

Best Practices in Journey Mapping

Driving Customer-Focused Change

Jim Tincher
Mapper-in-Chief
Heart of the Customer

Jean Fasching
Engagement Lead
Heart of the Customer



Agenda

Who we are

Why journey mapping

What makes journey mapping successful

Case study: Meridian Health



Who is Heart of the Customer?



We are a focused journey mapping firm.

This is what we do. It's our focus and our mission.

96% of our business comes from journey mapping.

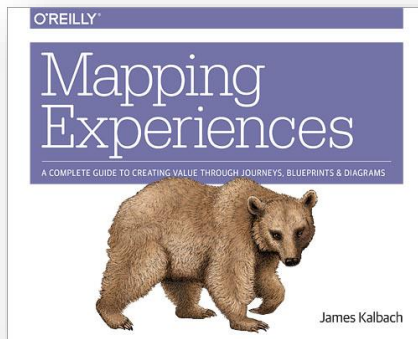


Recent Thought Leadership



“ Jim Tincher shared one of his favorite journey maps to give us a better idea of how to bring his 10 steps to life. Yes, it's profoundly more sophisticated than previous examples we reviewed. It should be. This is a grid approach that works well as it provides an in-depth overview of people and the context and relationships...”

– *X: The Experience When Business Meets Design*



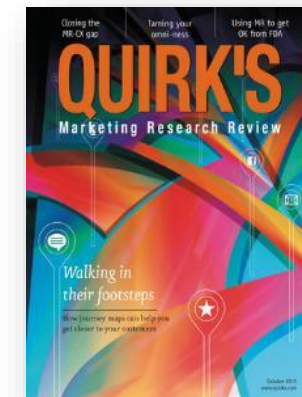
“ Seeking to identify specific ways to boost loyalty and referrals among its radiology patients, Meridian Health reached out to the customer journey map experts at Heart of the Customer.”

Mapper-in-Chief, Jim Tincher, and his team worked with [Meridian] to identify several key customer personas to focus on...”

– *Mapping Experiences*, page 270



Cover article on YMCA case study, Quirk's Magazine, April 2017



Cover article on Journey Mapping, Quirk's Magazine, October 2015



Why journey mapping?

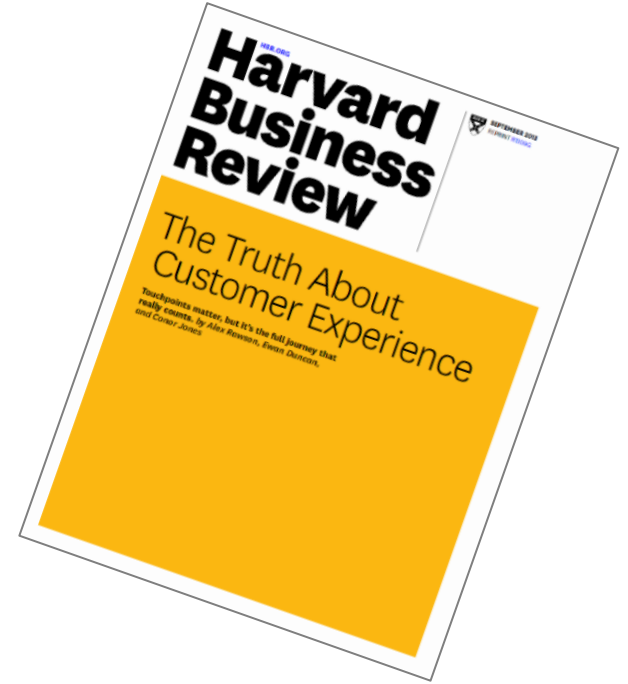


Managing the Overall Journey is **Critical**

A journey is your customer's end-to-end experience as they see it.

Companies have long emphasized touch points...but the narrow focus on maximizing satisfaction **at those moments** can create a distorted picture, suggesting that customers are happier with the company than they actually are. It also diverts attention from the bigger—and more important—picture: the customer's end-to-end journey.

