TAKING THE MYSTERY OUT OF CUSTOMER EXPERIENCE MAPPING

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1. UNDERSTANDING CUSTOMER EXPERIENCE

"Customer experience" has become an everyday phrase in recent years, but like "innovation" and "design" it is actually difficult to find a clear, commonly-held definition. This is despite the fact that many businesses see improving their customer experience as a critical imperative to growth and staying competitive. How we can really improve something if we can't even define it? This paper provides a comprehensive guide to getting started with analyzing and improving the experience you provide to customers.

Sometimes customer experience, or CX, is defined as more narrowly as digital experiences and interactions, such as on a website or a smartphone. In other cases, customer experience is focused on retail or customer service, or the speed at which problems are solved in a call center.

To be really successful on a long-term basis, customer experience needs to be seen as all these things, and more, as they apply to your business and your customers.

It is the sum-totality of how customers engage with your company and brand, not just in a snapshot in time, but throughout the entire arc of being a customer.

As we'll see, there are two challenges that are especially pressing today:

1) Different elements of the experience are often handled by different teams within an organization, making coordination and integration both trickier and more vital.
2) As the line between products and services becomes increasingly meaningless, it's ever more important that behind-the-scenes teams doing things like setting policies feel like they have a stake in shaping the customer experience.

Before we get into specifics, let's look at an example of a well-thought-out customer experience. Chewy.com is a pet-supply online retailer who sells all the usual foods, toys, beds, training aids, and so on. They have a lighthearted, welcoming visual design, and have taken clear inspiration from Zappos with their emphasis on contacting them for help any time of the day. They'll go above and beyond with hand-written thank you cards as follow-ups to orders, and even send out birthday cards personalized with our dogs' names. Since we dog owners tend to think of our dogs as family, this kind of touch really tugs at our heartstrings!

Customer experience isn't magic: it is created from concrete and controllable elements.
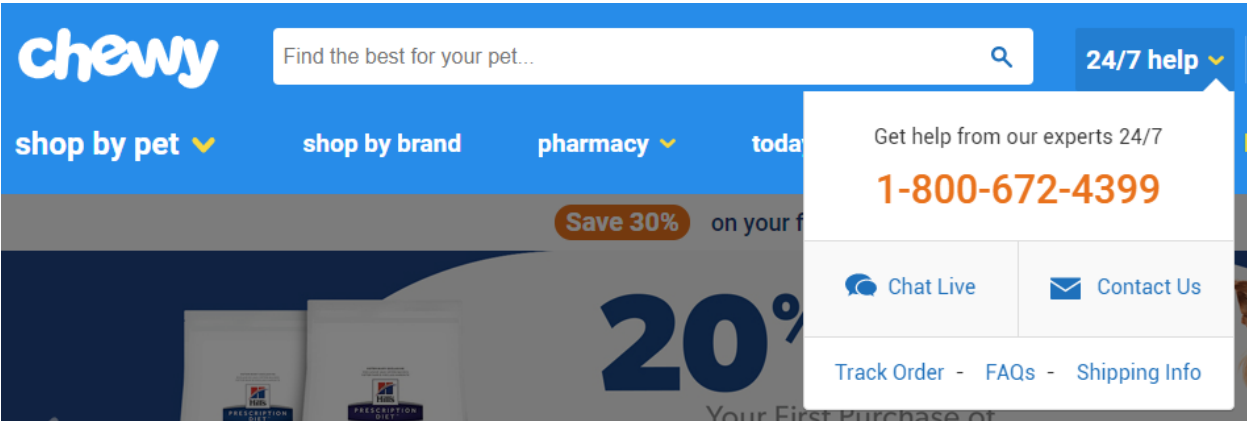
I had used Chewy for basic supplies before, but my vet also suggested getting some medication for our dogs through them – which surprised me since it was a prescription medication. But the real wow moment of the experience came when I went through the order process: I could simply search for my vet in Chewy's database, and Chewy themselves would contact the vet in order to verify the prescription. I didn't have to do anything else, or send them any proof of the prescription. That process took about a day, and they kept me updated with emails as they did the verification and successfully confirmed with the vet. My expectations were completely surpassed, and it made me an enthusiastic customer of the site from that point.

You Have a Customer Experience (but you may not know it)

Every company provides a customer experience. Your company does too, regardless of whether you create it consciously. That experience may be good, bad or indifferent, but the very fact that you have customers, you interact with those customers in some manner, and provide them products and services, means that they have an experience with you and your brand. It's up to you whether it's superlative, awful or industry average, and we'll look at how to analyze where you are exceeding or missing customer expectations and needs.

