

cxomni

Guideline Customer Journey Mapping

Basics & Best Practices



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*“I've learned that people will forget what you said,
people will forget what you did, but people will
never forget how you made them feel.”*

Maya Angelou

1

CUSTOMER EXPERIENCE MANAGEMENT (CEM) – BACKGROUND

The „journey“ of a potential customer along different touchpoints with a product, a brand or a company

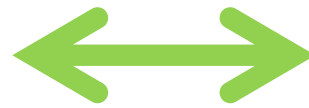
Customer Journey

Measures the individual experience at all touchpoints in relation to customer expectations at these touchpoints

All points of contact (direct and indirect touchpoints) of a consumer with a brand, a product or service

Customer Experience

The cumulative experience of many touchpoint impressions throughout the entire customer lifecycle



Customer Experience (CX) Management

Customer orientation, emotional differentiation and customer enthusiasm – these are objectives that require new actions in marketing, sales and IT. Customer Relationship Management (CRM) was just the beginning and is enhanced by continuously planning, controlling and managing the customer experience at all touchpoints. Such Touchpoint Management and Customer Experience Management are the success factors in Marketing 4.0.

CRM versus CEM

With a CRM system, you control chronological activities and campaigns with individual customers. In contrast, a CRM system records all interactions with individual clients, CEM (Customer Experience Management) follows the approach to enhance your CRM system by visualising personas, touchpoints, customer experiences and customer journeys. The goal is to understand and rate the overall process in terms of pain points, but also exceptional customer

experiences and emotional differentiation.

Accordingly, there is no either-or, but a valuable combination: To manage the "Customer Relationship" and simultaneously plan, measure and continuously optimize the emotional experiences at the contact points for enterprises.

CEM-System

A CEM system like cxomni supports the following substantial optimization approaches in the context of customer management:

- Improve brand awareness / brand value
- Simplify Information
- Increase perceived customer value
- Improve user experience with interactions
- Raise conversion rate
- Increase „Share-of-wallet“
- Create emotional customer experience
- Communicate services proactively

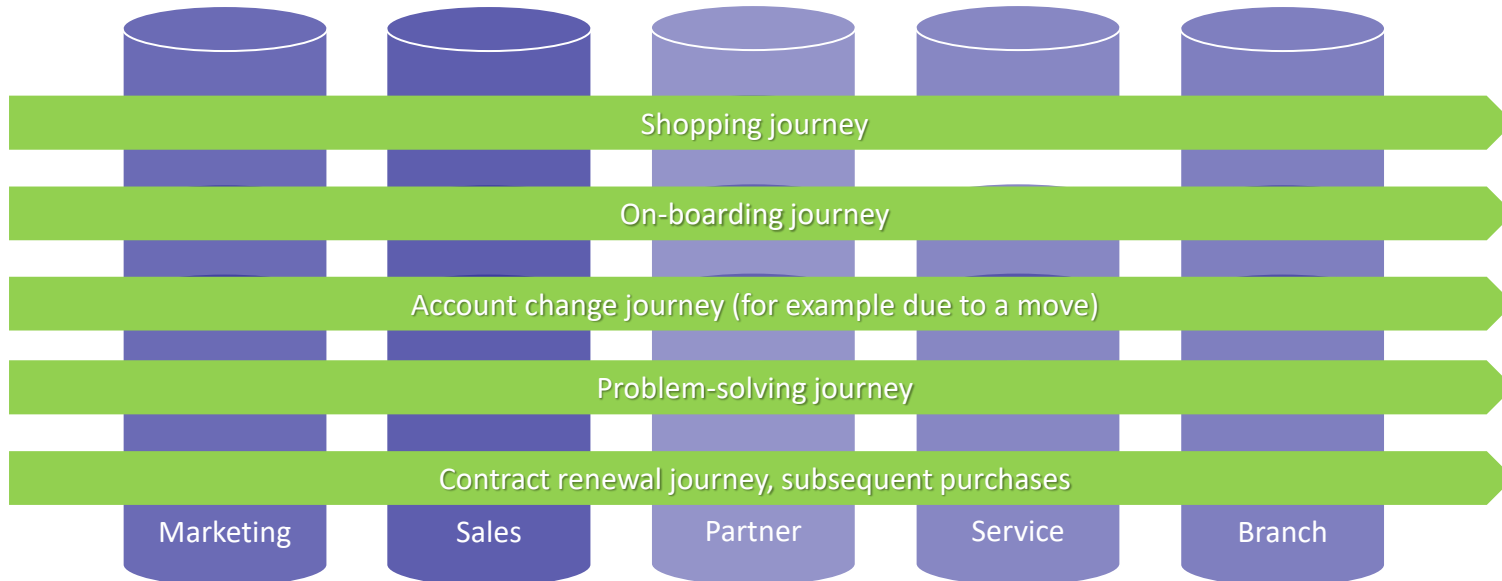
- Maintaining loyalty
- Stimulate referrals

Customer management, customer experience management, touchpoint management and customer journey mapping have a pleasant destination:

More sales and satisfied customers.

Customer Journeys

take no account of silos



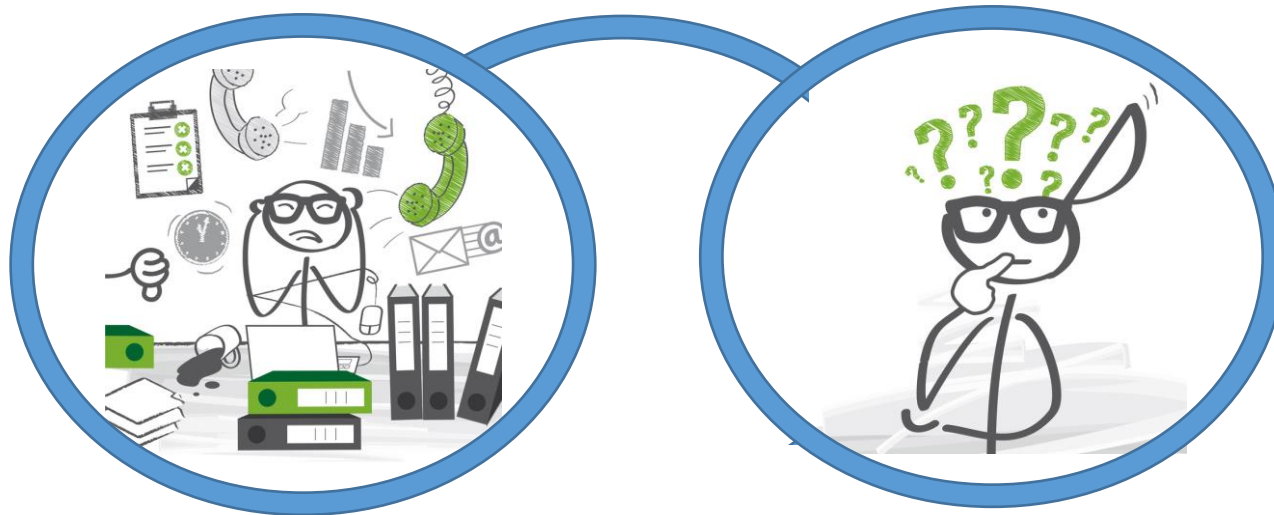
The inside-out perspective:

