CUSTOMER JOURNEY
MAPPING WORKSHOP

April 5, 2016
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#Customer360CX

HAPPY CUSTOMERS LEAD TO HAPPY SHAREHOLDERS.
LET’S MAKE HAPPY HAPPEN.

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AGENDA

Presentation & Discussion
• What makes journey maps effective?
• What are the different types of journey maps?
• How can you put your journey maps to work?

Break

Exercise
• Defining a persona
• Mapping your customer journey

Presentation & Discussion
• Facilitating a journey mapping workshop
What makes journey maps effective?
Journey maps are:

Diagrams that visualize the actions, thoughts, and feelings of a person or group over time.
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Diagrams that visualize the actions, thoughts, and feelings of a person or group over time.
Health Insurance Purchase Journey Map

**Young Families Segment**

The Young Families Segment is primarily made up of 25-35-year-olds with 1 or 2 children. With their busy lives, they rely heavily on the Internet to do their research, whether through their computer, tablets, or smartphones. They primarily talk to friends and family (especially other young parents) to make decisions.

Access to their children's pediatrician is the make-or-break criterion for a health plan. Once that is known, premium and wellness options are also important, as are an easy-to-use website.

**Legend**

- **Touch point (Area of Interaction)**
  - [ ] Bright Spot (High Satisfaction area to promote)
  - [ ] Hot Spot (Importance significantly higher than Satisfaction)
  - [ ] Over-Invested (Satisfaction significantly higher than Importance)

- **Moment of Truth (Critical Interaction)**
  - [ ] Slightly More Effort than I Expected
  - [ ] Far More Effort than I Expected
  - [ ] Far Less Effort than I Expected
  - [ ] About the Effort I Expected

**Health Insurance Purchase Journey Map**

**Phase**

- **Awareness**
  - Duration: 1 week
  - Goal: Your consumers begin by just learning about the health plan options. The key goal at this stage is to understand how the different plans work, and to develop the list of questions to ask.

- **Research**
  - Duration: 2-3 weeks
  - At this stage, consumers are conducting research to expand the consideration set. While some choice reduction happens along the way, the primary goal is to broaden the consideration set and determine the final criteria for making a choice.

- **Choice Reduction**
  - Duration: 1 week
  - At this point, the consumers have the criteria set and has mostly finished along the discovery phase. Now, they focus on narrowing down the list from 2-3 candidates to the final choice.

- **Purchase**
  - Duration: 1 day
  - The final decision is made, and the purchase process completed.

**Touch Point Map**

- **Employer Site**
  - Commercial consumers begin the process by looking through their employers’ sites; most young families members do not attend employer-sponsored meetings. Individual consumers skip this step, but follow mostly the same process.

- **Health Insurer Site**
  - The shopping process begins at the health insurance company site—learning more about the plan and its benefits. If there are plans from multiple companies, each site is reviewed.

- **Google, Third-Party Sites**
  - Consumers use Google to research non-employer based options. einhealthinsurance.com is a common destination. This becomes a Moment of Truth, as this step determines whether the research stage ends quickly or continues onto reviewing options outside of those offered by the employer.

- **Social Media**
  - Facebook is used by about 1/3 of members to ask what providers are best and to get feedback.

- **Friends and Family**
  - Young Families members search for reviews on the plans. While premium cost is the top criterion, many are frustrated by the lack of useful comparisons outside of cost. Those not using einhealthinsurance.com typically make their own spreadsheets to provide cost comparisons. At this moment of truth the list is reduced to 2-3 providers.

- **Print Media**
  - (The Young Families segment does not use Print Media extensively)

**Legend**

- [ ] Touch point (Area of Interaction)
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  - Far Less Effort than I Expected
  - About the Effort I Expected

**Create your own Customer Experience Journey Map**

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What are the different types of journey maps?
Four types of journey maps

• Current state
Finding Catering

Customers find out about the service via word of mouth, social media, website, and marketing materials.

Deciding on Catering

The caterer communicates to the customer through all marketing media, that they are available, reliable, and consistent.

Ordering Catering

This service is friendly and consistent, and staff strive to answer order requests within one hour during the work day. The kitchen staff are active partners in helping the client decide on a menu appropriate for the event.

