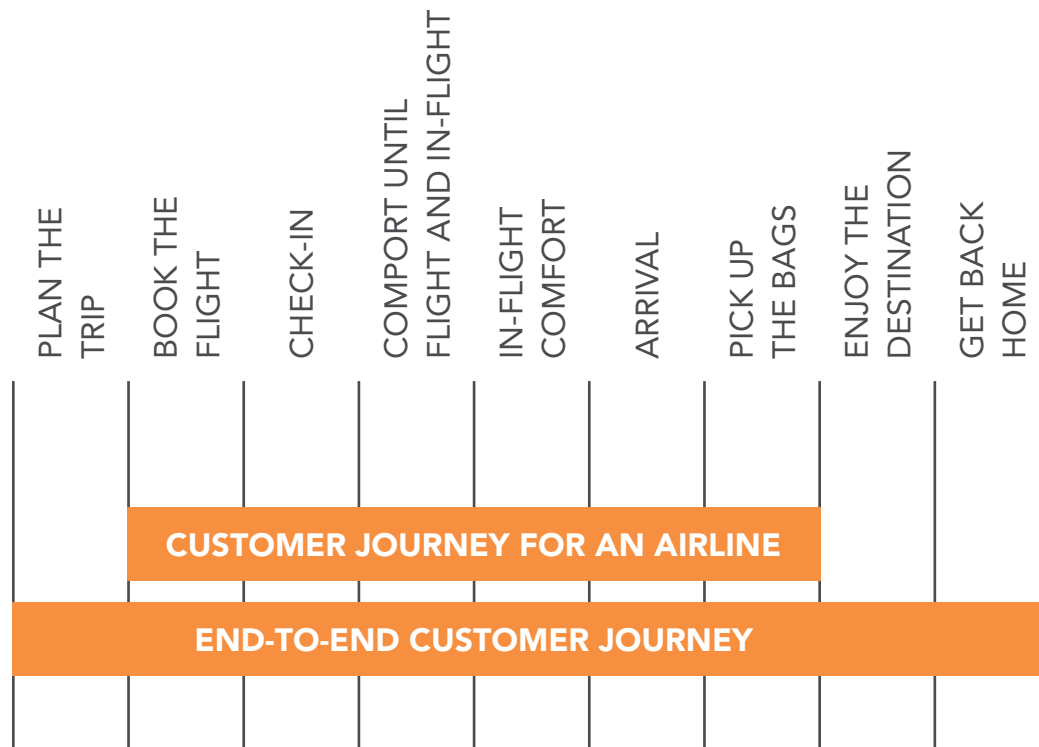
A second important piece of the ‘*Customer Journey*’ puzzle to solve is to identify, where the journey starts and ends from the customer perspective. Once we know whose journey we are mapping and what is the perimeter, we are ready for the actual mapping. It is amazing how inclined we are as people to think about the journey from our own or corporate perspective. Nine times out of 10 it takes a bit of extra effort to get the real answer to question “*Where does the journey start and end from the customer perspective?*” But don’t worry, that is perfectly normal and takes some practice. Since this is a fundamental question, let’s do one real-life example from the aviation industry.

Let’s imagine you own a traditional airline. Your core business is to move people and goods from one place to another. Now we are mapping a Customer Journey for a holidaymaker, who wants to fly to Sardinia for a beach holiday. Before reading forward, think about the answer to question “*where does the journey start and end?*” What would be a natural starting point for an airline to consider as a start for a Customer Journey? It is very likely that you thought about online booking website or such. Now, what would be the end of the journey? That’s right when the customer picks the bags at the airport. It could look something like this:



**Picture 3.** Customer Journey for an Airline

Now, is this a real end-to-end Customer Journey? Let's see. Put the metaphorical customer shoes on your feet and ask the question "*where does the journey start and end from the customer perspective?*" Is it still the same answer as above? It is not the real end-to-end Customer Journey. So, where does it start for the customer? When they begin to think about the relaxation and the holiday. And when does it end for the holidaymaker? Not when they pick you the bags, but when they are back at home with great memories from the holiday to share. For the customer the journey may look something like this:



**Picture 4.** End-to-end Customer Journey

It is a dramatically different picture. We can conclude from this real-life case example: many times the end-to-end Customer Journey is not the same for the company and the customer. And that is one of the reasons, why proper Journey Mapping framework can give so much for the business. It reveals gaps, missed opportunities and potential for cost-effectiveness improvement.

