

# Journey to Wow!

## A How-to Guide to Customer Journey Mapping

*Presented by*  
The Brookside Group, Inc.  
[www.brookside.com](http://www.brookside.com)



*The best way to predict the  
future is to create it*

- Peter Drucker

# thank you.

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Thank you for downloading our latest eBook: [Journey to Wow! A How-to-Guide to Customer Journey Mapping](#)

For over two decades all of us here at The Brookside Group have been focused on helping our clients get closer to their customers – building mutually beneficial, long-term relationships. Along the way we've learned a lot, had some great successes and learned some best practices. We look forward to sharing our thoughts with you today. Together we'll learn:

- How to design an effective Customer Journey Map
- How to leverage your Buyer Personas so they work for you
- How to identify key TouchPoints for taking action and increasing engagement
- How to run an effective, productive session

Please take a look – I hope these ideas help you and your organization as well.

All the best,

*Tom*

Thomas M. Cates

President & Chief Storyteller

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PS: May I ask a favor? We are always trying to improve the state of knowledge – please shoot me an email with your experiences, best practices and ideas around Customer Journey Mapping. Thanks!

# Welcome.

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## 01 Executive Summary

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"70% of buying experiences are based on how the customer feels they are being treated." - McKinsey

## 02 Why Customer Journey Mapping

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"In the U.S., the estimated cost of customers switching due to poor service is \$1.6 Trillion." - Accenture

## 03 CJM Terminology

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"A customer is 4x more likely to buy from a competitor if the problem is service-related, versus price or product-related." – Bain & Co.

## 04 CJM Process

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"67% of customers mention bad experiences as a reason for churn, but only 1 out of 26 unhappy customers complain." - Esteban Kolsky

## 05 Logistics Around CJM

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"By 2018, more than 50% of organizations will implement significant business model changes in their efforts to improve customer experience." - Gartner

## 06 About Brookeside

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"72% of businesses say that improving the customer experience is their top priority." - Forrester

# 01 Executive Summary

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# executive summary

## Customer Journey Mapping



### Wow! your customers

Taking the time to understand as much as you can about what your customers' goals and their journey can go a long way towards "Wowing" your customers and growing your business.



### Its not about the map

Creating a map shouldn't be the goal. Creating a customer that says Wow! Should be the goal. Successful maps:

- Facilitate decisions
- Identify opportunities
- Drive decisions
- Result in action



### Proactively manage

Customer Journey Maps are about proactively managing all the customer TouchPoints. Remember, the customer experience happens whether you manage it or not!

- Can be used to improve a current journey or design a new one
- Go as granular as you need



### don't settle for fine

Don't settle for "satisfied" customers who consider you a "fine" Transactional Vendor, instead:

- Map their journey
- Manage their thoughts, feelings and emotions
- Become their Trusted Advisor
- Wow! your customers
- Grow your business



# 02 Why Customer Journey Mapping

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“In the U.S., the estimated cost of customers switching due to poor service is \$1.6 Trillion.” - Accenture

# why Customer Journey Map?



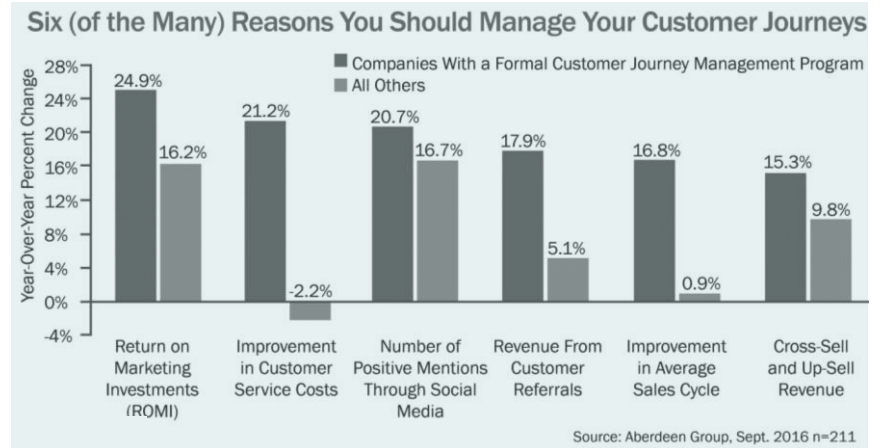
## People don't think in isolated experiences

