



# Journey Mapping:

An Outside-in Approach to Delivering  
Great Customer Experiences



# 1. WHAT'S A CUSTOMER JOURNEY?

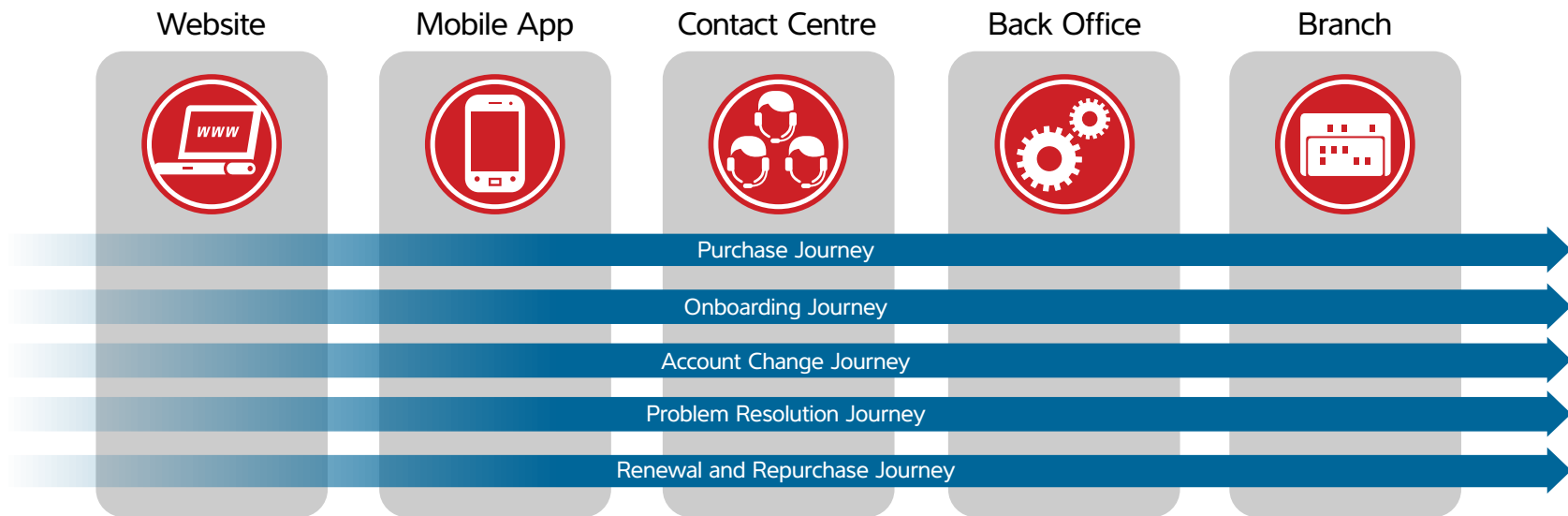
A customer journey is the set of interactions a customer has with your business to complete a task such as evaluating, onboarding, getting support, or renewing a product or service.

Taking a step back, Customer Journey Management is an omnichannel customer engagement strategy that takes an outside-in approach from the customer's perspective to improve customer experience (CX) for the most important of your customer's journeys. It's a subset of Customer Experience Management (CEM) which Gartner defines as 'the practice of designing and reacting to customer interactions to meet or exceed customer expectations and, thus, increase customer satisfaction, loyalty and advocacy'.

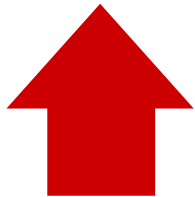
In practice, Journey Management typically involves breaking down traditional system, department and channel silos to unify and automate the customer engagement process. Cross-channel customer context is collected and analysed to inform self-service and assisted service next best actions in real time and then to support continuous optimisation of the customer experience over time.

In each industry, only the subset of journeys that drive high transaction costs or high incremental customer value (CX, loyalty, up-sell) really matter. These are where we focus efforts for the greatest returns.

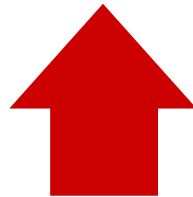
# COMPANIES THAT FOCUS ON JOURNEY OPTIMISATION PERFORM DRAMATICALLY BETTER



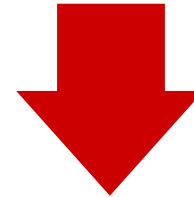
Revenue Growth 10 to 15 %



Customer Satisfaction 20 %



Lower Cost to Serve 15 to 20 %



Source: McKinsey



## 2. WHY FOCUS ON CUSTOMER JOURNEYS TO GET OUTSIDE-IN?

Customers are increasingly empowered by competition, digital channels and easy access to information, forcing businesses to reinvent themselves to increase customer value and deliver great experiences.