It's Not Magic

Customer experience often seems ethereal, something which appears as if by magic, and only certain companies (the usual suspects — Zappos, Apple, Google, Southwest and so on) are able to conjure it on a regular basis.

Here's the good news: Creating a great customer experience does not require knowledge of magical incantations. Instead, customer experiences spring from concrete, controllable elements — the touchpoints. These can encompass digital and in-person interactions, brand and marketing, online and brick & mortar retail and more; but they can be identified, crafted, and integrated.

So why are wonderful customer experiences still so uncommon? Crafting a great experience requires enormous amounts of collaboration across groups in a company that often work independently and at different stages of product development. In many cases marketing, product design, customer services, sales, advertising agency, retail partners must all be working in concert to create even a single touchpoint.

Step by Step

In this paper we'll look at how to build up an understanding of your existing customer experience and identify ways to improve it. Because the range of customer experiences types is tremendously diverse — it covers everything from healthcare to consumer electronics, from financial services to automotive — my focus here will be on providing frameworks that can be adapted to your specific industry, rather than trying to create a one-size fits all solution.

There are several steps involved:

Customer Journey: The fundamental piece of knowledge you need to start with is a thorough understanding of the journey that your customers take with your company. In the example from Chewy, we saw how they worked hard on a specific, frequently-used part of their customer journey that could be a blocker for completing an order – and which if solved could be a delighter and a competitive differentiator. We'll look at how to analyze a customer journey and what steps, activities, questions, barriers and emotions come up throughout it.
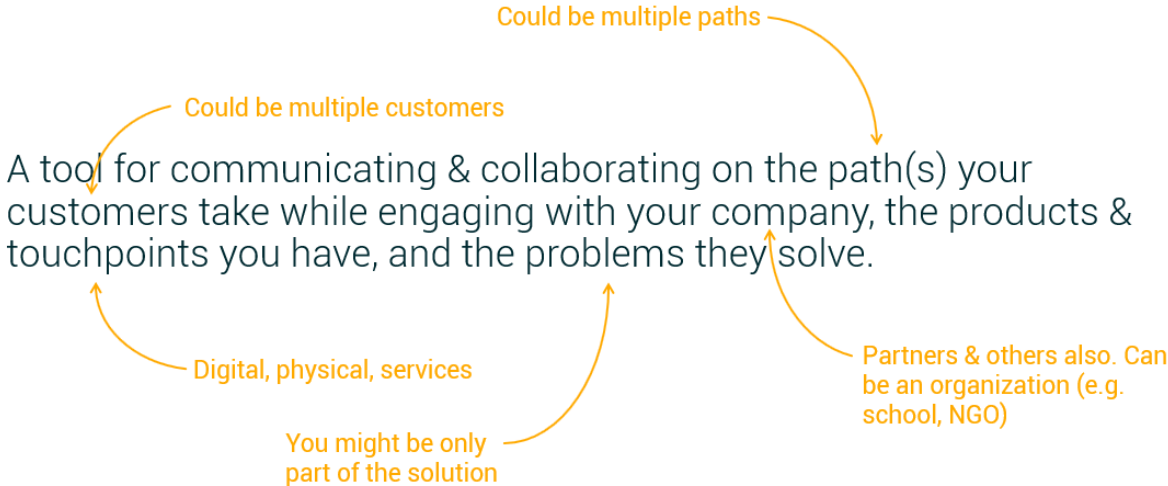
Touchpoints: Next we'll look at how you provide touchpoints — products, web sites, advertising, call center, etc. — that support the customer through their journey. Chewy shows how this can also involve third parties (vets in their case) that can become enablers of a successful journey.

Experience Systems: Lastly, we'll see how looking more broadly at the customer experience opens up new opportunities in ways that more isolated touchpoints cannot.

Collectively, these establish a map of your overall customer experience.

2. GETTING STARTED WITH CUSTOMER JOURNEY MAPS

A customer journey map is a very simple idea: a diagram that illustrates the steps your customer(s) go through in engaging with your company, whether it be a product, an online experience, retail experience, or a service, or any combination.

Could be multiple paths

Could be multiple customers

A tool for communicating & collaborating on the path(s) your customers take while engaging with your company, the products & touchpoints you have, and the problems they solve.

Digital, physical, services

You might be only part of the solution

Partners & others also. Can be an organization (e.g. school, NGO)

A web search for customer journey maps will reveal a pile of beautiful looking but often hard to understand diagrams. Keep in mind that a map is a *tool* – don't be overly precious with it, treat it as a living, evolving thing. And if people can't understand it (especially stakeholders outside the team that created it), then it's not doing its job. That may mean you need to make various versions of the map – more complex and comprehensive ones for the team closest to the journey, and a simpler one for others who just need to know the basics.