- The Truth About Customer Experience, *Harvard Business Review*



“Journeys are 30% more strongly correlated with business outcomes [than measuring individual touch points.]”

– McKinsey Consulting



Journey Mapping is Becoming Indispensable

88%

of customer experience
professionals are mapping their
customers' journeys*

FORRESTER®

60%

of customer experience
professionals are increasing
their journey mapping efforts**





Journey Mapping **ROI is strong**

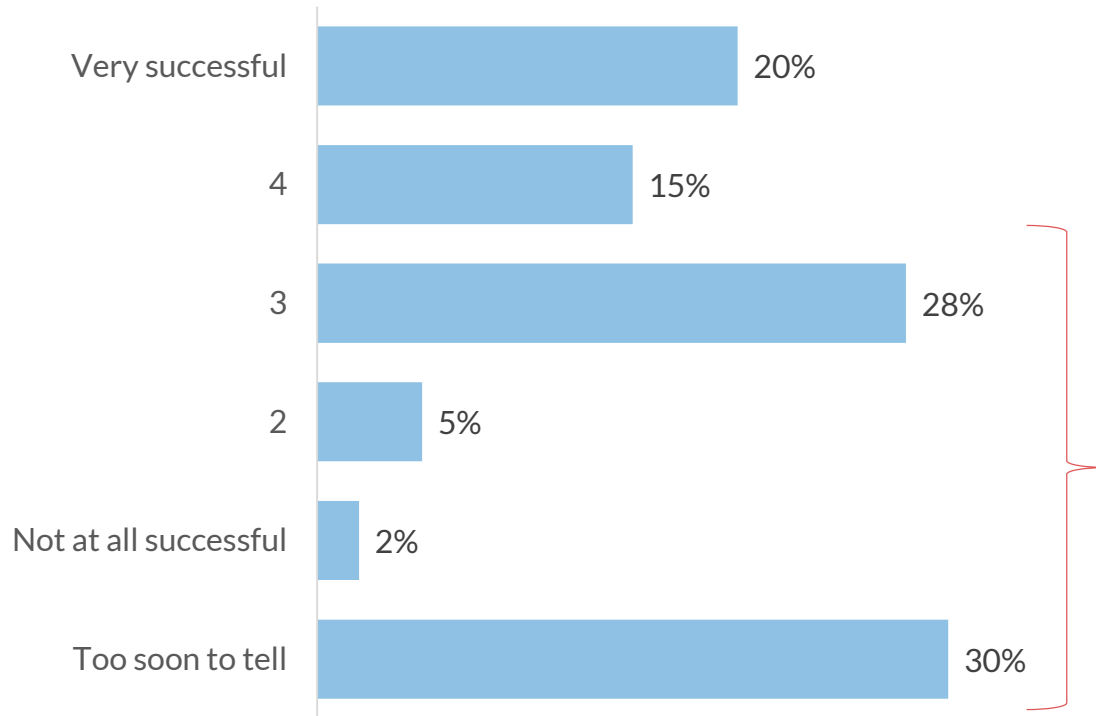
ROI advantages for companies with a journey mapping program
vs. those without

Improvement in customer service costs	+23%
Improvement in average sales cycle	+16%
Employee engagement	+14%
Return on marketing investment	+10%
Revenue from customer referrals	+10%
Revenue from cross-sell and up-sell	+5%
Number of positive social media mentions	+4%



But it's easy to get it wrong

Thinking of your last journey mapping project, how successful was it?



The overwhelming reason?

A lack of action taken.

2/3 rated their journey mapping as unsuccessful



What makes journey mapping successful?



