The Customer Journey

- You're very welcome this morning!
- Session starts at 10am
- Please enter your name and organisation/location in the chat window as you arrive
- Set your chat audience to DCM remote trainer1 rather than entire audience (in control panel)
- You will be muted as you arrive (I will explain this further)
- You do not need your webcam for this session

dcm THE LEARNING EXPERTS

HELLO!

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I am a trainer since 2014.
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The Customer Journey

Olivia Roche

Agenda

- Introduction to journey maps: What they are and why they work
- The framework: Elements of a customer journey map
- Understand how customers experience each stage
- Explore how brand values can be brought to life in each stage
- See how different customers go through each stage
- Understand what objectives and tasks customers have in each stage
- Identify opportunities in each stage
- Increase design effect in each stage
- Focus the dialogue with the customer in each stage
- Q&A session

Journey Maps

- A journey is your customers end to end experience
- The process of creating a graphical representation of the steps and stages a customer goes through to experience a product or service
- The perception that customers have across all of their interactions with your organisation
- How to show everything that really matters to your company's success using a lot of post-its
- Journeys typically involve multiple departments and touch points
- Most maps are linear (some are circular) but they all have some things in common

  - measure touch points along the journey
  - capture your customers attitudes and emotions
  - help you to see your experience through your customers eyes
  - shows your experience across touch points
  - focus on your customers true needs

Journey Maps

- Customer journey mapping is relevant because it helps you design ecosystems of lasting value and you can use it when you want to learn about the processes internally or the customers in the ecosystem (emotions, good or bad, brand values, objectives/tasks of customers, who what how why, design and innovative opportunities)
- To understand how customers experience each stage
- To explore how brand values can be brought to life in each stage
- To understand what objectives and tasks customers have at each stage
- To scout for innovative opportunities to each stage
- To increase design effect in each stage
- To focus the dialogue with the customer in each stage
- A journey map is typically one of two things; research to understand your customer experience or a workshop to document your customer experience
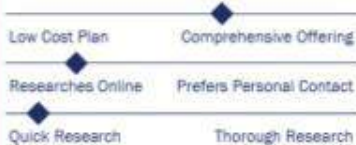
Research Based Maps

- Maps that represent qualitative conversations with your customers
- Interviews, focus groups, journals (not surveys)
- Break your customers into segments and interview enough representatives of each to find common themes. Customers are different so segments are important as different personas often experience your product or service very differently
- The benefits of research based maps is that it is an unbiased view of your journey and clearly goes across each touch point capturing your customers actual steps and attitudes/emotions
- The disadvantage is that it is harder to internalise as you are capturing from customer's perspective and it can be seen often as just another research report with little action taken after

Meet Amanda

Amanda is a freelance graphic designer with two kids. Her husband Mike recently lost his job, and their health insurance is about to run out. Amanda needs to find a plan that will protect her kids and ease her mind. She's never shopped for health insurance before, and finds the thought of it overwhelming.

They don't have a lot of money but it's very important that she has the right healthcare for her kids, especially Jacob, who suffers from asthma.

Low Cost Plan	Comprehensive Offering
Researches Online	Prefers Personal Contact
Quick Research	Thorough Research

"We had a plan a few years ago that didn't cover Jacob's inhaler. It was terrible that my insurance company didn't think it was important. Of course we paid for it. But I hate having to make these kinds of choices about my kids' health."

"When I shop for auto insurance it's really easy. I put in my information and up pops three quotes. But choosing health insurance is a job—and one I don't enjoy!"

Create your own Customer Experience Journey Map

Selecting a Health Insurance Plan Journey with Coolsure Health Insurance

	Initial Research	Deeper Research	Application	Approval and Onboarding
Phase	Typical time: 1 day to 1 week	Typical time: 1-2 weeks	Goal: 30 minutes	
Goal	Your potential customers starts by gathering ideas. In this stage, companies are discovered and discarded until 1-3 are left to consider. Losing here takes you out of the picture the rest of the way.	As this phase, your customer researches 1-3 companies to find the best match. About half use social to help with their decision-making.	The application process is a moment of truth—if this fails, it has long-term impact on your relationship. Some members quit complicated processes and go elsewhere.	The onboarding process sets the stage for membership. Positive experiences help members make the best use of their plan, setting the stage for renewal. Negative experiences result in attrition.

Customer Experience Perceptions Map

Positive Experience

3 of 10 responses say Coolsure is a good company.

Amanda goes to Jacob's soccer game and talks to her friend Jane. Jane recently went through a similar experience purchasing healthcare. Jane suggests she look at Coolsure plans.

