WHY IS THIS IMPORTANT?

CUSTOMER JOURNEY MAPS

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What is a Customer Journey Map?

Customer journey mapping provides a comprehensive visual representation of each interaction between customers and internal teams. This tool has the potential to serve as a catalyst for continuous improvement initiatives, enhancing customer satisfaction and engagement. However, without deliberate action, it risks becoming merely a decorative artifact rather than a driver of tangible business outcomes.

Importance of Customer Journey Maps

Effective customer journey mapping offers a comprehensive view of existing processes across the organization. This valuable tool illuminates the critical role of each team in shaping the customer experience. By leveraging this insight, organizations can prioritize improvement efforts within the Six Sigma framework, ensuring focus on areas that generate the most significant impact.

How to Get Started

While no single methodology is definitive, here's a structured approach to help you initiate the customer journey mapping process:

- **Step 1: Identify Organizational Touchpoints**
  - Chart the role and influence of each internal department across the customer journey, recognizing that all teams contribute in some capacity.

- **Step 2: Outline the High-Level Process**
  - Construct a simplified workflow, highlighting inter-team dependencies and key handoff points. Avoid excessive detail at this stage.

- **Step 3: Prioritize Key Stages**
  - Define critical milestones and deliverables within each stage of the process.

- **Step 4: Analyze Stage Components**
  - Dissect each stage, mapping out specific steps in granular detail.

Step 1 - Identify Organizational Touchpoints

Marketing:

Identifies ICP & Creates Brand Awareness

Sales:

Sets Growth Targets, Converts Prospects into Customers

Professional Services:

Implements Customer Solutions

Customer Success:

Leads Enablement, Adoption, & Services.

Product Support:

Resolves Customer Issues, Provides Product Feedback

DevOps:

Maintains Technology Infrastructure to Support Product Needs

Product Management:

Ensures Product Meets Customer & Market Requirements

Engineering:

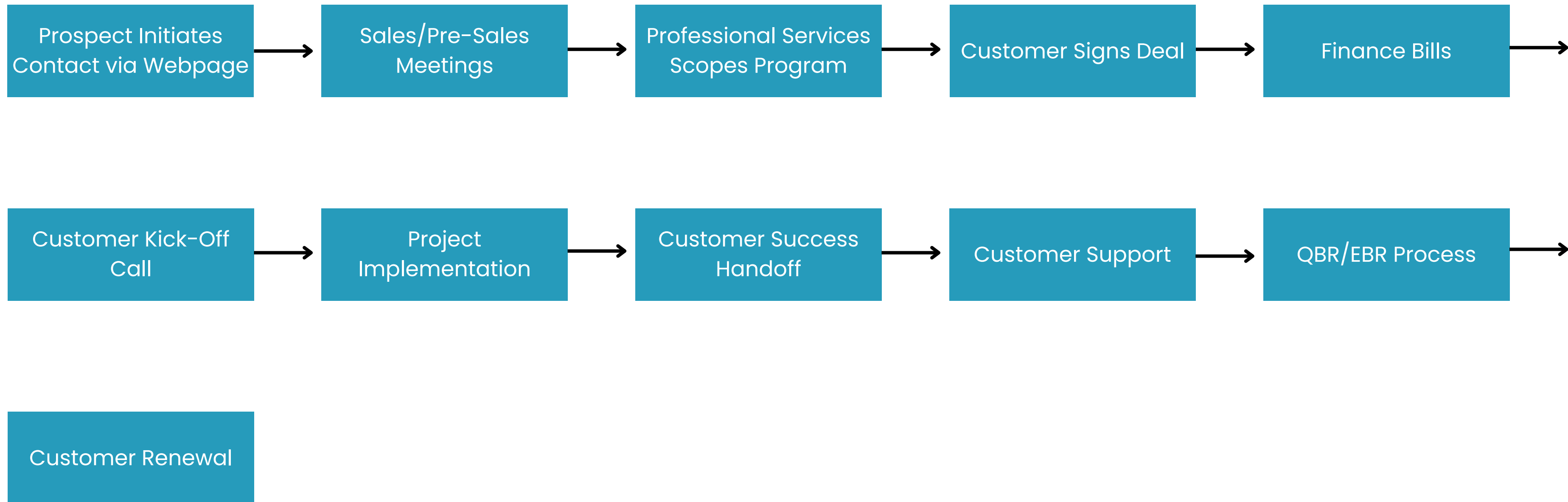*Develops & Maintains Product in Accordance with Product & Business Objectives.*

Finance:

Sets Margin Goals, Manages Billing, & Says No to Everything

Human Resources:

Recruits & Develops Talent, Ensures Skills Meet Business Objectives.

Step 2: Outline the High-Level Process

| Prospect Initiates Contact via Webpage | → | Sales/Pre-Sales Meetings | → | Professional Services Scopes Program | → | Customer Signs Deal | → | Finance Bills | → |

| Customer Kick-Off Call | → | Project Implementation | → | Customer Success Handoff | → | Customer Support | → | QBR/EBR Process | → |

| Customer Renewal |

Step 3: Prioritize Key Stages - E.g. Professional Services

Project Scoping - SOW

Professional services scopes the program, assesses initial client needs and requests, formulates the program's statement of work, and precisely outlines the scope of deliverables.

Project Plan Document

A concise project plan is created, highlighting key deliverables and due dates, task owners, milestones, and completion criteria. Input from product, DevOps, and engineering is required.