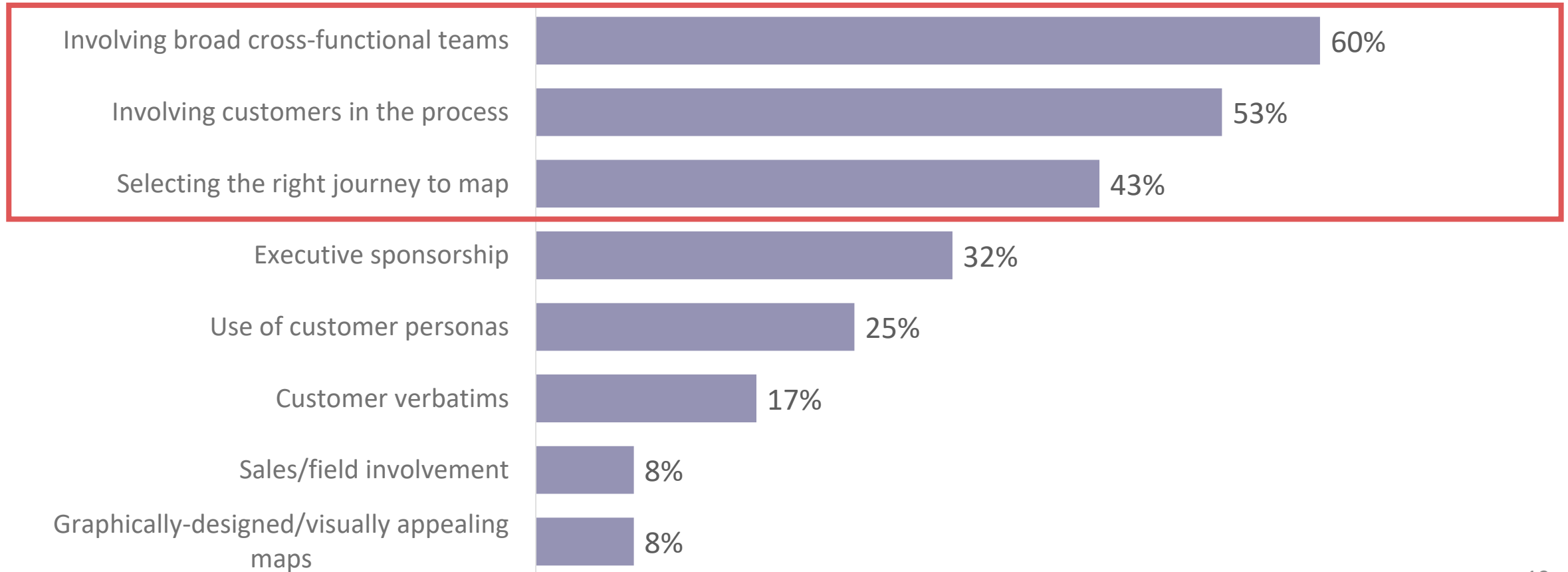
What elements are most critical to success?

- Executive sponsorship
- Graphically designed/visually appealing maps
- Involving broad cross-functional teams
- Involving customers in the process
- Running a project quickly
- Sales/field involvement
- Selecting the right journey to map
- Use of customer personas