Receiving Catering

Delivery always arrives shortly before the event. It is always the right temperature, and arrives in the right location. The delivery staff are a friendly face for the caterer and ensure the customers are satisfied and have all that they need.

Eating & Presentation

Eating the food is an experience: new flavors are around every corner. The packaging and dishes explain clearly what the contents of each dish are, and indicates which dishes are intended for which special diets. The presentation is professional, sustainable and reinforces an experience.

Wrap-up, Follow up, Payment

There is an established pick-up and a clear invoicing system that leaves a good last impression on the customer. There is a system to gather feedback from customers.

Source: Bridgeable

In summary, the overall experience of the catering process is generally positive, with customers expressing satisfaction with the quality of the service, the food, and the presentation. However, there are some areas for improvement, particularly in terms of communication and customer service. Support data and quotes from customers provide insights into their experiences and offer opportunities for further improvement.

Quotes:

- "Are you sure they do catering?!"
- "They have a lot going for them in terms of feel good factor, but because they’re social enterprise we know they may not be as professional. But they really win on the feel good factor."  
- "I love Sybil. She is a doll, I simply adore her!!"

Supporting Data:

1. Some people visiting the FoodShare website took more than two minutes to find the Field To Table Catering section. Others dismissed the website because it presented too strongly as a charity.
2. Many people found out about Field To Table Catering via word-of-mouth or after attending an event that had been catered.
3. People choose Field To Table because they like what it stands for. However, there is a constraint that social enterprises are less professional.
4. The lack of marketing materials makes it difficult for customers to get a sense of whether Field To Table is a good catering choice and appropriate for their event.
5. People love interacting with Sybil. Sometimes, two or three days pass before customers get a reply or confirmation on their order.
6. The online menu is unclear and doesn’t give customers a sense of proportion or presentation.
7. Some customers love being able to take advantage of the full culinary capabilities of the kitchens others aren’t aware of the options of which Field To Table is capable.
8. The presentation of the food in plates, not ceramic, made it not suitable for client-facing events.
9. Sometimes, customers receive the wrong item. For instance, one client received a jar of spicy chutney instead of a jar of jam.
10. Food is sometimes too late, too early, or delivered to the wrong location.
11. There is sometimes either too much or not enough food.
12. "Wow, it’s so good! This is ridiculously yummy."  
13. "The presentation of the food in plates, not ceramic, made it not suitable for client-facing events.
14. Sometimes, customers receive the wrong item. For instance, one client received a jar of spicy chutney instead of a jar of jam.
15. Food is sometimes not properly labeled, making it dangerous for people with special diets.
16. Customers rave about how good the food is.

Source: Bridgeable
Four types of journey maps

• Current state
Four types of journey maps

• Current state
• Future state
Four types of journey maps

• Current state
• Future state
• Blueprint
line of visibility
Journey blueprints may come in two flavors...

**Current-state** journey blueprints...
- Represent the organization and infrastructure that support the experience your customers have *today*.
- Are used to identify and fix the root causes of customer pain.

**Future-state** journey blueprints...
- Represent the organization and infrastructure that you *need to build* in order to deliver on your CX vision.
- Are used to plan and prioritize longer-term projects.
Four types of journey maps

• Current state
• Future state
• Blueprint
• Day in the life
How can you put your journey maps to work?
Improve your current customer experience

Current-state journey map
• Identify pain points and prioritize fixes.
• Identify opportunities for feedback or measurement.

Current-state journey blueprint
• Zero in on the root causes of customer pain.
Visitor Experience Map
What opportunities exist to impact the experience at scale?

Source: Adaptive Path
Envision your future customer experience

Future-state journey map
• Design an improved experience.
• Plan the rollout of a future product or service.
• Get employees (and customers!) comfortable with a new or changing experience.

Day-in-the-life journey map
• Identify innovation opportunities.
1. Child’s Doctor / Emergency
   - However you come to Children’s, know what kind of care you can expect, how to find us and who to talk to first.

