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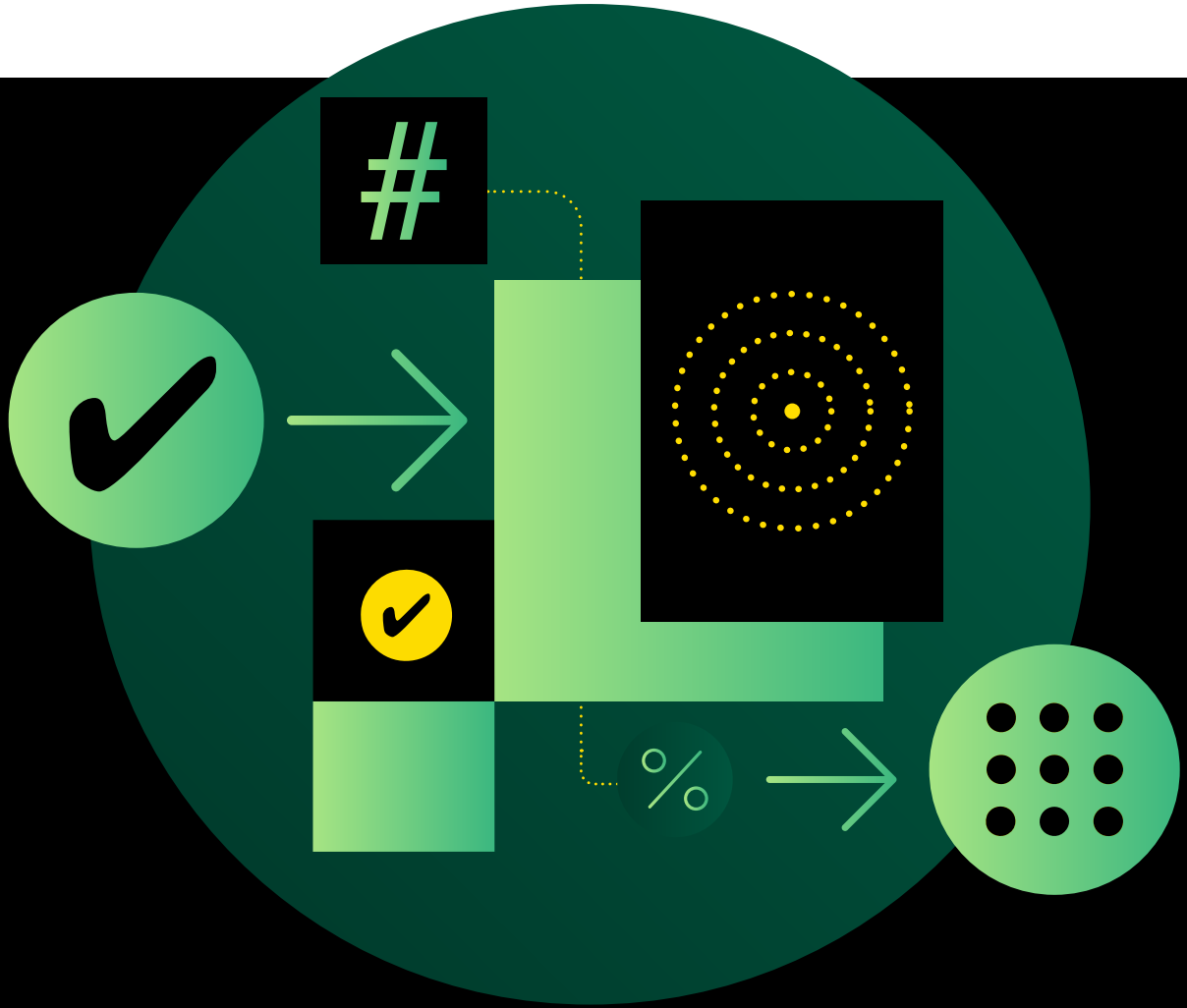
JOURNEY QUICK-START GUIDE 1

Build A Journey Practice That Gains Traction

Go beyond mapping to create focus, momentum, and early wins



Introduction

Many organizations begin their journey efforts by mapping customer experiences, identifying pain points, and generating lists of opportunities for improvement. These activities can create valuable insights but don't automatically translate to business impact. Without a clear focus and a path to action, the result may be a collection of well-intentioned artifacts that struggle to gain traction.