As customers and their devices become more integrated and connected to your business and systems via the Web, self-service and mobile apps, you typically need to re-factor systems and processes to consistently support customers on these new touchpoints. This digital disruption is making customer experience a priority and shifting business focus from traditional systems of record to dynamic systems of engagement.

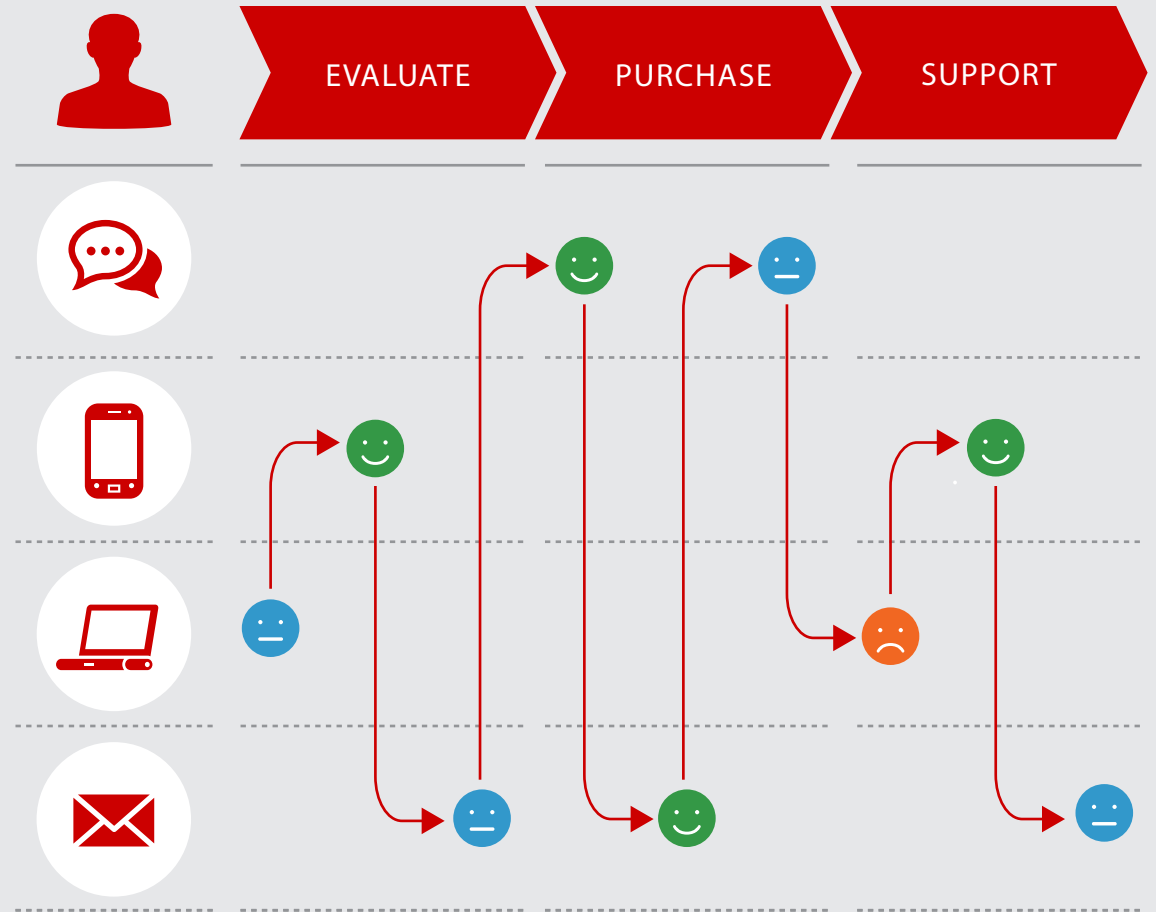
Taking a journey-focused, outside-in approach to continuous CX optimisation helps put the customer at the center of your business strategy, which in turn drives loyalty and revenue. Companies with a mature approach to customer experience take an iterative, disciplined approach to continuous improvement, with the ongoing assessment and optimisation of customer journeys as a core practice.

