

The Customer Journey Mapping Guide

This 9 step guide will show you how to use a customer journey mapping workshop to identify what's wrong with your current journey and then optimise it for faster processes, higher efficiencies and a better customer experience.



STEP 1

Pick a customer journey



This could be any journey where you have multiple touchpoints with your customers. For example, a mortgage application process, a change of address, a credit application underwriting process or an insurance claim.

Look for the symptoms of an inefficient journey.

Does it have a high customer attrition rate? Is there a high cost-to-serve?
Do they generate a high number of calls into the contact centre?

STEP 2



Gather the right team

Once you've chosen the journey to work on, you need the people directly involved in that journey. Not the executives with general oversight, you need the people who talk to clients and customers every day – those whose jobs are impacted by the inefficiencies you want to solve.

STEP 3

Prepare the workshop



Gather your materials and choose the right environment.

Book a conference room with plenty of space for writing and sticking up notes, whether it's flipcharts, whiteboards or walls to cover in blu tac and post-its.

Bring an open mind, make sure all the pens work and order lots of coffee.

We recommend bringing in an objective facilitator. Someone with fresh eyes, who can ask the difficult questions about how things are done, not "how you do things".

Ideally they should be from outside your organisation. Failing that, make sure they are from a department that has no involvement in this customer journey at all.

STEP 4

The Workshop

The goal of the workshop is to get every single element of the customer journey written down. The good, the bad and the ugly.

You need it all for this to be an effective use of your time.

Make sure everyone knows that this is about solutions only, not blame for current issues, so you can encourage honesty.

Use your materials to record ideas and create structure.

Separate your questions from your ideas.

Write your questions on a flipchart, and stick your ideas on post-its.



Draw the flow of the current customer journey on the whiteboard.

Identify all employee and all customer touchpoints.

At every single one, what does the employee do, and what does the customer do.

For employees, look at:

Channels
(paper form, letter, phone, email, online portal, whatsapp etc.)

Systems
(Salesforce, Quadiant, Adobe Experience Manager etc.)

Time on task

Effort required

How they feel

Knock-on effects to other teams

For customers, look at:

Channels

Outbound contact

Inbound contact

Effort required

Time taken to complete interaction

Time waiting between stages

How they feel

Once you've drawn and annotated the journey, it should be easy to see where the inefficiencies are.

Use a new colour of post-it to highlight each issue.



STEP 5



Analyse your findings

Answer the following questions:

1

How much does it cost you to actually manage this process for a typical customer?
Estimate the true cost-to-serve for a typical customer.

2

Where are we losing customers in this journey?

3

What percentage of customers are you losing in this process?

4

What potential revenue are you losing?

Identify opportunities in the journey if we could process faster, what's the benefit to us? What is the commercial upside? Then design a better customer journey.



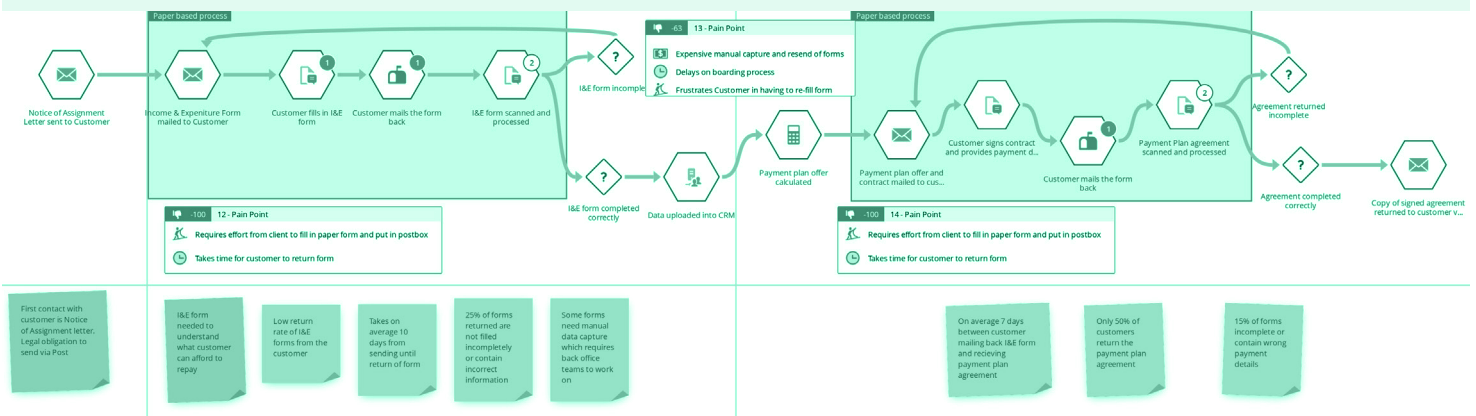
STEP 6

Map the current journey



Your flipchart, whiteboard and post-it notes need to be distilled into a visually digestible map. Simplify all the information and create something you can share across the business.

At Adare SEC, we use Quadient's customer journey mapping tool, but there are others.



STEP 7



Prioritise

Use the data to identify the quick wins.

In which parts of the journey can you invest and improve the least to get the highest impact and the biggest gains?

This could be: removing paper forms, replacing scanning and printing with a digital mailroom, implementing Hybrid Mail.



Now ask yourself:

1

What new technologies exist to support these changes?

2

What investment would be required?

3

What are the changing needs of customers?



STEP 8

Map your future customer journey



Look at your current customer journey map, and implement the quick wins you identified in the last step.

How much time and effort can you remove?

Add labels to each process change with the action and the intended outcome.

E.g. digitised form = removed friction and reduced time to complete by 7 days.



STEP 9

Keep it alive



Keep the map alive by making it shareable across the business in an easy to understand format.

Transforming a customer journey doesn't happen overnight. Your new map has to be maintained as it evolves.

As you make your changes to the journey, record them and measure their impacts so you can make informed decisions for the next incremental improvements.



Book a Call with our CX Team

We run frequent customer journey mapping workshops with our clients. Talk to us about how to maximise your mapping to create optimal customer journeys that drastically improve your customer experience.

[Click Here to Open the Call Calendar](#)



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