Well-organized, process-optimized, different silos



The outside-in perspective

Pain points, inconsistencies, complex user experience



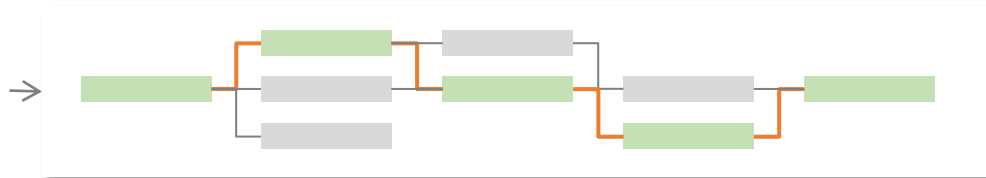
cxomni Change 1: Understanding all touchpoints

From inside-out to outside-in perspective



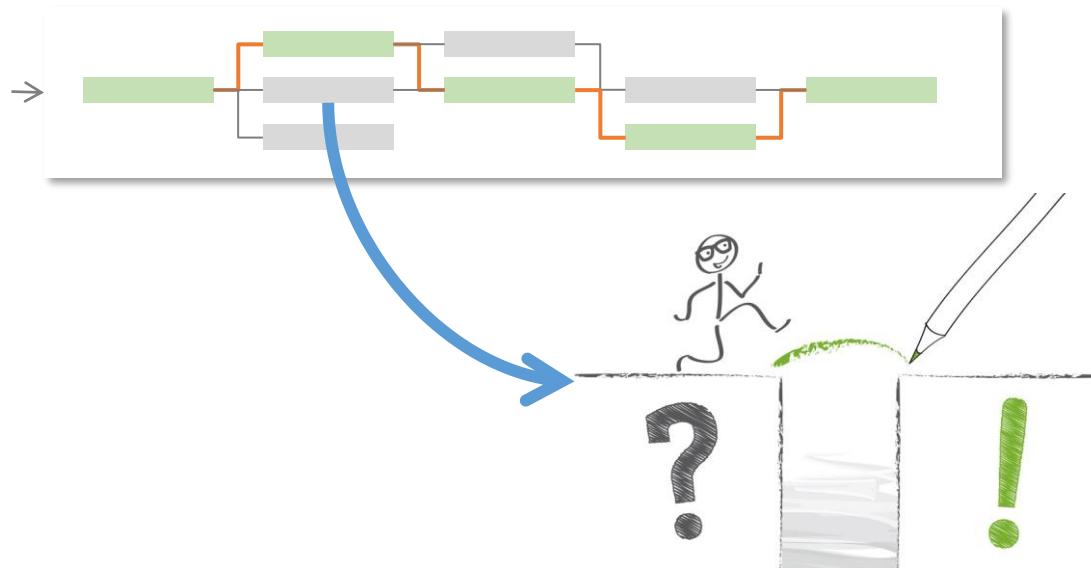
cxomni Change 2: Understanding customer journeys

Generating journey maps and common understanding



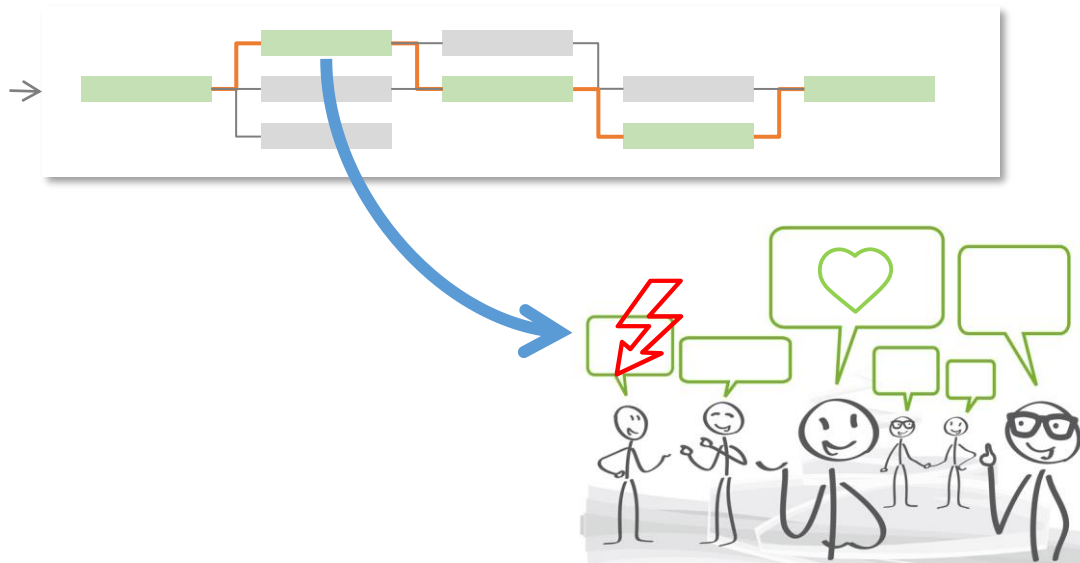
cxomni Change 3: Understanding micro-moments