Always start and end the Journey Mapping from the customer, not company perspective. Make an informed decision, which parts of the journey the company serves and which not. It is much worse to be ignorant and miss the potential due to not knowing than to purposefully choose not to do something. Also, consider using partners for those parts of the journey that the company decides not to serve directly. Customers will prefer a one-step solution over those companies that offer an only small portion of the end-to-end journey (there are exceptions to this though surely). Now the borders of a Customer Journey Map have been defined, and we can move into filling the rest of the journey.

### 3.3 IDENTIFYING A MACRO JOURNEY

Macro Customer Journey (MCJ) is a “*big picture*” of what happens when a customer begins to convert a desire (i.e. a want or need) into an outcome (i.e. the result). That’s why the Macro Journey covers the whole end-to-end life cycle of a Customer Journey and contains the main steps along the way. It is a quite common question, how detailed the Macro Journey Map should be. There are no hard limits for that, but it is a best practice to keep the Macro Journey’s length to a maximum of 7-10 Steps. The shortest Macro Journey we have come across was described by a banker. He mapped the journey like this: “*We take money in, move it around and give it out*”. Can you spot the mistakes in that? Is that a real end-to-end Customer Journey? No. Is it detailed enough to give a clear idea of the journey from the desire to the outcome? No. It wasn’t an MCJ at all since it described what happens from the Inside-Out perspective.

What should a Macro Journey look like then? It could be mapped in linear, circular or into a combination shape. We will see some examples in the following chapters from all of these. To make things a little bit more complicated, there are different types of Customer Journeys. They can be Universal, Generic or Customer specific. Regardless of these types, usually you will have only one Macro Journey for each customer segment or group. The type merely describes the level of details and effort spent on them.

Universal Customer Journey (UCJ) has the lowest level of details and personalisation for the Journey Map. It satisfies those companies for who one size fits all or the ones who want to get started from somewhere. And yet, that’s not a good reason to dismiss it. The Steps in the Universal Journey are: desiring, understanding, considering, choosing, satisfied, engaging and promoting. The benefit of the UCJ is that it fits the most private organisations from big picture view. We will discuss this in more detail later.

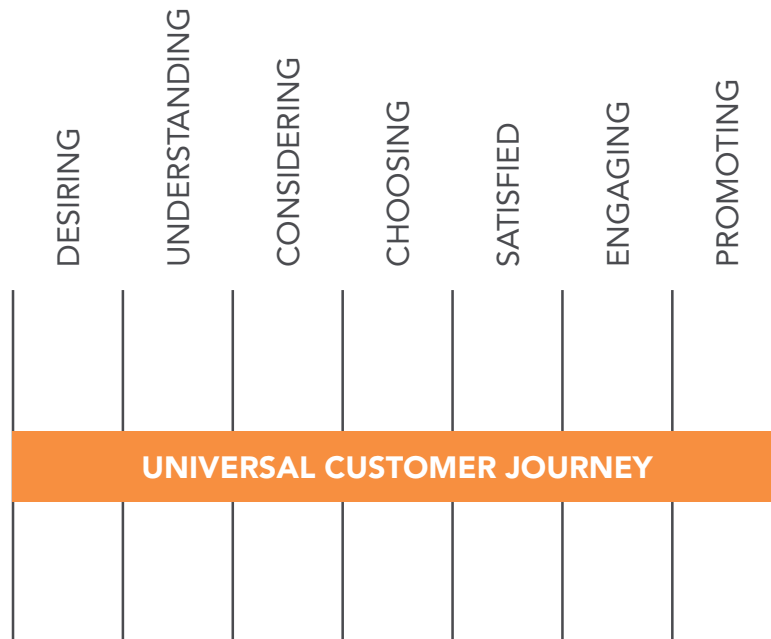
Generic Customer Journeys (GCJ) are similar to Universal one but are more specific. They span across multiple organisations and geographies within an industry. For example, for a telecommunications industry, a Generic Customer Journey could be awareness, comparison, enrolment, using, renewing. As you see, it applies to most of the customers that utilise telecommunication services regardless of their service provider. Still, this journey wouldn’t apply well to other industries, like retail.

