Journey Maps And CX Transformation
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How To Use Journey Maps To Kick-Start A Customer Experience Transformation

Journey maps are powerful artefacts that clarify how customers interact with your organisation and what their experiences are like. They can also catalyse your organisation’s customer experience (CX) transformation.

This guide will show you how to leverage existing journey maps to spur investment and interest in CX, as well as boost performance. Discover how journey maps can serve as a springboard to:

• Increase employees’ understanding of and empathy for customers.
• Prioritise CX projects that will have the greatest business impact.
• Improve the efficacy of CX measurement.
• Design experiences that drive loyalty.
Many organisations map their journeys, upload maps to a content repository, and never touch them again. No wonder clients often come to us frustrated: They’ve put a ton of time and effort into journey mapping but have difficulty employing it in a way that earns a positive ROI.

The first step is to stop thinking of journey mapping — or any other tool in your CX arsenal — as the end game. The focus should be not on the tool but on the way of thinking that it entails and the action it drives.

Journey maps are flexible tools that can be combined with adjacent methodologies such as design thinking and agile development, as well as with complementary artefacts like empathy maps and “jobs to be done” frameworks. Within the context of this larger ecosystem, journey maps can pinpoint opportunities to retain more customers, improve the employee experience (EX), lower costs, and increase customer satisfaction.

Make Sure Your Maps Have You Set Up For Success

Before diving into transformational work, double-check your journey maps. Make sure you can answer “Yes” to the following questions before proceeding:

- Do your journey maps have a clear purpose?
- Do they map the full breadth and depth of your CX ecosystem?
- Are they focused on customers’ goals?
- Have they been validated by customers?
- Have they been socialised?
- Do they have the commitment of key stakeholders, including executive buy-in?

Forrester clients can use our checklist to assess the quality of journey maps.
Use Journey Maps To Prioritise CX Projects

Seventy-seven percent of CX organisations lack a framework for prioritising projects across the company. If your team falls into this category, you’re open to risks including wasted resources, negative ROI, diminishing buy-in from stakeholders, and stagnant (or sinking) customer satisfaction. For many, these problems are already acute: 48% of CX leaders say buy-in is their biggest obstacle.

Establishing a journey-based prioritisation framework for CX projects can ensure that resources are used wisely and that attention is given to projects that combine high feasibility with great business benefits. As journeys are mapped from the customer’s point of view, they provide clarity on where pain points live. This enables CX teams to focus on what customers see as the most pressing issues — rather than what internal stakeholders guess the problems are.

Some companies choose to prioritise pain points, while others ideate solutions and then prioritise the solution that will improve the most pain points. Ad agency T3 suggests clients start with the low-hanging fruit, or “quick wins,” in order to show momentum and get more investment for larger projects.

When KPMG mapped seven journeys, 30 potential projects emerged. The organisation created a framework for evaluating the projects based on customer desirability, feasibility, and project viability. This helped bring clarity to the selection process, and the organisation was able to zero in on the best two projects to begin work on.

Forrester clients can get started building a prioritisation framework by reading “Build A Strong Foundation For Your CX Prioritization.”
Most CX professionals are drowning in data but still parched for insights. For all the effort CX teams put into measuring, it far too often fails to spur much beyond a soon-forgotten report. Time is spent measuring the wrong things and/or stitching together data in unhelpful ways, leading to a measurement variation on advertising pioneer John Wanamaker’s classic quip, “Half the money I spend on advertising is wasted; the trouble is I don’t know which half.”

A lack of varied techniques contributes to this problem. Seventy percent of companies don’t go beyond surveys to measure CX, leading to a limited understanding of how customers’ sentiments change over the course of a journey. In addition, overreliance on surveys leaves rich data sources untapped — only 25% of companies mine call transcripts, and a mere 18% incorporate product usage data.

That’s where journey maps come in. Maps show you what an experience looks like from the customer’s perspective. That outside-in point of view can break your team out of a typical measurement trap: organising your measurement according to how your company organises itself (i.e., by touchpoint). For example, imagine a shoe retailer:

- The purchasing department acquires a new model of shoes. They send the model’s specifications (size chart, materials, etc.) to an e-commerce team.
- The e-commerce team lists the model on the retailer’s mobile shopping app, where customers purchase the shoes.
- When customers need to return the shoes, they go into a brick-and-mortar store.

If the shoe retailer notices a tanking customer satisfaction score (CSAT) around returns, the CX team may logically conclude that there’s an issue with the in-store return experience and try to fix that, because that’s the touchpoint incurring negative customer feedback.

By taking a journey-centric view, however, the CX team would be able to find the original source of the problem: The purchasing department incorrectly noted the size chart, leading customers to accidentally buy the wrong-size shoes and, therefore, need to go in person to return them. A customer doesn’t know (or care) that the error happened in the purchasing department. They’ll express their dismay at the first opportunity after the frustrating experience (in this case, receiving shoes that don’t fit).

Taking the holistic view enabled by journey maps allows you to pinpoint real problems and measure whether or not your efforts are successful at remediating them. This can save you the frustration of spending time investing in solving issues that aren’t the actual source of the problem.
Embed Customer Insights Into Your Organisation

Mapping journeys is the first step toward journey-centricity (i.e., using customer journeys as the organising principle for operations and measurement).

**Journey-centricity is good for business:** Organisations can realise revenue increases of 10% to 20%, cost reductions of between 15% and 25%, and 20- to 40-percentage-point improvements in customer advocacy as a result of a customer-journey-at-scale approach. Lloyds Banking Group’s journey-centric digital transformation — which we’ll discuss in depth later in this guide — delivered estimated savings and revenue increases to the tune of **£500 million over three years**.