Most critical factors for **Success**

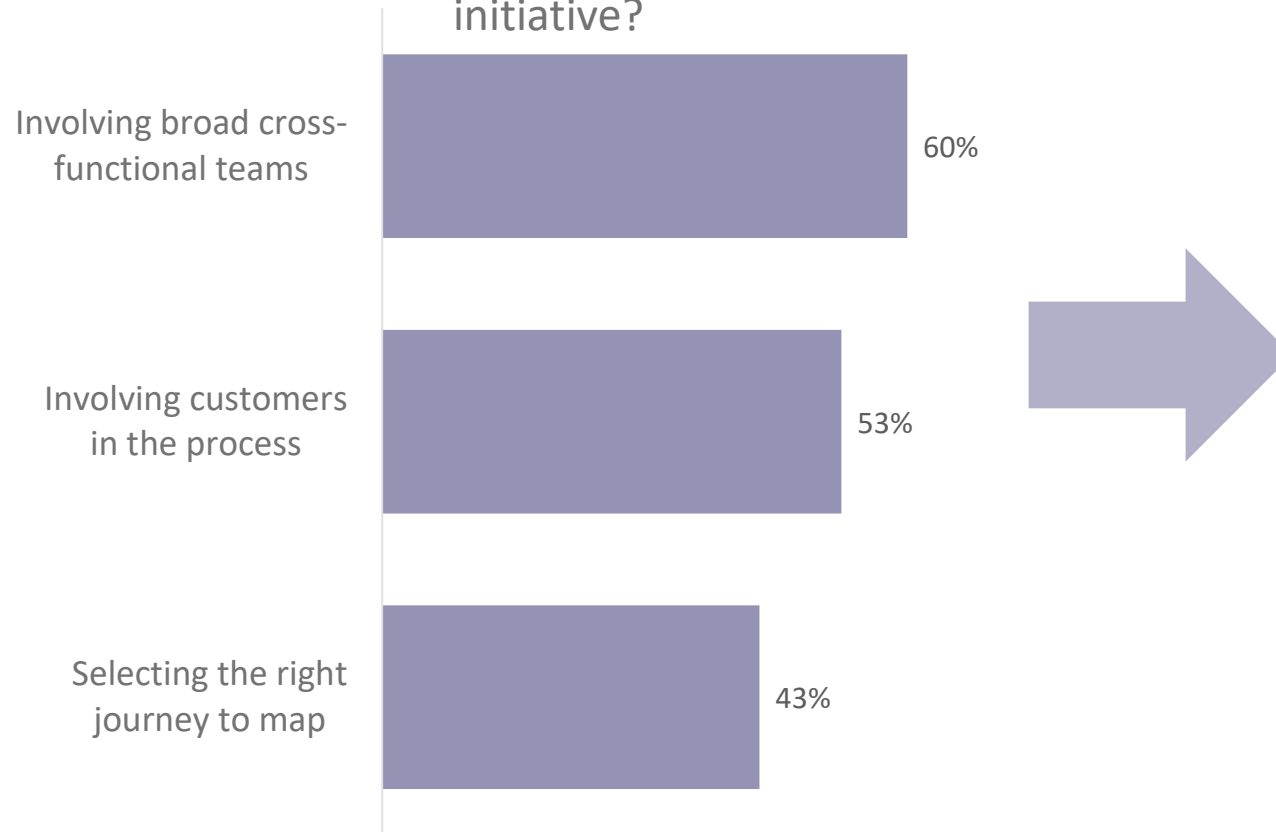
Practitioners: What do you see as most important for a successful journey mapping initiative?
(select up to three) n=53





Most critical factors for **Success**

Practitioners: What do you see as most important for a successful journey mapping initiative?



5 Critical Journey Mapping Questions:

1. What is the business problem or opportunity?
2. What is the right journey?
3. Who is the right customer?
4. What is the right approach?
5. Who's on the team?