Amanda Googles "Coolsure reviews." Overall comments are very positive.

Encouraged, Amanda decides to apply.

Agent Betty listens carefully to understand Amanda's needs and recommends the best plan to cover Jacob's asthma treatments. Betty also asks if Amanda would prefer it if they finish the application over the phone. Amanda gratefully says yes.

Worried, Amanda asks Jane about it. "Sarah's in a weird situation. Coolsure has been good for us."

Amanda sends out a tweet. "Looking 4 health plan. Ideas?"

Confirmation text and email come—she's approved!

The start date comes. A welcome email gives Amanda helpful tips for dealing with asthma. Amanda is happy to know that Jacob's asthma medications will be covered.

Neutral Experience

Feeling overwhelmed, Amanda Googles "Health insurance plans. She has no idea where to start, so begins clicking through sites.

"I don't know how to answer some of these questions. I'd better call for help."

Amanda wonders, Did I make the right choice? Did Betty actually do the application for me? Did I miss anything?

Amanda goes to Coolsure Website. "Hmmm, 8 plan choices. How do I know which one is best?"

She goes to her state's exchange website. "Wow—so many choices!" In frustration, Amanda procrastinates and decides to do something else.

Amanda gets a text from her friend Sarah, "Saw your tweet. Don't do Coolsure. Had nightmare getting Danny's surgery covered."

Amanda waits 15 minutes on hold, hearing, "Your call is very important to us." "Right," she mumbles.

Negative Experience

Legend	● Positive experience	● Neutral experience	● Negative experience

| **Level of Effort** (5-point scale, 5 = high effort) | About the Effort I Expected **2.9** | Far More Effort than I Expected **4.3** | Slightly More Effort than I Expected **3.7** | Far Less Effort than I Expected **1.6** |

Journey Mapping Workshops

- Review your research map first – you need to view your journey as your customer does which is why research based maps help. If you don't capture your customer's true steps here then the rest if the process will suffer
- Usually full day sessions
- Bring in your teams to map out and create an ecosystem for all the parts of the company involved in a customer's journey
- The benefit to these workshops are that they create a shared view of internal systems – easy to apply to your business as they are so specific
- However customers are not present so sometimes it can just reinforce existing work
- We will come back to this………

Segments

- Use personas to represent your different customer segments. They can be fictitious characters created to mimic a real customer (hypothetical use)
- Grouping different sets of like people based on distinct needs and/or characteristics
- Demographic information like age, race, location or other information such as, interests, opinions, values, lifestyle or life stage
- Customer segments don't provide insights into a customer but insights about groups of customers

Journey Mapping Workshops

- Step one: Document your customers steps in your experience, documenting each step on separate post-it notes
- Step two: Document your customers goals
- Step three: Document your customer's attitudes and emotions
- Step four: Who does your customer interact with on the journey?
- Step five: Document the systems and objects interacted with
- Step six: Document where your friction points are (red dot stickers)
- Use different colour post-its to represent each different step

Step 1 Steps involved	First she speaks to a health insurance salesperson via email 😟😟😟	Then she researches a few different insurance companies to discuss policies	She then makes a list of the best based on her personal goals 😟😟😟😟😟😟	Then chooses 2 or 3 to research further and call agents
Step 2 Goals	Learned about the process of setting up policy	Discovered possibilities	Discarded some companies (out of budget)	Choose the top 3 to potentially purchase from
Step 3 Attitudes and emotions	Delighted	Frustrated	Annoyed	Thrilled
Step 4 Interaction on journey	Salesperson	Call centre		Call centre
Step 5 Systems and objects interacted with	Email	Comparison website	Specific company website	Phone
Step 6 Friction points				

Discussion

Assessing Brand values and dialogue with customer at each stage

Exercise

Could you now think of one persona and one journey for your business to possibly put this into practice?

Backstage

- Problems often originate backstage and decisions made here can have dramatic impacts on your customers
- You can end up solving your own problems instead of the customers
- There can be a lack of backstage team knowledge about customer problems
- You can visually represent moving backstage with a red ribbon
- Then show what happens backstage for each frontage step

Frontstage steps involved	First she speaks to a health insurance salesperson via email	Then she researches a few different insurance companies to discuss policies	She then makes a list of the best based on her personal goals	Then chooses 2 or 3 to research further and call agents
Backstage processes	Send email	Phone call		Generate quote and await response
Backstage groups	IT	Operatives		Finance
Backstage systems	Email system	CRM		SAP

Make Changes Actionable!!

Recap

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THANKS!

Any questions?
30 min Q&A