2. Scheduling
   - Schedule your appointment in just one phone call, at a time that works for you.

3. Clinic visit
   - Expect that your visit goes smoothly and that you’re in and out without waiting.

4. Before Surgery
   - Receive and understand all the information you need before your child’s surgery.

5. Surgery
   - We’ll start the surgery right on time.

6. After Surgery
   - Your child will move to a hospital room or go home as soon as they are ready.

7. Inpatient Care
   - Know when you can go home.

8. Going Home
   - Have all your questions answered and get clear instructions on how to care for your child.

9. Follow-up visit
   - Your appointment will begin on time.
Drive cultural change

Current-state journey map
• Help employees and partners develop empathy for customers.

Current-state journey blueprint
• Help employees and partners discover their own roles in delivering a remarkable customer experience.
THE MEMBER JOURNEY

UNDERSTANDING MEDICARE EVENTS THROUGH THE MEMBER'S EYES

Let's improve the member experience by making it more simple and personal

**CHOOSE**

- "Help me clearly understand my options and choose the right plan for my needs, with as little effort as possible." Insurance plan and company selection is driven by a myriad of influences. People are overwhelmed with information, and often depend on trusted relationships for guidance.
  - How can we ensure people have complete information about the options available to them?
  - How can we help people filter through the information to find the right plan for them?
  - How will we influence people's personal relationships to help drive their selection?

**ROUTINE CARE**

- "Help me take care of myself and stay healthy." Members hire their executive doctors and manage chronic care even interactions, see doctors, labs, well-being, or her past experience. When members are exposed to common chronic care, and believe their health is under control, they become hobbled, confused, and angry.
  - How can we ensure members are interested in the plan?
  - How can we help members make informed decisions about their health?
  - How can we ensure members are engaged and improve our relationships with providers?

**PRESCRIPTIONS**

- "I pay out the highest cost of prescription drugs." The pharmacy benefit caps cost at a cost they average. They use a number of strategies to manage their prescription needs and costs. Even after completing the members select the plan.
  - How can we ensure that members are managed and that they get the best care?
  - How can we ensure members have the best coverage possible?

**PERKS**

- "People in my area tell me that the savings are huge!" Many members find plan details and benefits in their area.
  - How can we ensure consumers are interested in the plan?
  - How can we make sure members understand what is included or not included?

**MAILINGS**

- "When I get mail, I don't understand what is about." Mailings often contain unclear information or what isn't needed. When members review mailings, they may not understand what they need or what to do with them.
  - How can we make sure members understand the purpose of the mailings?
  - How can we make sure members understand the importance of the mailings?

**RENEWAL**

- "Help me get the right coverage with the right affect." Members prefer to keep their current plan. They look for a new plan. Members review this plan, and they are enrolled and their plan will be the same. Members will take action or not, and ensure their plan is the best for them.
  - How can we better understand and respect the plan?
  - How can we ensure members are informed about the plan?

**SIMPLE & PERSONAL**

- "Make Medicare easy for me."
  - Know me and my situation
  - Help me understand how your plan works for me
  - Make sure the interactions are non-personally relevant
  - Assist me in accessing the plan documents that support my specific needs
  - Create an issue and navigates through different systems for me
  - Empower me to take care of my own needs

**EMERGENCY**

- "I don't want to worry about how much my plan will cover." This issue arises when members are not aware of the plan's coverage or what it will cost them.
  - How can we ensure members understand their plan and its coverage?
  - How can we ensure members understand the impact of their plan on their finances?

**DOCTOR ISSUES**

- A few recent episodes are getting quality care can be an issue for many. Members may be on a plan or an out-of-network provider, which can cause them to have to take a second look. Members turn to the plan or are surprised by the lack of a second look.
  - How can we ensure members understand their plan and its coverage?
  - How can we ensure members understand the impact of their plan on their finances?

**MIX-UPS**

- "How can I decide what is covered in my plan?" Members must make sure they are in the correct plan to ensure they are covered.
  - How can we ensure members understand their plan and its coverage?
  - How can we ensure members understand the impact of their plan on their finances?

**REFERRALS & AUTHORIZATIONS**

- "I don't want to worry about referrals or what my plan will cover." This issue arises when members are not aware of the plan's coverage or what it will cost them.
  - How can we ensure members understand their plan and its coverage?
  - How can we ensure members understand the impact of their plan on their finances?