Customer Specific Journeys (CSJ) are organisation and customer segment-specific journeys. This is the most valuable (and hardest) way of mapping Customer Journeys for an organisation. CSJ’s can be informed by the other more generic maps. In this book, we will give examples of UCJ and GCJ, but the majority of the book focuses on the Customer Specific Journeys.

Next step down in the Journey Mapping hierarchy from the Macro-level is a Micro Journey. We will discuss it in more detail later in this book.

### 3.4 UNIVERSAL CUSTOMER JOURNEYS

Universal Customer Journey (UCJ) is the most generic type of mapping. The best use of it is to have it as a starting point or as a comparison for your Customer Specific Journeys. The steps in the Universal Journey are: desiring, understanding, considering, choosing, satisfied, engaging and promoting. The picture below shows the Universal Customer Journey.



**Picture 5.** Universal Customer Journey

Let's discuss each of the steps through for more details.

#### Step 1 – Desiring

We discussed earlier where does the Customer Journey start and end. That is quite a tricky question in the Universal Journey, where we can't be specific. Still, we can come to a satisfactory answer that applies to most organisations. The journey starts for customers from desiring some outcome. This desire could be existing, new (born from inside) or discovered (suggested from the outside). The first one is a desire for an outcome that has once been new (or discovered) but hasn't progressed to next step of understanding. This could be, for example, the desire to have the feeling of freedom and the wind (i.e. to get a motorcycle or to go skydiving). It may be that the customer has had children, work or something that has prevented her/him from realising this desire. Maybe the timing is now right, and s/he starts to acquire understanding. A new desire is born from the inside. It is not much different to existing desire, except the perspective of recency (having a higher potential for moving to next step quicker).

The last type of desire is discovered, which is born from an external stimulus. Examples of ways for discovering a desire include participating in education or training, engaging in a company-developed community or social networking site, attending a special event like a holiday party or being exposed to marketing and being receptive. Desires are also born from customer needs and wants that find their way into their lives one way or another. Once a desire is born, it is time to move to step 2 and acquire understanding.

### **Step 2 – Understanding**

Understanding is key to customer decision-making because that is the time they find the necessary information to start considering what to do. Depending on the complexity of the desire, this step can be a highly dynamic phase of information gathering. Customers may interact with many touchpoints to gain the knowledge or information they seek. Today people use increasingly online search and comparison portals to do that.

### **Step 3 – Considering**

In the considering step, the customers are getting closer to decision-making. They evaluate the various options and decide whether they need to return to Universal Journey steps 1–2. They might return to desiring step if they couldn't find an opportunity that works for them. For example, the customer may not afford the motorcycle and returns to dreaming of it instead of acquiring one. Or maybe the customer feels like need to do bit more research and returns to understanding a step. Once the customer feels confident with the knowledge and thinks that they are ready to choose, then they will move to step 4, which is choosing.

### **Step 4 – Choosing**

This is the time when the customer chooses one of the options or chooses to fold altogether. Where for us as an organisation the choosing step was first chance to lose business with a customer (by not ending up on the shortlist of options), this is the second critical point for us. Customer hopefully chooses us, but they might go with someone else too.

### **Step 5 – Satisfied**

This is where the commitment has been made, and the organisation delivers its value. It is a complicated psychological process that will determine whether the customer will be satisfied. In short, it is best to describe it as the difference between the expectations and what was delivered. Dissatisfaction (or disappointment) is the gap between the expectations and the reality. One might think that this is the end of Universal Customer Journey and for many companies, it is (since they don't know better).