Identifying pain points, developing service ideas



cxomni Change 4: Understanding customer stories, expectations and feelings

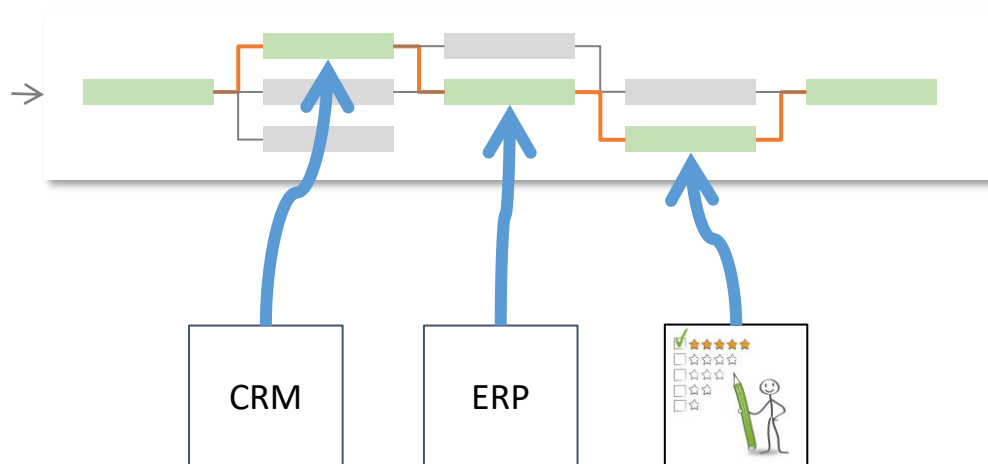
From mapping to performance from a customer perspective



cxomni Change 5

Integrating process intelligence and Voice of Customer

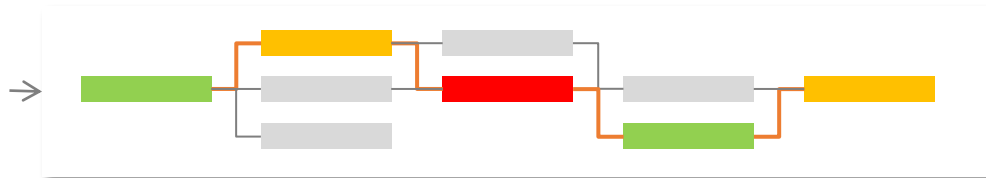
Insights and business intelligence from process data



cxomni Change 6

Gaining customer experience insights

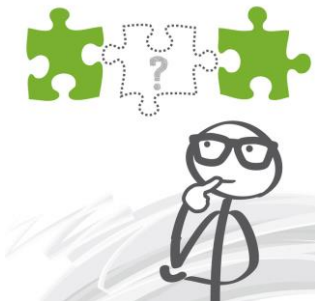
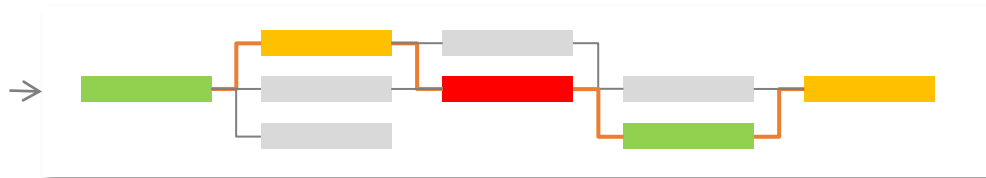
Reviews and heat maps



cxomni Change 7

Optimizing and simplifying customer experiences

Insights and actions (recommendations)



CUSTOMER JOURNEY MAPPING – THE CONCEPT



Customer journey maps provide stakeholders with the customer perspective – a mutual „outside-in language“ is created.

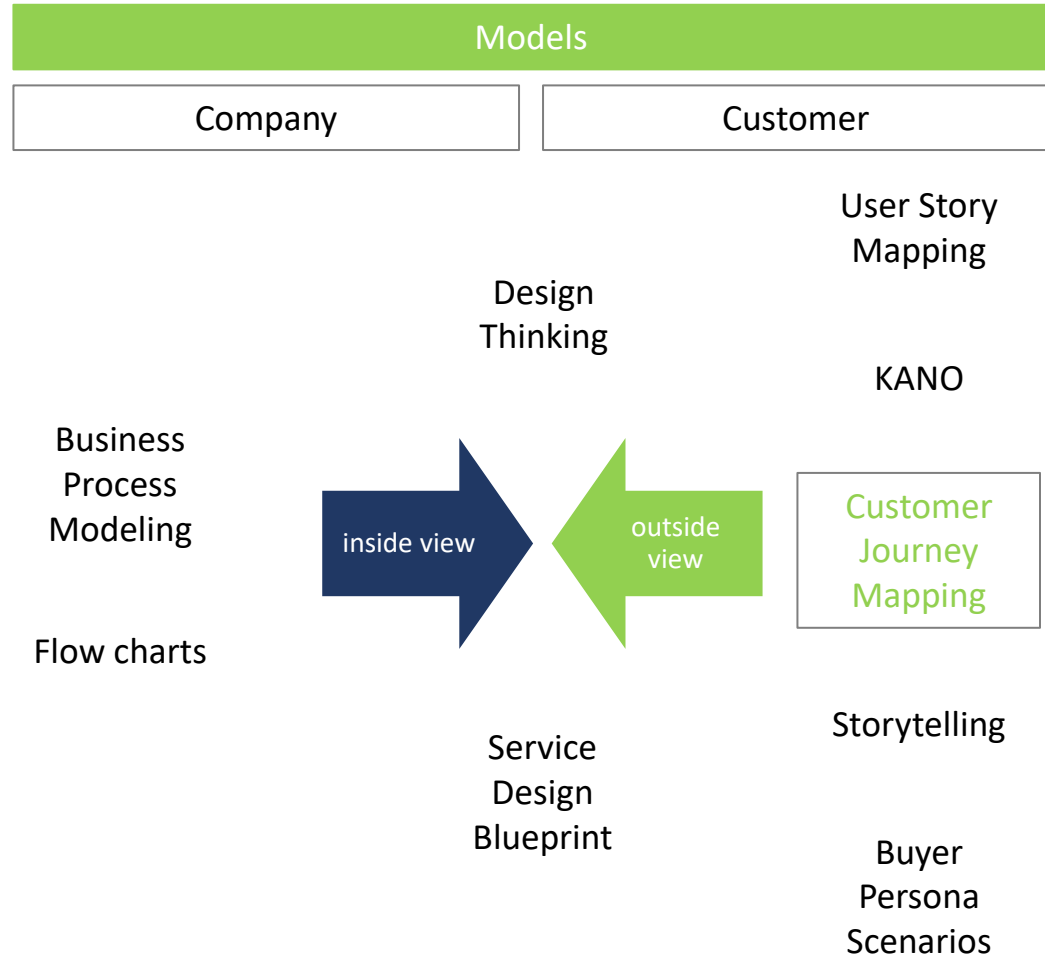
From the internal to the external point of view

Customers today expect a consistently positive experience when interacting with companies and brands.

