



POLITECNICO
MILANO 1863

Customer journey

Debora Bettiga

Customer Journey

Two Premises

- All Customer Journeys are different.
- Customer Journey Mapping is not the ends, it is the means.

Customer Journey

What is **customer journey**?

Customer Journey is the steps that the customer(s) go through in engaging with a company.

Each customer journey could start and/or finish at different point and pass through different route.



Customer Journey

What is the **objective** of mapping customer journey?

Mapping customer journey is to illustrate customer journey with a diagram. It helps the company to:

- Understand the experience of customers
- Identify areas that are important (or less important) to customers
- Identify gaps between departments and channels which cause customers frustration

Thus, ultimately, through mapping customer journey a company aims to design a seamless customer experience, which is truly valuable to the customers and is also efficient and effective for the company.

What is the **objective** of mapping customer journey?

Strategic goals

- Foster a customer-centric culture in the firm
- Support collaboration among business units and among the functional areas
- Reinvent segmentation and the firm's approach to market
- ...

Operational and specific goals

- Evaluating a specific service or process, identifying weak points, and improving customer experience
- Deepening understanding of different segments, or a specific segment
- Developing new product or service
- Planning multichannel experience
- Planning a specific campaign
- ...

First of all we need to identify *personas*

What is a **persona** in customer journey?

Customer personas are embodiments of a company's target segment.

A persona has his/her needs, wants, beliefs, preferences, goals, motivations, behavioral habits, and so on.

Customer journey is mapped as the steps that a persona goes through with a company.



The Persona

Who are the customers that you are going to map the journey for?

Segment:	Domestic Affluent Progressive Shopper
Age:	39 to 45 years old
Income:	\$75,000 – \$110,000
Work:	Educated professional, career oriented
Hobbies:	Health, community, shopping
<p>Female, recently divorced with 2 children living at home. Lives in metropolitan area (e.g., 15 minutes north of Seattle)</p> <p>Works full time in white collar industry (e.g., for a manufacturer of healthcare electronics)</p> <p>Likely to be interested in personal fitness and health. Active in her local community. Is an avid shopper.</p> <p>Has been online for six years and feels comfortable with ecommerce. Favorite Web sites are Amazon, Lands End and Macy's.com.</p>	


Segments

The groups of customers who are similar to each other within the group, and different from the ones in other groups, in terms of (some of) the following variables:

- Demographics
- Purchase and usage behavior
- Preference
- ...

The Persona

Who are the customers that you are going to map the journey for?



Name/Tagline:	Comparative Caroline
Priority:	High (Primary Persona)
Type:	Comparative shopper
Goal:	Find the best deal
Cognitive Background:	High level of familiarity with shopping carts, comparative tools; needs to self-justify each purchase or impulse purchases
Tools:	Checks 3-5 sites for each purchase; Google, Pricewatch, consults friends

Comparative Caroline has a pretty good grasp of how the Web works and buys something every month or so online. She likes Web sites to be easy to use and doesn't have a lot of patience with difficult Web sites. At work she uses the Web to shop around for deals she can't get in her local stores.

Caroline is resilient about getting the best price online. She will spend several days shopping for one item and has been known to take up to two weeks "shopping around." Caroline is not shy on the Web and regularly uses Google for her search shopping. She will only click Google Adwords if they have the keyword she is looking for, otherwise she doesn't bother. Caroline wants to be sold on why a product is the best deal. She doesn't always shop on price however, but does look for a reason and a feeling as to why purchasing from one site is better than another. For Caroline, the best deal is not always the cheapest buy.

What gets her attention? Free shipping offers, product guarantees, large product images, fast check outs and polite and concise copy.

Persona

An embodiment of the typical customers in a segment, which allows the firm to understand these customers on a more personal level through:

- Objectives
- Expectations
- Motivations
- Habits
- Feelings
- Likes and dislikes
- ...

The Persona

How to construct personas?

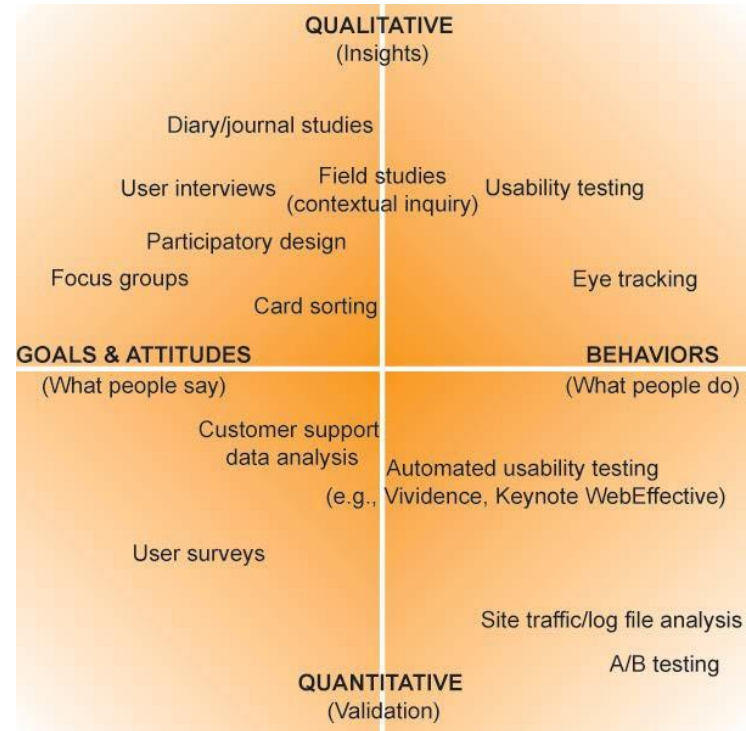
Research

Qualitative: few subjects; deep and open interaction; insights discovery

Quantitative: large sample; quick/automated and pre- defined interaction; insights validation