Organizations with effective journey practices take a more deliberate approach. They build a broad understanding of customer journeys, identify the experiences that matter most, and focus their efforts where they can create measurable value.

Read on for three actions that will help your journey practice gain traction. Each action is accompanied by an additional resource for you to take your work further.

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Action 1: Create A Journey Atlas

Creating individual journey maps can be valuable, but it can inadvertently cause fragmentation. Different teams may map different experiences, resulting in disjointed views of the customer and no common understanding of which journeys matter most.

A journey atlas provides a broader view. It acts as a catalog of customer journeys, helping organizations see how journeys connect, identify gaps in understanding, and determine where to focus improvement efforts. With this big-picture view, teams can later home in on individual journeys.

You don't need special software to create a journey atlas. Teams can use visual collaboration software they may already have, or even PowerPoint. The important thing is that the atlas is accessible, socialized, and used. Follow the steps below to get started.

1. **Identify the major stages of the customer lifecycle.** Use these stages — e.g., awareness, evaluation, purchase, onboarding, use, support, and renewal — as the foundation for organizing journeys and understanding how customer experiences connect.
2. **Determine customer goals and journeys.** Gather input from customer-facing teams, customer research, and voice-of-the-customer data about what customers are trying to accomplish within each lifecycle stage. Focus on customers' goals rather than the processes your organization uses internally.
3. **Cluster and organize journeys into a manageable set.** Group related activities into high-level journeys. Resist the urge to catalog every interaction and instead identify the experiences that matter most to customers and the business.
4. **Assess journey importance and health.** Review and validate the journeys with stakeholders and use available data to understand where customers are succeeding, where they struggle, and where improvement opportunities exist. This will help you identify the journeys most in need of attention.

Don't wait for perfect data or a complete inventory of journeys before starting this work. You can create a simple straw-man version of your journey atlas and refine it over time as new information becomes available. Even a high-level atlas can help create organizational alignment, establish a common language around journeys, and support more effective prioritization decisions.

Go Deeper:

Learn how to create an actionable journey atlas.

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Action 2: Focus On A Few High-Value Journeys

Once you've created a journey atlas, your next challenge is deciding where to focus. Organizations rarely have the resources to improve every journey simultaneously — nor should they try. The most successful journey programs concentrate their efforts on a small number of journeys that have significant impact on both customers and the business.

Use the steps below to prioritize journeys.

1. **Gauge customer and business impact.** Evaluate each journey based on criteria such as importance to customers, effect on loyalty or satisfaction, influence on employee experience, and contribution to strategic business goals. Journeys that strongly affect both customer outcomes and business performance typically represent the strongest opportunities for investment.
2. **Evaluate feasibility.** Some high-value opportunities may be difficult to pursue immediately. Assess the effort required to improve each journey, considering factors such as stakeholder support, required investment, technical complexity, and resource availability. Improving a moderately important journey that is highly feasible may deliver value faster than pursuing a transformational effort that will take years to complete.
3. **Balance quick wins, strategic bets, and longer-term plays.** Categorize journeys according to the type of investment they represent:
   - **Quick wins** offer visible impact in a relatively short time frame and help build momentum.
   - **Strategic bets** have the potential to create meaningful customer and business value but typically require greater investment and longer time horizons.
   - **Long-term transformations** may involve substantial changes to operating models, technology, or experiences.

   The most effective journey portfolios include a mix of all three. Early wins demonstrate value, while larger investments position the organization for future differentiation and growth.
4. **Create a prioritized roadmap.** Once you've evaluated impact and feasibility, sequence your journey work accordingly. Determine which journey to address now, which to plan for later, and which may need additional analysis.

   This creates a practical roadmap that helps leaders align resources and investments around the journeys most likely to improve customer and business value.

Go Deeper:

Learn more about prioritizing customer journeys.

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Action 3: Generate An Early Win

Many successful journey programs start by addressing a single customer problem that can be improved within a reasonable time frame and produce measurable business value (i.e., a quick win). This achieves two things: It improves a specific experience, and it proves that journey work creates tangible customer and business outcomes. That helps generate buy-in for future investments.

Follow these steps to get started.

1. **Identify a specific customer problem.** A good early-win candidate is a problem that is often experienced by customers; well understood by employees; important to the business; easily measurable; and realistic to address in the near term.

