The Value of Customer Journey Mapping

and Unlocking New Approaches with Technology

White Paper

Customer Experience

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1.0 Who this paper is for:

This paper is for those wanting to understand the customer interactions that take place within their organization, the journeys these customers take, and what happens at these key interaction points with the organization. This insight can be leveraged to design improved, smoother customer journeys that ease the movement of customers from one touchpoint to the next, resulting in reduced losses of customers at each point of the journey. Readers who may find this paper of interest include, but are not limited to, Insight Teams, Marketing Directors, and Chief Customer Officers. Anyone whose role requires a deep understanding of customer behavior to drive towards a more customer-centric business may benefit from reading this paper.

1.1 What readers will gain from reading this paper:

Readers of this paper will gain an understanding of customer journey mapping, along with its metrics, and an insight into how best to implement customer journey mapping within their organization. The paper considers the application of journey maps in different sectors and explains how technology has eased the burden on effectively undertaking a customer journey mapping study. Readers will understand some of the different approaches and options open to them when considering customer journey mapping, along with the benefits such activity will bring to their organization.

2.0 What is customer journey mapping?

Customer journey mapping is a simple concept to understand but typically, in practice, requires a great deal of detailed work to execute. A customer journey map considers how a customer interacts with an organization, both online and offline, over a period of time. The map attempts to capture not only all of the interaction points but also those critical points (often referred to as 'moments of truth') where customers typically make a critical decision in terms of their overall opinion about a brand, product, or service. This opinion will determine whether they decide to buy the product or service, or repeat the purchase and recommend it to others.
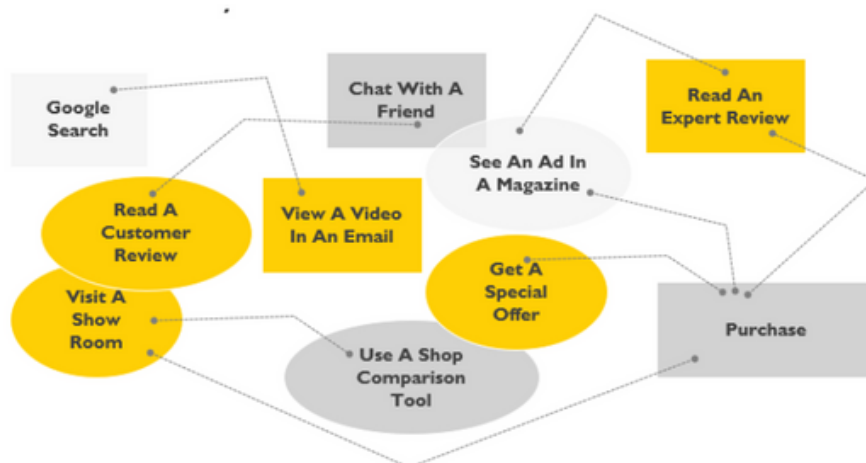
An illustrative version of how a customer journey map can look, in order to summarize and understand all possible touchpoints and channels of customer interaction.

2.1 Where does customer journey mapping start and end?

The answer to this question could be considered, in a purely academic sense to be the entire time a customer remains a customer until they lapse. For some products and services, however, this could represent many years and the ability to map the customer journey accurately over such a period might be unrealistic. A more pragmatic stance for companies selling a product or service might be to map the journey from initial awareness up until final purchase and possibly initial usage.

Taking this approach, a hotel user would be mapped from their research and purchase of a room through to their final checkout. An automobile manufacturer might wish to understand the journey of a customer from researching new cars to buy and then their journey to the point of purchase of a new vehicle.

In reality, the hotel guest's experience and interaction with the hotel brand can continue for many years after their stay. They may be part of the hotel's or brand's loyalty scheme. They may interact on social media and repeat visits. The automobile customer will have a continuing relationship with their dealer and after-market experiences following their purchase of the vehicle for many years. This might be a key factor in their decision-making for future vehicle purchases.

Finally, it is worth highlighting that not all customer journeys are linear. Some are repetitive and cyclic, for example, weekly grocery purchases, and cinema or theatre visits. Pragmatically, customer journey mapping studies usually have a time frame for completion or a particular focus that will dictate the start and finish points of the customer journey map. In addition, journey maps can vary enormously in length. The journey cycle for vehicle hire, for instance, is typically quite short, comprising of an online search and comparisons, booking, collection, usage, and return. The journey, by contrast, for a student choosing a university may potentially involve four or more years if their study experience is included as well as their selection of an institution.