Sometimes customer journey maps are "cradle to grave," looking at the entire arc of engagement. But often they focus on a slice of the total customer relationship – for example it would have made sense for Chewy to do a customer journey map just on the prescription fulfillment. Later we'll look at how to "nest" journeys together that cover different timespans.

A typical starting point is the new customer acquisition and purchase journey. It's familiar, concrete, and has clear business value. Here, for example, is a basic framework for the journey of purchasing a vehicle, starting with the Research phase which can last for many months, into pre-purchase immediately before going to dealer to close the deal, and finally taking ownership of the new vehicle:

RESEARCH → **PRE-PURCHASE** → **PURCHASE** → **TAKE OWNERSHIP**

It's often helpful to try and think of a particular persona for the customer journey, since different people will have somewhat different needs and contexts which will affect the details of their journey. An overly generic

journey is going to miss out on the nuance and insights that come from getting specific, and therefore gloss over missed opportunities.
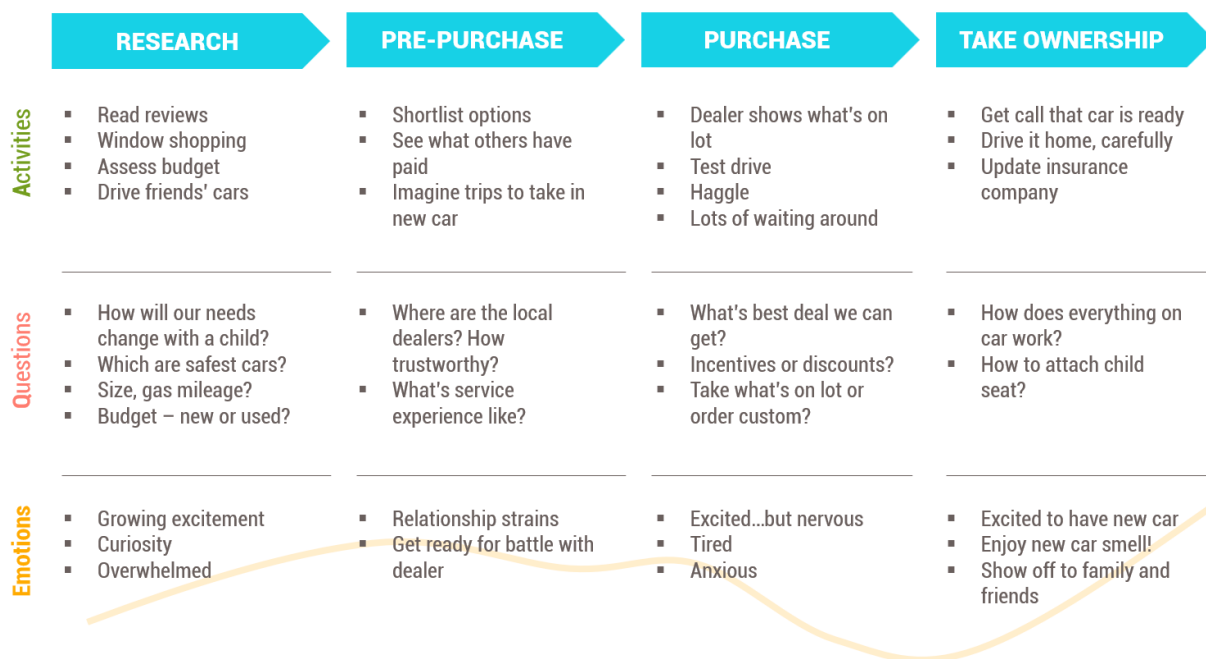
Let's use a persona of a married couple expecting their first child and who are buying their first vehicle together. This raises uncertainties about how their needs will change once their baby is born, which are hard to predict, and because it's probably the largest purchase they've made together thus far, it can create some new strains on the relationship.

(Not all car purchases are this orderly of course! Sometimes they have to be done in a hurry if the existing car dies. This is a case where starting with the more common use cases makes sense to get a baseline, and then defining less common scenarios to find the differences. From there you can determine the ROI of supporting the edge cases.)