- Customers form perceptions as they proceed through their "journey"; perceptions drive future behavior
- People determine value from their relative total experience



## When done correctly, customer journey mapping helps to:

- Create a customer-focused perspective
- Break down silos between departments
- Emphasize high-value TouchPoints
- Eliminate ineffective TouchPoints
- Increase employee accountability
- Increase customer engagement and mutual long-term value
- Earn Trusted Advisor status (rather than a Transactional Vendor)
- Engage all employees. Typically a very hands on experience  
Customer Journey Mapping engages all stakeholders and creates ownership for a customer focused culture.



03

# Customer Journey Mapping Terminology

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“A customer is 4x more likely to buy from a competitor if the problem is service-related, versus price or product-related.” – Bain & Co.



# CJM Terminology



## Persona

A generalization of your target customer or segment, including demographic and psychographic information, want's and needs, preconceived notions (baggage) and JTBDs (“Jobs to be Done”)



## Customer Journey

The specific experience to be mapped. Sometimes “cradle to grave”, more frequently they are specific processes (e.g., Sales, Implementation, Problem resolution)



## TouchPoint

Any interaction that a customer has with your organization, product, or brand in the journey, including your marketing and promotion, research on your website, discussions with your sales team, using your product / service, opening your invoice & paying their bill, calling your service department, etc.



## Moment of Truth

A TouchPoint that is pivotal in the customer experience. The customer pays particular attention at this moment and the experience has a significant impact on the customer's perception of value



## Customer Journey Map

A customer journey map is a visualization of the process (the journey) that a specific customer/segment goes through in order to accomplish a goal



## Customer Journey Mapping

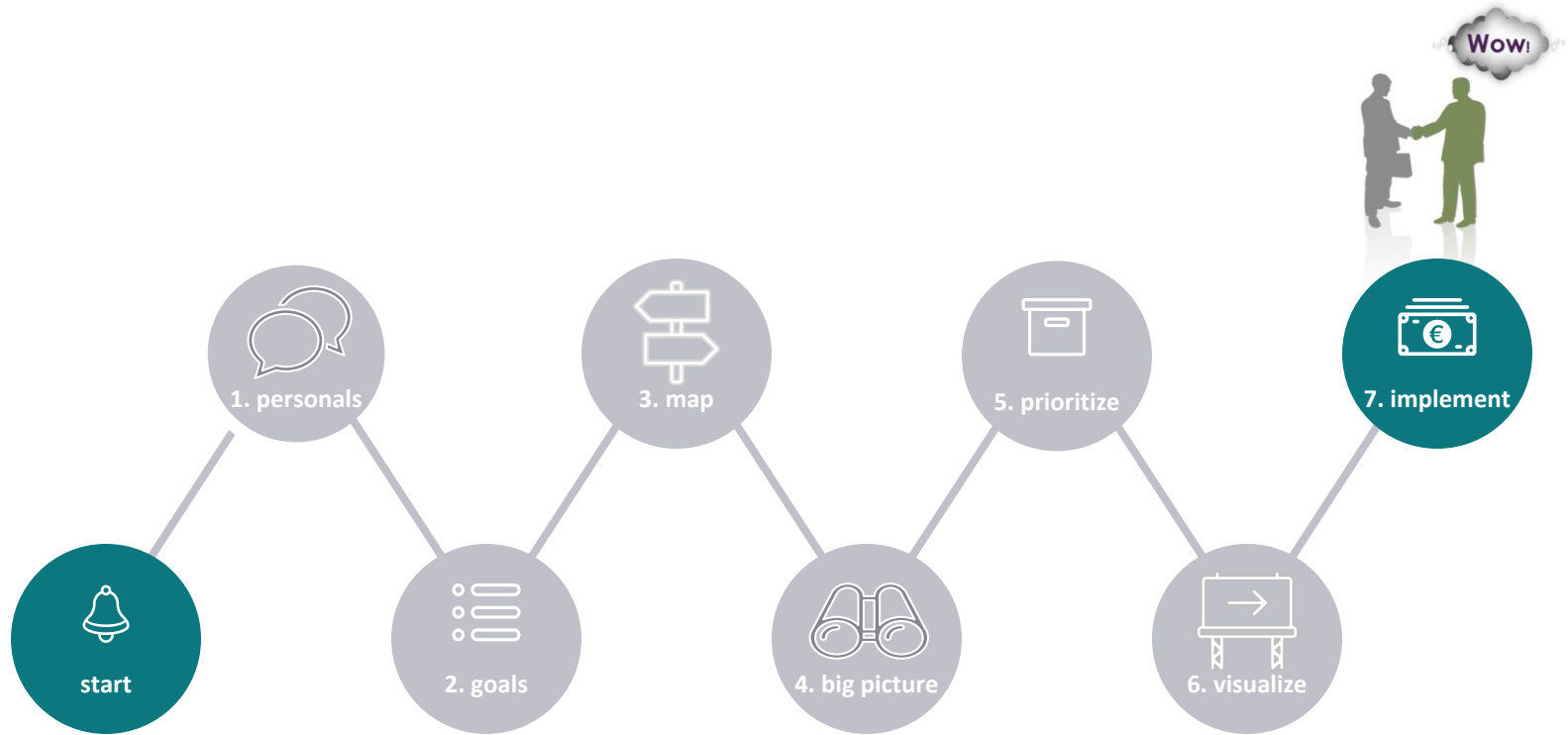
An exciting process of understanding, visualizing and designing an exceptional customer experience...  
**a Journey to Wow!**