The customer journey mapping as a method to understand the customers' needs early and thus formulate specific internal improvement measures was developed by Oracle's Brian Curran and John Kembel in collaboration with Stanford University. Other variants were developed by McKinsey and further consulting firms.

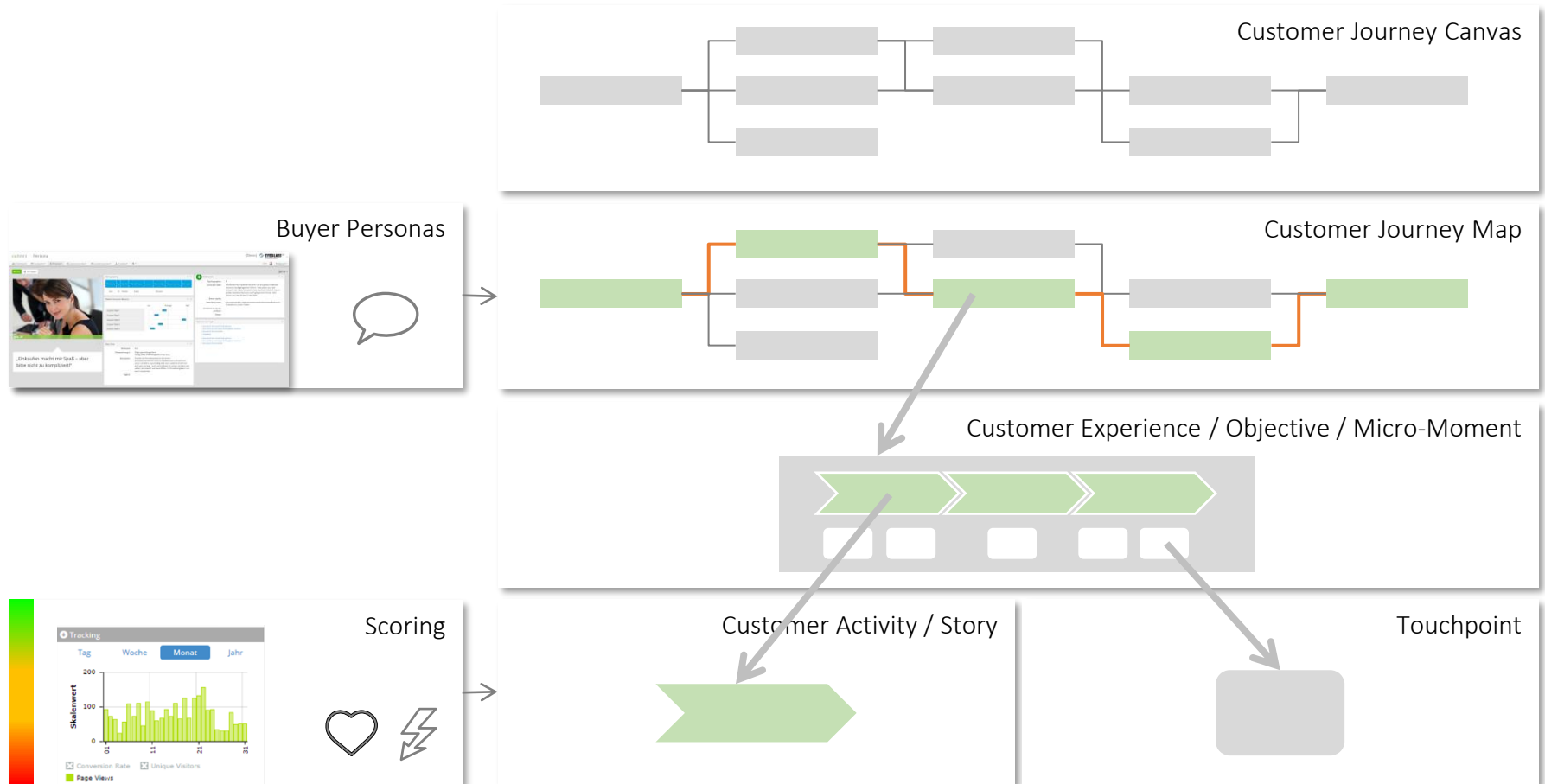
With this method, the documentation of the customer perspective is carried out step by step on a time axis, wherein the procedure may vary slightly depending on the model. These concepts primarily overlap in their approaches but there is no universal standard for the presentation.

The motivation of the customer – and the emotions during a purchase or service process – are always the focus.

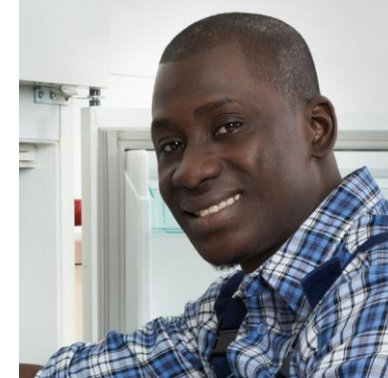


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Elements of customer journey mapping with cxomni



BUYER PERSONAS: WHO ARE OUR CUSTOMERS?



„A picture and a quote turn an abstract target group into an emotionally understandable (buyer) persona.“

Personas instead of target groups

In content marketing and customer experience management, a “buyer persona“ refers to a precisely defined, typical target group representative.

While target group definitions are rather vague and are represented as a faceless and anonymous dataset (such as Sinus milieus), the application of the buyer persona methodology brings the customer to life. The buyer persona is a prototype for a group of users with distinctive features and a specific usage behavior.