5 Critical Journey Mapping Questions

1



Business
Problem or
Opportunity

You can't drive ROI
without a clear target





3 Common Categories for CJM Business Problems or Opportunities

Something is broken

- Loyalty issue
- Negative feedback
- Survey drivers

New opportunity

- New development
- Website update

New CX capability

- New CX program or leadership
- New survey platform



5 Critical Journey Mapping Questions

2



Right Journey

Select the Right Journey
to Create the Right
Change

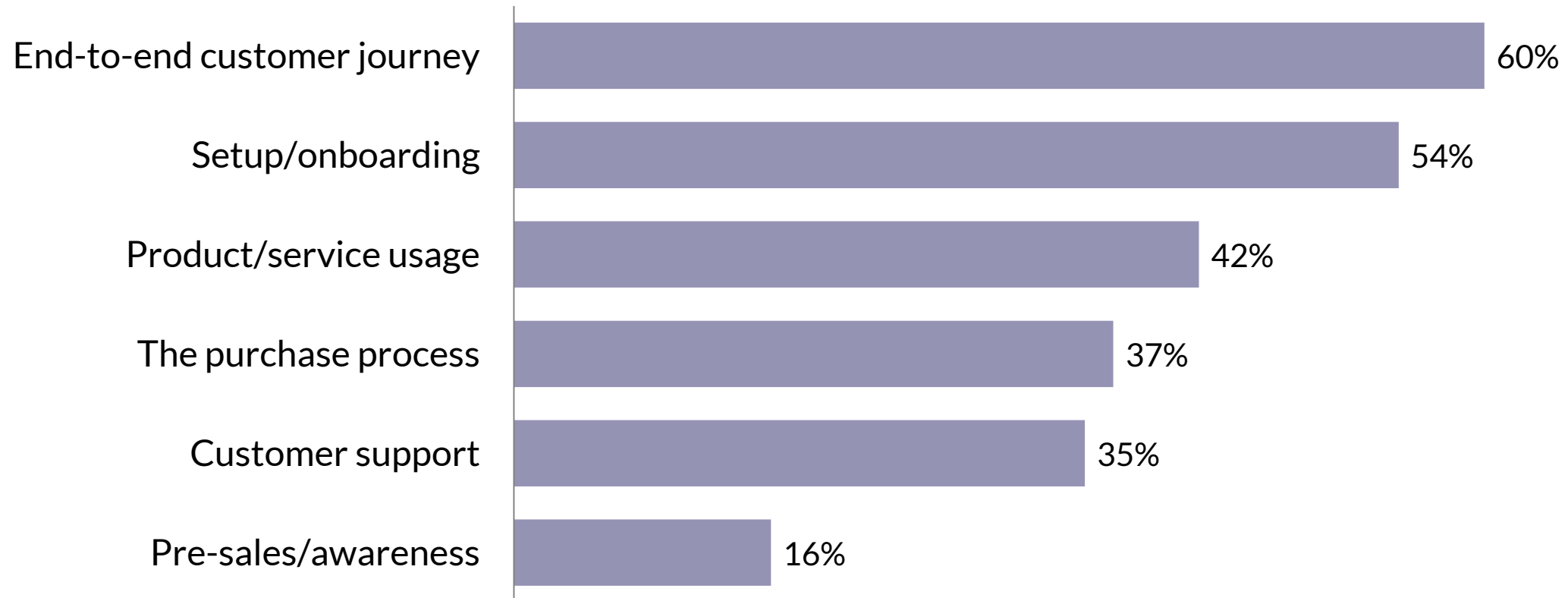




Most participants mapped multiple journeys

Which types of journeys did you map?

(select all that apply) n=57





5 Critical Journey Mapping Questions

3



Who is the Customer?

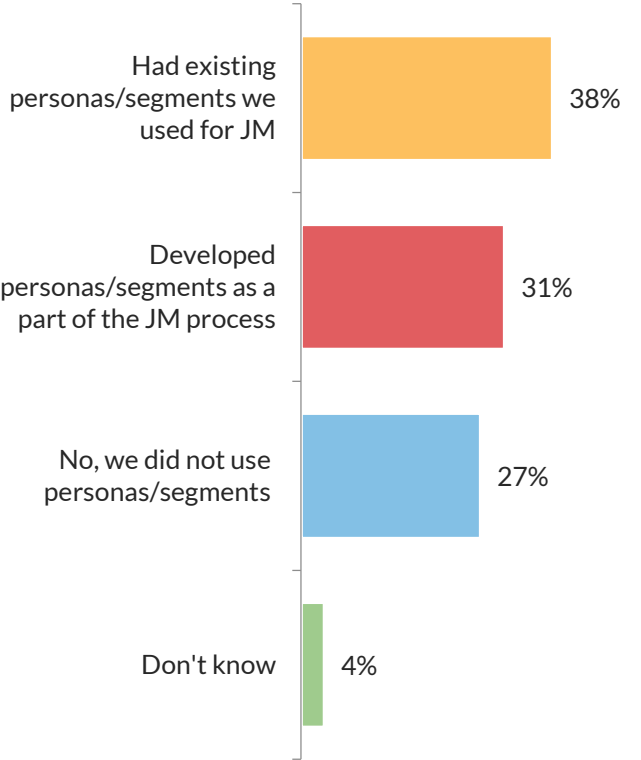
A Journey Map of Everybody Sometimes Tells You About Nobody



