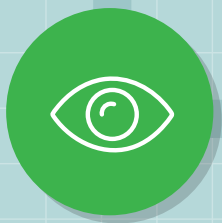


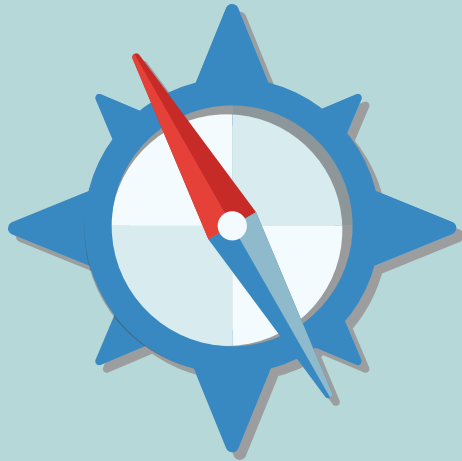


CUSTOMER JOURNEY MAPPING



PATLive





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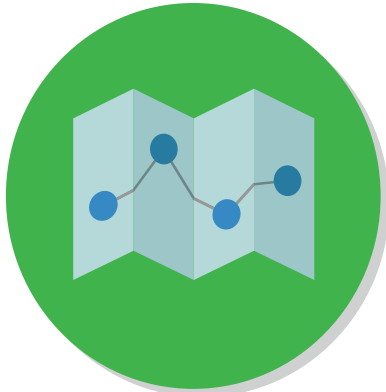
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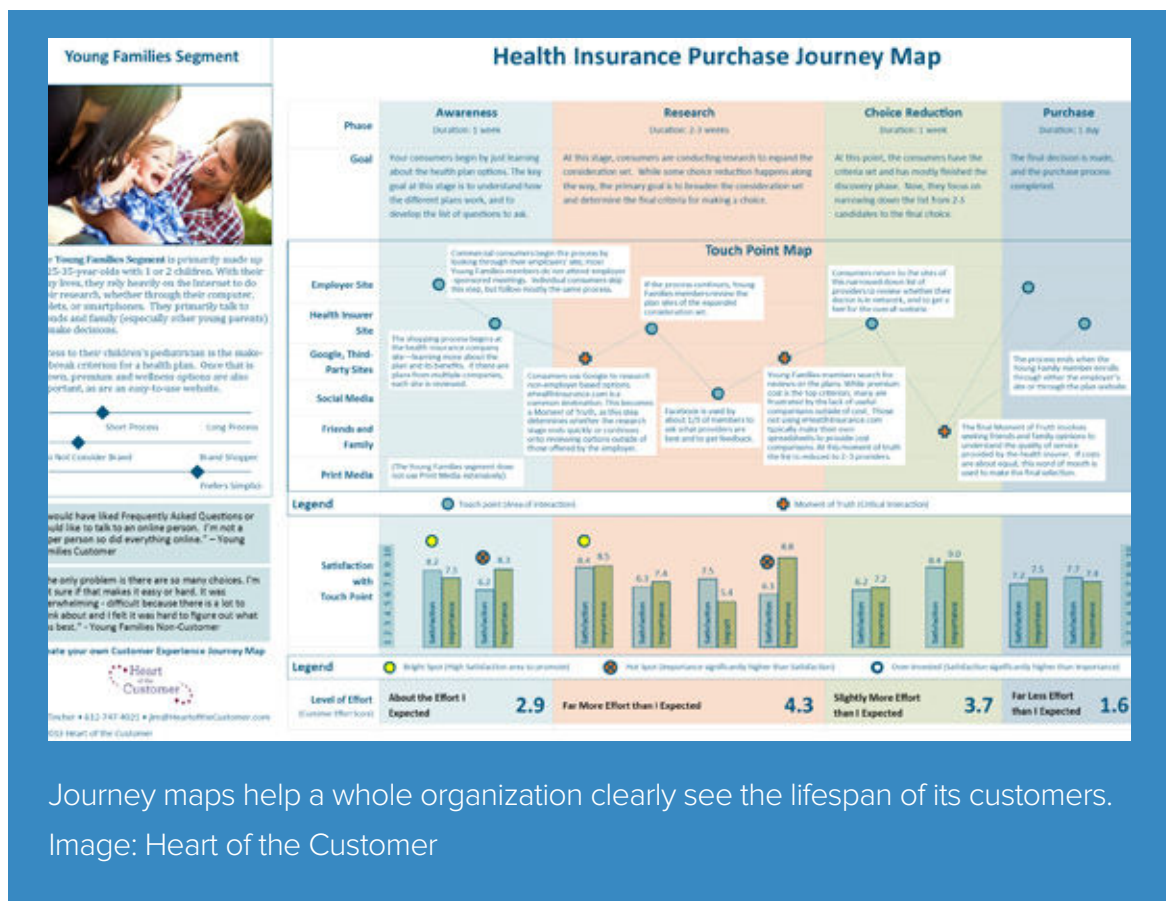
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The Benefits of Customer Journey Mapping

