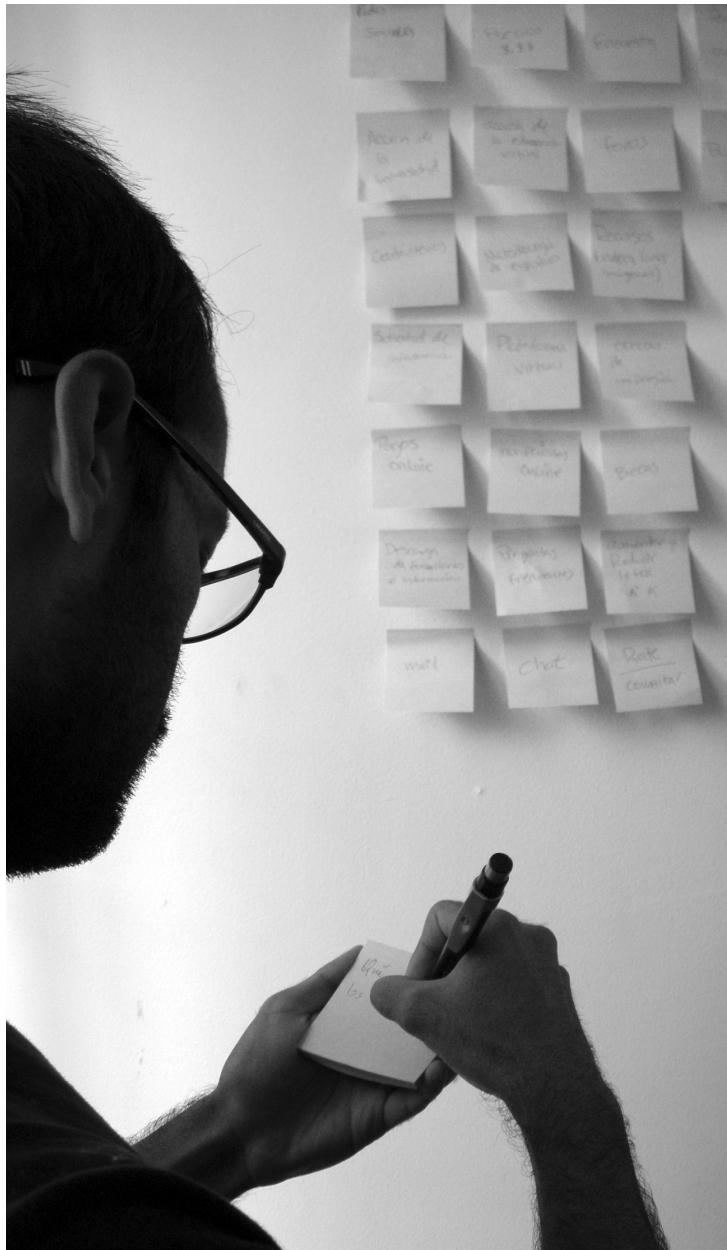


# MOVING DAY

## USING CUSTOMER JOURNEY MAPPING TO SPARK INNOVATION

*The Journey Maps Mindset*



"User Journey Map" by Luis Alveart CC BY-NC-ND

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## DETAILED CUSTOMER ENGAGEMENTS

*Customer journey maps are not a trend. They are a reliable, viable way for your organization to discover an accurate, holistic view of customer engagement with your brand, product or service. It's important to find the best way to create customer journey maps for your particular project or organization. Ethnography research, the Lemonade Stand Principle, the 7 Stages of the Customer Life Cycle, channels, touchpoints, interactions, and more—we outline the whats, whys and hows of customer journey mapping so you can begin using journey maps to study and enhance customer engagement with your brand, product, service, etc.*

*I began a recent UX strategy talk with this quote from George Lois, 'A trend is always a trap. Instead, go for the new.' Think about why your organization needs the journey map. Is it because it's cool and everyone is doing it, or because it's a new way of consolidating and presenting the user's perceptions of your brand, created by the user's experience, within a specific scenario or journey. If you need the latter, then journey mapping is probably for you.*