Personas are used in requirement management of software as well as in customer experience management. For a software in planning, it will be analyzed which group of users will use this application later. For this purpose, a few fictional characters are created based on observations of real people that are representatives of the majority of the subsequent actual users. The application is then created by the design and development team which picks up the needs of

these fictional characters and plays through different operation scenarios accordingly.

Start with your buyer personas

First, give your buyer personas a name and assign a typical image to them. In addition, define demographic data, values and goals. Document emotions and personal behaviors as well. Optionally, you may visualize them as a mood board with pictures of typical consumer worlds.

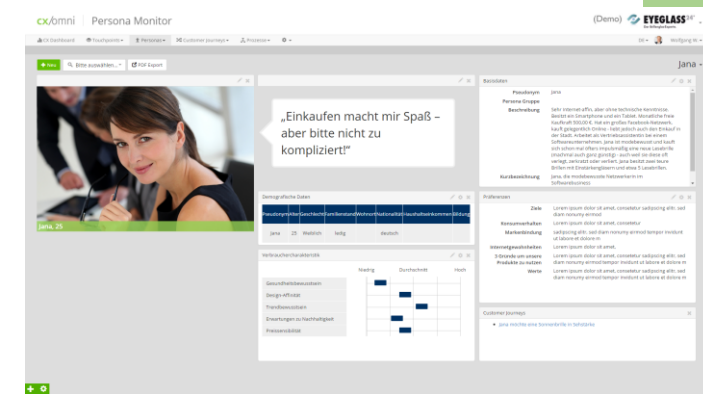
In order to segment your personas, bring your key stakeholders from sales, service, marketing and management CX together. This inter-disciplinary exchange as well as workshop results, surveys, market research, etc. represent the basis of the design and the common understanding of your personas. The personas defined as such create transparency for all parties involved and will simplify your corporate communication about needs, expectations and customer behavior. The knowledge about how the customer accesses information and which channels and with what expectations are used during the customer

journey, allows you to pursue a differentiated approach to customers groups.

Buyer personas in cxomni

In cxomni CXM cloud, you can customize your personas dashboard individually and configure specific consumer characteristics for your industry in addition to the standard characteristics and display them visually on a scale.

The typical features of buyer personas can also be represented in the form of persona stories.



CHANNELS, STAGES AND DEPARTMENTS: OUTLINING THE PATH OF THE CUSTOMER JOURNEY

Channel diversity and complexity

The complexity of marketing campaigns is increasing and so are the requirements for consistent brand management. Whereas an advertising campaign typically used to be delivered using a few traditional media channels, nowadays online channels such as email and social media are used as well. Simultaneously, the interaction speed in customer communications is increasing. Yet the alternation of channels is typical and in marketing also referred to as multi-channel or omni-channel strategy.

Therefore, one crucial aspect is to link sales channels with each other so that the customer can move seamlessly from one channel to another during the customer journey.

At the same time, the customer comes into contact with various departments of the company in different stages of the shopping or service journey and expects consistent behavior and knowledge of his status.

Structuring stages of the customer journey

Start the journey by specifying all the channels, departments and stages involved.

For departments, it is best to use your existing department names and department codes.

For channels, choose designations as you use them in your marketing plan.

For stages and channels the following rule applies: as many as necessary, as few as possible. Fewer channels and stages make your customer journey maps more transparent. Create divisions of channels and stages only in the way you want to evaluate later. In the maps in cxomni, stages are represented as stage arrows and departments and channels can be visualized with unique colors.

Examples of stages:

1. Inspiration
2. Investigation / Perception
3. Consideration
4. Offer
5. Purchase
6. Delivery
7. Use

Typical channels:

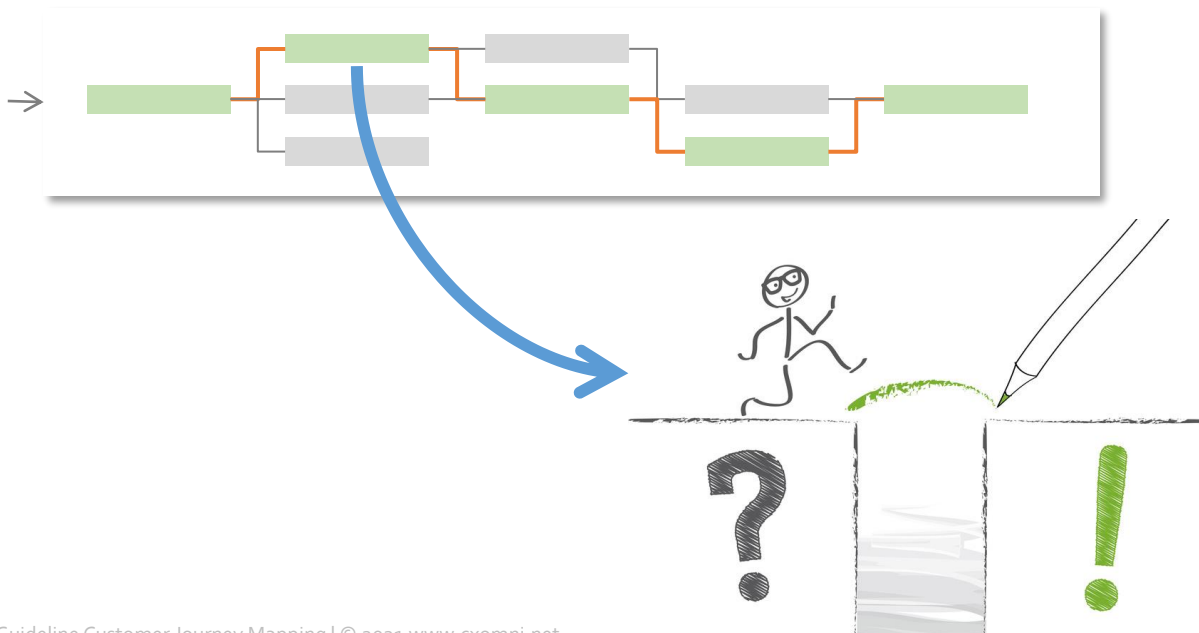
- Online / Mobile
- E-mail / Newsletter
- Radio / TV
- Print
- Phone
- POS
- PR
- Social Web / Blogs
- Packaging/ Product
- Form

MICRO-MOMENTS: WHAT DO OUR CUSTOMERS EXPECT?

