

# Customer Journey Mapping



redshift  
research

*Understanding customer  
engagement*

Research Briefing Series

# The customer journey

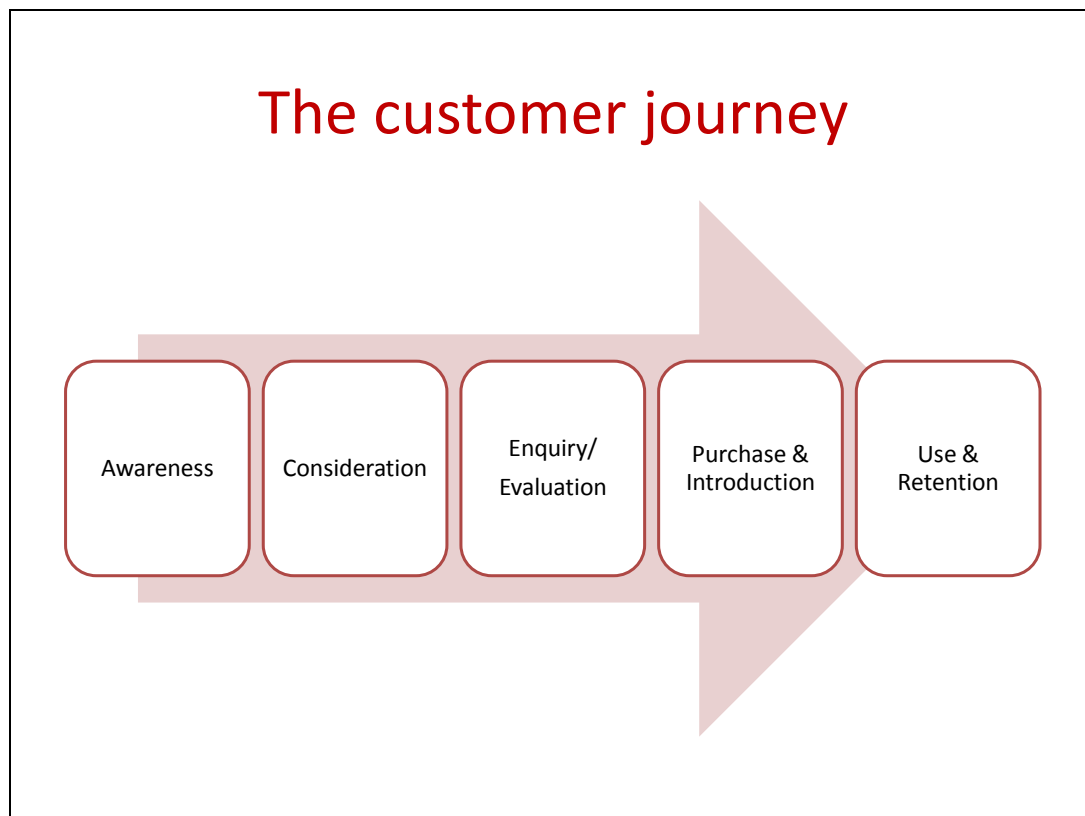
Any organisation will engage with its customers at a number of different times in a number of different ways from the point in time when a customer is as yet unaware of the product/service until the point at which they become a loyal and satisfied customer.

These points of engagement play a critical role in winning a loyal and happy customer base and by having a clear understanding of what the key points of engagement are, and what impact they are having on customers is key to the success of the organisation.

This process is known as the “*customer journey*” and is perhaps better understood when broken down and into its constituent phases.

## Stages of the journey

The customer journey has five distinct stages, the precise importance, duration and nature of which will vary significantly, depending on the type of product or service in question. Nevertheless, regardless of this, the same stages will be present in every case and each stage in this process raises different questions and challenges that need to be considered.