Maybe you're hesitant to set sail on this journey, or maybe you don't quite grasp why journey mapping is important for your business.



Journey maps help a whole organization clearly see the lifespan of its customers. Image: Heart of the Customer

It's understandable that you would be concerned. After all, mapping your customer's entire journey is no small feat. It takes some serious data mining across departments and gathering your company's stakeholders. And that's just the beginning.

Before you dive right in, here are the core benefits of creating a customer journey map. There are some major core benefits of creating a journey map that make it worth your while. A journey map:

- Places an emphasis on the customer in your business
- Broadens your overall scope and allows you to better understand your customer
- Helps to identify any operational issues and correct them
- Gives the entire company a better understanding of customer issues and how to solve them
- Encourages every single person in your company to think about the customer experience
- Places all departments on the same page when it comes to customer care

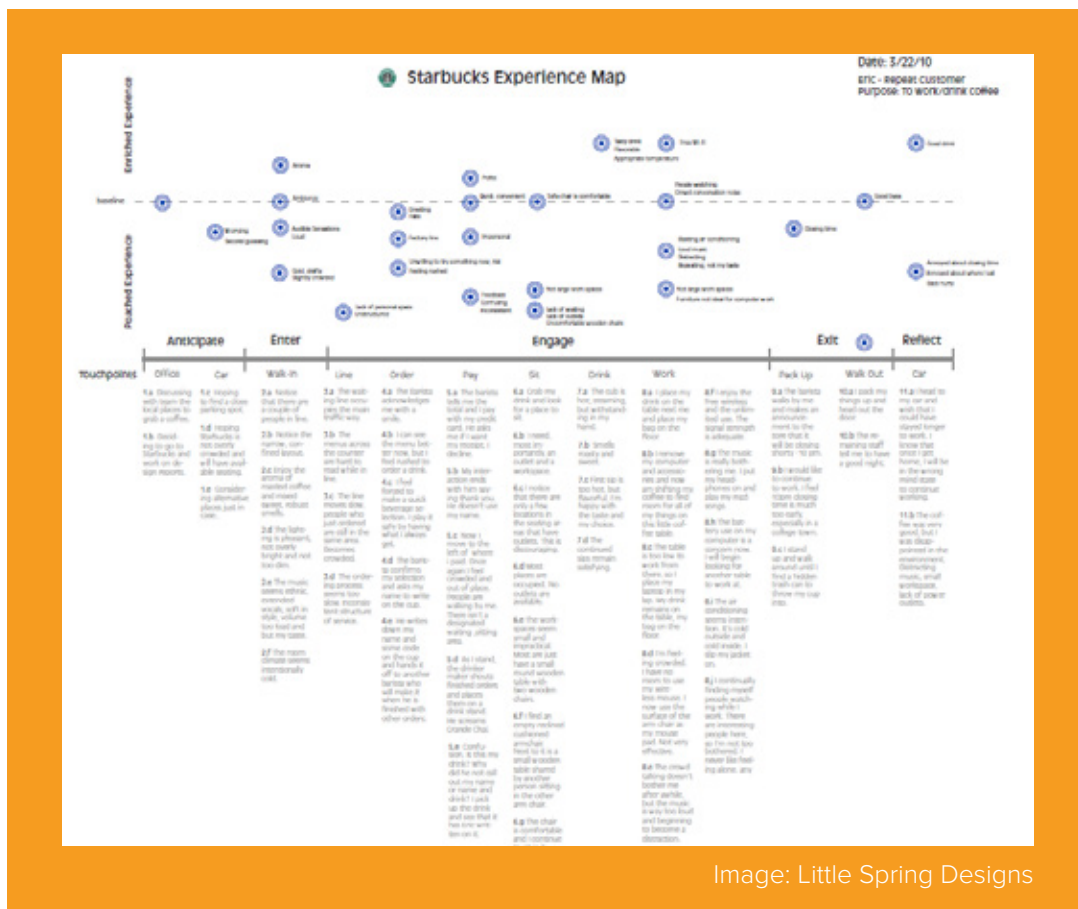


Image: Little Spring Designs

Start with Research

It would be awesome if you could just dive in and get to mapping away furiously, however, it's going to take some work to do the work. To create an optimal customer experience and a map that will drive that experience, you need to gather any and all data your company has collected on your customer. This research comes in two forms: analytical and anecdotal.



ANALYTICAL RESEARCH

Analytical data can be pulled from a number of sources and, when pieced together, can help create a view of how your customers are interacting with your business. This type of data can be culled from:

- Your company's website
- Search data from Google Analytics
- Social media channels where the company has a presence
- Email analytics
- Customer satisfaction ratings, like NPS

Analytical data can be difficult to interpret, so you will want to ensure you're reading the information correctly. For example, some of your data may point to customers spending a significant amount of time on your website. While this could be because your site is blowing their hair back, it could also be a sign that it's confusing.

Number crunchers love data, but it's not the only kind of information you should use to create a well-rounded journey map. Anecdotal research will help give you a full picture of your customer's entire journey.

ANECDOTAL RESEARCH

You're also going to need to step away from the numbers and talk to your customers to gather some of that tasty anecdotal research. This type of research will enable you to create a fuller, richer image of the entire customer journey. This includes:

- Online customer reviews
- Comments posted to social media channels
- Interviews with staff who work with customers daily, such as customer service or sales
- Focus Groups

There's a chance you already have access to much of this information, while something like a focus group could be outside of your time and budget constraints. It is possible to make educated guesses about your audience, though it won't be as reliable as actual research and could muddy your journey map. If you do have to play the guessing game, it's important to note every instance of it in your map.

Now that you have your research all packed up and ready for the journey, it's time to head out to gather supplies and ready your team for this adventure.