Customer Experience (Micro-Moment)

The smallest unit of a purchase or service process is the micro-moment. This can be a precise target from a customer perspective (customer objective) or an unplanned experience (customer experience).

This also includes the stage before the purchase, during which the customer may be inspired or zones in on the potential products or service providers.





TOUCHPOINTS: WHAT IS THE SPECIFIC EXPERIENCE OF OUR CUSTOMERS?



The chances for emotional differentiation are often in the details – the small contact points. Especially the supposedly inconspicuous touchpoints lead to a negative customer experience which goes unnoticed at first.

Touchpoints, contact points = experience points

Touchpoints refer to all customer contact points where the customer actively or passively perceives the company or the brand across all channels (online and offline). Touchpoints are the linchpin between companies and customers. From the outside-in perspective, these are basically experience points. Understanding the experiences of your customer is the idea and the purpose of touchpoint management.

Are you able to trigger enthusiasm at all touchpoints?

Every customer using your service or purchasing your products has at least one touchpoint, but usually a variety of touchpoints, i.e. contact points with different areas and employees which affect the perception of the brand. In order to strengthen customer loyalty, you ideally make your customer's journey through the shopping or service process as pleasant and smooth as possible.

Managing touchpoints

Capture all touchpoints in detail and prioritize them by relevance: From the company parking lot to the advertising flyers and online shop or sales and service talks. This means a listing and mapping of all online and offline interaction points, such as forms, mails, letters, portals, press, social web - think about all your advertising material. You will soon discover that there are numerous customer touchpoints which were not actively being monitored or managed previously.

Touchpoints in cxomni

Start with the essential features of your touchpoints:

- Touchpoint name
- Pictures of touchpoints
- Stage
- Channel
- Department / Responsibility
- Pain point and moment of truth

Other features you may add now or later include:

- Media type
- Frequency
- Perception
- People / Objects
- URL
- Acceptance criteria
- Currently achieved value
- Best-in-class value
- Appearance
- Scope

If you need additional company-specific fields, you can configure them in the settings.

2.5



EMOTIONAL JOURNEY:
WHAT DO OUR CUSTOMERS FEEL?



The journey of your customer is not a straightforward one. Your customer undergoes emotional experiences that will massively influence his decision, especially at the small touchpoints.

Rating the touchpoints from customer view

The journey of your customers is not a straightforward one. Your customer undergoes emotional experiences that will influence his decision. The measurement and holistic evaluation of touchpoints is therefore a relevant factor for success. The key question: What does your customer expect and feel during a sales or service process?

Online plus offline

Capture the customer experience in the overall sensation by rating every single touchpoint. Your customer makes no emotional difference between online purchases and offline services. In order to arrive at a rating as objective as possible, evaluations from voice-of-customer systems, such as market surveys, ratings, feedback assessments, etc. are helpful.



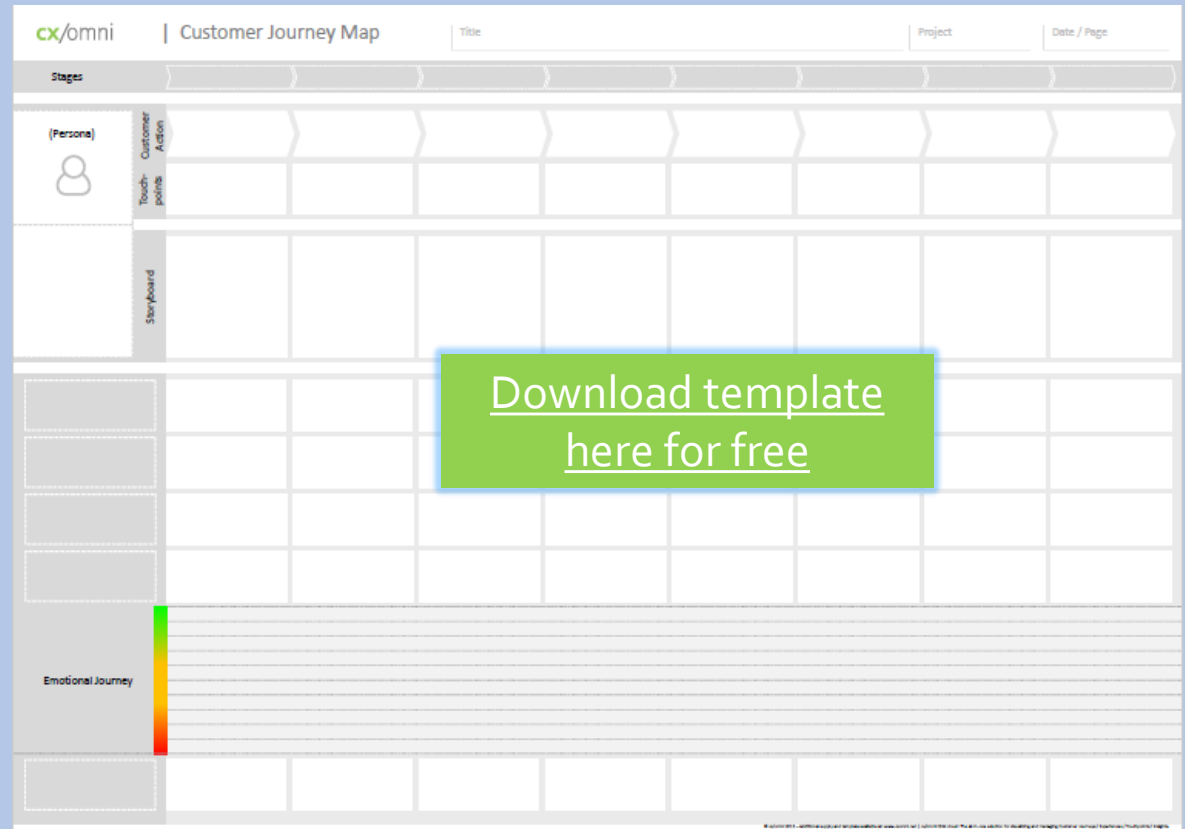
Performance from customer view

We recommend scaling from 1-10 (10 = expectations are exceeded, 1 = expectations are clearly missed). Possible evaluations are also smileys, traffic light system etc. Another option for arriving at objective evaluations at the touchpoints is interviews with employees who are involved in the abovementioned points of contact or specific customer surveys.