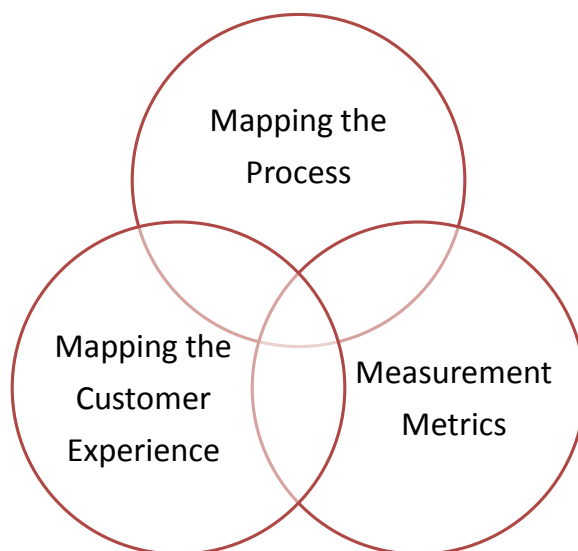
Stage	Key Issues
<b>Awareness</b>	How do new customers first become aware of the product/service? What interactions generate this initial awareness?
<b>Consideration</b>	What prompts someone to consider using the product/service? How and why do people switch from being simply aware to being genuinely interested? What interactions help to prompt this interest?
<b>Enquiry/ Evaluation</b>	What do customers experience when making initial enquiries about the product/service? How do they evaluate and compare alternative options and how do their experiences influence their final decisions? What convinces people to try out the product/service? ...and what discourages them?
<b>Purchase &amp; Introduction</b>	What does the customer experience during the physical purchasing process? What are the initial contacts and experiences they have in the early days of dealing with the company? Does this entail training? Consultancy services? An implementation or installation process? How positive are these experiences? How do these first impressions influence their subsequent dealings with the company?
<b>Use &amp; retention</b>	What contacts and experiences do customers have in their dealings with organisation during their ongoing usage of the product/service? How do these engagements shape their perceptions of the product/service? What factors aid retention and encourage loyalty?

**Customer journey mapping is a systematic methodology for understanding this process and, more importantly, how it can be most effectively influenced to deliver a positive outcome.** A critical focus of the methodology is understanding at what points interactions occur between customers and the organisation and what influence these are having on the overall outcomes.

# Mapping the journey

In order to understand the journey it is necessary to map it. Usually this is done via means of three separate activities:

## The customer journey map

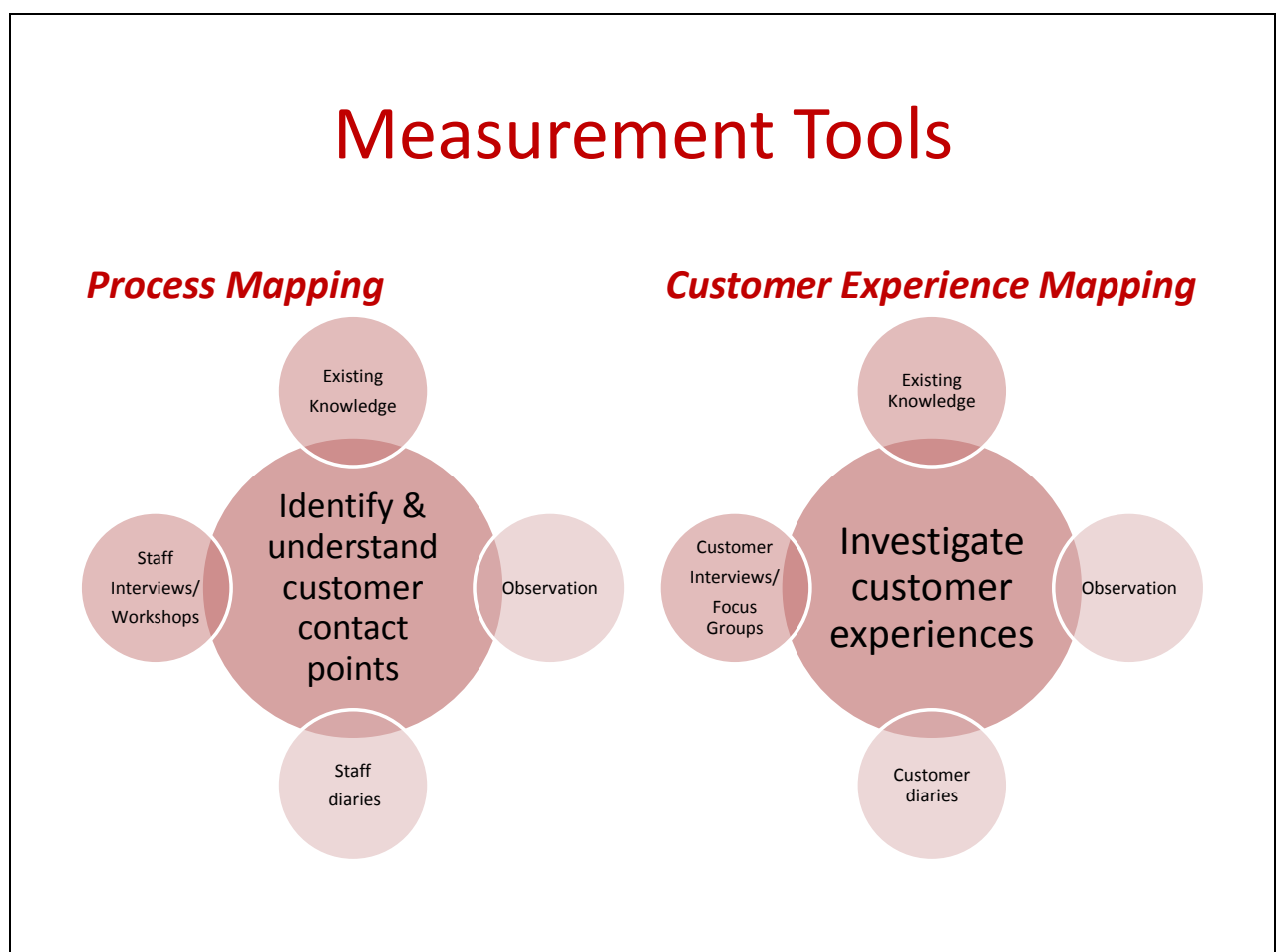


- Mapping the process = obtaining a detailed understanding of contact points – i.e. the times and situations in which customers will interact with the organization.
- Mapping the customer experience = obtaining an understanding of the mix of different customer experiences at each contact point
- Measurement metrics – developing a formal means of measuring the effectiveness of customer contacts and obtaining meaningful measures.

# Measuring Customer Experiences

How we actually choose to measure the process and the customer experiences at each stage depends on the type of product or service we are looking at. Some processes are more complex than others and would potentially involve a greater number of contacts with customers and take different forms at different phases of the relationship. Other processes are far simpler and require a much simpler solution.

Nevertheless there are a number of different approaches that can be used, either in isolation or in combination, depending on the situation.



- Existing knowledge - usually the existing knowledge of senior management serves as a useful and obvious starting point to obtain a basic view of the overall process and of what is already known about the experiences (both good and bad) of customers. This knowledge might be incomplete and/or anecdotal in nature and, for this reason, is usually just an initial starting point.
- Observation – sometimes it is appropriate to gain insight by observing customer interactions with the organization to build up a picture over time. This can happen in a number of different ways. Examples might include:
  - Logging customer activity on a website
  - Measuring the time taken to respond to email enquiries from customers
  - Monitoring conversations on customer helplines or user group forums
  - Observing customer behavior in a supermarket aisle or at an exhibition
  - Recording the average time(s) spent waiting on helplines
- Interviews, focus groups and workshops – sometimes discussions about the experiences of customers and staff are useful tools in obtaining a more detailed understanding of the nature of different contacts occurring and the kind of experiences people are having. This can be done either through one on one interviews or group sessions.
- Diaries - sometimes encouraging staff and/or customers to keep formal diaries can be a useful way to record what exactly happens during customer interactions. This can be especially useful in situations where customers have a significant number of ongoing contacts with staff on a regular basis. Each individual contact, in and of itself, might not be especially significant but the cumulative effect over time may prove critical to shaping a customer's view of the company. Situations where such an approach might prove useful include:
  - Diaries logging details of calls to helplines
  - Diaries logging details of experiences during placing orders
  - Diaries of experiences during sales calls
  - Diaries of experiences during maintenance call outs
  - Diaries of product installation/implementation experiences

# Mapping the Process

The first stage of any Customer Journey Mapping process is to successfully map the overall process. At the end of this stage the criteria for success is to have a complete “map” of all the contact points that exist. An example of what this might look like is provided below.

Stage	Contact/Engagement
<b>Awareness</b>	Website Advertising in magazines Exhibition Word of mouth (work colleague or friend with past experience of the product)
<b>Consideration</b>	Email enquiry Telemarketing contact Sales visit Exhibition
<b>Enquiry/ Evaluation</b>	Demonstration Questions/answers by email Questions/answers by telephone FAQ section on website Case study information References requested/provided by salesman
<b>Purchase &amp; Introduction</b>	Order placement (interaction with salesmen) Order placement (interaction with resellers salesmen) Installation (contact with installer/implementer) Questions submitted to helpline during installation Help section on company website
<b>Use &amp; retention</b>	Customer helpline Annual review with sales rep Interaction during updates/upgrades Maintenance visits Ordering spare parts Customer user group Brand Facebook page

# Mapping the Customer Experience

Once the process itself is understood, it is possible to begin to build up a picture of what kind of experiences customers are having at each stage. In the initial instance the information collected will be both wide ranging and largely anecdotal in nature. A number of different views will be taken into account, both internal and external, to help begin to construct a picture.