Journey-centricity is an ongoing process that will evolve with your business. Here is a brief overview of activities that can bring your firm closer to journey-centricity:

<table>
<thead>
<tr>
<th>Information</th>
<th>Definition</th>
<th>Best practice for journey-centricity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Culture</strong></td>
<td>The shared values and beliefs that drive behaviour</td>
<td>Build shared knowledge of which journeys matter most, and foster the required shared values and beliefs — like openness to change, transparency, and collaboration — to drive the right behavior.</td>
</tr>
<tr>
<td><strong>Structure</strong></td>
<td>The structure of the organisation</td>
<td>Ensure top-down and bottom-up cross-functional collaboration.</td>
</tr>
<tr>
<td><strong>People</strong></td>
<td>Talent management and employee experience practices</td>
<td>Instill a journey mindset throughout the organization, and invest in journey-mapping accreditation and support networks. Consider creating, hiring, and training for new roles like journey owners, stage owners, and journey managers.</td>
</tr>
<tr>
<td><strong>Processes</strong></td>
<td>The ways people work and make decisions</td>
<td>Fuse journey data, tools, and methods across the ecosystem to extend journey influence.</td>
</tr>
<tr>
<td><strong>Technology</strong></td>
<td>The systems and tools that enable processes</td>
<td>Upgrade your journey tools to unify journey advocates, scale, and increase speed. Blend journey-centricity with agility to quickly shift and innovate.</td>
</tr>
<tr>
<td><strong>Metrics</strong></td>
<td>The strategic measurements that drive business decisions</td>
<td>Use a system of end-of-journey metrics and in-journey signals that balance customer and company goals to help measure and predict journey performance.</td>
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Design Experiences That Drive Loyalty

C-level executives at forward-thinking companies such as Bank of Montreal (BMO), The Economist, E.ON, and Lloyds Banking Group (LBG) have been shifting their focus away from channels and touchpoints and toward journeys instead. Why? Because, as we referenced earlier, there are big business benefits to doing so.

Journeys are customers’ lived realities — which are rarely the same as the firm’s imagined business processes. Focusing on journeys is essential to an organisation’s maturation from inside-out to outside-in thinking.

The benefits of this maturation are clear. In two years, LBG achieved:

- **Improved digital offerings.** Forrester’s research indicates that LBG now has the most capable retail mobile banking services in the UK, as mobile customers have access both to basic functionality and more advanced features like letting customers book a branch appointment.

- **Happier customers.** LBG has seen a rise in customer satisfaction, including a 78% increase in positive customer feedback for one previously onerous part of the corporate pension journey.

- **More productive employees.** Employee capacity for value-add activities increased by 40%.

- **A boost in sales.** Better tools and processes for online personal loan applications have seen the overall credit acceptance and path to purchase increase by 40%, with average loan amounts up by £700 at subsidiaries Halifax and Lloyds Bank.

- **Accelerated speed-to-market.** It takes LBG only four to five months to bring something from just an idea to a live product or service — down from 12 to 18 months in the past.

How did LBG achieve this? It brought journey-centric thinking into its digital and wider organisations. In the words of Jon Webster, former CIO of digital and transformation, “We were solving the classical online problem rather than focusing on customer experience across touchpoints, policies, and procedures. We needed to stop thinking about digital channels and approach customer problems holistically.”

To that end, LBG focused on transforming a set of 10 customer journeys. Rather than trying to aim for perfection, it prioritised speedy resolution of customer pain points, enabling innovation to move faster.
The value of taking a journey-centric approach to design innovation is evident in LBG’s results. But that doesn’t mean you need a commensurate level of budget and buy-in to be successful. Plans can be tailored to fit the resourcing available at your organisation. According to Webster, finding the right balance between risk and reward is crucial. If you “pitch this too small, nobody is interested; if it’s too big, then it’s too much of a risk,” he said. His advice is to aim for about 10% of your company’s investment portfolio.
Next Steps

HOW CAN YOU START LEVERAGING JOURNEY MAPS AND KICK OFF YOUR CX TRANSFORMATION?

For companies new to journey mapping, assembling an initial success story that you can scale and socialise is a great way to get started. Use a quick-fire approach to journey mapping, which focuses on a well-known (and preferably time-sensitive) problem that a core group of stakeholders can resolve and measure quickly. By rapidly delivering value, the quick-fire approach helps CX pros establish journey mapping as a practical and valuable tool for resolving broader CX problems.

Company culture, skill sets, budget, urgency, and bandwidth are all factors that CX pros need to take into consideration when deciding whether to create their journey maps in house or hire an outside firm to do it for them.

If journey mapping is already an established practice at your firm, begin by assembling an action-oriented, cross-functional team. Together, create a journey atlas — a catalogue or taxonomy of your customers’ journeys across their relationships with your firm. It’s OK if it’s simply a straw man at first. To choose which journeys to map first, consider scale, pain points, and misalignments between brand and customer impact. Also consider stakeholders’ willingness to act, in addition to technology or regulatory changes that may have an impact on CX and EX. Have stakeholders review the journey atlas and run through a prioritisation exercise as outlined in this guide.

Go back to your journey atlas and tackle the priority journeys in order. Find the right allies and assign ownership of projects to business units or individuals with authority. Over time, you can build your CX team’s skills and consider adding journey-mapping capabilities and responsibilities to employees’ competency models. Formalizing journey mapping as an accreditation that employees can acquire and a responsibility that gets assigned helps promote accountability and sustainability.
Recommended Resources

On-Demand Webinars: Enhance And Prove The Value Of Your Customer Experience Strategy
WATCH NOW

Complementary Guide: Capturing The ROI Of CX
DOWNLOAD NOW

CX EMEA Event:
30 September–1 October
REGISTER NOW

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