   For example: A bank discovers that customers are starting an online loan application but abandoning the process before submission. Customer research, call-center feedback, and web analytics all confirm this is an issue. Customers are dissatisfied, and the bank is losing revenue.

   Rather than redesigning the entire loan journey, focus on understanding why customers are getting stuck. Narrowly defining the problem increases the likelihood of a successful outcome.

2. **Build an evidence-based case for change.** Once you've identified the problem, gather evidence to support action. Sticking with the loan example, you might learn that customers are not sure whether they can afford the loan or if they meet the eligibility requirements. That uncertainty causes many of them to exit the application process.

   The proposed solution could be straightforward: Add a loan affordability calculator and clearer eligibility guidance before the application begins.

   When presenting the opportunity to stakeholders, be explicit about:

   - The customer problem you are solving.
   - The expected customer benefit.
   - The business value of addressing the issue.
   - The resources required.

   You don't need to create a lengthy business case, but you do need to clearly connect the proposed improvement to customer and business outcomes.

3. **Define success before you launch.** For the loan example, potential success metrics could include application completion rates, conversion rates, customer feedback, and calls related to loan eligibility questions (i.e., "Do these decrease because people can now determine their eligibility online?").

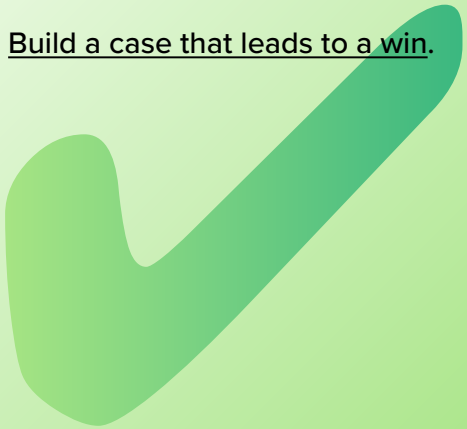
   Define a baseline and determine when you will review results. Research consistently shows that teams are more successful when they define success measures before implementation rather than after.

4. **Implement, measure, and share results.** Once the improvement is in place, monitor performance and communicate results broadly.

   If the new loan calculator increases application completion rates and reduces customer confusion, share that story. Highlight the business and customer impact, the teams involved, and the approach they used. Sharing how the improvement happened can build confidence and support for future journey improvement efforts.

Go Deeper:

Build a case that leads to a win.



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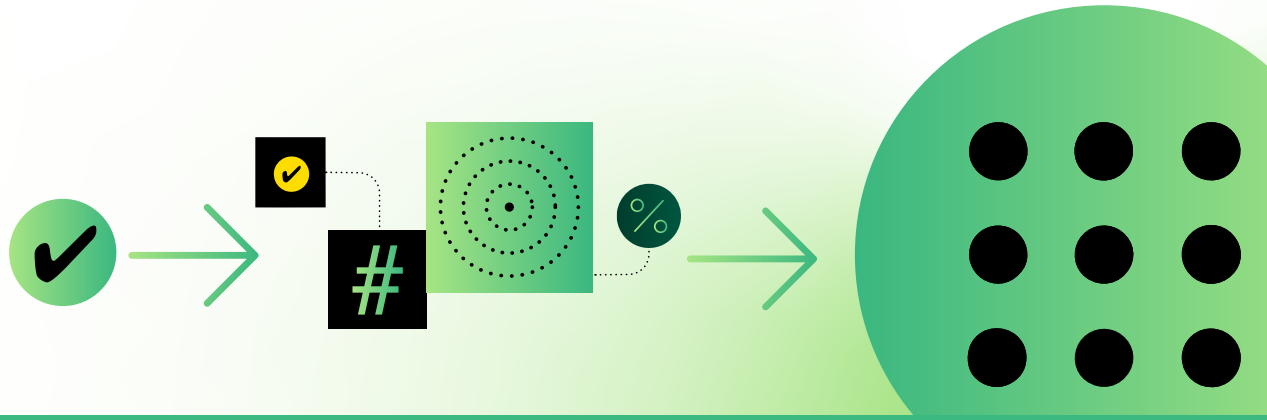
Take The Next Step

Building a successful journey practice starts with focus. Once you've built a journey atlas, begun prioritizing journeys, and delivered a measurable improvement, you're ready to start turning early successes into a repeatable discipline. Learn more in our next quick-start guide, Turn Journey Insights Into Action.



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