Mona Patel  
CEO at Motivate Design

## 360° MARKETING IS A TREND & JOURNEY MAPPING IS NEW

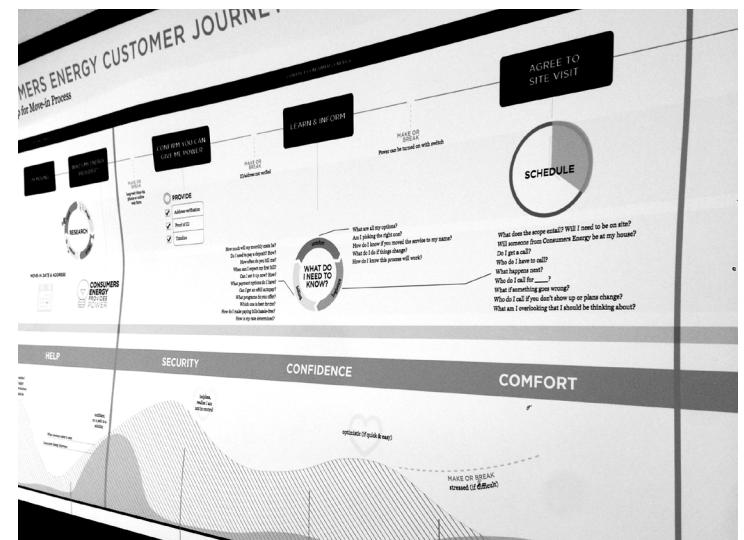
We've all heard of 360° marketing, and unfortunately, the effectiveness of these marketing methods wanes quickly. Why? There's no lasting customer traction because there's:

- too much focus on acquisition and not quality
- a disproportionate emphasis on outbound marketing methods

Your brand is central to your success. "Every interaction people have with your brand has to express its essence with consistency and quality. This is true not

only in the acquisition-focused stages of the journey, but all the way through post-purchase until they become your loyal advocates," advises Tony Brinton, Experience Design Director at Motivate Design. Customer perceptions, which are formed through the collective sum of all customer interactions with your brand, define your brand's genuineness.

Rather than beginning with how to sell your brand to customers, customer journey maps start with illustrating every step of a customer's experience with your brand. To establish your desired brand perception, you need to think holistically about your brand experience. On one side, you have your brand vision—how you want to be seen. And, on the other side, you have people's brand perception—how they actually see



you. Ideally, you want those perceptions to be the same. The only way to bridge your brand vision with perception is through the customer experience. By focusing on discovering (mapping) customer touchpoints, journey mapping helps your brand adopt a realistic and holistic view of customer engagement.

## KEY INSIGHTS



Customer Journey Maps are visual diagrams that illustrate a customer's experience with your brand. Journey maps detail your customer's needs and demonstrate the interactions the customer has with your brand to meet those needs and/or accomplish goals.

# ***The key output of journey mapping is identifying opportunities to innovate at each step of the customer life cycle***

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## **KEY INSIGHTS**



### ***What are touchpoints?***

- ➔ Any point of contact or interaction between customers and your brand.
- ➔ These points can be in-store, online or mobile experiences; customer relations interactions; at-home product use or installation; mobile interactions; contact via social media or email channels, etc.
- ➔ Touchpoints can occur in linear, cyclical, spiral, zigzag, etc. patterns; time may or may not be a restriction.

## **HOW JOURNEY MAPPING WORKS**

Journey maps can be particularly helpful when beginning new initiatives or for discovering opportunities to improve current customer life cycles such as:

- redesigning your company's website
- planning your integrated marketing communications
- laying out the on boarding process for new customers

First, it's best to define the scope of your mapping exercise. Consider how the journey map will relate to the overall project. The journey map could cover your customer's entire engagement cycle or pinpoint a specific customer interaction with your brand.