Customer may be satisfied, but it doesn't make them necessarily loyal or engaged. Think about a new restaurant in your local area. It will have its appeal for a while, but when the next new one opens, you'll be there to test it, and if it is better, you'll keep on going there until the next one opens up. This is why restaurants need to renew themselves periodically because customer loyalty is difficult for them to maintain.

### **Step 6 – Engaging**

As discussed in the previous step, satisfaction doesn't lead to loyalty always. Thinking about the today's world, loyalty is harder to achieve day by day. Customers go after whatever is most engaging for them. If they stay engaged, they may remain loyal (until the engagement has been lost). Organisations that engage customers well will succeed long-term. Research has proved that engaging companies see higher revenue and stock value than their disengaging competition (Watermark Consulting, 2015).

### **Step 7 – Promoting**

Promoting an organisation is the highest compliment customers can give. They think the business is so engaging that they want others to join them, too. This kind of customer advocacy may be bought for very short-term, but it has to earn for long-term benefit. Unless the organisation is engaging both the hearts (feeding the desired outcome) and the minds (best choice) of the customers, they will not acquire a significant number of promoters. From the commitment-level perspective, satisfied customers have the lowest, while promoters have the highest level of commitment to the organisation.

### 3.5 GENERIC CUSTOMER JOURNEYS

Generic Customer Journeys (GCJ) are similar to Universal ones (UCJ) but are more specific. They span across multiple organisations and geographies within an industry. They apply to most of the customers within an industry. Still, these Generic Journeys wouldn't apply well to other sectors. At least to date, there are no widely accepted Generic Journeys available from any single source. Both academia and practice are sharing various suggestions for potential Generic Journeys. These can help the organisation to start to shape journeys for their customers.

An important distinction between business process and Customer Journey Maps is that process maps are usually internal to the organisation when Journey Maps are Process Maps for customers. Sometimes organisations draft Customer Journey Maps based on their process maps that have a separate swim lane for the customer. That is not a Customer Journey Map, but more like an external view of a process map. Customer Journey Map has to stem out from the customer going from a desire to an outcome from their perspective.

Here are some examples of potential Generic Journey Maps for a couple of industries:  
Telecommunications:

- Awareness
- Comparison
- Enrolment
- Using
- Renewing

Restaurant:

- Awareness
- Access
- Having a meal
- Satisfaction
- Revisit



**Picture 6.** Examples of Generic Customer Journeys

These are just a couple of examples of Generic Customer Journeys. You can build your library of them as you practice the technique. Just choose any industries or businesses that you are interested in and use the advice from this book to map the journeys.

### 3.6 CUSTOMER SPECIFIC JOURNEYS

Customer Specific Journeys (CSJ) are the “*Rolls Royce*” of Customer Journey Mapping. They give the highest value to the organisation since they take into account various aspects related to specific customer segments. They consider customer expectations, market situation, location and many other things making the Journey Map highly relevant. Rest of this book will focus on mapping out CSJ’s through cross-departmental workshops.

Customer Specific Journey mapping focuses on the total customer experience across all the touchpoints and channels between the customer and the organisation. That is the initial desire, through choosing, satisfaction and hopefully onto service renewal or product repurchase. It maps all the elements of the Customer Journey for a specific customer segment, which includes (but is not limited to):

- Customer’s desire as a starting step
- The most critical factors from the customers’ perspective impacting engagement and advocacy
- Touchpoints along the journey
- Internal handovers and business processes affecting the journey
- Systems and tools impacting the journey
- Various customer emotions along the journey
- Successful customer outcome as the final step

Customer Specific Journey mapping should always be an organisation-wide, cross-team effort. The purpose of creating a Journey Map is to highlight the impact of all relevant departments across the organisation to customers. All employees influence the customer experience whether they know it or not. Many times, the result of their work may become visible much later steps in the journey. As an example, I had to take my car to service once. They needed to replace a part for the vehicle, and as it wasn’t a standard procedure, they had to order the part in, or at least that was the plan. We agreed on a date, and the service manager promised to order the part in. The appointment came, and I took the car in. Repairman disassembled the front part of the vehicle and noticed that the new part hadn’t been ordered. The car waited in the service pit for two days, taking one service unit out and wasting my time. This happened because the procurement had forgotten to order the part in time. These are all different functions within the same business, but they are all part of the same Customer Journey contributing to the un/successful customer outcome.