# 04 Customer Journey Mapping Process

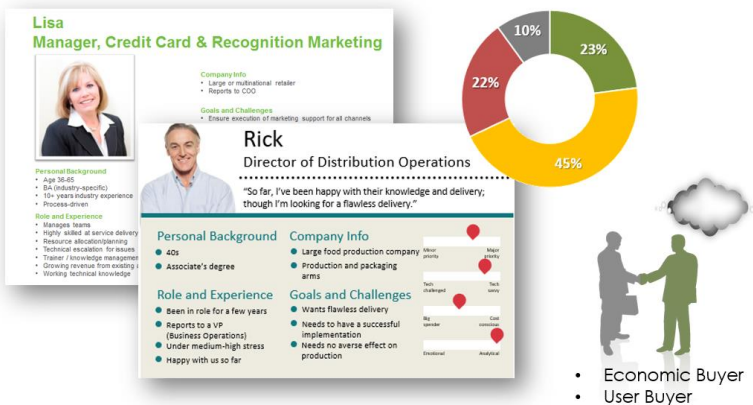
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“67% of customers mention bad experiences as a reason for churn, but only 1 out of 26 unhappy customers complain.” - Esteban Kolsky

# customer journey mapping process



# customer journey mapping process



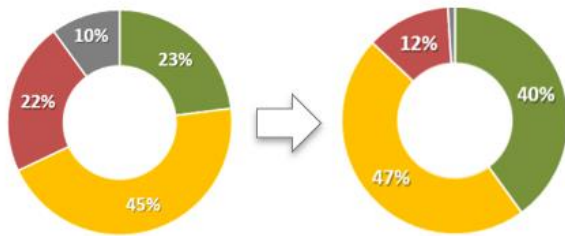
This is our starting point

## 1. Choose a Buyer Persona to Focus On

Customer Journey Mapping starts with a “representative customer persona” whose journey we will map (*much of this is available online*):