Goals & attitudes: what consumers (claim that they) think and feel in the given context

Behaviors: what consumers actually do in the given context



The Persona

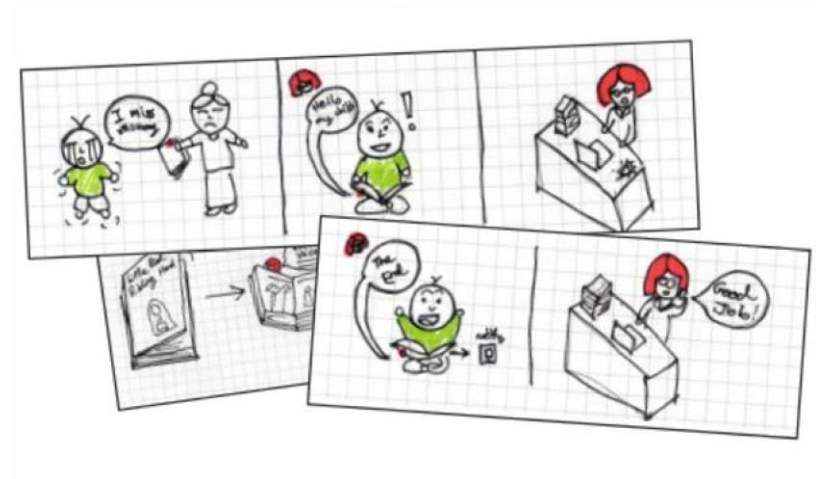
How to construct personas?

Scenario

Create scenarios under your business goals, observe/observe customers' thoughts and actions in these scenarios. For example:

- Looking for solutions to a current problem
- Learning to use a new product
- Requesting for maintenance visit
- Considering replacement purchase

...



The Persona

A healthcare wearable device manufacturer wants to define the features of its product and the complementary services, to best suit the needs of its potential customers.

Clark Andrews

AGE 26

OCCUPATION Software Developer


STATUS Single

LOCATION San Jose, CA

TIER Experiment Hacker

ARCHETYPE The Computer Nerd

Friendly Clever Go-Getter



"I feel like there's a smarter way for me to transition into a healthier lifestyle."

Motivations

Incentive	80%
Fear	30%
Achievement	75%
Growth	90%
Power	50%
Social	40%

Goals

- To cut down on unhealthy eating and drinking habits
- To measure multiple aspects of life more scientifically
- To set goals and see and make positive impacts on his life

Frustrations

- Unfamiliar with wearable technology
- Saturated tracking market
- Manual tracking is too time consuming

Bio

Aaron is a systems software developer, a "data junkie" and for the past couple years, has been very interested in tracking aspects of his health and performance. Aaron wants to track his mood, happiness, sleep quality and how his eating and exercise habits affects his well being. Although he only drinks occasionally with friends on the weekend, he would like to cut down on alcohol intake.





Personality

Extrovert	20%	Introvert
Sensing	10%	Intuition
Thinking	80%	Feeling
Judging	10%	Perceiving

Technology

IT & Internet	100%
Software	100%
Mobile Apps	100%
Social Networks	20%

Brands




<https://www.alphadigital.com.au/blog/advice/persona-important-seo/>

The Persona

A travel website attempts to reinvent its services in order to differentiate itself from the many competitors by focusing on the business travelers.

Jill Anderson



"I'm looking for a site that will simplify the planning of my business trips."

AGE 29
OCCUPATION Regional Director
STATUS Single
LOCATION Portsmouth, NH
TIER Frequent Traveler
ARCHETYPE The Planner

Organized Practical
Protective Hardworking

Bio

Jill is a Regional Director who travels 4-8 times each month for work. She has a specific region in which she travels, and she often visits the same cities and stays in the same hotel. She is frustrated by the fact that no matter how frequently she takes similar trips, she spends hours of her day booking travel. She expects her travel solutions to be as organized as she is.

Personality

Extrovert Introvert
Sensing Intuition
Thinking Feeling
Judging Perceiving

Brands

KAYAK Basecamp
Outlook
enterprise IHG
IHG International Hotels Group

Goals

- To spend less time booking travel
- To maximize her loyalty points and rewards
- To narrow her options when it comes to shop

Frustrations

- Too much time spent booking - she's busy!
- Too many websites visited per trip
- Not terribly tech saavy - doesn't like the process

Motivations

Price
Comfort
Convenience
Speed
Preferences
Loyalties/Rewards

Technology

IT & Internet
Software
Mobile Apps
Social Networks

<https://eclincher.com/6-tips-to-actually-grow-your-brand-on-social-media/>

The Persona

Why is persona helpful and important in the process?

- Deep understanding of the customer needs and behaviors
- Coherent understanding of the customers across different functions of the firm
- Clear guidance to decision making centered on customer needs