We have already discussed some benefits of Customer Journey Mapping, but let's remind us of what the Customer Specific Journey mapping may help us to do:

- Understand better the end-to-end journey of specific customer groups
- Improve efficiency both from internal and external perspectives
- Remove inconsistencies in the customer's experience
- Implement a more seamless experience across teams, departments and channels
- Redesign existing journeys or innovate new ones
- Assess the impact of internal activities on the customer's experience
- Establish improvement priorities based on customer value
- Develop cross-departmental alignment across the whole organisation

Customer Specific Journeys can be dividing Macro and Micro-levels depending on their details. Let's discuss these further next. A Macro Journey is the overall view of the end-to-end steps the customer will take from a desire to an outcome. Usually, CSJ Macro Journey isn't any longer than 7–10 steps or less. This is to keep the Macro map manageable. Also, Macro Journey Map doesn't typically contain the detailed information a Micro Journey will (such as touchpoints). Here is an example of a CSJ Macro Journey for a health insurance:



**Picture 7.** An Example Macro Customer Journey

As you can see, the map contains all the most major steps from beginning to the end. Sometimes it may take time to adjust the scope and the wording for macro journey's (because it has to be condensed information), but that is part of the learning experience a Journey Mapping exercise can provide.

### 3.7 DETERMINING A MICRO JOURNEY STEP-BY-STEP

Macro and Micro-Level Journeys are like the world map and a local map. Both have their uses, and they are not interchangeable. Macro refers to the scope of the perspective we will use: high-level end-to-end Customer Journey. Micro, on the other hand, has the detailed view, with a narrower scope about the end-to-end journey. Macro Journey is better for an overview and strategic decision-making when Micro Journey offers more value into operational improvement. From this chapter onwards, we'll go through creating a full-scale Micro Journey step by step.

A most logical place to start mapping a Micro Journey depends on the objective. If the focus is only on a particular part of the journey, hence there is not necessarily point to map out all the other steps of the Macro Journey on a Micro Map. If the objective is to understand the whole journey, then it is necessary to have all steps in the Macro Journey mapped out. In Micro Journey, each step represents one thing the customer does or thinks. For the clarity of the map, you should not have several different things in a single step.

Let's take some examples of bad Journey Steps:

- Fill in the form and mail it back to supplier
- Take the car to service and wait for it to be ready
- Board the train and find a seat to read a newspaper
- Buy and pay for the product

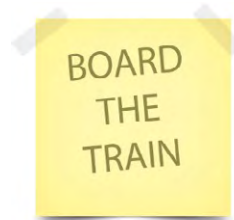
What is wrong with all of the above? They have several Steps in them, which makes it more difficult to be specific in the later Journey Mapping stages.

And some good ones:

- Fill in the form
- Mail the form back to supplier
- Board the train
- Find a seat on the train
- Pay for the product

What is great with all of the above? They are clear, precise and straightforward. Don't worry too much about the Steps when you start the mapping. We will add, remove and replace many of them before the first draft of the map will be ready. Also, the map should be updated regularly to reflect the changes in the journey and our increased understanding of it.

Now that we are on the same page regarding the scope of a Journey Step, we can describe them individually. Whether you are doing this alone or with a cross-functional team, each should have their pile of yellow sticky notes. Take enough time for everyone to write their own notes on what happens in the Customer Journey step by step. At this stage, it is most important to write one, the short and precise title of what happens in that Step.



**Picture 8.** Example Journey Step

Then move on to the next step. Write out the whole journey, one Step at a time, one step on each sticky note. It makes sense to keep these stickies in order while doing this. Once you are ready, if you have several people, you should add initials to each sticky to know who wrote it (if necessary).



**Picture 9.** Example Journey Step

If you have challenges keeping the stickies in order, you can add an order number to another corner.



**Picture 10.** Example Journey Step

At this point, everyone should have their bunch of yellow sticky notes with an end-to-end Customer Journey described. It doesn't look like a map yet, and that will be sorted in the next phase.