## **THE JOURNEY MAP MINDSET**

Getting into the journey map mindset means looking at your customer life cycle from the perspective of your customer. How do you get in touch with your customer's perspective? Apply the Lemonade Stand Principle.

## **THE LEMONADE STAND PRINCIPLE**

It does not matter whether your customer engagement cycle is intricate or simplistic. Just start by envisioning a cold, refreshing cup of lemonade and work backwards. Why does this cup of lemonade exist? It exists because it fulfills a simple need on a hot, summer day—quenching someone's thirst.

The lemonade stand is often a child's first foray into the business world. We'll call our lemonade stand proprietors Aiden and Luisa. When they set out to build and manage their first lemonade stand, it's all about putting that thirsty customer first.

## **DETERMINING PERSONAS**

Aiden and Luisa know that people usually like lemonade, often have change in their pockets, and tend to be thirsty on hot days if they are walking around. However, they need to consider who this someone actually is.

This someone is also known as a customer persona—a hypothetical person that represents a user type within a targeted demographic, attitude and/or behavior set for a product or brand. For each brand or product, there can be multiple personas.

Our lemonade stand proprietors innately consider the question, "Who is my customer?" by thinking about who might be thirsty on a hot day. They conclude their customer personas could be any one of the following: a person walking a dog, a group of kids riding skateboards, Ted the mailman, a mom pushing a stroller, or kids walking to the library.

# ***Seven Stages of the Customer Life Cycle***

The journey mapping process begins with identifying your brand's personas and considering the following at each stage of the customer life cycle, being sure to encompass all actions from pre-purchase to purchase to post-purchase.



## AWARENESS

"How will the customer know about my brand, product or service?"

## KNOWLEDGE

"What ways will the customer gain more information about my brand, product or service?"

## CONSIDERATION

"What other factors (habits, culture, peer group, etc.) might influence my customer?"  
  
"How does my product, service, brand, etc. and my customer's experience compare to the competition?"

## TRIAL/PURCHASE

"How/Where will the customer try or purchase the product, service, etc.?"

## SATISFACTION

"What does it take to satisfy customers just after a purchase?"  
  
"How well are we satisfying customer needs and wants during each touchpoint, channel, interaction (see below) and overall?"

## LOYALTY

"How can you encourage repeat business?"  
  
"How do your customers show a strong preference for your brand?"

## ADVOCACY

"How can you encourage your loyalists to recommend your brand and, ultimately, become brand evangelists?"

"How do your customers become loyal?"  
  
"How is customer satisfaction known, measured, tracked, etc.?"

"How can you encourage your loyalists to recommend your brand and, ultimately, become brand evangelists?"

# ***Identify moments that link your brand vision (how you want to be seen) with people's brand perception (how they see you)***

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## CUSTOMER JOURNEYS VARY

Each persona may have a slightly different customer journey. Sometimes a customer journey is erratic and does not proceed in a straight line. A customer could jump quickly from awareness to purchase based on the recommendations of friends or family (e.g., a neighbor sees a friend's photo post on Facebook of Aiden and Louisa's lemonade stand and heads out to purchase a cup without thinking about the cost or quality; a mom recommends a specific child's booster seat to her book club group, which motivates another mom in the group to head directly to the Amazon website and purchase the product from her smartphone immediately).

Or, a customer could have a cyclical, even static journey, spending an inordinate amount of time oscillating between knowledge, consideration, and trial, remaining extremely hesitant to purchase. Sometimes this persona resembles the serial taste-tester. From smartphones

to pants to ice cream flavors, this persona seems to relish the research and consideration stages. Fear of making the wrong purchasing decision and/or not being completely satisfied could be causing this customer to languish in the pre-purchase stages. Discovering this customer's wants and needs through journey mapping (see below) can help your organization identify opportunities to help this customer feel more comfortable and keep progressing toward making an actual purchase.