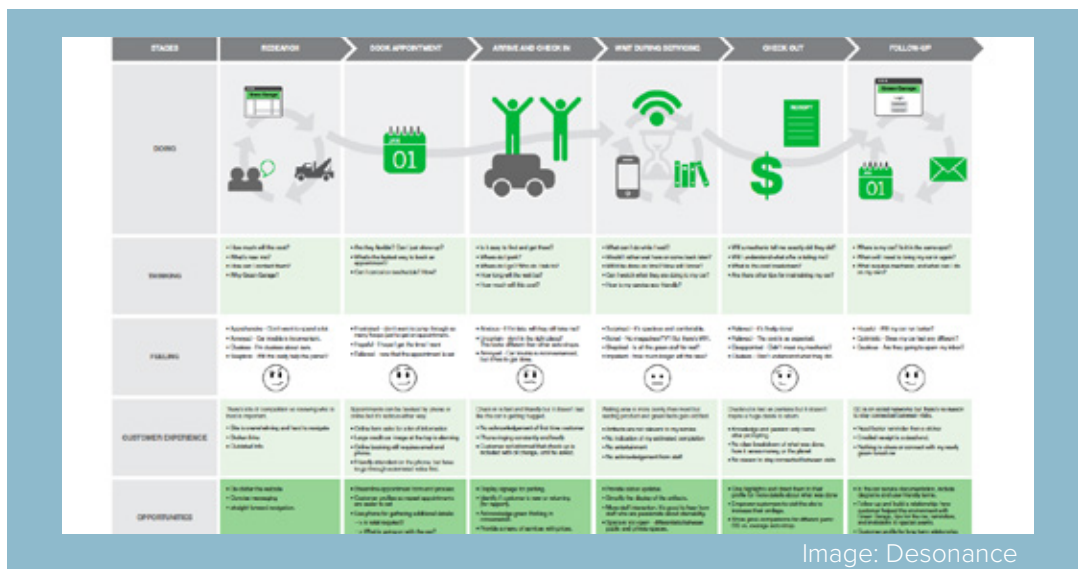


Image: Desonance



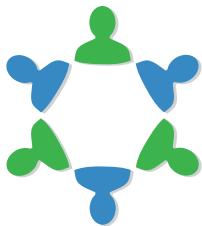
Gather Your Team and Ready the Supplies

You've gathered all of that juicy data, and now it's time to pull together the team you need for your journey mapping adventure. You might be wondering who you ought to include. Here are some frequently asked questions about journey mapping workshops:



1. What supplies will I need?

Sticky notes (at least 5 colors), sharpies, pens, and a dry erase board or butcher paper.



2. Where should I get my stakeholders?

You're going to need the Skipper, the Professor, the Movie Sta...oh wait. We're talking about customer journey mapping and not Gilligan's Island.

You will want to build a group of stakeholders from all departments: marketing, sales, customer service, development, IT, and executives. You'll want to be sure you get at least one person from each of the departments since they all have different perspectives. Of course, if you run a small business this team might consist of me, myself, and I. If that's the case, reach out to friends or family who understand your business or are willing to help you gather and sort copious amounts of data to find you customers' journey.



3. What will a facilitator do?

This is the person who will steer the entire workshop from top to bottom. The facilitator will bring context to the workshop by reviewing research that was found and dividing all the stakeholders into groups. You will want the groups to have a representative from each department, if possible, and you should limit the groups to 6 people.

Consider providing a packet with all the research and clear directions for the workshop - make it easy on your stakeholders!



4. Once in groups, what are the duties of the stakeholders?

Each team will need to look through the research and pull out the information they think would be most important and would be a good building block for the map. The teams will use stickie notes to highlight these building blocks and place them under one of three categories: Doing (what actions is your customer taking), Thinking (what is your customer thinking about during this action), or Feeling (what does this make the customer feel).

There will come a time when teams begin to have stickie notes building on top of each other and that's a good thing! It means there's a pattern or a relationship between the two. By the end of the session, the groups should begin identifying the customer journey and pulling out the key insights.

Once you have found your customer journey, it's time to make it visual! But first, you have to pull out the story from your findings.

Finding Your Customer's Story

Congratulations! You made it through your customer experience workshop and we bet you have all kinds of insight into your customer's journey. It's now time for all that information your stakeholders gathered and sorted to tell the story.



You have a ton of data slapped together on butcher paper or a whiteboard. The next step is to sift through the most important tidbits and pull out a compelling customer story that is worthy of your journey map.



We all know that stories include a beginning, a middle and an end. Your journey map should do the same. You really want to sift through those details to get to the heart of your customer's story.

Here are some tips for creating a story worth sharing:

- 1. Make sure your point of view is clear.** Can you easily summarize the key concepts of the map? Create a story that you want people to know about your business.
- 2. Create a hierarchy of information.** Like any great story, your customer journey map should have a beginning, middle and end.
- 3. Always think about your audience.** Consider the details that will help them understand the story.

Now that you've pieced together a story worth telling, let's move forward with design!



On to the next... Creating Your Map!

You've gotten your customer journey story together, so it's time for the best part: the designing of the map.