### 3. WHAT ARE JOURNEY MAPS?

The traditional focus of IT systems primarily accounts for the information under the company's control, but the customer's buying cycle starts long before they visit the website — and the service and support experience continues long after they place their order. Companies that fail to take the full buying cycle into account commonly under-deliver on customer expectations.

So how do you virtualise the outside-in scenario to see the full picture including customer perceptions, mobile and social media engagement? The short answer is by creating journey maps which visually document a customer persona's needs, perceptions and the touchpoints encountered for each step towards the customer's journey goal.

Journey maps are a common approach used to design customer-centric processes for multi-channel customer engagement. They often serve as the foundation for CX optimisation programs, identifying new ways to help your customers reach their goals while still delivering on the company's objectives. As one of the primary discovery tools employed to better understand your customer's interactions with your company, these journey maps should be data driven and sourced both from customers and direct research (e.g. mystery shopping, customer interviews, observation, web analytics). The ultimate purpose of the exercise is to find flaws, weaknesses and opportunities for improvement in the current process.



Journey maps are like snowflakes... no two journey maps will be the same.



#### 4. HOW DO JOURNEY MAPS IMPROVE CUSTOMER EXPERIENCE?

Different parts of the organisation such as marketing, sales, support and collections often only understand their portion of the user's end-to-end journey. They naturally gravitate towards supporting their own touchpoints, which then creates organisational silos. For example, it's not uncommon to find multiple departments sending excessive and overlapping communications to customers.

Journey maps serve as a corrective lens, providing an outside-in perspective and helping multiple teams within the organisational understand the big picture from the customer's perspective and create a shared understanding of the experience.

They create alignment across your business and help drive customer-centric change from product teams and business unit leads to IT operations and then out to marketing, sales and service. These groups are usually hindered by poor exchange of information, bad assumptions, lack of common standards and duplication of effort.

## 4. CONTINUED...

Journey mapping helps your organisation better understand the customer experience including all the journey steps and touchpoints along the way to achieving their goals. By exposing the gaps between the user's expectations and perceptions at key steps in the journey, they inform the ecosystem (applications, touchpoints, devices), participants (partners), process steps and influencers (social media) that enable the customer journey. There is typically a complex set of relationships at play.

Journey Maps are instrumental in identifying latent user needs and pain. Correctly applied, they:

- 1 Surface customer-centric insights into back-office and customer-facing systems that inform opportunities and drive business value,
- 2 Deliver the context needed to support solution ideation and the validation, prioritisation, design and testing of solutions for each idea, and
- 3 Inform where to apply more effort, personalisation, consistency or proactive communication to improve the customer experience.



# 5. SO WHERE TO START? WHICH JOURNEYS MATTER?

How do you identify the right areas to focus on to be strategic vs. opportunistic when deciding which customer journeys to map? Some journeys will be obvious to everyone as there are known problems and executive buy-in is easy, but you need to take a step back to identify which journeys really are most important and to ensure your efforts are aligned with long-term, strategic planning.

As a change management tool that brings a customer perspective to operations, journey maps can support a wide range of strategic and tactical objectives from transforming multi-channel experiences to identifying and resolving specific customer pain points. Rather than just starting with the low-hanging fruit, you need to illuminate the big picture to set the foundation for a broader perspective. This working framework then serves to align the team, standardise terminology and inform the effort and benefits to drive prioritisation.