Think and feel

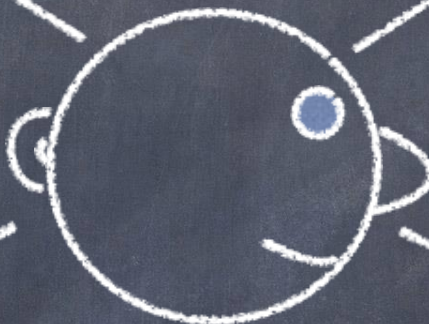
Hear

See

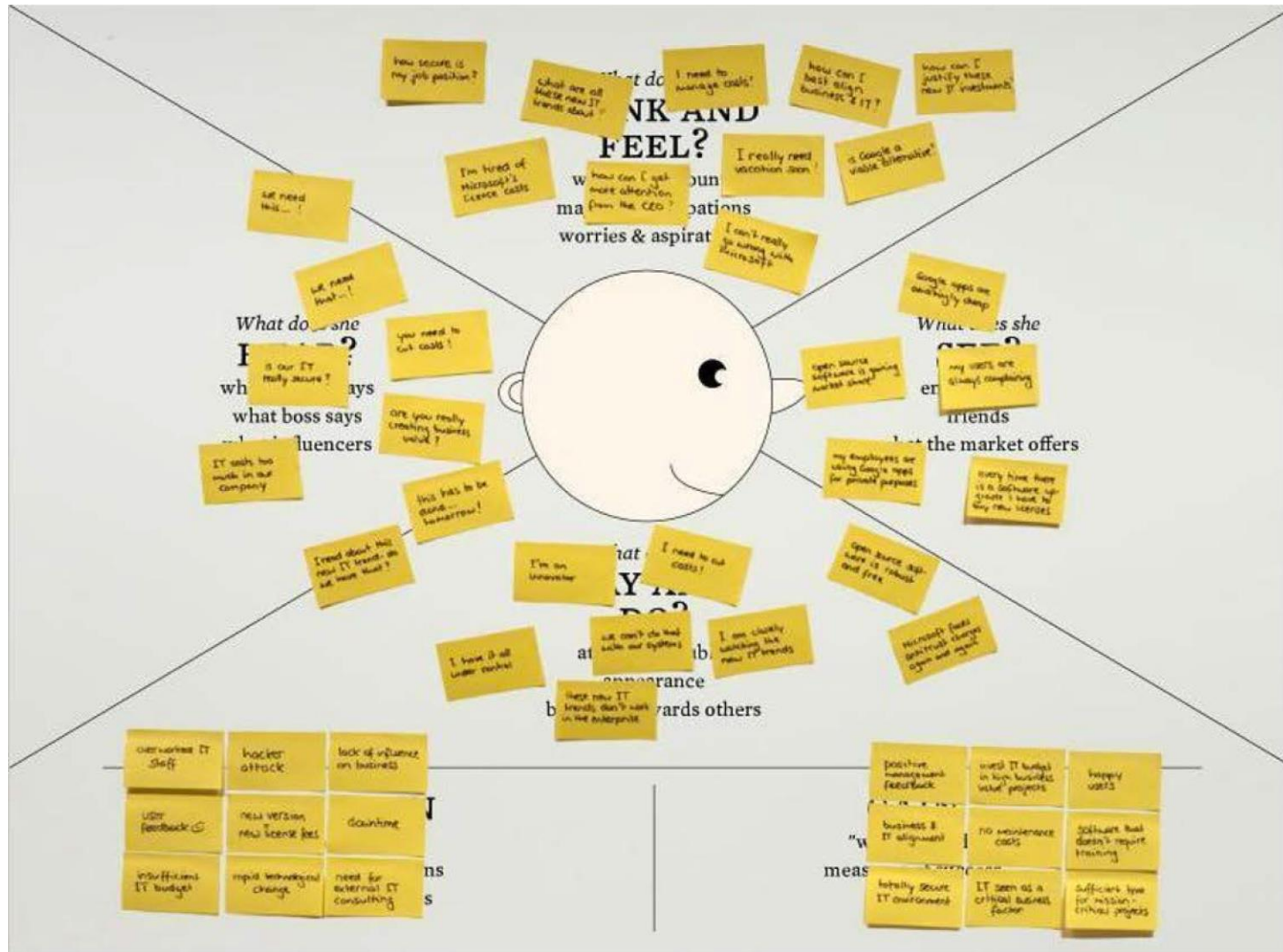
Say and do

Pain

Gain



Empathy Map @Work



Building a CJ

Step 1: touch point mapping

Write all the possible touchpoints on/off line and link them to the purchase process phases:

- pre purchase
- purchase
- post purchase

What are the stages that a **customer** goes through in the scenario?

Customer Journey map is organized by the stages that a customer goes through. Each stage represents a major goal that the customer tries to achieve through the journey.

It's important to notice:

- Such stages are **not** the firm's internal process
- Such stages could cover the entire customer-firm relationship over a long period of time; they could also refer to a very specific interaction between the customer and the firm