The timeline is just the starting point; next we need to look at what's happening at each stage. A framework that I find consistently useful is to look at:

- **Activities**: What is the customer doing at each stage? What actions are they taking to move themselves on to the next stage? (Don't list what your company or partners such as retailers are doing here. That will come later when we look at touchpoints)
- **Questions**: What are the uncertainties, jargon, or other issues preventing the customer from moving to the next stage, or creating confusion or mistrust in their minds?
- **Emotions**: How are they feeling at each stage? Is their emotional state on a positive upswing or are there factors turning it in a negative direction (illustrated by the curve in diagram below)?

Let's see how this plays out for our married couple:

	RESEARCH	PRE-PURCHASE	PURCHASE	TAKE OWNERSHIP
Activities	▪ Read reviews ▪ Window shopping ▪ Assess budget ▪ Drive friends' cars	▪ Shortlist options ▪ See what others have paid ▪ Imagine trips to take in new car	▪ Dealer shows what's on lot ▪ Test drive ▪ Haggle ▪ Lots of waiting around	▪ Get call that car is ready ▪ Drive it home, carefully ▪ Update insurance company
Questions	▪ How will our needs change with a child? ▪ Which are safest cars? ▪ Size, gas mileage? ▪ Budget – new or used?	▪ Where are the local dealers? How trustworthy? ▪ What's service experience like?	▪ What's best deal we can get? ▪ Incentives or discounts? ▪ Take what's on lot or order custom?	▪ How does everything on car work? ▪ How to attach child seat?
Emotions	▪ Growing excitement ▪ Curiosity ▪ Overwhelmed	▪ Relationship strains ▪ Get ready for battle with dealer	▪ Excited...but nervous ▪ Tired ▪ Anxious	▪ Excited to have new car ▪ Enjoy new car smell! ▪ Show off to family and friends

After you've populated the sections, pay particular attention to two things:

- What are the **motivations** for the customer to keep going to the next stage? Why do they care about getting to the end? Keep in mind that you – coming from the business perspective – could have a skewed point of view on the benefit of getting to the end of the journey. To you it's obvious why and how they should continue. That's what *you* want them to do, but is there a clear enough

"What's in it for me?" for them to actually do so? And if they do complete it, did they do so grudgingly out of necessity, or because they were truly motivated and felt supported?

- Do any of the activities or questions rise to the level of becoming **blockers** for moving to the next stage? Are they getting hung up on questions of value, of how it will fit into their lives, of having too many choices to make?

The emotional factors can easily get drowned out by the more concrete ones, but emotions play a critical role in successful and satisfactory journey completion. I recommend Donna Lichaw's book, *The User's Journey*, as a resource for thinking about the emotional aspects. Lichaw comes from a film background, and looks at the customer journey as a story with a beginning, middle, climax, and resolution.

Getting Started

It can feel daunting to get started with a customer journey if you've never done one before. Here's some advice on getting over the first hump:

- Pick a manageable duration journey that you already know something about. Probably don't try and tackle the entire customer lifecycle at first – you can come back to that later.
- Start with the activities, questions and emotions/motivations. Do a brain-dump of those, and only then start clustering them into stages of the journey. Let the customer's actions define the stages from the bottom-up, rather than presumptively imposing canned stages and making the actions fit into them.
- As noted, start with one persona and then try the same journey with other personas to see how much it could vary (e.g., the car-buying journey looks quite different than the example shown above for a college student buying a used car from an individual seller).
- Bring in others outside your team in discipline to join in thinking about it, so you get a variety of perspectives. Even better if you can find people who are similar to your personas so that they can speak from their own experiences.
- Don't have first hand-customer research yet? Go ahead and do a journey map anyway; it's a great way to practice getting into the shoes of the customer. Do your best to stay out of the corporate mindset – it's easy to fall into the trap of assuming your internal jargon and reasons for being on and completing the journey are shared by the customer. When I was working on the project that the car purchase journey is drawn from, one of the business stakeholders kept referring to the car as an "asset" – which is not how a non-economist thinks about their vehicle! To his credit, after more exposure to customers first-hand he adjusted his terminology to reflect theirs.
- *Do* come back to the journey after you have had a chance to talk with customers. What did you get right and where did you miss the mark? Maybe even show your journey to the customers to get their feedback, or have a co-creation session where they build their journey in front of you.

3. TOUCHPOINTS BRING THE CUSTOMER JOURNEY TO LIFE

A customer journey map starts by looking at things entirely from the customers' point of view; their actions, feelings, questions and barriers as the journey progresses. Only then do you look at how you are supporting them throughout it: are you anticipating and smoothing out the trouble spots, are you pleasantly surprising them, are there places where they are left floundering or taken off track?