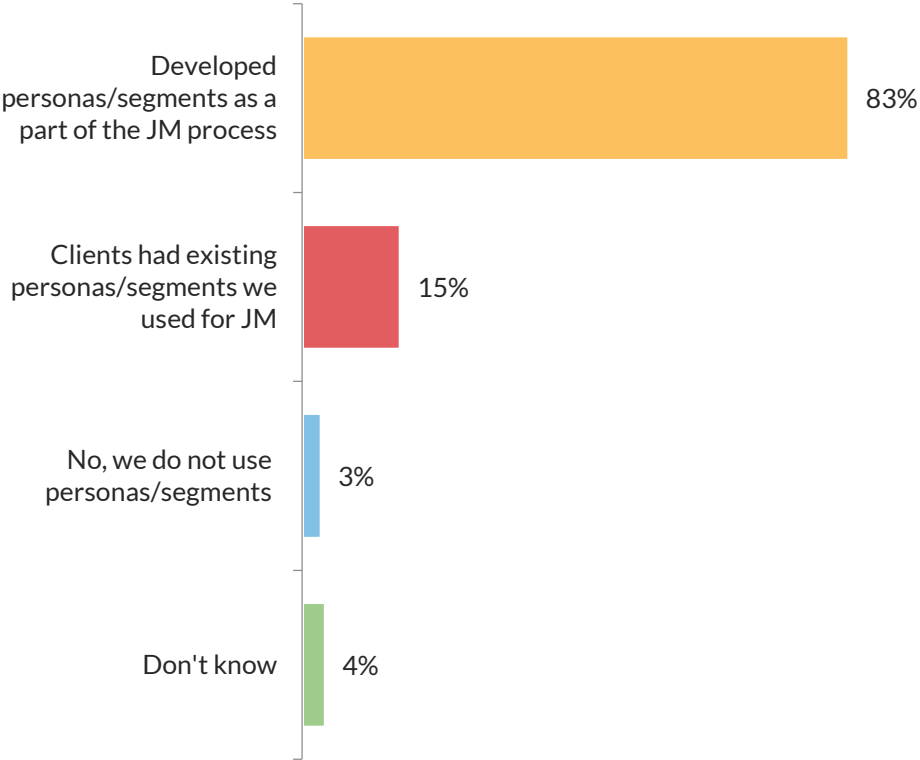


Role of personas

Practitioners



Vendors



5 Critical Journey Mapping Questions



4



What is the approach?

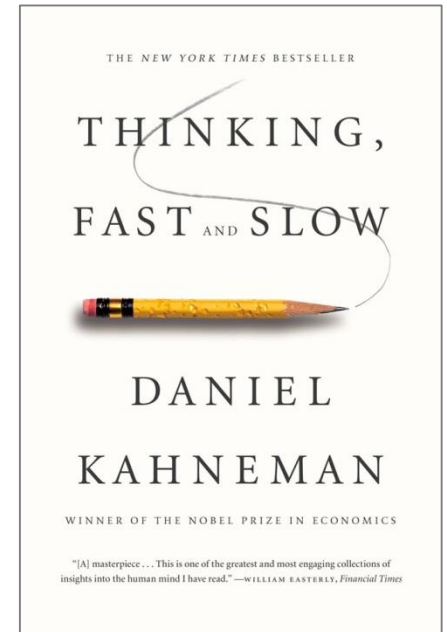
Use the right research methodology to discover the true experience