An example

Past Experiences

Awareness

Research
& Familiarity

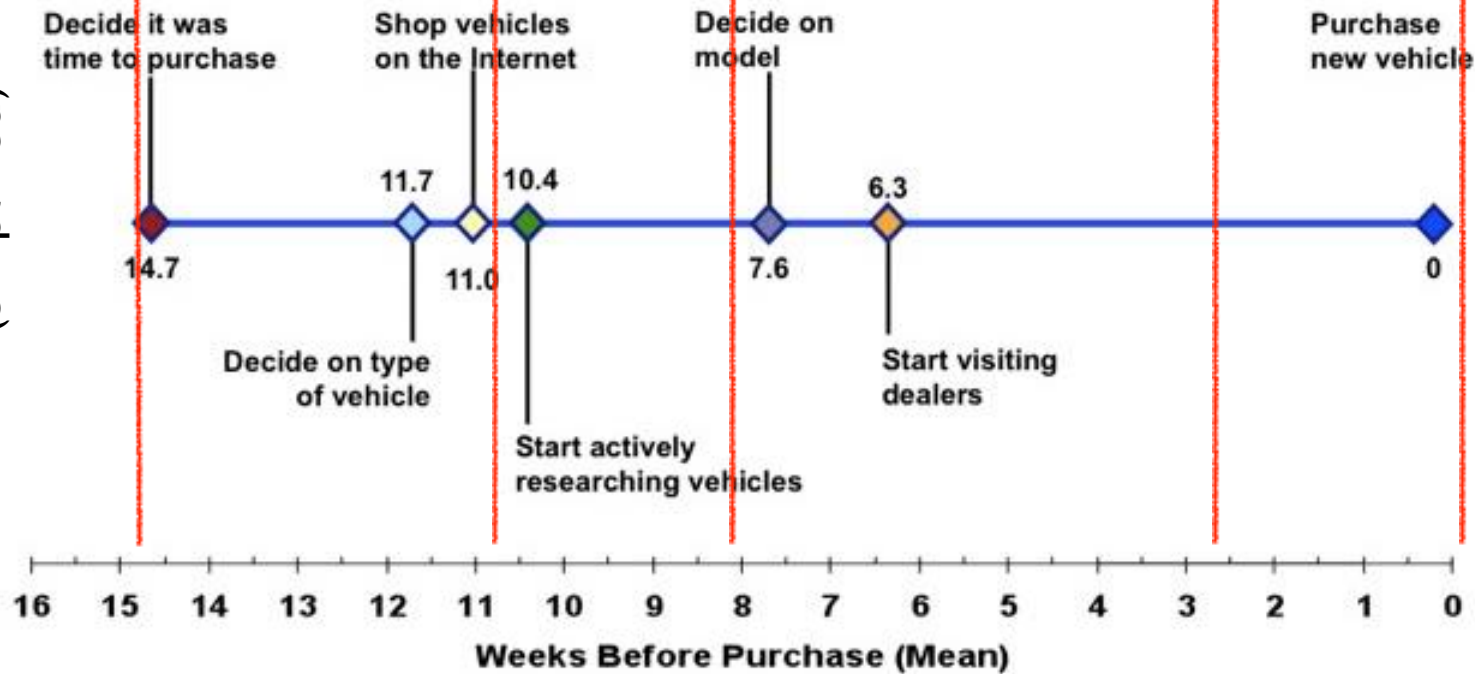
Short list

Acquisition

Retention

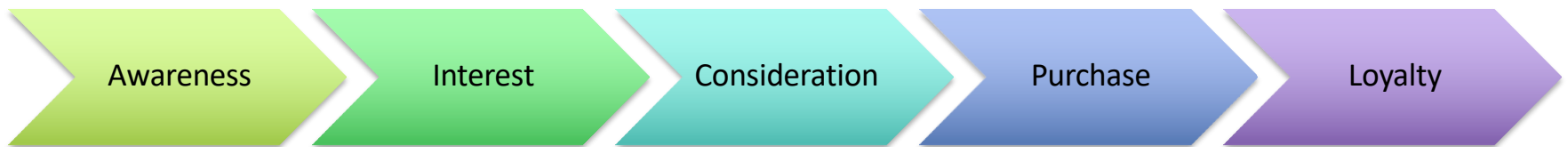
Up/Cross
selling

Ford Customer Journey
(Simplified)

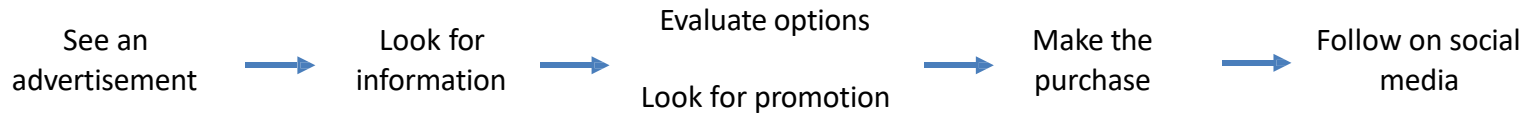


Ford Lincoln Mercury Digital Team

The classic purchase process / purchase funnel

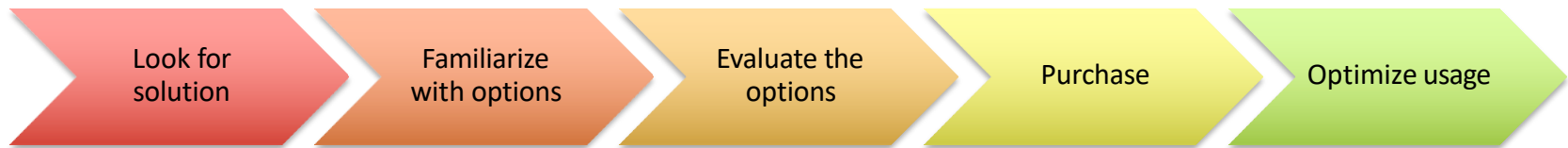


The naïve Customer Journey



- It's what the firm would like its customers to do, not necessarily what the customers actually do
- It completely ignores other elements in the environment, which are increasingly complex yet influential

From a customer-centric perspective

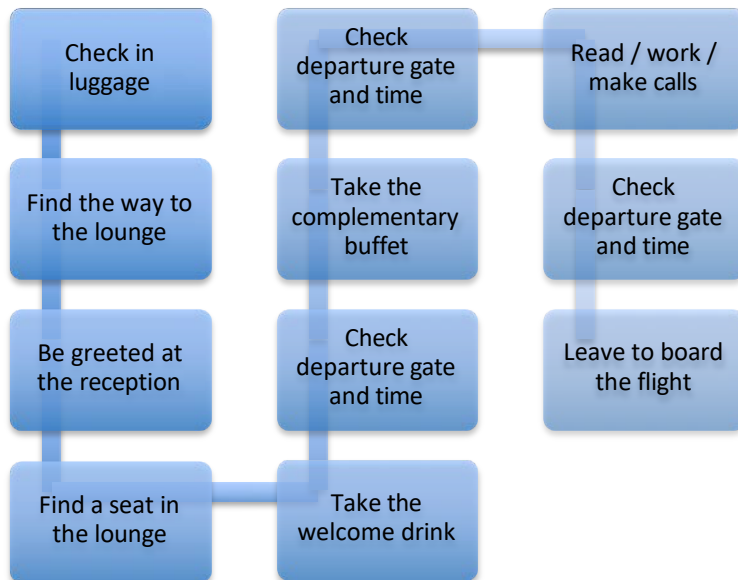


Example - Alitalia

Alitalia: how to earn customer loyalty through the journey?



