

WALKER'S APPROACH TO JOURNEY MAPPING

How journey mapping can enhance the experiences of your customers and accelerate success for your business.

Journey mapping is a visual illustration from the customers' perspective of the overall story of their relationship with an organization. This spans service, product, and brand over time and across channels. It's an essential tool for understanding customer needs and expectations at each phase of the customer journey.

Journey mapping is popular because the map captures an emotional element that's far more impactful than a graph or chart. There's just something about a visual of the customer journey that companies really seem to rally around. And having that visual allows you to spot gaps in the experience and design the ideal future experience.

THE VALUE OF JOURNEY MAPPING

When executed thoughtfully and correctly, the journey map is a powerful resource to support tactical and strategic decision-making in the areas that matter most to customers. Essentially, you get a clear picture of the steps your customers go through in working with you and how they feel at each, which makes improving those steps easier.

With its end-to-end vantage point, journey mapping is highly effective in identifying moments of truth—the key “make or break” touchpoints in the journey that define customer perception and determine the likelihood customers will buy from you again or recommend your product to others.

Walker is an experience management services firm that provides journey mapping and other services to help companies succeed by putting customers and employees at the heart of every decision.

THE WALKER DIFFERENCE

With decades of experience consulting with companies about ways to improve customer experience, Walker has the expertise to assist companies with all phases of the journey mapping process, from initial map development through activation. Walker's skilled facilitators and mastery of virtual workshops make the difference in developing a journey map that uncovers what customers truly value. While Walker serves a wide variety of companies, we specialize in working with B2B firms, which often have the most complex customer journeys.

Walker's comprehensive report includes a detailing of the key interactions, moments of truth, strengths, weaknesses, and recommendations for action.

Walker's deliverables are professionally produced and typically include:

Lifecycle Drilldown:

Identifies customer needs within each stage and how they align with the current business model

Priorities for Action:

Recommendations on which areas need to be addressed as a priority plus a roadmap for future areas of measurement

CX Principles:

Defines customer experience tenants that should be used by the organization to deliver a differentiated experience

KEY BENEFITS OF JOURNEY MAPPING:



Align the organization around a common and shared view of the customer experience – Journey maps help employees from different functions understand their role in the customer journey and its importance.



Get the right people engaged – Journey mapping creates opportunities for a large team to work together and creates new champions who are committed to delivering an exceptional customer experience. Good maps are powerful tools that can be used to support tactical and strategic design decisions.



Improve buy-in – By involving multiple stakeholders and soliciting feedback from key individuals, they are more likely to embrace the findings, which will lead to greater adoption and greater success of your program.



Affirm action plans, reveal obstacles – Maps reveal where the risks and value are from the customer viewpoint, ensuring the focus is on areas where the maximum impact will occur.



Create the optimal listening program – By identifying what customers care about most, the map guides current customer metrics and identifies gaps where surveys or other channels can focus.



Identify ways to evolve and innovate your customers' experience with you – Having a clear view of the customer journey – and setting more discrete customer journeys in context – helps you pinpoint which points are right for testing a new approach.

MAKING IT WORK

Journey mapping fosters awareness and buy-in and provides a current-state assessment of the environment. Findings from the journey mapping process become the foundation for creating an ideal customer experience. Although every situation is unique, Walker typically deploys a five-step process:

Discovery

Gathering information internal and external to the company

- Executive priorities
- Exploratory in-depth interviews with stakeholders and customers
- Observational and ethnographic research

Journey

Choosing a customer persona or segment to examine

Mapping

Mapping the customer journey during a collaborative workshop (either in person or virtually) and creating the map

- Laying out the current/ideal state of the customer journey
- Outlining key moments of truth
- Finding key strengths
- Determining areas for improvement

Innovate and roadmap

Using insights from the map to develop potential innovations or new experiences

- Identify quick wins
- Find opportunities for a differentiated experience

Implement and institutionalize

Socializing the map and plan within the company and assigning roles to ensure new experiences



VIRTUAL WORKSHOPS

While journey mapping is commonly conducted as an in-person workshop, the right online tools and skilled facilitation can make virtual options highly effective. This is particularly useful for decentralized organizations where aligning travel and schedules can delay progress.

Differences with virtual journey mapping include:

- Rather than meeting in person, Walker uses visual and audio online collaboration tools to facilitate the sessions.
- Sessions are spread out over several days rather than completed in one full day.
- Instead of everything being conducted with the full group, work will be completed in small groups and with the whole group.

Whether conducted in person or through virtual tools, the result is the same: Through collaborative efforts, you gain a clearer picture of the steps your customers go through and what matters most to them.

HEALTH INSURANCE COMPANY

CASE STUDY

An industry-leading healthcare insurance company recently completed a journey map with clients and members. The company wanted to take a more in-depth approach to understanding the journey clients go through in selecting benefit plans, using the benefits and ultimately renewing.

“Direct customer input played a critical role. Without it, we would not have been able to develop a true customer journey map and we risked focusing on the wrong things.” During the internal mapping workshop, several associates commented that they found it very challenging to stay “in their customers’ shoes.” They simply knew too much about their own internal processes and came to the table with natural fears, biases and assumptions.

Fortunately, Walker planned for two types of customer validation:

1. In-depth interviews conducted with clients, health-plan members, brokers and TPAs to gain a complete “outside-in” picture of the customer journey

2. Review of recent NPS survey feedback, particularly the open-ended questions, helped extend our perspective to thousands of clients and members

When customer feedback was used to validate the map, many of the “moments of truth” shifted significantly. In five key areas, we observed important differences between the internal view and the customer view. For example, customer education was viewed as a key strength internally, but when customer feedback was included, it became very clear that this was an area of risk and concern.

The time invested in including customer feedback not only helped create a better journey map, recommendations and roadmap, but it also fostered stronger executive buy-in and attention. Immediately following the journey map project, four strategic recommendations were adopted by the executive team as priorities for the year. Detailed action plans were created and are being executed, all with the goal of improving the journey to secure higher retention.



WALKER'S SERVICES

Walker provides a wide range of flexible services to maximize your technology investment and accelerate the success of XM initiatives.

- Technology services. Implementation and engineering services for all programs, from fast starts to highly customized deployments.
- Managed services. Flexible professional services model for end-to-end program management and optimization.
- Advisory services. Tailored advisory solutions to build a world-class experience management practice.

As important as what we provide is how we deliver it. At Walker, we provide a highly personalized experience regardless of if you are new to XM or you have a well-established program that you want to take to the next level.

WALKER'S PARTNERSHIPS

Walker's strategic partnerships ensure that we provide best-in-class XM tools to complement our broad range of services. Walker is a charter member of the Qualtrics Partner Network (QPN) and is proud to be a top Delivery and Consulting partner in North America recognized as CX Partner of the Year in 2019. Walker is also an SAP Silver Partner, specializing in helping companies make the most of their data.



To learn more about Walker, please visit walkerinfo.com

THE CX LEADER PODCAST

The CX Leader Podcast with host Steve Walker provides weekly insights for business leaders to improve results by unlocking the potential of their customer experience. More than a discussion of CX topics, the podcast focuses on ways CX professionals can develop the right skills and ideas to be effective leaders in their organizations.



To learn more and view more than 100 episodes, visit cxleaderpodcast.com.