At each stage, give careful thought to channels, touchpoints, interactions, wants and needs, and opportunities. Here's where you dig in, and things might get a little bumpy as you start to look at points along your customers' journeys and each customer's whole, start to finish experience. These areas within the customer experience are places to identify moments that matter, which culminate to create a unified link between your brand vision—how you want to be seen—and people's brand perception—how they actually see you.

## CHANNELS

The medium or vehicle through which the experience is delivered such as call center, website, mobile app, in-store purchases, curb-side service, etc.

## TOUCHPOINTS

The physical locations or objects where the experience is delivered, which can include in-store, phone, desktop computer, mobile device, car, home, work, out walking around, etc.

## WANTS AND NEEDS

Each persona has preconceived, emotional and functional wants and needs (rational or irrational) at each step of the customer life cycle (e.g., how to get details on a product; feel safe; feel recognized and special; easily sign up for service online; not wait more than two minutes for coffee, etc.

## INTERACTIONS

The nature of the interaction with the brand such as viewing an ad, calling support for help, paying a bill online, etc.

## OPPORTUNITIES

What openings, breaks and chances are there to innovate ways to delight your customers at each stage of the customer life cycle. Once these opportunities are identified, they give you the basis for discussing and prioritizing strategic directions to pursue delighting your customers (e.g., automatically send a welcome kit after online registration; answer phone calls within 3 rings; offer a free sample in the store; have cashiers offer friendly small talk while tallying purchases; offer a small token like an organic lollipop if children find your brand's mascot in the store; allow online purchases to be returned or exchanged at any in-store location, etc.)

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*From lemonade stands to your brand, product or service, these steps help identify personas, customer life cycle stages, and the core channels, touchpoints, interactions and more that create the backbone of each persona's customer experience and your brand's overall customer journey maps.*

# ***It's surprising what you can uncover by considering your customer life cycle through a child filter***

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## **KEY INSIGHTS**



### ***The Child Filter***

- Children are less likely to be bound by preconceptions, assumptions or ubiquitous rules. No question is too simple or "dumb." And, assumptions are not welcome. This perspective invites possibilities for play, delight and empathy within interactions.
- A lemonade stand just doesn't have to be about selling lemonade. Sometimes, it makes sense for something to be just a little bit more (or offer a little more) than what it is or what is expected.
- These unexpected offerings, especially when they are driven by customer wants and needs, delight customers and boost sales (other examples include Target's fashion designers collaboration projects or Trader Joe's addition of little shopping carts for children to use).
- Think about your favorite local and/or national lemonade stand. How can its customer journey enlighten your organization's customer journey?



*Aiden paid attention to how to best serve his customer and his overall appearance and product presentation. His fancy lemonade dispenser (which allows customers to quickly serve themselves), display bowl of real lemons, and uniform (suspenders and a baseball cap) led to happier customers who were more likely to promote his stand to friends and strangers.*



*Louisa recognizes that not everyone likes lemonade, so she decides to sell chilled flavored, mini jelly beans and backpack charms made on-demand with her Rainbow Loom.*

# ***Service design & UX strategies***

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## ***So, you have journey maps. Now what?***

*Customer journey maps give everyone at your organization regardless of rank or division a definitive, holistic and empathetic view of the experiences of your customers. Often, the ethnographic research, which can include diary or “day in the life of” studies, reveals vital information about what happens to your customer in the areas between and within your brand’s customer touchpoints.*

### **GAPS OR BRIDGES**

For example, the customer service call-in center receives delayed website data—the system refreshes every 15 minutes—causing the call-in center to have no record of a repair ticket that a customer, who is now calling the center, submitted via the website a short time ago.

### **PAIN OR DELIGHT POINTS**

The website promises customers a 20% off online coupon when they update their email information on the new website; however, the online coupon is not delivered immediately. Instead, customers are disappointed when they are notified that the coupon will be delivered via email in 24-48 hours.