Example - Alitalia



Alitalia: Improve passenger experience in its VIP lounge

Example - Alitalia

Capture the customers' wants, needs, and expectations at these stages



The Touchpoints

Touchpoints

The points of interaction that a (potential) customer has with a firm and/or its products and services.

The touchpoints could be owned and controlled by the firm itself. But, at times, it could even be outside the firm.

Channels

Among the “touchpoints”, there is a sub-set that is composed by the channels operated by the company:

- Store
- Online store
- Website
- mobile app
- Call center
- ...

Devices

How are the touchpoints accessed?

- PC
- Mobile phones
- Smartphones
- Tablet
- ...

The Touchpoints

What are the touchpoints that customers interact with?

Desktop website

Mobile website

Mobile app

Search engine

Travel website

Email

SMS

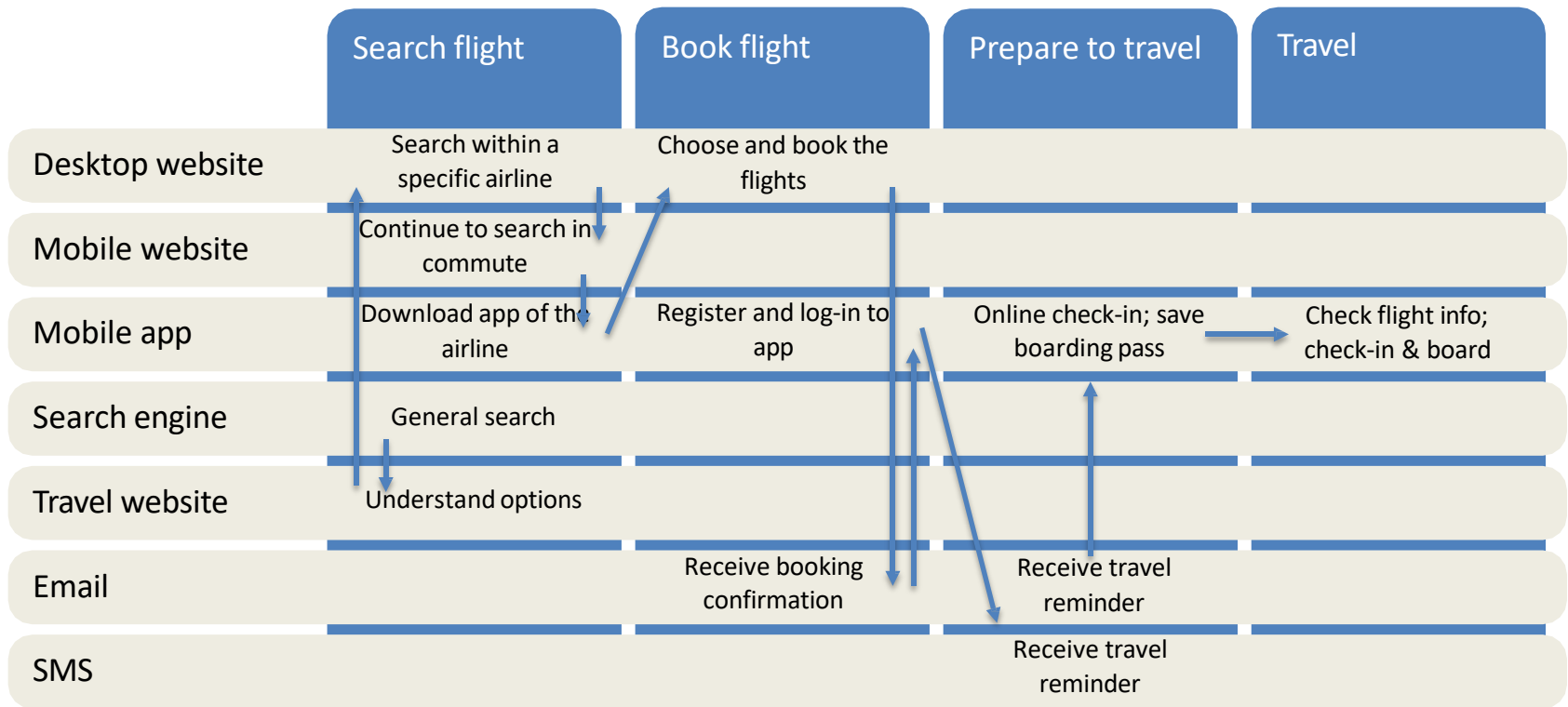
The Touchpoints

What are the customers' actions at these touchpoints?

	Search flight	Book flight	Prepare to travel	Travel
Desktop website	Search within a specific airline	Choose and book the flights		
Mobile website	Continue to search in commute			
Mobile app	Download app of the airline	Register and log-in to app	Online check-in; save boarding pass	Check flight info; check-in & board
Search engine	General search			
Travel website	Understand options			
Email		Receive booking confirmation	Receive travel reminder	
SMS			Receive travel reminder	

The Touchpoints

How do the customers travel through the touchpoints?