- Demographics (Age, Education, Home life)
  - Role, job title & description/role (responsible for)
  - Experience (with your offer; with other)
- Firmographics
  - About the company/division, their customers, culture, current successes/strains
  - Reporting relationships
- Goals and Challenges
  - Near- and Long-term goals, metrics & measures
  - Level of authority to make commitments
- Needs
  - What is she looking to get from us?
  - JTBD – Job To Be Done
- Beliefs
  - About business, her role, about us
  - Communication style

# customer journey mapping process



Increase % Trusted Advisor Relationships

## 2. Establish Win – Win Goals

- What does this specific persona hope to achieve as they experience the journey?
- What do we hope to achieve?
  - Retention ↑
  - Cross-selling ↑
  - Referrals ↑
  - Price sensitivity ↓
  - Etc.
- Where are the Win – Win opportunities?

# customer journey mapping process



## 3. Map the Journey

- Deeply understand our client's journey
  - TouchPoints and Moments of Truth
  - Impact of each on customer perception
- Take every touchpoint into account
  - Put yourself in your persona's shoes
  - Where do they go to solve a problem?
  - What else do they consider in the process?
  - How do they decide?
- At each step along the journey we want to capture what the customer is...
  - Doing (Actions)
  - Thinking (Questions & Concerns)
  - Feeling (Motivations)
- Done well this is exciting process of understanding, visualizing and designing an exceptional customer experience... **Journey to Wow!**

# customer journey mapping process

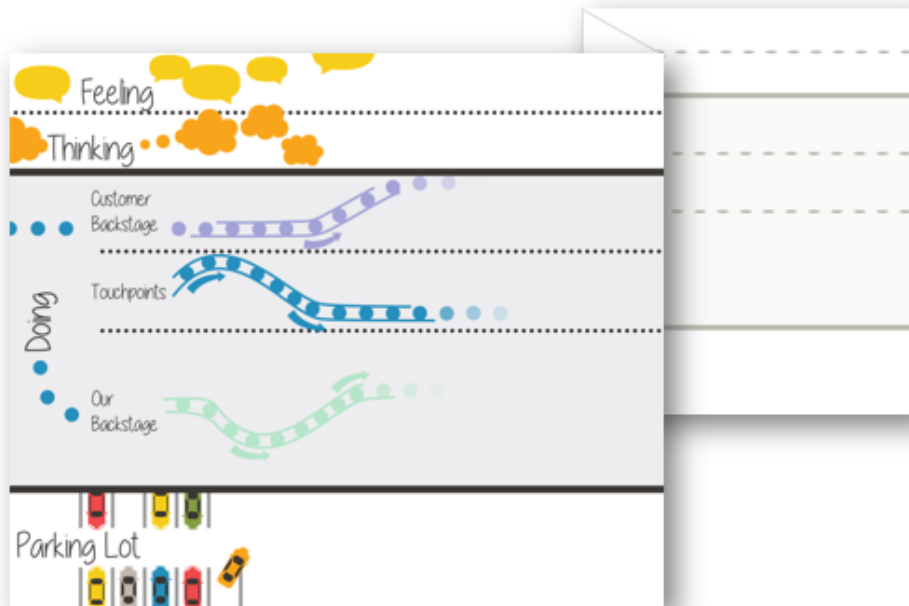
We use a **custom scroll** to capture our thinking:

Step 1: We use custom “post-it” notes to first map TouchPoints

Step 2: Capture customer & our “Backstage”

Step 3: Capture what the customer is Thinking, Feeling, Questioning

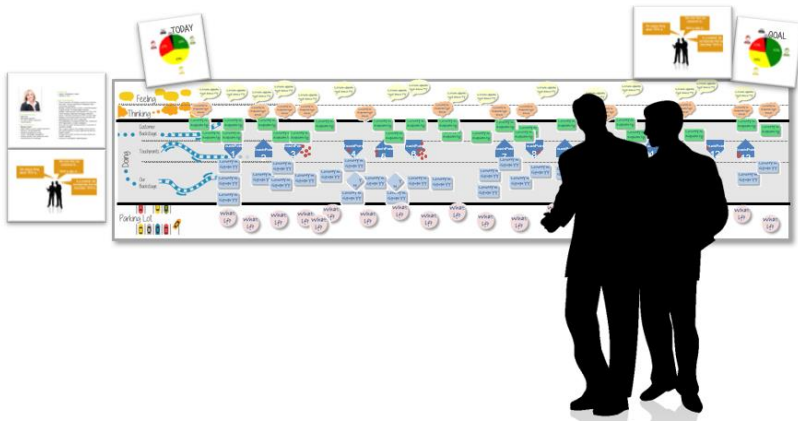
Step 4: Add outside issues & ideas to the Parking Lot