It is best to compare both perspectives (inner view and outer view). The outer view can also be assumed by a consultant instead of the customer. In cxomni, you can define specific questions and ask and evaluate them regularly per touchpoint.

The performance from customer perspective is presented as an emotional curve and by using a color system at the touchpoints.

3.1



CUSTOMER JOURNEY MAPPING WORKSHOPS: PREPARATION

Choose micro-moments or journey

At the beginning, only select the journey you want to document. Do not attempt to display the entire customer lifetime cycle. Rather choose a few micro-moments, as otherwise there will not be enough time for detailed discussion and evaluation from the customer view. Further journeys can and should be documented in subsequent workshops.

Whom to invite to the workshop?

Invite 6-8 participants. Usually, these are colleagues from the specialist departments along the customer journey to be documented.

Plenty of wall surface - lots of pictures

Make sure you have a big brown board or a free wall, at least 3 meters wide, where you can work with pinned needles. Bring photos or printouts of screenshots or original prints of touchpoints and photos / illustrations of your personas. Quotes from customers or small video sequences of customer statements along the customer journey to be viewed are also helpful.

Working with the cxomni Customer Journey Mapping Toolkit

For your first journey map, select the "Customer Journey Map" view. If necessary, hang up two posters next to each other. Decide which theme cards to use: There is no strict standard, you do not have to use all terms. For the beginning, we recommend: customer expectation, customer sentiments, pain points, moments of truth and insights. All other cards are put aside during this workshop. You may also create your own cards for possible characteristics which may be specific to your sector or industry.

If you do not have a toolkit or would like to plot posters, you can download the template for free:

[Customer Journey Map Template](#)



ORDER TOOLKIT

The best toolkit for your workshop. Developed from practice for practice: Workshop material for the documentation of touchpoints and customer experiences.

3.2



CUSTOMER JOURNEY MAPPING WORKSHOPS: EXECUTION



Always
document from
the outside-in
perspective,
meaning from
the customer
view

Briefing / Agenda

Explain the objectives, the methodology and the various stages of the workshop to the participants.

Tasks in the workshop

- Determine a moderator
- All participants are called upon to participate.
- Typically, a participant will take notes in cxomni – or you work with the cxomni CXM cloud live on a large screen.

Journey mapping step by step

1. Pin the picture of a picture – including a typical quote – to the top left of the brown board and hold a small presentation to create an understanding of the persona whose journey is recorded.
2. Next, document the stages on arrow cards and attach them.
3. Always document the individual customer activities in the perspective of the customer (blue arrow cards). Each participant is allowed to name activities and attach them to the map.
4. Sort the customer activities chronologically.
5. Make the journey come alive: If anyone from the circle of participants is able to illustrate well, you should visualize the customer activities in the storyboard with sketches.
6. Now assign touchpoints and touchpoint images to the customer's activities.
7. The next step is to understand customer perceptions / expectations at the individual touchpoints. Write them into the corresponding lines of the map. Always document in the form of the customer (I feel ..., I want to ..., I believe ..., etc.).
8. Leave enough time for detailed discussions and develop an understanding for what the customer feels. This automatically results in pain points and moments of truth.
9. You will find out that you are already developing valuable ideas at this point. Collect all the ideas in the Ideas / Remarks line.

10. The next step is to evaluate the individual customer activities and / or touchpoints from the customer's experience.
11. Mark the touchpoints with smileys and the customer activities with pain points and moments of truth.
12. Discuss the performance from the customer's experience: Complete the map with the performance curve. Use the pins and the cord which marks the rating on a scale from 1-10.

The following questions should be reflected at the end of the workshop:

- Where are the possibilities of differentiation?
- What weaknesses (pain points) are there?
- What insights have we gained?
- Which actions can be implemented in the short-term?

- Who takes responsibility for this specific Customer Journey Map and its presentation?
- What other journeys will we document by when?

Now document specific suggestions for improvement and assign tasks for optimization to individual managers.



4

SHARING AND COMMUNICATING CUSTOMER JOURNEY MAPS

After the journey is before the journey ...

At the end of your customer journey mapping workshop, you will have reached an inter-disciplinary and cross-departmental agreement on a common "language": the customer experience. If you have not done so already, document the map in digital form in cxomni now in order to save it or plot it as a poster by PDF export.

With the completed journey map, you now have mapped and evaluated the current state across teams.

Share and communicate

Regardless of whether you have focused on micro-journeys or on a complete Journey, you should start communicating with the persons in charge to derive further measures from this status.

Perhaps not all those who are responsible were there. Start the dialogue with the responsible

departments with this customer journey and define which journey is to be documented next.

To continue the dialogue, share the customer journey map in cxomni with all responsible persons, print a poster and hang it in prominent place.

Sharing the maps to the process managers provides controlled transparency and makes the review and introduction of further improvement measures very easy.