2.2 How do you Map Customer Journeys?

A traditional approach to customer journey mapping often starts by running a series of workshops with experienced managers within an organization and those customers facing staff to identify the key customer interaction points. The workshop team identifies the key interaction points and considers, via customer personas, the typical feelings of customers at each of those points.

In these meetings, these question topics can help initiate discussion:

- Who are all the stakeholder and influencers involved throughout the journey?
- What are the customer interactions staff see daily?
- What are the transactional processes of the organization which impact the customer?
- What does existing customer research tell us about interaction points and customer experience?
- The questions of "What do we provide / do for customers?" and "What do customers provide / do for us?" – in terms of physical exchanges when considering each interaction point.
- How do we personalize our offer to customers' needs?

Trying to consider customers' typical emotions can also be of value in the workshop. It might be useful to think of the "customer experience" at each interaction point and then consider the types of emotions customers are likely to experience, quantified on a scale from one to ten. This can later be more accurately measured utilizing AI tools to uncover overall emotional context from unstructured comments at each touchpoint, so it is worthwhile comparing these initial workshop assumptions with reality. In addition, it is also worth trying to map how they are thinking and actually behaving separately at each touchpoint.

Core business processes can be discussed during the workshop and therefore it might prove useful to involve those in the organization who understand the detail of such processes. One should resist the trap of making the customer journey into an internal process map. It is important throughout the workshop process to not lose sight of the ultimate customer jobs or goals they are trying to achieve. It is the customer's journey we are aiming to map not the organization's process! Done correctly, such workshops will create enthusiasm and excitement within staff teams and a skilled facilitator, ideally from outside the organization with no preconceptions, can encourage more objective input.

Taking a very simple example of car hire, there are some obvious highs and lows in the experience along with key "moments of truth" where customers are so delighted (or the reverse!), they make a key decision about their purchase decision or continued usage of a product or service. It is important here to highlight those moments of truth can also consist of those things the customer expects and might not otherwise notice unless they are absent, such as the car being cleaned, properly parked, and fueled up, ready to go. For services where there is more limited opportunity to truly "delight the customer," for example, delivery services, measuring these key essential expectations within the customer journey can be equally critical.

A team of staff for the car hire company example might envisage the journey in the workshop along the following lines:

Fig.1
Car Hire Emotion Journey Map – Anticipated Customer Journey
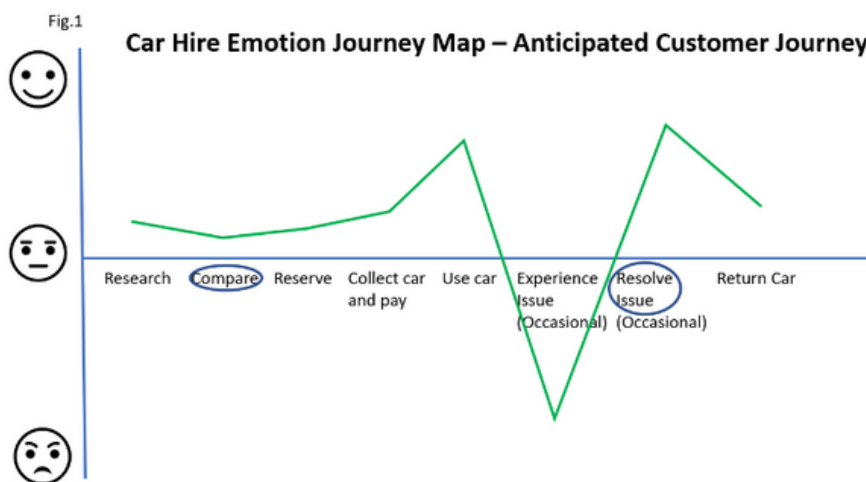
The circled areas might indicate those felt to be the critical 'moments of truth' areas where customers decide whether to use the company or continue to do so. This might be further broken down or segmented by persona to understand the different importance of different points in the journey to different people.