Very hands on experience



# customer journey mapping process



## 4. Look at the Big Picture

- How easily your customers can get done what they want to do?
- How do they feel throughout the journey?
- Where are the roadblocks?
  - Remove Grit
  - Improve Standards
  - Become a Trusted Advisor



Integrity



Competency



Recognition



Proactivity



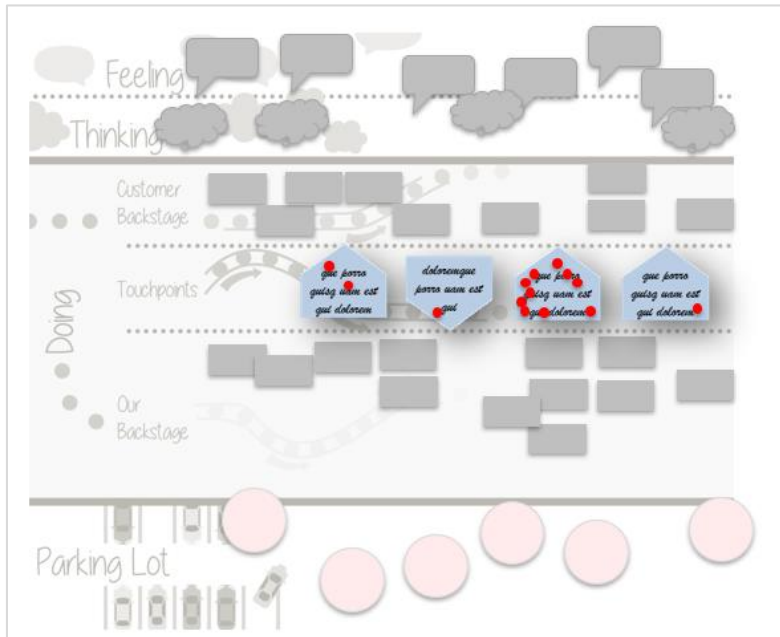
Savvy



Chemistry



# customer journey mapping process



## 5. Prioritize Improvement Opportunities

Establish the voting rubric

- Impact (near- vs. long-term)
- Difficulty
- “Magic wand”
- Constraints (investment, technology, staff)
- ROI

# customer journey mapping process



## 6. Visualize Your Information

We find it easiest to create the customer journey maps on our scrolls. You can also use a large whiteboard, large piece of paper, excel or some new online tools

- Consider if you need a “polished” map for communication purposes

# customer journey mapping process



## 7. Implement Changes

- Validate important hypotheses (FOG: Facts, Opinions, Guesses)
- Obtain a decision
- Communicate the plan
- Assign responsibilities
- Update the stakeholders on progress
- Update the customer journey map
- Measure impact
- Celebrate success!

05

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# Logistics Around Customer Journey Mapping

“By 2018, more than 50% of organizations will implement significant business model changes in their efforts to improve customer experience.” - Gartner

## Customer Journey Mapping Workshop

### How many participants?

One persona; one specific journey

- Representatives from every TouchPoint and those who must support a decision
- Ideally 10-12 people
- Could do multiple journey's in parallel and link them afterwards

### Who should participate?

We want participants who have in-depth subject knowledge and the ability to contribute in a team environment

- Team player; ability to effectively collaborate
- Opinionated yet participative
- Ability to challenge the status quo
- Committed to solutions
- Knowledgeable
- Ability to leave role at the door