The overall aim here is to obtain a comprehensive view of all the different kinds of customer experiences that people have had. At this early stage these experiences will not be quantified, as the aim is more to ensure that we collect a complete view of what all the different experiences and issues are, rather than how common a particular issue may or may not be.

Interaction with customers (whether in the form of conversations, observations or diaries etc) will form an essential element of this phase. However, we need to ensure we have a reasonable view of different types of customers both in terms of their demographics but also, perhaps more importantly, in terms of outcomes:

- Regular customers who are perceived to have a strong relationship with the company – here we need to get a feel for what has gone well, what aspects of the contact they have with the business are working best and why
- Less committed customers with whom the company is less strongly engaged - here we need to investigate why these people are not as committed as other customers & what differences can be detected in the nature of the contact experiences they have had
- Failed engagements – i.e. potential customers who made enquiries and/or seriously considered becoming a customer but eventually did not buy. Here we need to understand at what stage people ceased to engage with the company and what factors discouraged them from taking matters further
- Lapsed customers, who have switched to a competitor or who have stopped using the company's services for some reason. Here we need to investigate what factors/circumstances contributed to lapsed use and at what stage of the relationship this occurred.

At the end of this phase we can blend the information we have collected on customer experiences together with our map of the process. This allows us to understand what positive and what negative experiences people have had at different stages of the relationship and what kind of contacts have triggered these experiences.

# Measurement Metrics

Once we have a good understanding of the of all the potential issues and a good knowledge of the nature of the key contact points in the process we can then design suitable measurement metrics to formally measure the performance of the business at each stage of the customer journey.

In some ways this element of the process is very similar to a classic customer satisfaction survey and the same kind of measurement techniques can be employed. Customers are asked to score different aspects of the customer experience by giving marks of out ten to indicate how positive they feel about it. They are also asked to indicate how important it is to them if the business performs well or poorly in a particular aspect of the relationship.

However, measurement within the context of customer journey mapping differs from classic customer satisfaction in a number of ways:

- In addition to current customers we would also aim to interview a number of lapsed customers as well as lost prospects.
- The focus of the research lies specifically on the influence that specific interactions between the business and customers has on the relationship.
- Customer Journey Measurement Metrics should aim to identify specific:
  - Sweet Spots – factors that are responsible for generating loyal customers
  - Tension Points – aspects of the service where loyal customers and less engaged customers may be looking for different things
  - Pressure Points – important aspects of the service where the quality of service delivery might be variable & which thereby influences the level of engagement
  - Danger Points – factors that appear most directly linked to influencing a negative outcome – i.e. a lost prospect, a lapsed customer or an unhappy customer who is at risk of lapsing.

The precise nature of different key contact points are derived from the opinions of specific groups of customers and prospects – linking their perceptions, as closely as possible, with actual outcomes to understand how one influences the other. Thus, at the end of the process, we have a full understanding of the key points on the customer journey.

## Key Points in the Journey

Sweet Spots	Tension Points	Pressure Points	Danger Points
<ul style="list-style-type: none"><li>• Factors that generate high levels of engagement</li><li>• <b>What has been responsible for delivering loyal customers?</b></li></ul>	<ul style="list-style-type: none"><li>• Factors where less engaged customers might be looking for something different from those who are fully engaged</li><li>• <b>Are some customers less engaged because they are looking for something different?</b></li></ul>	<ul style="list-style-type: none"><li>• Factors which are important BUT where less engaged customers are clearly less satisfied than those who are fully engaged</li><li>• <b>Are some customers less engaged because the standard of service received is variable?</b></li></ul>	<ul style="list-style-type: none"><li>• Factors which disengaged customers &amp; prospects consider important AND express dissatisfaction with the business</li><li>• <b>What leads to customer dissatisfaction and lost business?</b></li></ul>

## Benefits of the Exercise

At the end of the process, the business will benefit in a number of different ways. A clear understanding of the customer journey will allow the business to...

- Understand key aspects of contact they have with customers that are delivering the most for the business. This enables the company to justify a continued focus of resource in these areas. It also enables the company to understand what aspects of their service will yield potentially valuable case study information that can help attract new business.
- Understand any areas of variable performance and hence channel resources appropriately to help improve relationships with customers who are less strongly engaged.
- Understand any areas where those customers who are less strongly engaged might actually be looking for a different type of service to those customers with whom the company has a strong relationship. This raises the question as to whether there might be any advantage to be gained in offering new or modified services to help improve relations.
- Understand those areas of the business where contact with customers and prospects is most likely to be failing/potentially delivering a negative outcome. This then highlights those areas in most need of attention, helping significantly in determining future priorities.

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