**Picture 11.** Example Journey Steps Sticky Notes

If you are doing this the first time, it may feel a bit awkward. That's natural and OK. Once you have done this process few times, it becomes easier. Typically, there are quite many questions around should I write this or that on the stickies. Here are some key things to consider:

- Think like the customer, not like the business.
- Include also such steps that your business doesn't deal with, remember this about the end to end micro journey from the customer's perspective.
- Don't write too long descriptions; details will be added later.
- Use clear handwriting so that others can read your stickies and they will be clear with photos also.
- There's no right or wrong if you think something should be in a sticky, put it out there.

The biggest challenge is to keep yourself in the “*customer mode*” continuously in this stage. This is all about the customer; it is called a Customer Journey Map after all. It is OK to write down things that the customer needs to do with the organisation, but even those are written from their perspective. As an example, “*bring the car to service location*” would be “*take my car to service shop*” instead. The view should represent what the customer does from their perspective.

Another common question is that should real customers be included in this exercise? The answer is yes, if possible. We need to make sure the Journey Map is a relevant and accurate snapshot of the customers' reality. Though the map will never be the territory, we want to get as close to it as possible. There are several options for including the customers, and you need to choose the best way depending on your access to customers and availability of resources. Let's discuss some of the options to do that.

Including the customer right from the start. This would mean asking some of the customers to join the mapping session. This can be great fun and very educative. Be careful choosing

customers who represent the journey you want to map well. Also, make sure they are able and willing to voice out their thoughts. The downside of this is that it requires some time from the participating customers. The upside is the immediate contribution and initial validation.

Validating the final map with customers is another option. In this case, the organisation would do the map as an internal exercise and then verify the map with the customers. The downside in this one is that if the map needs a lot of changes, you need to be able to receive that information from the customers and then update the map. It may cause several iterations of the map. The upside is that the map won't be just an internal exercise.

Depending on your needs and available resources, the most robust way may be to ask some customers to join the mapping and then validate the final map with other customers. As long as all the customers you chose are relevant for the map, the final version of it should be reliable enough to make business decisions on. As with everything, things change, so make sure to keep the map updated regularly.

### **3.8 SHAPING THE JOURNEY ON TO A MAP**

At this point, everyone participating the Journey Mapping exercise should have their pile of yellow sticky notes with individual Customer Journey Steps in them. Each sticky has a short and precise description of the Step and also potentially their initials and the order number.

What we'll do next is to start forming the actual Journey Map. The map itself could be done from left to right, top to down or in a circular shape. Since we will be adding a lot more details into the map, it is recommended to start from the left upper corner of the space you have available and then proceed to the right. At least in western countries, that is the typical way of presenting information and reading books anyway. If you are from a culture where the conventional way is to do it from right to left, feel free to do so.

If you are doing this exercise alone (e.g. to practise this method), you can just lay all the yellow stickies to the wall from left to right (or right to left), in order, in one single line. If you are doing this together with others, a count who has the most number of stickies and that person will become the chairman for this part of the exercise. The person will take one sticky at a time from his/her pile and read it out loud to others. If someone has Steps before this Step, then they need to be added first. If someone has the same Step, then our can adjust the title of the Step if necessary to accommodate that Step from both of your perspective and then laid on the wall. If someone has the same Step and you agree that the title of the step doesn't need any adjustment, then the extra sticky note can be thrown away.

For the sake of the clarity of the process flow of this mapping exercise, please have a look at the list below.

**Setting up:**

1. Count who has the most number of Customer Journey Steps
2. That person will become a chairman of this exercise
3. The chairman reads his/her first sticky note

**Process:**

1. Those who have the same sticky note can put theirs away. Those who have a sticky note before the Step that was just read, this will be added to the chairman's sticky note.
2. Once everyone agrees with the wording of the current Customer Journey Step title and previous Steps have been added, the chairman proceeds to the next Step (i.e. Sticky note). Continue with the previous step 1.