We all know the power of a well designed infographic; it can relay information quickly and easily without a ton of text and in simple snippets people can quickly grasp. Most customer journey maps take on this form. Not a design guru? No problem. Just because you facilitated the workshop does not mean you have to tackle the design of the map.

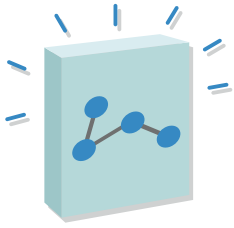
The next step is for you to join up with a designer and a marketer to really get to the heart of the notes that were created during the workshop. Working as a team, this group will shape and create what will become the end result: an enticingly designed and clean customer journey map anyone can understand.

While designing a customer journey map can be fun, here are a few tips you should keep in mind:

1. Simplicity is Best

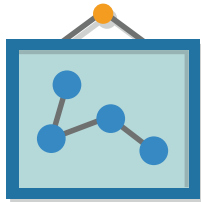


The more convoluted a journey map becomes, the easier it is to get lost on the journey. Make sure anyone could read and understand it. Don't be afraid to use descriptions where needed.



2. The Map Should Be an Autonomous Unit

There shouldn't be additional information needed to understand your journey map. All the information should be contained within it.



3. Share it Everywhere

Your entire organization should know about the journey map. Print copies of it to hang around the office. Have staff hang it at their desks.



Image: Steve Batty



Putting Your Journey to Practice

You have a brand new map that clearly defines the journey of your customers, from first touchpoint up to the moment they end their relationship with your company. The map has been distributed across all departments, and all that's left to do is put that map into practice. Here's how to apply the journey map to your business and begin creating a customer experience that won't soon be forgotten.

Here's how to begin applying your map to your business:

1. Start by highlighting your pain points and prioritizing them. A journey map is a fantastic way to assess where a company is falling short for the customer. It's never fun to look our mistakes in the face, but now's the opportunity to do something about it!

Create a meeting with your key stakeholders once more and list out every single pain point listed on your journey map. From there, it should be easy to figure out which points need immediate correction. Prioritize them and present the issues to the appropriate department.

2. Decipher the map for each department. While a customer journey map gets an entire organization to rally around its customers, each department will need to know how it functions in accordance to the map.

Let's say one of your customer pain points includes a poor onboarding process, which creates confusion and leaves the customer in the dark. In that

case, your marketing and development departments would want to create literature that would help the customer have a better understanding of the software. Customer success teams could be created to track new customers and ensure they are getting the most out of the software.

Whether they are front-facing or more behind the scenes, each department plays a different role and your journey map should give the entire company a greater understanding of their place in providing the very best service to your customers.

3. Analyze the infrastructure of your company to see what is needed to drive your overall goals. A journey map gives an organization insight on their current customer experience, so it's easy to see if your current performance is aligned with your overall vision.

Use the map to determine what is needed to create the sort of experience you envision. Maybe that includes new positions, custom software, new office equipment or even a different type of pencil; the map can give you greater insight into where the organization is falling short to help you determine how to realign it with your vision.



This map portrays the average journey an e-commerce customer might take. Image: Delvinia

You did it! Hooray.

You made it through to the other side of this customer journey mapping adventure.



Customer journey mapping is a fantastic way to create a pro-customer approach across your entire organization, but no one said it would be easy. There is a lot of thought and dedication that goes behind understanding your customer's entire experience from top to bottom, however, your organization will come out as one that excels at providing great service and putting its customer front-and-center.

What We're All About



PATLive has been a leader in great customer service since it was founded in 1990 with 5 employees and 20 customers. Our live answer center knows every call is important. Whether you're a hairdresser, a plumber or a utility company, we can answer all your calls when you can't.

We don't outsource our calls, and we never ship them overseas — they're all answered right here in America.

We believe that the foundation of our business hinges on recruiting and hiring great employees, and we work hard to create a culture that attracts top talent.

[Learn more about our brand of customer service now!](#)