The Touchpoints

Diagnose the touchpoints

- More touchpoints means higher flexibility for customers; yet higher complexity to manage. Across your touchpoints, are the objectives aligned and the information integrated?
- Where are the possible gaps?
 - Are the customers moving from one touchpoint to another because of their natural needs?
 - Are the customers leaving one touchpoint because it doesn't properly satisfy their expectation?
 - Are there cumbersome switches among the touchpoints?
 - Are there some missing touchpoints which may improve an action in a certain stage?

Building a CJ



Step 2: present customer journey

Create different journeys for different targets

Defining what they want to know, who they want to talk to and how, etc.

Elements of Customer Journey

Customers' activities

What is the customer doing when the encounter with the company occurs?

- Customers are proactively seeking out the encounters: call to make an inquiry, go to the website, go to the store, ask for a quotation, subscribe to newsletter or service, pay bills, open the product packaging, etc.
- Customers are passively involved in encounters: see an advertisement while watching TV, hear about the product or brand in a conversation, be approached by a sales person, receiving a bill, etc.

Elements of Customer Journey

Customers' motivations and objectives

Why are customers engaging themselves in these activities and what are they trying to achieve?

- Current PC is not up to the tasks now; I need to replace it
- There are some aspects of the current PC with which I'm not very satisfied; I want to look for other models with better features
- The model I like costs a lot; I repeatedly visit the website and forums to make sure that it would be worthy
- I want to have the optimal price-service ratio; so I compare the prices and service terms of several retailers
- ...

Elements of Customer Journey

Customers' barriers

Why are the barriers customers might be facing at each stage of purchase process, at each channel, during each activity?

- I didn't know there's product that can solve this problem
- I don't like to ask for information on the phone
- I can't understand how this product works
- I don't like dealing with salesperson
- I hesitate to make a decision because I often regret a purchase
- I don't know how to dispose the replaced product
- ...

Elements of Customer Journey

Customers' emotions

How are customers feeling at each stage of purchase process, at each channel, during each activity?

- Angry/panic to find the current product is broken
- Depressed/frustrated/excited/hopeful to look for new options
- Cautious/nervous to make a decision
- ...

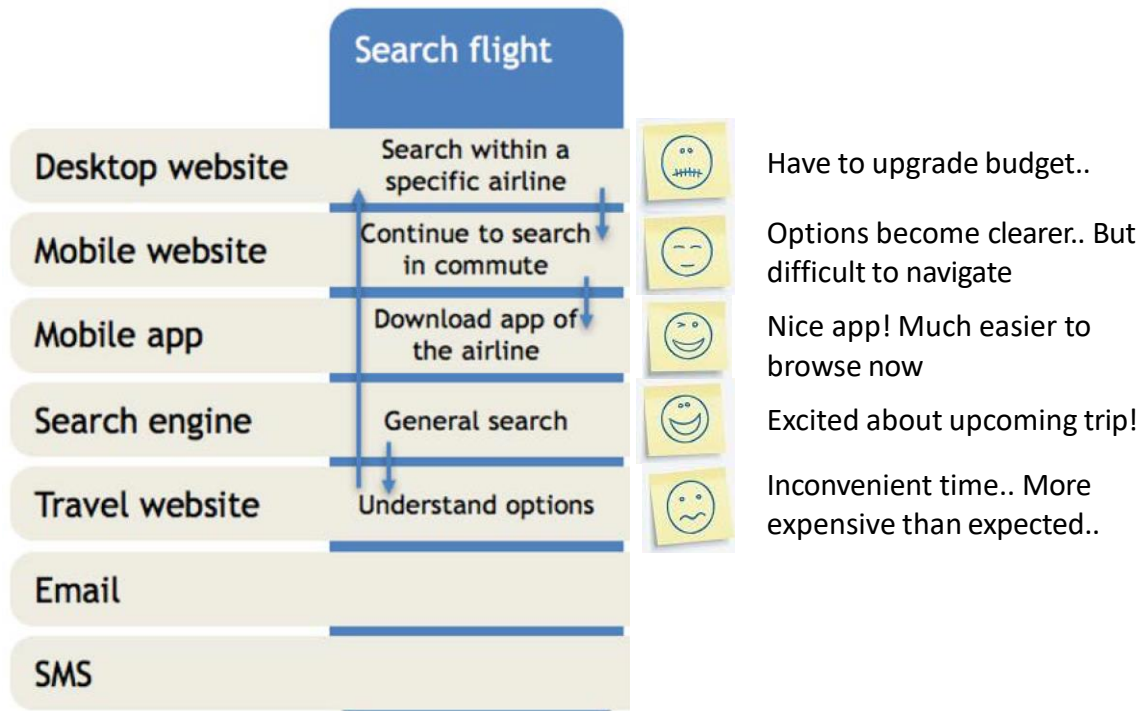
What are the customers' emotions during the interaction?

Emotions are important factors driving customer behavior, in both B2C and B2B context.

Customers could go through a wide range of emotions across their journey. Therefore, understanding and managing their experience also means understanding and managing their emotions.



What are the customers' emotions during the interaction?



Why Emotion?

How customers remember and evaluate their experience, and how they remember and evaluate a brand, are highly driven by the emotions that they felt during the interaction!