Change Requests

All changes to the original scope are documented and assessed for inclusion in current or future project, sales and finance are engaged to determine any cost implications.
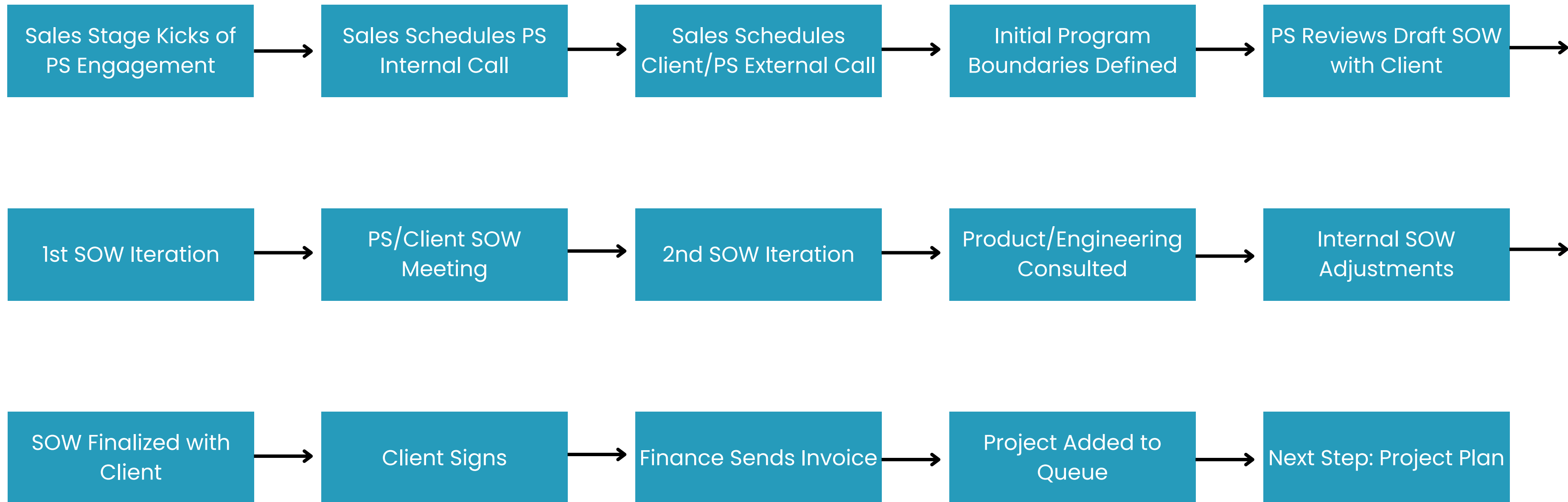
Project Close - Signoff

Upon completion, the customer reviews deliverables meet their requirements, and officially signs off on the project. This initiates the handover to the customer success team.

Step 4: Analyze Stage Components
E.g. Professional Services - Project Scoping

| Sales Stage Kicks of PS Engagement | → | Sales Schedules PS Internal Call | → | Sales Schedules Client/PS External Call | → | Initial Program Boundaries Defined | → | PS Reviews Draft SOW with Client | → |

| 1st SOW Iteration | → | PS/Client SOW Meeting | → | 2nd SOW Iteration | → | Product/Engineering Consulted | → | Internal SOW Adjustments | → |

| SOW Finalized with Client | → | Client Signs | → | Finance Sends Invoice | → | Project Added to Queue | → | Next Step: Project Plan |

How to Use the Map

Determine Bottlenecks

Identify the primary pain points within the customer journey. Where do complaints —both internal and external— cluster?

Identify Friction & Risk

Analyze the journey's complexity. Evaluate the number of handoffs, crucial dependencies, and potential risk mitigation strategies.
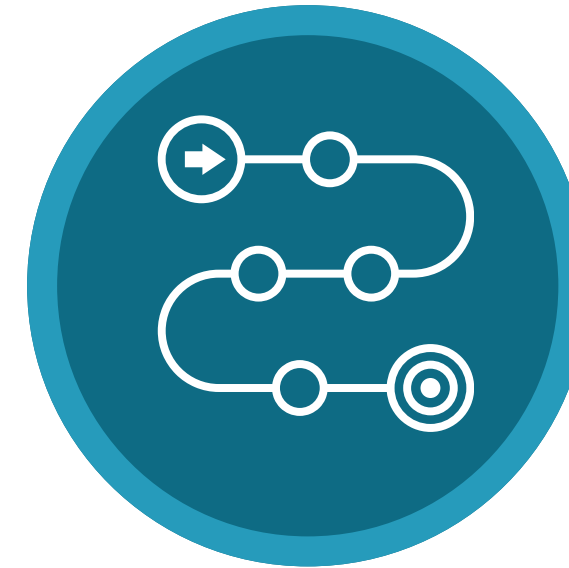
Improves Processes & Policy

Once areas for enhancement are pinpointed, formalize updated processes to establish organizational standards, influence behavior, and ensure accountability.

Drive Continuous Improvement

Measure the impact of your changes, periodically reassess the journey, identify new areas for optimization, and track long-term effects. Implement a regular review schedule for ongoing evaluation.

Conclusion

A well-constructed customer journey map offers organizations powerful insights to elevate performance. However, without the full commitment of the executive leadership team, it risks becoming a futile exercise and wasted investment.

Customer journey mapping is best suited for organizations where leadership prioritizes exceptional customer experience and continuous process improvement. While some value can be realized without this full commitment, the overall impact and potential benefits will be significantly limited.

One final note: if you stop here, then you're only looking at the process from one lens, yours. Complete this exercise from the customer's point of view and you can elevate the value even further.