The car hire company, again through a workshop approach, might be able to estimate the different emotional / satisfaction journeys as:
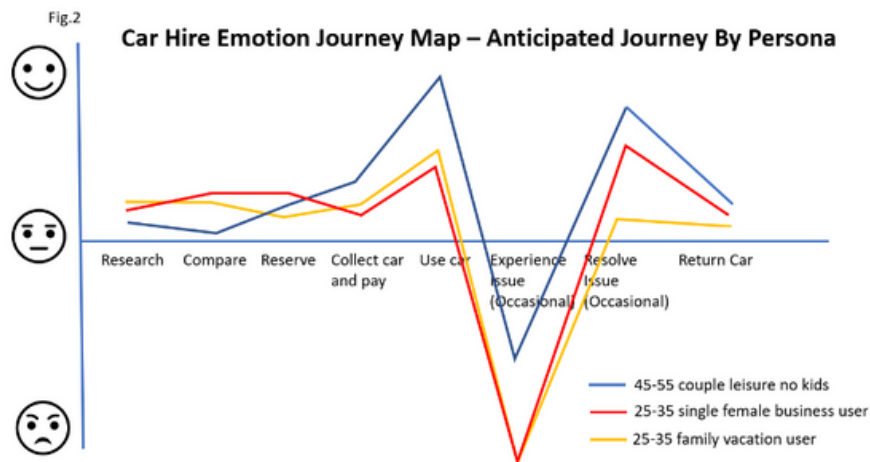
Draft customer journey maps can be shared with customers for further feedback and insight once they have been developed. Even earlier on the process it might prove fruitful to involve customers in focus groups to discuss their journeys and drill into their motivations, goals, purchasing habits and pain points. This provides the opportunity for further insight and tweaking before advancing to the stage of measuring the specific points in the journey, both online and offline, and the expense and resources required to do that effectively.
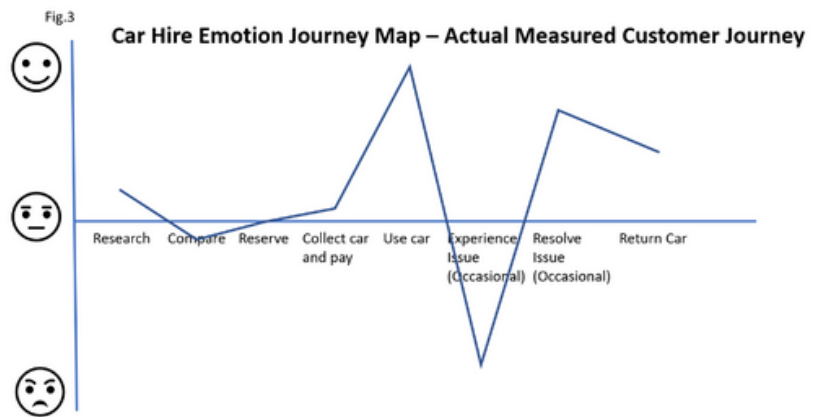
2.3 Measuring Customer Interaction Points

The next step in the journey for our car hire company would be to actually try to understand the accuracy of their hypotheses by careful measurement of satisfaction and sentiment at each feedback point. This is sometimes the stumbling block for many organizations in having the resources, tools, and ability to select appropriate customer experience (CX) metrics, KPIs, feedback, and survey mechanisms to understand the real customer journeys. Many organizations have focused on Net Promoter Score (NPS), providing an understanding of a customer's likelihood to recommend a particular service or product. NPS however lends itself to providing feedback at the end of the customer journey, at that point, they have purchased and used the product or service rather than other points and cannot be used repeatedly. Customer Satisfaction (CSAT) type metrics provide an understanding of those customers who are satisfied or extremely satisfied at any particular point. Although this can be useful, a more granular measurement at a touchpoint is sometimes more useful since there is a significant difference between customers who are mildly dissatisfied and those that are extremely dissatisfied.

For touchpoints relating to support (in our car hire example, the touchpoint of the vehicle experiencing an issue such as a breakdown or collision) Customer Effort Score (CES) helps understand the amount of effort the customer had to utilize to resolve the issue. For this type of touchpoint, CES can prove more useful than satisfaction (CSAT) scoring since customers are typically happy to allocate a relatively high score to their last interaction point with an organization that resolves their issue, but this does not capture their pain and effort for reaching the final resolution.

Once mechanisms are in place a real aggregate customer journey (as Fig3.) can be produced and again be segmented by persona as required.