Building a CJ

Step 3: validate your customer journey

Conduct external research to validate and improve your customer journey

Use hypothesized customer journey map to shape your user research

- Explore gaps within the customer journey that you are unable to visualize because there is no existing data
- Validate (or invalidate) the hypothesized journey

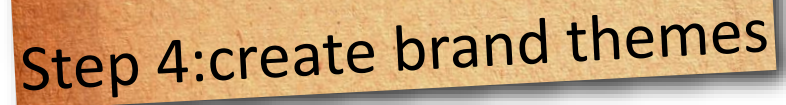
Validate the Customer Journey

Use qualitative research methods to validate and fill in gaps

- Customer interviews
- Direct observation
- Diary studies
- Focus groups

Plus other methods (e.g. real time tracking)

Building a CJ



Step 4:create brand themes

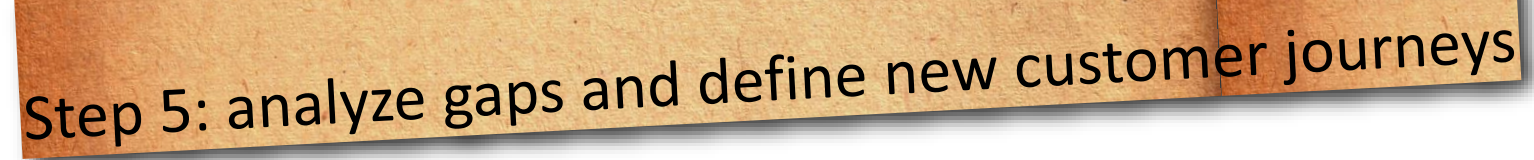
Identify a theme to interact with the brand for each persona along the CJ

Defining a brand theme

Which is the topic that the company can deal with and that is relevant for customers' pains and gains?



Building a CJ

A piece of brown paper with a fold, containing text. The paper is slightly tilted and has a soft shadow beneath it.

Step 5: analyze gaps and define new customer journeys

Understand where there are “blank areas” or inconsistencies along the CJ for each persona and redesign new customer journeys accordingly, in order to enhance the overall experience

The key: DREAMING!

Customer Journey Mapping - Example

Customer life cycle with a company



What does this customer journey map tell you?

- The company might be spending more efforts on attracting new customers than on taking care of existing customers.
- Product design could be good but not very intuitive.

How did customers evaluate their experience?

Emotion is one of the possible evaluations for a interaction

Other possible evaluations include:

- Importance of a touchpoint
- Satisfaction of a touchpoint
- The amount of effort required for a customer to accomplish their goal on a touchpoint, compare to their expectation
- The time required to accomplish the goal on a touchpoint, compare to their expectation
- Functionalities provided by a touchpoint, compare to customers' expectation
- Relevance and usefulness of content provided by touchpoint
- ...

How did customers evaluate their experience?

Experience
Ratings

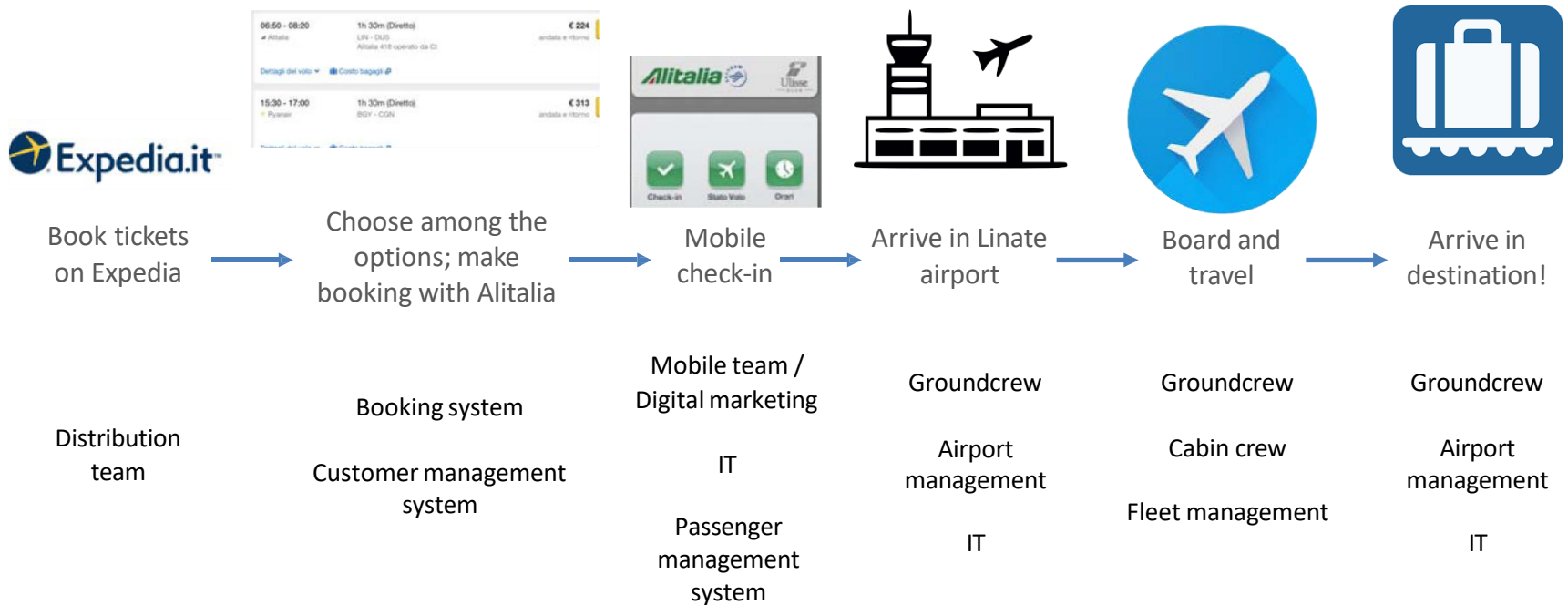


Who are in the backstage, responsible for delivering this customer experience at the touchpoint?

After having identified the journey from the customers' point of view, the internal process which delivers customer experience has to be identified as well. The backstage refers to the internal systems, processes, and people that are involved in delivering that journey.