**PLANNED PROCEDURE**

- "Help me get the right treatment for me with the coverage I expect." Many members are in the plan and want to know what plan is best for them.
  - How can we ensure members understand their plan and its coverage?
  - How can we ensure members understand the impact of their plan on their finances?

**ENROLL**

- "How can I enroll and make my choices?
  - How can we ensure members understand their plan and its coverage?
  - How can we ensure members understand the impact of their plan on their finances?"
“It is important to learn who the customer is and what they are saying and thinking, but it is also important that everybody in the business, even those who do not necessarily think of themselves as being connected to the customer, feel like they have a part to play.

Mapping the customer journey can help you do that.”

David Metcalf, head of customer experience and customer strategy
Transform the way your business works

Future-state journey blueprint
• Identify the infrastructure and capabilities needed to deliver on your vision of the future customer experience.

Current-state journey map
• Realign your organizational structure around customer journeys.
First ask:
What’s our business objective?

Then ask:
What kind of journey map do we need?
EXERCISE:
Define a persona
Personas are:

• Fictional, realistic models of target customers.
• Vivid representations of customers’ behaviors, attitudes, and goals as well as demographics.
• Created from primary research.
Business-minded Dealer

"I need online sales tools that help me compare products based on relative price for specifications so that I can keep my business competitive without sacrificing quality."

Role

"I'm usually in the office reviewing sales proposals, booking work, answering questions for sales associates, trouble shooting from the office, and researching products."

Bob Hill

NAME: Bob Hill
AGE: 57
EXPERIENCE: 30 yrs
SIZE: 13 Employees

ROLE: Business-minded Dealer

"High standard of quality"
"Keeping business profitable"
"Growing the business"
"Satisfied customers"

Pain Points:

"Honeywell tech support is weak."
"Honeywell is forgetting who their customer is. They're losing a personal touch. Customer service suppliers are only able to work with exact part numbers. They talk down to my technicians."
"Honeywell products are not always the most cost effective. We have gotten used to using them, but should really start learning new products to stay competitive."

Likes Most:

"I like making the customers happy and watching my business grow."

Business Goals

1. High standard of quality
2. Keeping business profitable
3. Growing the business
4. Satisfied customers

Business Focus

40% Residential
50% Commercial
10% Industrial

Frequency of Tasks

- Making sure sales proposals are accurate & technically solid
- Reviewing sales reports & improving sales relationships
- Training sales associates on solution details
- Making sure customers are satisfied & trained on products

Technology Used

- PC desktop with multiple monitors
- PC laptops for use in the field
- iPad for field use to configure systems
- Phone to train customers on Total Connect
- Chrome is preferred browser

% of Honeywell Products

- Fire: 80%
- Burglary: 5%
- Burglary: 15%
- Video: 60%
- Access: 55%
# Health Insurance Purchase Journey Map

## Phase

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Research</th>
<th>Choice Reduction</th>
<th>Purchase</th>
</tr>
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<tbody>
<tr>
<td>Duration: 1 week</td>
<td>Duration: 2-3 weeks</td>
<td>Duration: 1 week</td>
<td>Duration: 1 day</td>
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</tbody>
</table>

### Goal
- **Awareness**: Your consumers begin by just learning about the health plan options. The key goal at this stage is to understand how the different plans work, and to develop the list of questions to ask.
- **Research**: At this stage, consumers are conducting research to expand the consideration set. While some choice reduction happens along the way, the primary goal is to broaden the consideration set and determine the final criteria for making a choice.
- **Choice Reduction**: At this point, the consumers have the criteria set and has mostly finished the discovery phase. Now, they focus on narrowing down the list from 2-3 candidates to the final choice.
- **Purchase**: The final decision is made, and the purchase process completed.

## Touch Point Map

### Employer Site
- Consumers begin the process by looking through their employers' site; most Young Families members do not attend employer-sponsored meetings. Individual consumers skip this step, but follow mostly the same process.