Continual measurement of feedback allows the ability to track improvements in customer experience touchpoints over time. At these key interaction points, feedback mechanisms are put in place to measure the journey.

Fig.3

Car Hire Emotion Journey Map – Actual Measured Customer Journey

Research   Compare   Reserve   Collect car and pay   Use car   Experience Issue (Occasional)   Resolve Issue (Occasional)   Return Car

2.4 Limitations of the traditional approach to customer journey mapping

Customer journey mapping projects often get off to an enthusiastic start with the workshop approach. A key limitation at this stage is the internal perspective of the team. This can be offset to some degree by utilizing customer research, external moderation and even direct customer feedback on the journeys developed. There remains, however, the potential criticism that the initial map is an informed guess, rather than an actual mapping of customer journeys resulting in an aggregate view.

Having established the customer journey, moving on to develop granular insight into customer personas or behavior again can be limited in relation to the amount of data that is, or can realistically be, captured at each touchpoint. The approach proposes reviewing metrics at each touchpoint. Where CX metrics already exist in the organization, however, there can be considerable internal resistance to changing them. This may be due to long-established internal processes and sometimes even reward schemes tied to the current metrics.

Organizations can struggle to complete customer journey mapping studies to the point of applying appropriate metrics at all the key touchpoints. After the initial mapping workshops, it can prove challenging to maintain the momentum and for key stakeholders to understand the benefits of progressing to the metrics stage, particularly where there are other demands on resources. Those interactions that take place online, rather than face-to-face, can also be challenging to map but essential for the full picture. Tools such a Google Analytics can help determine traffic and traffic flows and most organizations gather this data for their own websites. Funnel analysis can be configured to show key touchpoints and traffic losses at each point however the granular detail of how different types of customers conduct their entire searches across the web, review sites, social media interaction, and competitor websites requires more detailed tracking. This is vital to understand the complete journey.

How customers move after purchasing to usage, support, and advocacy can also be more challenging to measure and understand at a more granular segmented level. Why is all this important? It is essential as marketers move towards more targeted personalized marketing experiences. Understanding the value of carefully targeted messaging versus the efforts of competitors and how this resonates against other online review media and advice/guidance sites is key to developing more effective marketing strategies.

This all highlights a need for an approach capable of understanding individual interactions at a more granular level and developing a more detailed understanding of the customer undertaking real journeys, mapping actual experiences. This is now possible with the advent of new technology tools.

3.0 New approaches using technology to map customer journeys

We've outlined so far the traditional approach to customer journey mapping and its limitations. It's easy to see how this approach can suffer from an internal bias or myopia from too many internal stakeholders. It is also quite clear that although rough mapping might be achieved in a short series of workshops, this is really just where the work begins. The challenge of building effective and accurate CX metrics at the key touchpoints can be hugely challenging.

New approaches and technologies can help, however. Rather than building a preconceived idea of the customer journey the ability now presents itself to observe, record, and measure actual customer journeys and experiences. This requires little more initially than an understanding of where the main customer touchpoints are likely to be. Which ones are the most important and how customers feel etc. can be left to real CX mapping and metrics? The ability to follow customers both in terms of their detailed online interactions and journeys as well as their physical in-store journeys now exists and can be utilized to provide a rich and detailed understanding of the customer journey.

Online level tools can record every single customer interaction, every click of their mouse, every search term they type in, every website they visit whether that be review sites, social media sites, comparison sites, or others, and the detail of their interactions on these sites. Should the customer choose to purchase products online again, technology can provide the ability to track these interactions and provide a consolidated picture of customers' interactions. Customers themselves can be tracked by their physical location and video or audio recorded during their online interactions for additional insight.