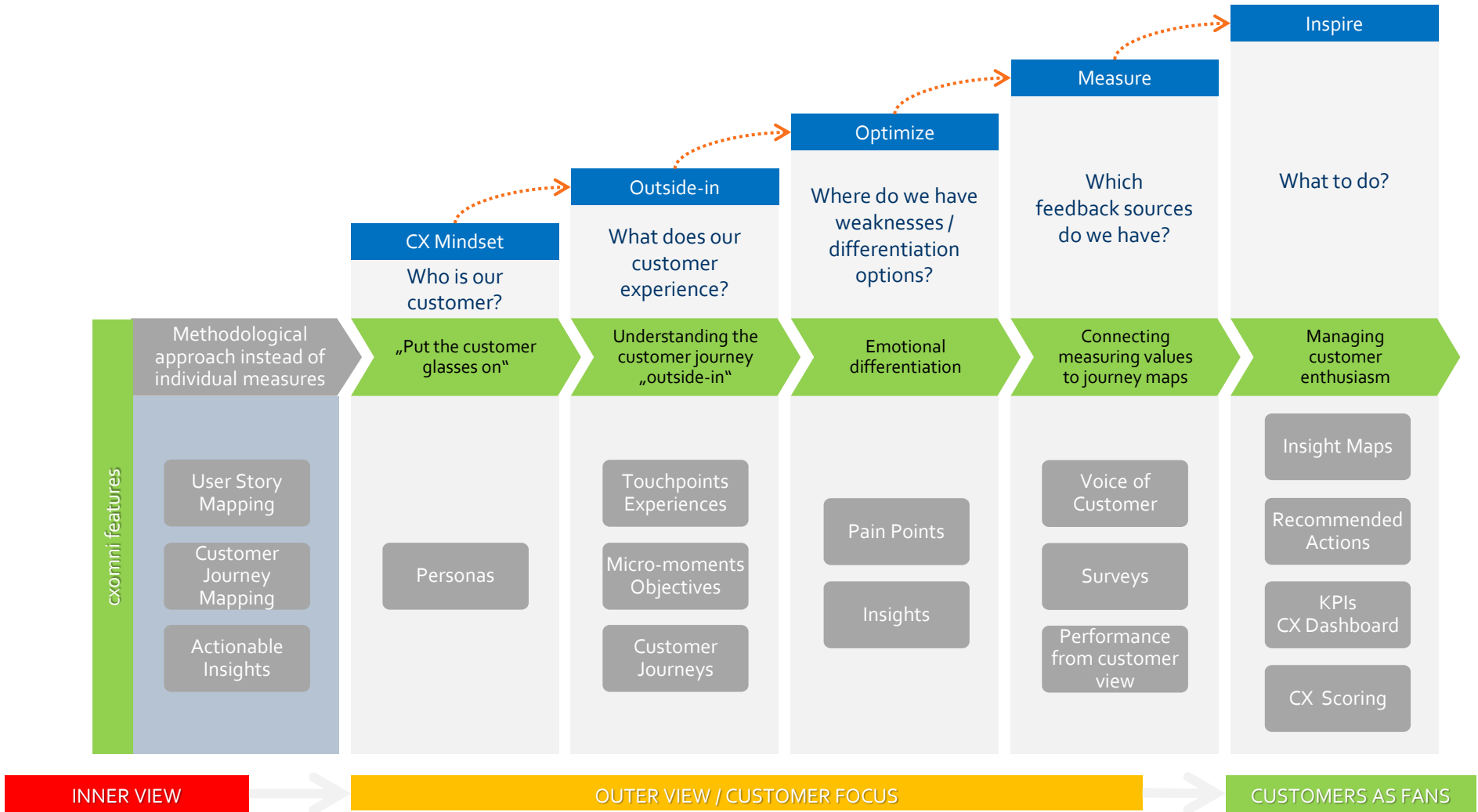


5



FROM CUSTOMER JOURNEY MAPPING TO HOLISTIC CUSTOMER JOURNEY MANAGEMENT

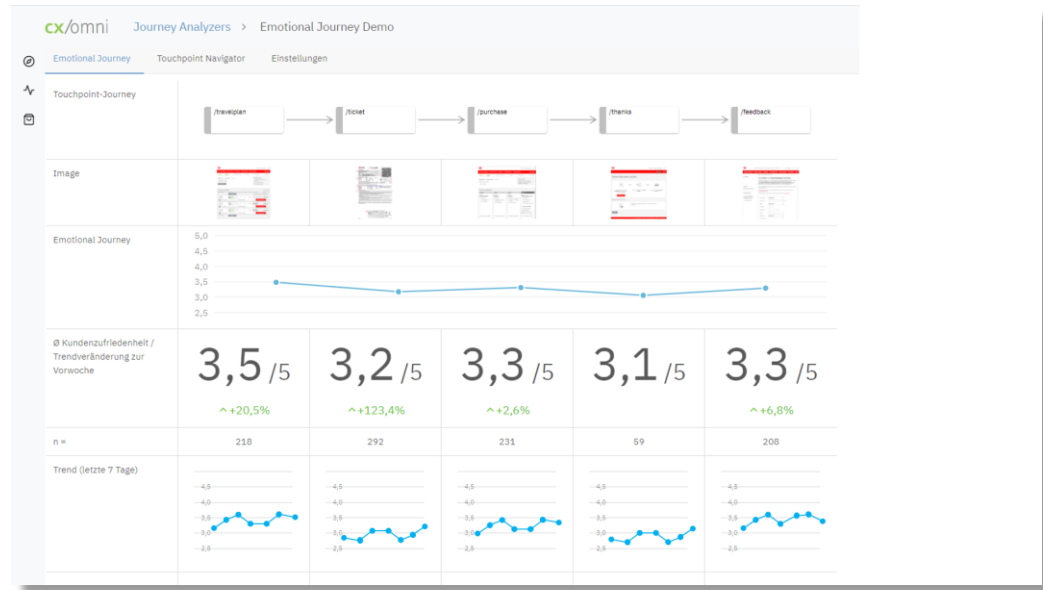
FROM CUSTOMER JOURNEY MAPPING TO HOLISTIC CUSTOMER JOURNEY MANAGEMENT



Customer journey map – now what?

After you have created your first customer journey maps, the question arises as to how to deal with the knowledge gained in the medium term and how to avoid everything simply being a snapshot.

Unless you have already initiated a holistic transformation project, you could, for example, follow these steps:



Regular touchpoint audit

Perhaps you will objectively evaluate your touchpoints regularly in the future? cxomni offers an uncomplicated solution that allows you to regularly record the actual situation in your project teams according to individual questions and to evaluate them as a target / actual comparison.

API interfaces

Integrate your cxomni system with data from other systems, such as voice of customer, net promoter score, market surveys, web analytics, to add actuality and target / actual comparisons to your touchpoints and journey maps. The cxomni support team will assist you in doing so.

Journey Dashboard

A journey dashboard gives you a 360-degree perspective from the customer's point of view. Avoid information overload - provide a small number of very relevant metrics. Enable benchmarks with best-in-class values or target values.

The quintessence of all efforts is to achieve more satisfied customers and increase sales.

So, shift the perspective: away from purely internal process and resource management to a consistent focus on the customer perspective:

Managing positive customer experiences at all touchpoints.

[TRY IT NOW FOR FREE](#)

Managing Personas, Customer Journey Maps and Touchpoints.

No more individual documentation and static presentations: cxomni CEM cloud is the central customer journey management platform for the documentation and internal communication of all CX/UX Insights from the point of view of your customers. Expectations, sensations, pain points, performance gaps – along all contact points of the customer journey and in real-time with market research and feedback data.

[TRY IT NOW FOR FREE](#)

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