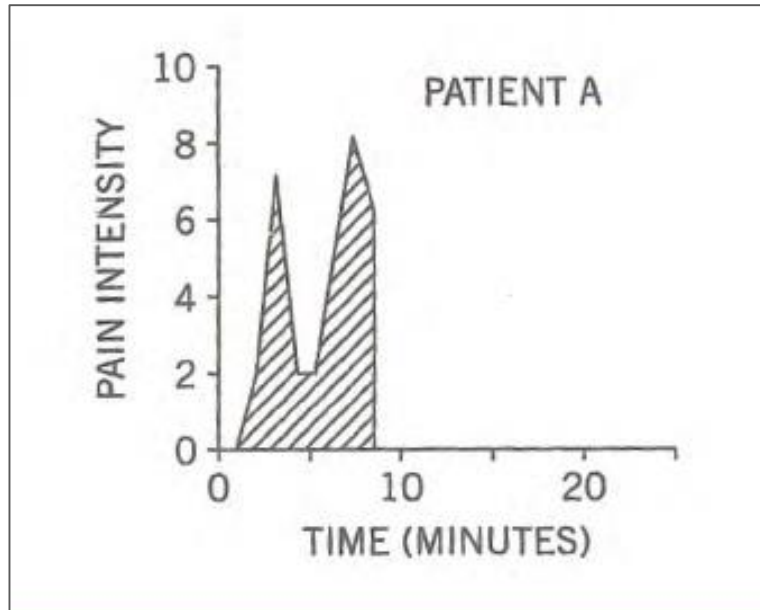
Peak-End Rule

“The Peak-End Rule: the [experience] rating was well predicted by the average of the level of pain reported at the worst moment of the experience and at its end.”

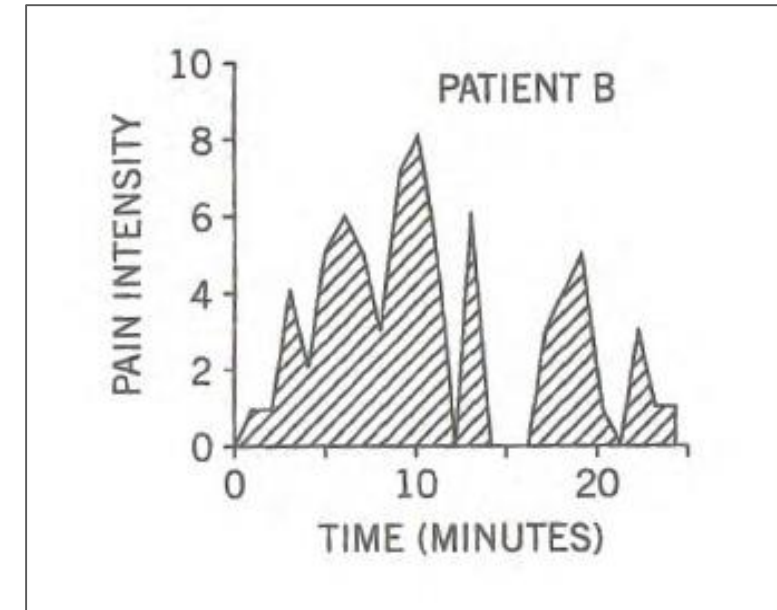




Who experienced more pain?



Patient A



Patient B



Use the appropriate research methodology

Research varies depending on the journey and the customer.

Methodology	Best for
Guided in-office interviews	Great for B2B
In-home contextual interviews	Powerful consumer-focused methodology
Virtual interviews	Work well for either B2B or B2C
Digital or mobile ethnographies	Most common for consumers, but also in specific B2B journeys
Focus groups	Typically used only as a secondary methodology
Surveys	Often used in healthcare and financial services



75% 10:13 AM

YMCA New Member Study

UNANSWEREDANSWERED

GETTING STARTED

Jim

Which of the following parts of the Y do you plan to use on a regular basis?

Jim

Do you have a goal that the YMCA is helping you to accomplish? If so, what is it?