This brings us to a framework for understanding how your organization is helping – or hindering – the customer throughout that journey. This is accomplished by orchestrating touchpoints, a touchpoint being any interaction, in any medium, between your customer and your brand.

Being creative with how you think about the touchpoints along the customer journey can yield surprising benefits. For example, part of car ownership is insurance, and in the car insurance customer journey one of

the stages — if you're unlucky — is getting in an accident and having to report a claim. With most insurance companies this is a complicated and poorly defined process that takes place when you are traumatized. For insurers it is risky because a significant number of accident claims are fraudulent.

Progressive Insurance rethought this step of the journey and introduced a new touchpoint — their now-famous white vans show up at the scene of the accident as soon as it's reported. This helps the customer feel taken care of at a stressful moment, and it minimizes the possibilities for fraud because the accident can be verified. (Frances X. Frei wrote about Progressive in this HBR article, and revealed the insights about the dual benefits of this and other operational choices.)

Once you have mapped your customer journey, you can move on to looking at touchpoints. With the stages of the customer journey laid out on the horizontal axis, on a vertical axis list out the touchpoints that apply to your customers. Think about the products and services you offer, channels and any physical environments involved, person-to-person interactions, and also consider touchpoints that you are not involved with, whether provided by third parties or completely independent. At this stage, try to avoid segmenting them by who in the organization owns a given touchpoint — you can come back to that later. We're just trying to get a sense from the customer's viewpoint about how the touchpoints are manifesting and supporting them through their own journey.

Let's use a bank as an example, again looking at the early stage of a customer relationship. The stages here are somewhat different than car buying: There's awareness of the various bank brands which leads into researching and comparing the different options, selecting one and signing up for an account. Then there is months and years of ongoing usage, which can be punctuated with questions or problems that need to be resolved, and potentially "upgrading" to another offering. For example, the young couple may have started with a simple checking account before investigating their bank for a car loan, and in the future maybe they will want a college fund for their newborn or a mortgage for a house.

For its part, the bank has a variety of financial products and offerings that are delivered through digital experiences (web, phone app, ATM, etc.) and brick and mortar retail locations. They have various outbound and 2-way communications to build awareness of their brand and offerings, and to interact with customers at various points. For brevity I have clustered these together in the diagram below, but for you it may make sense to break them out individually to be more precise.
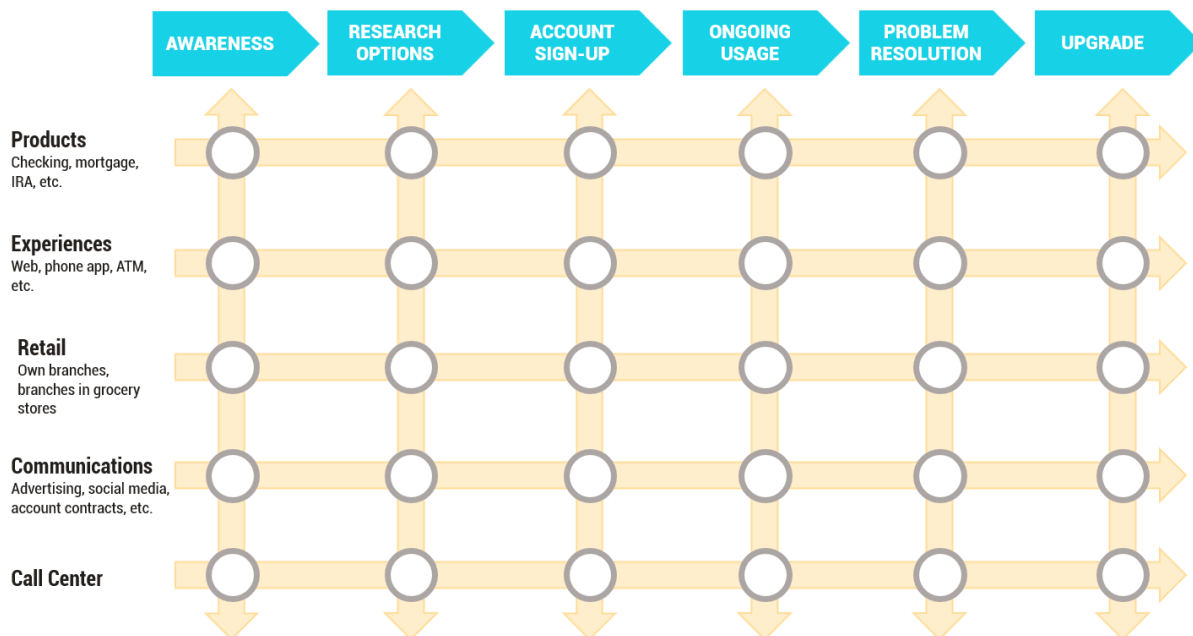
Look at all the touchpoints and ask yourself:

- What specific things are you doing at each touchpoint?
- Are the touchpoints addressing customers' motivations, and answering their questions or allaying concerns? Are they satisfying unmet/underlying/latent needs?
- Are you satisfying the needs of different personas, or as someone moves from being a new to expert customer?
- your brand being communicated effectively, consistently and clearly? Is your messaging overly generic or are you able to tailor it at various points to the various personas?
- Are there hiccups in the flow from one stage to the next that may cause potential customers to drop off, or cause dissatisfaction for current customers (and perhaps costly product returns or help-line calls)?
- Are you able to detect when someone has dropped off or stalled in the journey, and help them get back on track? How are customers moving from one touchpoint to another (rather than staying in a horizontal "lane") and how do you track and support them as they do so?

If we visualize this as a matrix as in the diagram, we can see how there needs to be coherence within each touchpoint category "horizontally" over time. And there needs to be coherence "vertically" within each stage. We've all experienced situations where this *doesn't* happen, and banking is notorious for it. Bank websites are byzantine mazes of offerings, and moving from one to the other leads you to different looking pages, and where they seem to lose track of who you are, and you need to keep re-entering information. Or the tone with which you are treated on the website can be very different than the tone in-person at a retail location. This both throws up frustration and blockers, and lowers trust and the motivation to move through the journey to purchasing a new product.

Take the time and effort to look at your touchpoints not just as isolated mini experiences, but as a collective whole. It will not only lead to a better customer experience, it can even point to opportunities to invent new types of touchpoints, as Progressive did with its roving vans.

Product, design and marketing should be best friends, working toward common goals.

Or, perhaps there are some touchpoints where you've been overly dependent on third parties who are not holding up their place in the journey. When Apple got fed up with retailers not doing a good enough job demonstrating the Mac experience, it opened up its own stores. At the time it was widely considered foolhardy; today they are hailed as a retail benchmark and a key strategic moat and revenue source for Apple.

Work on the Plumbing

The obvious outcome of taking an integrated look at touchpoints is that it requires multiple parts of a company, and often outside partners, to work together to improve the experience. It used to be that each of the touchpoints was essentially its own channel or medium, and did a distinct job. Today each touchpoint is often doing multiple jobs, particularly as products and services get blurred together. In a SaaS world, the product needs to play a role in marketing, and marketing itself is increasingly seen as an offering that delivers value, not just a sales pitch. Product, design and marketing should be best friends in this scenario, working toward common goals.

Today it requires far more work and complexity behind the scenes – in the plumbing of the organization so to speak – to deliver the high quality, smooth experiences that customers demand.

Service Blueprinting is a technique that is often used to capture this, using the concept of *front of stage* – what the customer sees – and *back of stage* – behind the scenes that makes the magic happen. Service Blueprints also include the touchpoints, and look at how the touchpoints and invisible activities,

relationships, technologies, communications, data sharing, and so on, all come together over the course of a journey. They can be an invaluable tool, especially in a service-oriented business where online, offline, in-person and call-center interactions must be brought together seamlessly (the method originated from the practice of service design). Healthcare, restaurants, retail and banking are all examples where this can be helpful.

As you can imagine, service blueprints can get very complex and can take considerable time from a multi-disciplinary team of people to put together. But creating the behind the scenes align-ment is critical to creating customer experiences that are seam-less and have a consistent tone.

Creating world-class experiences involves lots of behind the scenes partnerships and building trust with stakeholders.

When I worked in product management at a fintech (financial services/tech) company, we tried hard to be inclusive of a wide variety of stakeholders as we were concep-tualizing a new feature or offering. In a complex and regulated business, especially a B2B2C one like this was — involving multiple layers and gatekeepers to get to the end-customer — we recognized that it was going to take a village to create a great UX. And to their credit, we found tremendous support and open-ness.

For example, we had great partners in the legal department who came to embrace the speed and iterative nature of Agile development and the more consumer-friendly tone we were trying to take. They overhauled their approach to speed up approvals and worked with us to simplify copy and even interactions (such as how we presented a privacy policy for customers' approval).

Creating world-class customer experiences often involves these kinds of behind the scenes partnerships and hard work, which in turn means building trust over time with stakeholders who you are asking to go above and beyond and perhaps even take a risk on trying something new.