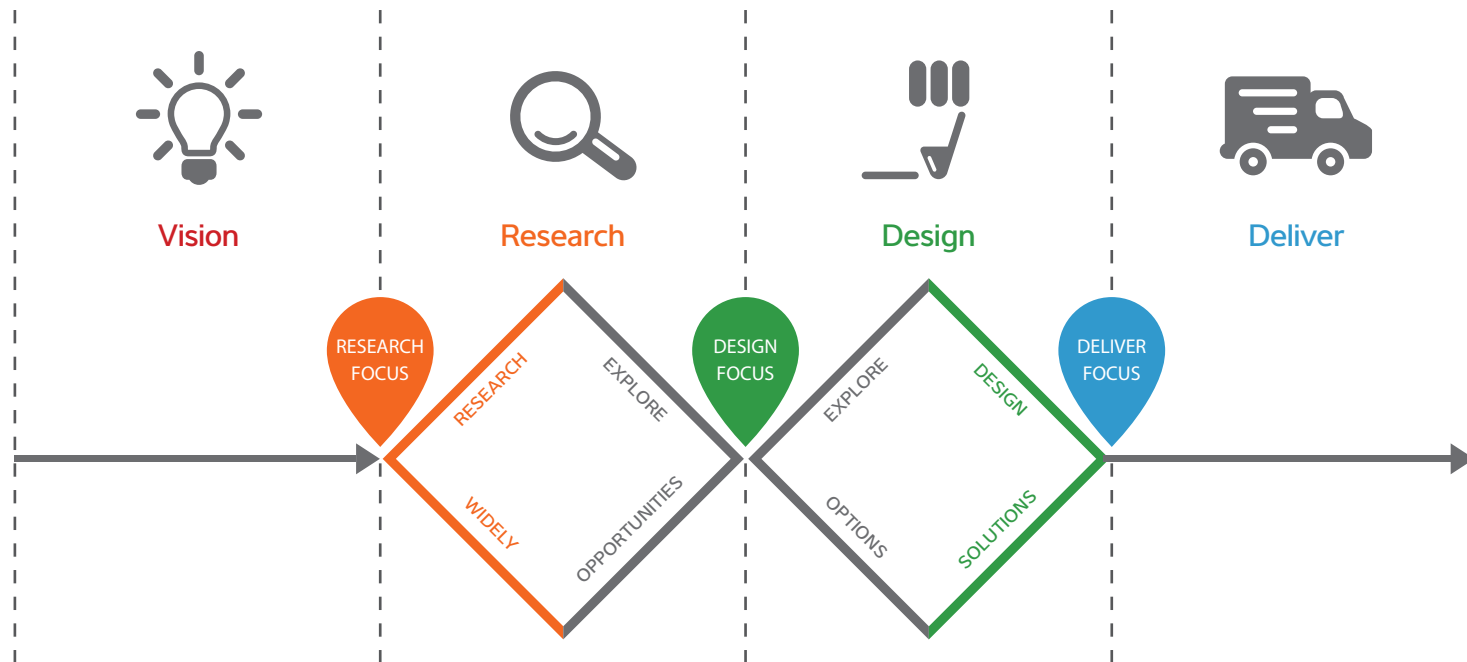
To create this framework and level the playing field, first identify all your customer journeys at a high

level. This aggregate view of journeys effectively summarizes how your customers interact with your company. From this global perspective, you can see how all the journeys fit together, how they inform the broader experience, and how they fit into your CX vision and strategy. This makes it much easier to see the relative importance of each journey and how it shapes the customer experience.

You can next start to apply prioritisation criteria and review early metrics to identify which journeys matter most to your customers and present the greatest opportunity to reduce pain and create delight. When evaluating where to start, work to factor in the goals of your organisation as well as cost, revenue, retention, brand reinforcement, customer satisfaction or other KPI-based benefit drivers as weighted selection criteria. Creating a weighted matrix for prioritisation has the additional benefit of providing transparency and alignment across the organisation to focus on common goals. Scoring opportunities by effort and value is another clear route to prioritisation.



## 6. THE GENESYS APPROACH TO CX DESIGN



Once it's clear where to focus, you can commence the research and discovery to inform the CX design process. The Genesys Wow Method requirements discovery is based on the "Double Diamond" design process for products and services (Design Council, UK), comprised of four phases: discover – define – develop – deliver. This approach utilises service design thinking tools, techniques and templates that have been developed and rigorously tested with leading organisations around the world.

## 6. CONTINUED...

- 1** Vision - It starts with a Wow vision event to clarify business priorities and high level opportunities to deliver a 'wow' experience.
- 2** Research - Next, the research starts with a CX Safari (observation, contextual interviews, ethnography, mystery shopping) and persona identification to build the customer journey map. Additionally, stakeholder maps and interviews are conducted to gather the organisation's perspective on CX. The cross-functional design team drives the customer journey mapping exercises to discover latent user needs and define solutions from the perspective of the targeted user. The research phase also identifies business challenges, customer value and brand values as context for solution creation and to help the organisation deliver on its brand promise.
- 3** Design - In the design phase, we focus on the challenges identified to design, prototype and test multiple solutions for an optimised journey factoring in company goals, business requirements, cost to implement and value created.
- 4** Proposal - With design complete, we make recommendations for the most appropriate next steps for the organisation.