### The Decision Team

- Senior level stakeholders
- They will either approve or disapprove the recommendations
- Ideally they won't be the ones making the recommendations ("The people who do the work know it best")
- They will be kept informed on how implementation is progressing

Welcome and Thank You  
About the Customer Journey

Map the Customer Journey  
Doing, Thinking, Feeling

Prioritize TouchPoints & MOTs  
Brainstorm Improvement Options

Lunch

Prepare  
Recommendations

Present  
Recommendations

Sample Agenda  
*Plan on 1+ Day*

# 06 About Brookeside

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“72% of businesses say that improving the customer experience is their top priority.” - Forrester



“To sum it all up, when I’m involved in training or a project or anything else and I find out that Brookside is involved, I am at peace. I know that we have professionals on the case that will lead us through the darkness and into the light. The issues will all be fleshed out, the days will be organized, what we learn will build on (not contradict) other trainings from the past, and we are not being guinea pigs for the latest and greatest trendy business self-help philosophy. I appreciate everything you all do for us. Keep up the great work!”

**Benjamin C.**  
Atlanta

# about The Brookside Group, Inc.

We help you boost revenue and enhance efficiency by deepening and enriching your client and team relationships in three ways: training, consulting, and through our partner's client feedback measurement tool. We can combine these approaches to help make sure you get action – not just advice.



## award winning training

Award-winning workshops in core business skills, client service, sales, and management coaching to help your team adopt best practices and differentiate your company from the competition.

## growth consulting

A collaborative, hands-on approach to improving business processes that goes beyond analysis and recommendations to help you implement change and make it stick.

## salesEQUITY

Our partners at salesEQUITY use a proprietary client feedback and sales coaching software that helps you turn your client-facing teams into Trusted Advisors to your customers.



# about The Brookside Group, Inc.



## successful

- A 6-time Inc. 5000 listed company (Fastest growing private company)
- Founder of salesEQUITY, Inc. – A Smarter Approach to Measuring Customer Relationships



## award winning

- An ASTD Best Award winner for the Critical Management Skills Program
- A Selling Power Top 20 Sales Training Companies
- 2012 awarded Sales Training Program of the Year
- 2013 Customer Service Consulting Practice of the Year



## Industry leader

- In addition to contributing to four books on customer strategies in 2016 our founder Tom Cates was named a **Fast 50 CEO** at the SmartCEO's Future 50 Awards
- Hold **two patents** on measuring and improving customer loyalty



2013 Customer Service  
Consulting Practice of the Year



A Member Of The  
THE WALL STREET  
JOURNAL.  
The Boston Globe



# star model making change stick



capabilities



structure



processes



metrics



people

A common thread in all our client successes is our use of the STAR Model to ensure we are creating change that sticks, not simply temporarily treating a symptom.

# about the author

## Tom Cates

Tom Cates is the founder and CEO of The Brookside Group, Inc. a management consulting company focused on building great customer relationships. Tom is also the founder and Chief Customer Officer of salesEQUITY, Inc., a software company offering the industry leading B2B client feedback and engagement platform.

Tom is a natural speaker and storyteller who speaks regularly to 5-5,000 person audiences about building Trusted Advisor relationships and improving customer loyalty. He brings his experience and insight of the customer-facing elements of sales, marketing, and customer service functions to his audiences. His speeches are customized, relevant, data-driven, and engaging. He has been quoted in the popular press including the Boston Globe, USA Today, and The Wall Street Journal.

Tom has contributed to four books on customer-based strategies and is currently working on a fifth book on measuring and managing customer loyalty; he holds two patents for his research in measuring client loyalty.

Prior to founding Brookside and salesEQUITY, Tom held senior positions at Mercer Management Consulting and IBM. He earned a BAE from The Pennsylvania State University and his MBA at The Wharton School of The University of Pennsylvania. Tom lives in Acton, Massachusetts with his wife and three children, and is a coach and a Board member for several local youth sports leagues and school organizations.



thank you.



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