### **STRENGTHS OR WEAKNESSES**

If the on boarding process and support available for new customers is seamless and efficient, yet new customer satisfaction scores and engagement begin to wane after the first 8 months.

To close these gaps, alleviate pain points and eliminate weaknesses, you may find it's important to consider the overall service experience, the design of the process your journey map illustrates, and the user experience (UX) strategy that guides how your brand satisfies customer needs. In other words, journey maps can help your organization with an integral principle of user experience strategy, service design.

Journey maps offer a way for your organization to begin working consistently through design process and user experience strategies without bogging down, worrying or confusing your team with yet another design approach. Service design focuses on designing the experiences between touchpoints including how touchpoints relate to each other, work together, etc. For example, you might find that customers are more likely to access your company's information or report an issue through a tablet or mobile app rather than visiting the website or calling customer service. So, you might have more work to do to ensure that

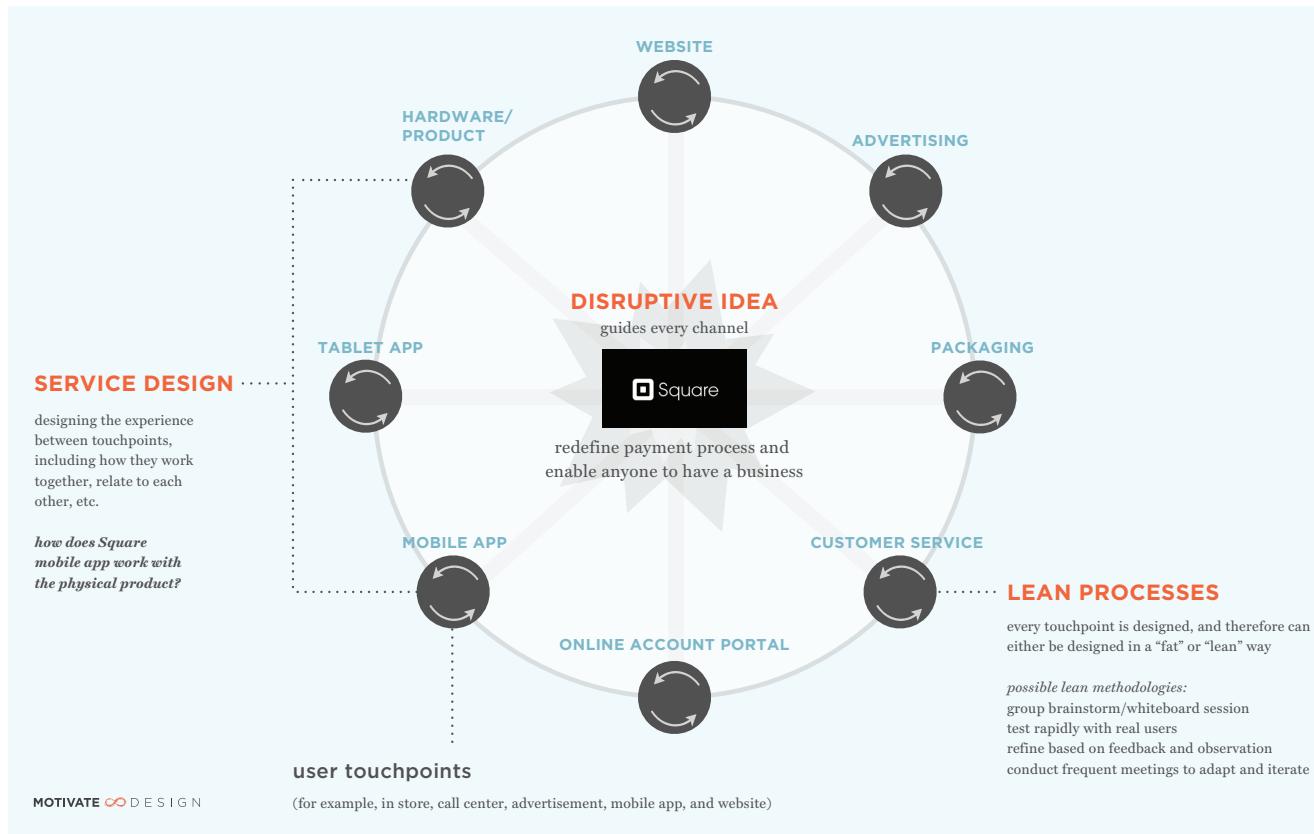
your customer's experiences within digital, mobile touchpoints (tablet app and mobile app) are just as good—or even better—than their offline experiences with your brand.