At an in-store level or service experience level customers can be messaged at the key touchpoints and asked about their experiences and feelings at each specific touchpoint on the journey. This delivers the goal many researchers strive for of asking about an interaction immediately after a customer has experienced it when they can articulate that experience most accurately and with as much vivid detail as possible without the bias of later reconsideration of the event.
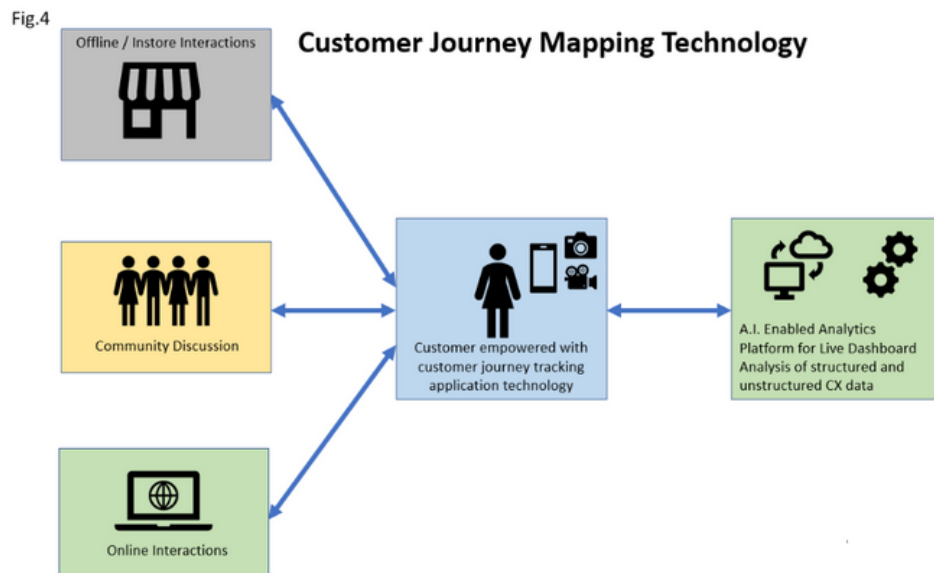
This ability to gather CX information at key touchpoints is undoubtedly valuable to every product or service supplier but vital, particularly where the product or service is likely to be less life-changing and significant to the customer. Choosing a wedding venue, a school for your children, or buying a new house are examples where, even a few weeks later, customers might still be able to provide vivid detail of their experiences of specific touchpoints. In comparison, transactions like buying groceries, selecting car insurance, or buying fast food will prove far more difficult to recall in vivid detail a few weeks later. In both situations, however, the "short sharp survey" approach immediately following each customer touchpoint experience is likely to unearth more accurate detail than detailed traditional surveys long after the event.

In addition, technology can enable customers to capture their own actual experiences through mobile device photography or video capture of anything from in-store product placement and promotions right through to their likes and dislikes on features of a new car or a hotel room at key touchpoints. This removes some of the subjectivity away from customer comments. A customer's perception for example of a "very dirty" hotel bathroom in a survey can be substantiated for accuracy with photographs. Technology can also provide the opportunity for customers to share their social activity in relation to a product or a service either through sharing their normal social media posts or through a locked-down purpose-built secure community. The latter can prove particularly valuable for more sensitive sectors such as pharmaceuticals, where the community can share their experiences, frustrations, or desires for a specific product or need.

3.1 Analyzing the Data

The utilization of technology to gather customer feedback in the form of survey responses, customer comments, video, audio, and images along with survey data can be accommodated by appropriately designed applications enabling customers to easily record their experiences on any convenient device. Customers can be recruited and, armed with the application, can then be tasked with a problem or job to undertake on either the entire or specific elements of, the customer journey. The application tracks all their online interactions but also the vital detail of how they feel, think, and behave at each particular touchpoint. Short in the moment surveys capture both their online and offline experiences. This results in huge quantities of rich customer journey interaction data in both structured and unstructured formats.
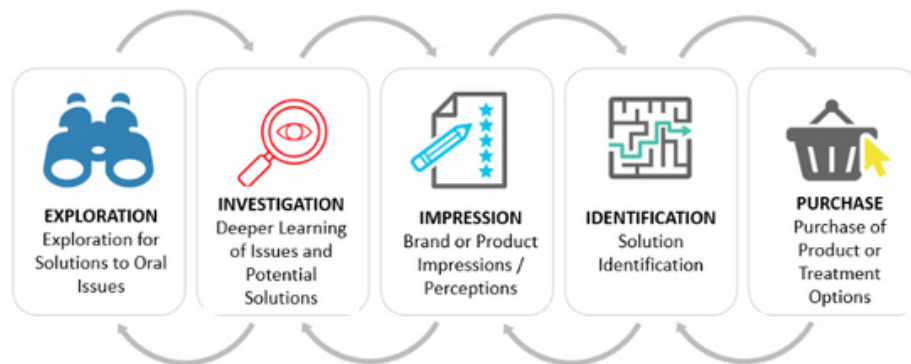
This data is best analyzed by powerful bespoke technology platforms calling on cloud A.I. services and data science expertise utilizing appropriate algorithms to produce live dashboards of customer progress and detailed final reports of customer journeys. Customer journeys, emotions, and much more can be mapped extremely effectively. Images and website activity can be scrutinized and aggregated. Fig.4 demonstrates how large quantities of both structured and unstructured customer journey data, potentially for thousands of customer journeys can be gathered and mapped for display on live dashboards.