This is not easy to do, and it's why so many touchpoints and customer journeys are more reflective of the company org chart than they are of an ideal experience. But if you can accomplish a measure of integra-tion, you will be rewarded with a customer experience that has a surprising amount of competitive durabil-ity, as well as customer engagement and loyalty.

4. THINKING BIGGER: EXPERIENCE SYSTEMS

Mapping out all the steps a customer takes while interacting with your company is a powerful way to im-prove the experience. Customer journey maps clarify what customers are trying to do, what barriers they face, and how they feel during each interaction with your product or service. Refining these smaller steps, such as how people complete a purchase online or file a complaint, is what journey maps are known for. What many companies don't realize is that these maps can also help them identify broader business op-portunities if they step back and look at the journey more holistically.

Let's look at the benefits of analyzing the smallest scale, or what designer and author Dan Saffer calls "mi-crointeractions": interactions of a few seconds or less that can either delight or hinder the customer. He gives an example of the Facebook Like button which freed people from having to actually type words to express approval. And recently at an ATM, the woman at the one next to me exclaimed, "It just wished me happy birthday! How cool!" That's a microinteraction that converted her into a brand advocate.

Working on these discrete, concrete interactions is attractive because the problem is usually obvious and it's clear what to change and what will benefit the customer and the business.

Zooming up a level, we find examples like the way that Chewy takes care of getting the vet prescription – which addresses a potential blocker in the journey and allows it to move smoothly and delightfully onto the next phase.

Zooming out even further to look at the whole scope of the customer journey, you may identify new customer challenges and opportunities to tackle. Let's look at an example from a project with a large pharmaceutical client. They had a drug for patients with an incurable disease that required them to inject themselves on a regular basis. Normally this was done with syringes, and the company wanted to see if there was a product they could develop to make this a less intimidating and painful process. The logical starting point for our customer journey mapping was at the most granular level: the activity of taking the drug.

That journey looked like the diagram at right. (Cassette Loading refers to the "cassette" that each dose of the drug came in – part of the new design that replaced the disposable syringe.) This is an example of a looping journey that repeats itself periodically.
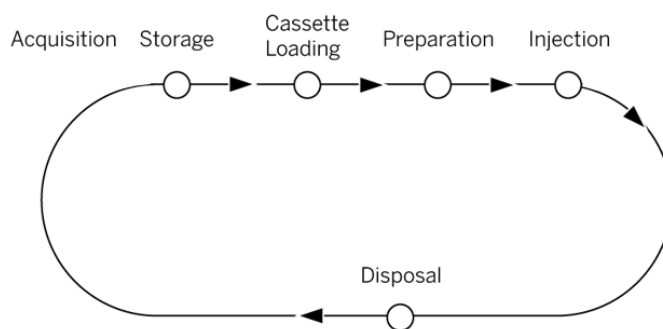

Over the course of nearly 20 in-home ethnographic visits, we got a nuanced picture of what the experience involved. The drug had to stay refrigerated — sharing shelf space with the family's food — until needed. And because the disease caused physical impairment of the hands, inserting the needle was even more challenging for patients.

We developed solutions for each of these problems: We rethought the packaging so that it was more convenient and secure when stored in a fridge. We tested a wide variety of shapes for the injection device itself to find one that was easier to operate.

These were concrete, meaningful improvements, especially considering that patients would be repeating this process each week for the rest of their lives. But the research also opened our eyes to the bigger story within which this weekly regimen was nested: living with this disease.

We looked at the traumatic and life-changing first stage: getting the diagnosis. This was followed by starting to use the drug. This process was often complicated by the fact that patients did not always get sufficient training on the injection procedure from their doctor or nurse. Later on, they sometimes couldn't remember all the steps to follow.