# 7. CREATING ACTIONABLE NEXT STEPS FROM JOURNEY INSIGHTS

Obviously, journey maps inform problems but don't solve them. Once you've created visibility, the next step is to make it actionable to improve customer experience. The low-hanging fruit is often to seek opportunities to make specific improvements to the current journey such as removing unnecessary or redundant steps and then improving inefficient steps. These typically target the most painful problems uncovered by the journey mapping exercise. Focusing on these targeted solutions then drives the value that justifies more structural journey optimisation work.

Many additional opportunities can be addressed through automated, proactive customer engagement practices. For customer-centric, outside-in processes, the first step is often ensuring you can identify customers consistently for important interactions. This creates the visibility necessary to roll up and preserve

customer context in the form of transactions, preferences, needs and opportunities for each stage of the journey.

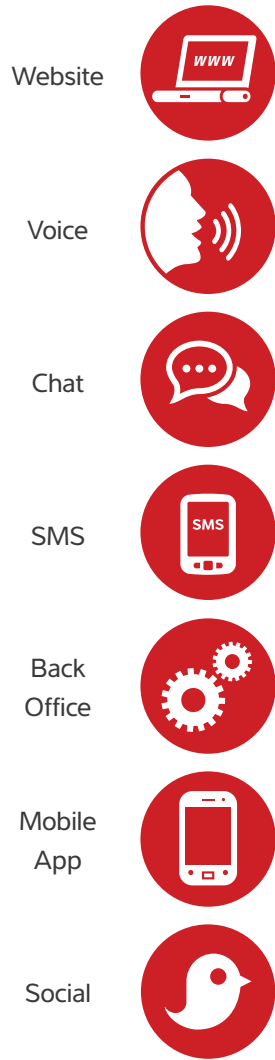
Once we can recognise and map the customer's journey across touchpoints and preserve context for the interactions, we're now in an actionable position to assess each customer journey in context of the opportunity to improve service.

We can:

- Leverage business rules and orchestration to be proactive and reduce customer effort,
- Leverage real-time analysis to determine next best actions and shape the customer's experience at each moment of opportunity,
- Use analytics against outcomes to measure results and drive insights for improvement via closed loop optimisation.