Fig.4 — Customer Journey Mapping Technology

- Offline / Instore Interactions
- Community Discussion
- Online Interactions
- Customer empowered with customer journey tracking application technology
- A.I. Enabled Analytics Platform for Live Dashboard Analysis of structured and unstructured CX data

The accuracy and insight in comparison to traditional methods can be monumental and often surprising. Just taking one individual element of a recent OSG study as an example, looking at the exploratory online phase of a customer journey for health-related consumer goods, we scrutinized thousands of online customer journeys. Findings were that far from a discrete simple interaction, the online discovery/research journey consists of the stages shown in Fig. 5 and customers can move both backwards and forwards on this journey before making a purchase:

Fig.5

Customer Journey Mapping Technology – customers move in both directions on their investigative journey

EXPLORATION
Exploration for Solutions to Oral Issues

INVESTIGATION
Deeper Learning of Issues and Potential Solutions

IMPRESSION
Brand or Product Impressions / Perceptions

IDENTIFICATION
Solution Identification

PURCHASE
Purchase of Product or Treatment Options

3.2 The Value of Customer Journey Mapping

Understanding the key customer interaction points and being able to effectively monitor them with powerful CX metrics and A.I. enabled analytics provides a significant advantage to organizations wishing to become more customer-centric. Ultimately clearly directing strategic actions for improvement is the end result and the key advantage over other metrics-based CX programs. Implementation of effective journey mapping and remedial actions logically leads to improved reputation and growth.

4.0 Conclusion

Customer journey mapping is an important weapon in today's battle for consumers. The traditional approach of mapping was challenging in practice to implement into effective CX programs and can be argued as now redundant. With recent shifts in technology and AI-powered analytics, it has become practical to map and understand real customer journeys in omnichannel (offline and online) environments. The bespoke nature in developing optimum technology solutions and the back-end analytics platforms to articulate the data make outsourcing studies of this nature attractive and more cost-effective than in-house efforts. The results are hugely more detailed and useful than educated guesswork and provide a strong source of competitive advantage. The return on investment is quickly realized through far more effective strategic decision-making to enhance customer centricity and grow revenue.

4.1 How OSG Can Help

OSG has a developed OSG o360, omnichannel consumer targeting technology, to offer the ability to map and measure customer journeys with all the functionality outlined in section 3.0 and more besides. OSG will take your customer journey objectives, recruit a panel of appropriate customers and message them with a series of online and offline tasks. All online activity is recorded and offline experiences are captured through short burst surveys immediately after each touchpoint interaction. Social activity can be captured and secure OSG moderated communities created to supplement all this data and enhance panel engagement. The resulting data is analyzed by OSG's powerful AI behavioral analytics platform to provide live dashboards of progress along with a detailed report meeting KPIs. Live dashboards can be developed to continuously monitor highly dynamic markets.

4.2 About the Author

Layton Quinton-MSc BA(Hons) Dip.M, Director of Product Marketing, OSG

Layton has over 20 years' experience of marketing technology and other complex products across a variety of sectors including financial services, automotive, hospitality, education, transport and chemical. He has a passion for bringing new technology to solve real world problems and bringing the right tailored solutions to OSG's customers with high levels or performance and usability.

The Power of OSG Analytics

OSG is a global technology and analytics provider that delivers outcomes on customer engagement to Fortune 500 clients with the help of leading analytical technologies and world-class global resources. OSG uniquely combines historical data with the future needs of patients, physicians, consumers, or customers of our clients by going beyond the "who" and the "what" and understanding the "how" and "why" behind their decision-making. OSG focuses on the 3E's, Behavioral Expectations, Superior Experiences, Guaranteed Engagement, to help drive growth through customer-centricity.

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