The overall objective of this part of the exercise is to make the Customer Journey visual from all the various perspectives represented in the room. The output is a compromise that should capture all the necessary Steps in the Micro Customer Journey. The final Journey Map formed of everyone's yellow stickies may look something like this:

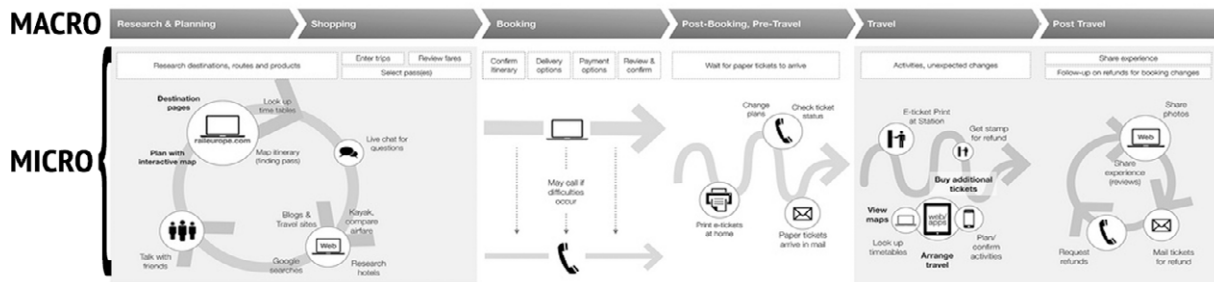


**Picture 12.** Example Journey

Once you have laid out all the stickies on the wall (or some other space), you should have an end-to-end Micro-Level Customer Specific Journey Map. Once you are at this stage, it is good to have a short break and let it stew for a moment. Once you come back from the break, have a look at the map and adjust with any new details that came to your mind. Don't worry about the map not being perfect, just make sure it is good enough so you can all agree to it. If you had some customers with you forming the map, you could decide to move forward to next stages, or you can do a validation for the journey with some other

customers. Just be careful of “analysis paralysis”, again it doesn’t have to be perfect because there will be many more chances updating the map.

Here is an example of a map with both Macro and Micro Customer Specific Journeys in their final documented form:



Picture 13. Example Macro and Micro Journeys

Once you are all happy with the map, it is time to move on to the next stage, which is the Customer Touchpoint mapping.

### 3.9 CASE WWJD: CUSTOMER JOURNEY MAP

Let’s go back to the WWJD case example, which was described in one of the previous chapters and make an example Customer Journey map for it. Remember that the example here is just one option and the final may look different when done by different people. That is normal since as discussed, no map is the territory so different people may create different representations of the journey. This is why Customer Journey mapping should be done together so that it becomes a consensus of how the group sees the journey. Before reading the map presented below, why don’t you get some yellow sticky notes and make your Customer Journey from the WWJD story? You can then compare your Journey Map to one below (and it very likely will be different; as it would be different to both your and my map if we did this together).

Example Customer Journey Steps in the WWJD case:

- Prepare the meeting materials
- Find a place to print the documents online
- Call to print house to arrange the printing
- Hold the meeting
- Follow up with the meeting participants

It is up to you what level of details you want to have on the Journey Steps. The more you have, the more you can optimise the Journey based on more information. But having too many details will make the map harder to handle. So it is about finding the right balance. Below is a picture of the journey in sticky notes format. In this journey map, the Steps are on high-level due to space restrictions of a page in a book.



**Picture 14.** Example Journey

How does your Journey Map look like for the WWJD? You can keep on building on your map as we advance in this book.

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## 4 SUMMARY

**This book has been divided into two parts for your convenience. Please, continue reading more about the method in the second part of the book.**

### 4.1 SHAPING THE ORGANISATIONAL CULTURE USING JOURNEY MAPS

Organisational culture can be quite a fluffy topic. In business dictionary ([www.businessdictionary.com](http://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 this to make it practical. It enables them to make decisions based on the insight generated from the maps.

## 4.2 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.

### **4.3 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!

## 5 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)



## 6 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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To see Part II download  
*Aligning Your Business to Customer Journeys:*  
*A Definitive Guide to Customer Journey Mapping - Part 2*