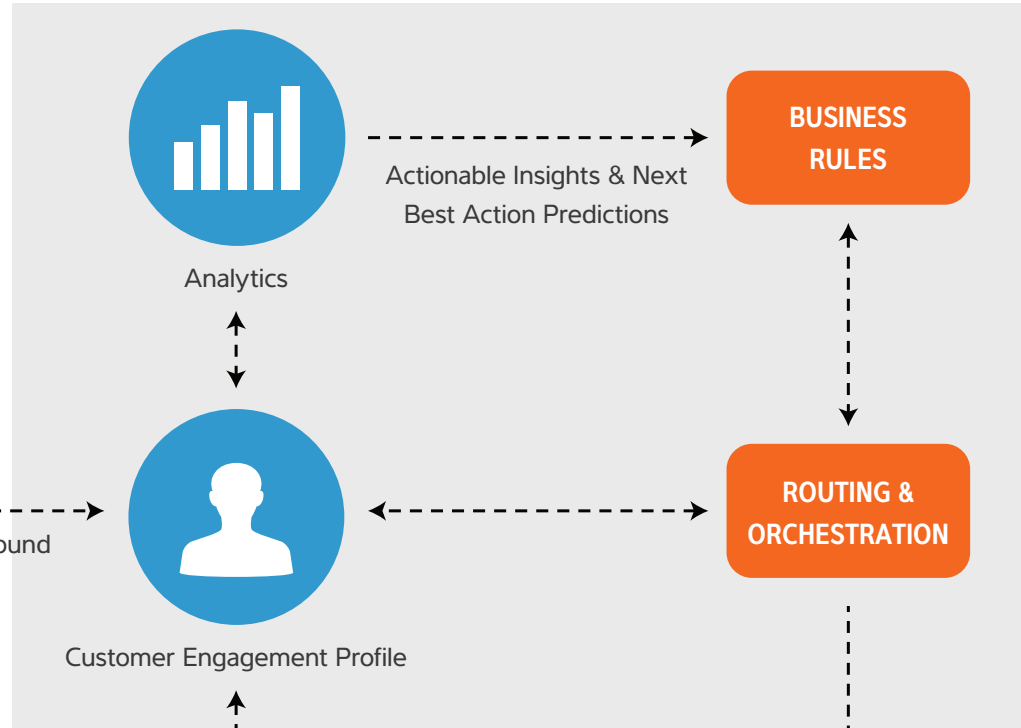
## 1. COLLECT

Identify customer and interactions across channels



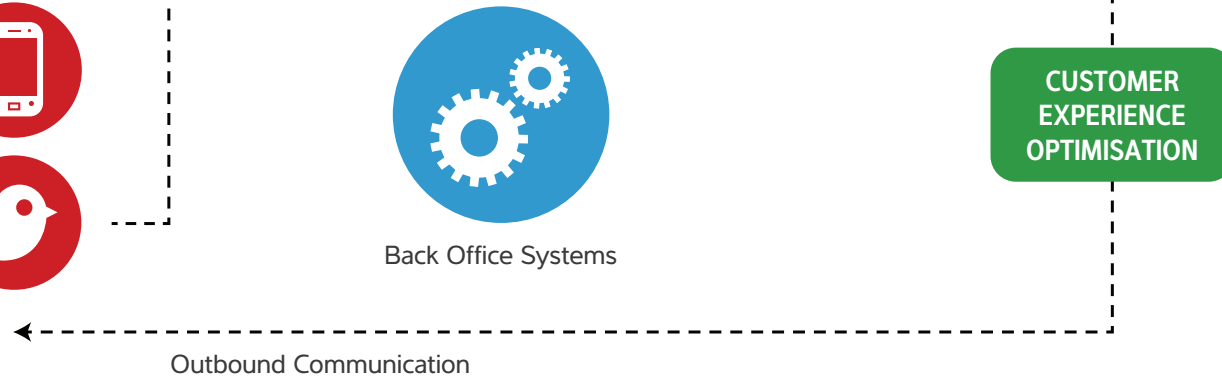
## 2. ENGAGE

Analyse in real time to understand customer behaviour, intent, engagement profile, opportunities, etc.



## 3. OPTIMISE

Drive Personalised and Proactive Engagement based on Customer Context, Business Rules and Predictive Next Best Actions





## 8. APPLYING JOURNEY MAPPING TO YOUR ORGANIZATION

Genesys can conduct a detailed discovery of your requirements using the Genesys Wow Method. This new way of assessing Customer Experience visualises the current customer journeys and identifies the root cause of current pain points. As the Customer Experience leader with more than 4,500 customers, Genesys brings tested and proven CX Design methodologies to the table.



High level examples of journey optimisation applied include:

- Tiered Service – Offer different routing strategies and service levels based on segmentation, projected lifetime value, profitability, current satisfaction, churn risk or other factors. This maximises value for the customer and the company (matching the expense to the reward).
- Omnichannel Context – Know when a customer is active on another channel and leverage that context.
- Interceptors – Optimise handling for frequent contacts to get to previous agent or best agent.
- Personalisation – Personalise service via a customer profile to reduce effort on repeat transactions or target recommended offers.
- Effort Tracking – Track customer effort in real time and escalate to improve CX.
- Proactive Communication – Add proactive notifications to keep customers informed.

# TAKE YOUR CUSTOMER EXPERIENCE TO THE NEXT LEVEL

Customer experience maturity is measured by the extent to which an organisation routinely performs the practices required to design, implement, and manage customer experience in a disciplined way. We can help you foster these CX optimisation processes and then take action based on the insights, providing clear roadmaps with iterative improvement.

[Get Started](#)

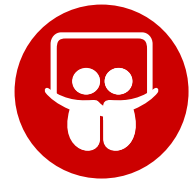
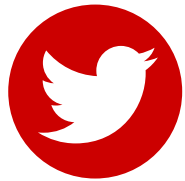
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Genesys is the market leader in omnichannel customer experience (CX) and contact centre solutions in the cloud and on-premises. We help brands of all sizes make great CX great business. The Genesys Customer Experience Platform powers optimal customer journeys consistently across all touchpoints, channels and interactions to turn customers into brand advocates. Genesys is trusted by over 4,500 customers in 80 countries to orchestrate more than 100 million digital and voice interactions each day.

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