Then every month or two, patients would be delivered a new batch of doses. Since the drug needed refrigeration, it was packaged in dry ice and bulky Styrofoam insulation inside a large cardboard box. And where did most people receive deliveries? At work. One woman told us how embarrassed she was getting these large boxes, as her colleagues thought she must spend a lot of money on shoes.
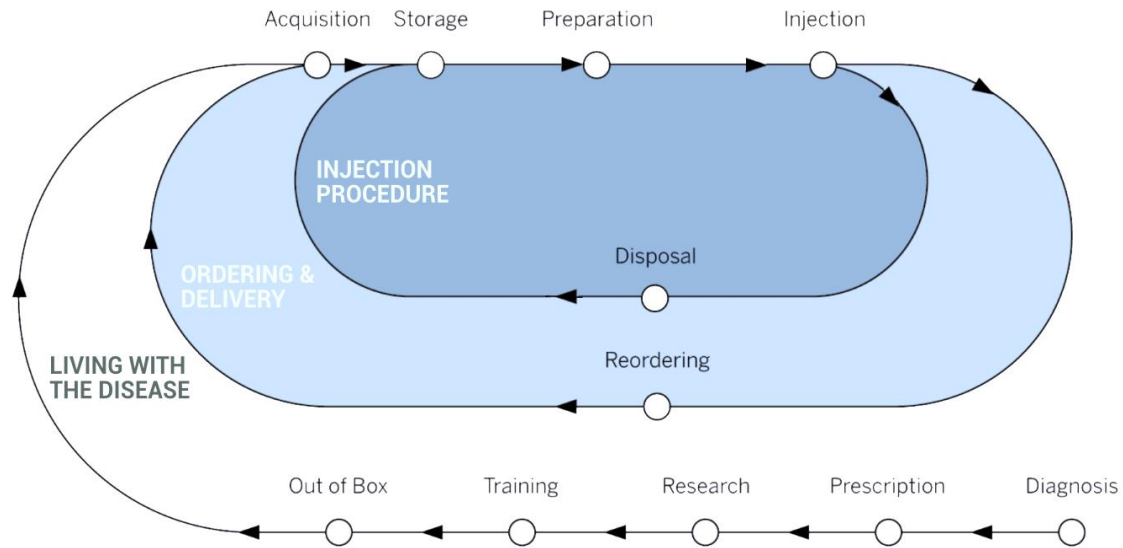
The resulting customer journey was a series of nested mini journeys, each covering a different span of time, as shown above. The injection procedure lasted about 30 minutes. The reordering and delivery happened every couple of months. Living with the disease lasted the rest of their life.

We proposed initial ideas to address these findings, and even early on it was clear that they implied significant modifications to business as usual. It implied engaging other stakeholders like doctors and nurses to improve training, or innovations in shipping and packaging to reduce waste and improve the delivery experience. But none of these were in the client's comfort zone at the time.

That's understandable. It can be challenging to address these opportunities in the bigger journey, as they are initially vague and unfamiliar or can seem like distractions. But embracing them can lead to new growth opportunities because you are solving a real customer need with a solution that is going to be tough for competitors to replicate (they likely face the same integration barriers that you do).

Consider how Spotify has created player apps for almost every platform available – iPhone, Android, Windows, Mac, Amazon Echo, Google Home, car dashboards, you name it. And it has established integrations with third party services that allow even more opportunities for customers to listen. The sheer effort to develop and the maintain these offerings allows them to serve their customers wherever they are and whatever they are doing, and creates a high barrier for competitors to match.

Or think about that time your inkjet printer ran out of ink right as you needed to print an important document, and you had to run to the store to find the exact right ink cartridge from amongst the sea of lookalike boxes. HP has solved that problem with its Instant Ink program, where you pay a monthly fee based on how many pages you think you will print each month, and it ships you a new cartridge (along with a prepaid box to return the used one) when it gets a signal from your printer that it's running low. This solves a real customer pain point, turns a product into a coveted subscription payment generator, and also has environmental benefits by creating a closed-loop system that delays plastic cartridges going into the landfill.

Have the courage to look beyond the bounds of the "product" and challenge yourself to think like your customer. Then build the solution – whether it's a product, a service or other system that solves their unmet needs, and meaningfully improves their lives.

This white paper is based on articles written by The Enigma Bureau's founder, Adam Richardson, for the *Harvard Business Review*. You can find the originals here:

[Understanding Customer Experience](#)

[Using Customer Journey Maps to Improve Customer Experience](#)

[Touchpoints Bring the Customer Experience to Life](#)

[What you Can and Should be Doing with Your Customer Journeys](#)

ABOUT THE ENIGMA BUREAU

The Enigma Bureau's mission is to decode the "fuzzy front end" of new product development. We bridge design, technology and marketing in order to help you define and answer the fundamental questions: Who are your customers? What do they need and want? What should you build to improve their lives? And how do you create growth by doing it?

We do innovation and product strategy, customer research and usability assessment, experience design, and workshop facilitation. In addition to customer journey mapping, we have particular expertise in financial services, Design Thinking, and design in Agile environments.

About Adam Richardson

Enigma Bureau founder and "Chief Bureaucrat" Adam Richardson is an award-winning designer and strategist who has been helping companies and organizations innovate by better understanding their customers – and much more – for over 20 years.

GET IN TOUCH

We'd love to talk and find out how we could help you better understand your customers and create new opportunities and growth for your business.

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