### Health Insurance Site
- The shopping process begins at the health insurance company site — learning more about the plan and its benefits. If there are plans from multiple companies, each site is reviewed.

### Google, Third-Party Sites
- Consumers use Google to research non-employer based options. ehealthinsurance.com is a common destination. This becomes a Moment of Truth, as this step determines whether the research stage ends quickly or continues onto reviewing options outside of those offered by the employer.

### Social Media
- Facebook is used by about 1/3 of members to ask what providers are best and to get feedback.

### Friends and Family
- Young Families members search for reviews on the plans. While premium cost is the top criterion, many are frustrated by the lack of useful comparisons outside of cost. Those not using ehealthinsurance.com typically make their own spreadsheets to provide cost comparisons. At this moment of truth the list is reduced to 2-3 providers.

### Print Media
- The Young Families segment does not use Print Media extensively.

## Legend
- **Touch point (Area of Interaction)**
- **Moment of Truth (Critical Interaction)**

### Satisfaction with Touch Point

<table>
<thead>
<tr>
<th>Satisfaction</th>
<th>Import</th>
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</tbody>
</table>

### Level of Effort (Customer Effort Score)
- **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

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**The Young Families Segment** is primarily made up of 25-35-year-olds with 1 or 2 children. With their busy lives, they rely heavily on the Internet to do their research, whether through their computer, tablets, or smartphones. They primarily talk to friends and family (especially other young parents) to make decisions.

Access to their children's pediatrician is the make-or-break criterion for a health plan. Once that is known, premium and wellness options are also important, as are an easy-to-use website.

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"I would have liked Frequently Asked Questions or would like to talk to an online person. I'm not a paper person so did everything online." — Young Families Customer

"The only problem is there are so many choices. I'm not sure if that makes it easy or hard. It was overwhelming - difficult because there is a lot to think about and I felt it was hard to figure out what was best." — Young Families Non-Customer

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Worksheet: Define your persona

**B2C**
- Name
- Age
- Location
- Family status
- Occupation
- Personal goals
- Attitudes
- Quote – something your persona would really say

**B2B**
- Name
- Age
- Location
- Role
- Professional goals
- Main challenges
- Attitudes
- Quote – something your persona would really say
EXERCISE:
Map your customer journey
Next, evaluate the maps with circle stickers.

- Which steps or touchpoints worked particularly well?
  - Add **GREEN** dots.

- Which steps or touchpoints caused pain or friction for your persona?
  - Add **RED** dots.
Check flight status

Smartphone app

Airport monitors

Accurate, consistent info

A plan to get to my gate

Frustration: Is my flight boarding or not?!
CAUTION!

• You have just created a *hypothesis* journey map.
• Parts of it are certainly correct...
• ...But other parts are wrong or incomplete.
• Test your assumptions with customers.
REATIONS

• How did that go?
• Any big surprises?
• What did you find difficult?
• What did you find easy?
Facilitating a customer journey mapping workshop
Project Overview: Customer Journey Mapping
FOUR GROUPS PER WORKSHOP

• We divide participants into small groups, each of which can focus on a different persona or journey.

• Each group has up to six people:
  - A facilitator
  - A notetaker
  - One optional employee
  - 2 – 4 customers
Day 1 — Workshop Prep: Stakeholders go through facilitation training and compile hypothesis journey maps using existing research.
Day 2 — Journey Mapping: Bring in the customers!
Warm-up: Participants build rapport with their small groups through storytelling and brainstorming exercises.
(In)validating assumptions: Participants give feedback on assumption current-state journey maps and provide detail into the steps, expectations, and emotions they actually experience.
Future State Mapping: Participants plot out the steps, touchpoints, and emotions they’d like to experience during their ideal journey.
Prototyping: Participants may augment future-state journey maps by creating prototypes of interactions or touchpoints that would improve their journey.
Readouts and reactions: Participants present their top pain points, prototypes, and/or ideal journeys to the larger group for feedback and discussion.
Debrief: After customers depart, facilitators and stakeholders discuss their biggest insights from the workshop and highlight potential areas of opportunity.
THANK YOU!

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Download these slides:
krybd.in/Cust360CJM

P.S. I’M COMING BACK IN MAY!