The touchpoints and experiences revealed in your brand's journey maps offer tangible action points that you can use to educate stakeholder groups and individuals on your current customer experience with digital apps. Plus, this will spur rethinking and innovation on the design of these interactions, allowing you to shift your brand's user experience strategy accordingly.



# ***Disruptive Thinking + Service Design + Lean Processes =***

## **INNOVATIVE UX STRATEGY**



Julia Sloan, Motivate Design's Senior Experience Designer, uses Square's mobile app to illustrate how journey map touchpoints and channels become key components in an organization's UX strategy. At Motivate Design, we merge three concepts—service design, disruptive design and lean UX—to create compelling and successful user experience strategies for clients.

“One of the key ingredients in a successful UX strategy is cohesiveness. It is very difficult to create a cohesive experience without a clear picture of how all the moving parts come together. That is why journey mapping is a vital step in the design process. It forces us to look at the “shape” of our experience, giving us the ability to see where things get convoluted and where we could improve. Journey mapping enables us to empathize with what users actually deal with when they interact with our brands.”

Julia Sloan,  
Sr. Experience Designer at Motivate Design



# Conclusions

**“The power of journey maps lies in its ability to reveal the complexities of the customer experience to the employees of any organization. In the daily melee of policies and complications, losing sight of keeping things simple for the customer is incredibly easy. The journey maps reveals a reset button, and meaningfully brings any organization back to what keeps it in business—its customers, keeping them happy and hungry for more.”**



**Meena Kothandaraman**  
*Experience Research Director at Motivate Design*

Customer journey maps take many forms from diagrams to storyboards to sticky note flow-grams. It's important to find the best way to create journey maps for your particular project or organization. If your journey map is based in ethnography research and focuses on the 7 Stages of the Customer Life Cycle—giving careful thought to channels, touchpoints, interactions, wants and needs, and

opportunities—there's a good chance you're well on your way to discovering an accurate, holistic view of customer engagement with your brand or product.

We encourage organizations to display their customer journey maps. When positioned where all stakeholders have a chance to view them, journey maps can be a power communication and

contemplation tool. As a common reference point for your organization's actual or ideal customer experience, journey maps enable opportunities to ponder, rethink or reimagine design process thinking and user experience strategy to build empathetic, creative, efficient and effective customer engagement experiences.

**We are a boutique UX firm in NYC. We lead the research, strategy and design to create exceptional experiences for brands, products and services that help humanize technology and enrich people's lives.**



## SMALL AND BIG AT ONCE

At Motivate Design, we offer big company expertise with a higher level of personal service. You work directly with our expert practitioners, which means you don't get insulated from the people actually doing the work. Yet, we have the big agency experience to know how to simplify and keep things easy for you.

## RESEARCH & DESIGN EXPERTS

Our passion for research and design really comes through, as you'll see, in all our interactions. We love nothing more than a juicy problem to solve, and clients love the insights and solutions that we bring to the team.

## AN EXTENSION OF YOUR TEAM

We are proud of our brand and our work. But, we don't need the credit and are happy to quietly work as an extension of your internal team. You know what works to move the needle at your organization; we work with you to get that done.

## THE RIGHT PARTNER

We respect our clients and only work with clients that do the same for us. True success stems from meaningful collaboration. We are known for our honesty and will tell you the best way to approach a problem, even if it's a cheaper way to go. We value relationships, not projects.

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