Mapping the backstage into the customer journey helps a firm to create consistent objectives and incentives for different functional areas, in a customer-centric approach.

Who are in the backstage, responsible for delivering this customer experience at the touchpoint?



Finally, to accomplish the initial business goal:

- Identify the current gaps in customer journey
- Identify opportunities for improvement and transformation
- Design the customer journey to-be
- Develop new solutions
- Roll out the new solution
- Drive customer adoption

Building a CJ

Step 6: build relationships

Use brand themes to establish relationships with the target. In this phase you have to decide how “open” to co-creation you want your brand to be

Summarizing

Step 1: touch point mapping

Write down all company touch points on and off line and link them to the purchase macro phases: pre purchase, purchase and post purchase

Step 2: present customer journey

Identify specific customer journeys for each persona

Step 3: validate your customer journey

Enrich personas through exploration techniques using different sources of data such as:
-segmentation
-narrative insight

Step 4: create brand themes

For each persona go through customer journeys and extrapolate a brand interaction theme

Step 5: analyse gaps and define new customer journeys

Find the experience gaps and design new customer journeys

Step 6: build relationships

Build relationships with enriched personas in such a way that they encompass the brand theme



Exercise: build the Customer Journey map!

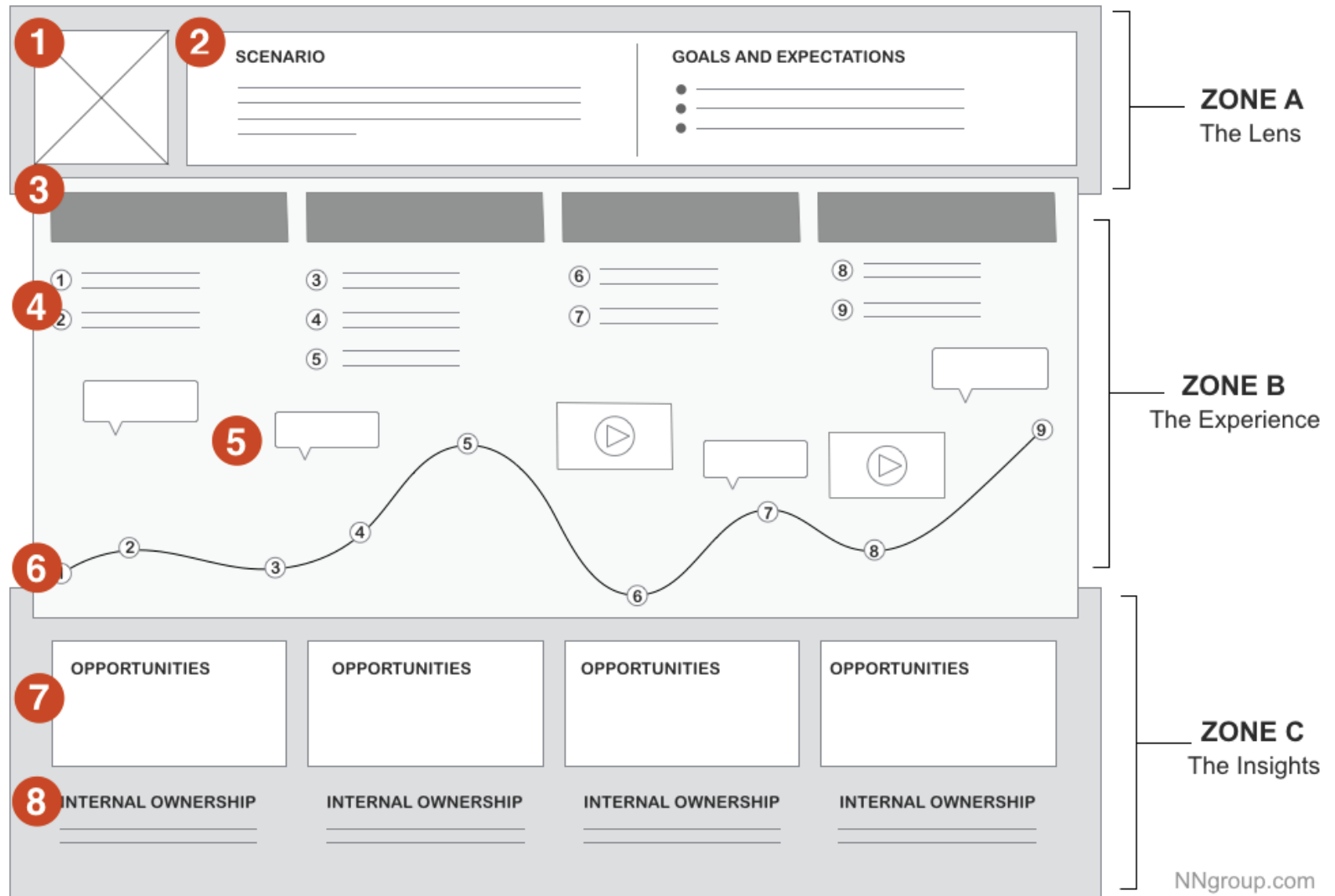
Step 1: Individuate one segment targeted by Zara and develop the Personas representing such customer segment (you can use a template of your choice)

Step 2: Build the Customer Journey of this Personas (you can use a template of your choice, here some examples:

<https://www.servicedesignshow.com/customer-journey/templates-and-examples/>)

Step 3: Identify gaps or inconsistencies in the customer journey and propose ideas to improve them (Be creative but take into account cost and feasibility!)

Customer Journey Mapping – Canvas example



Further readings

- Rosenbaum et al. (2017) How to create a realistic customer journey map. Business Horizons, 60(1), 143-150
- Mapping Customer Journey – Forrester report (available on WeBeeP)