5 Critical Journey Mapping Questions

5



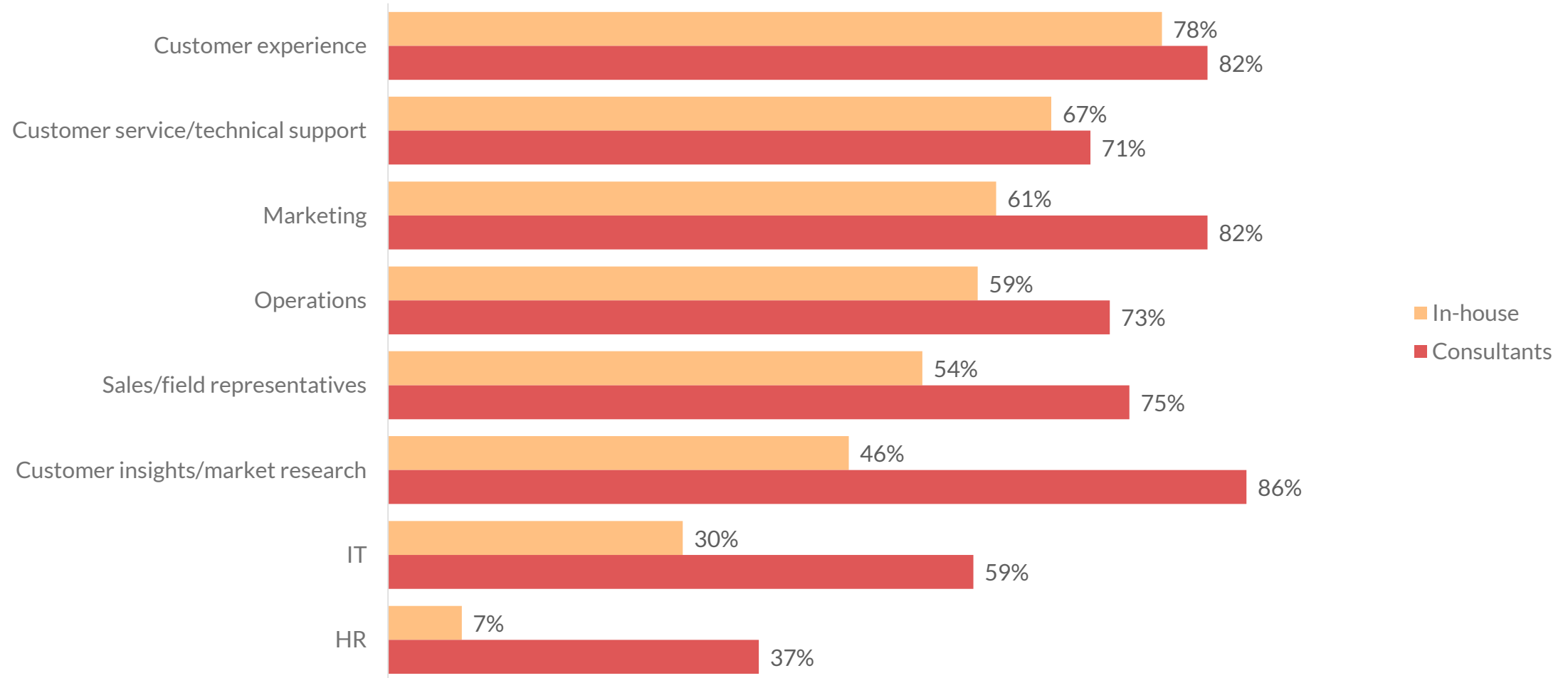
Who's on the team?

Use the right research methodology to discover the true experience





Who was on the journey mapping team





Turning journey mapping insights to action



A deliberate process ensures success



Discovery

Discover what is known today

Kickoff

Review existing research

Stakeholder interviews

Hypothesis Workshop

Typically 3-5 weeks



Research

Uncover the heart of your customer experience

Protocol development

Research (methods vary)

Typically 4-8 weeks



Action

Drive customer-focused change

Journey map(s)

Research report

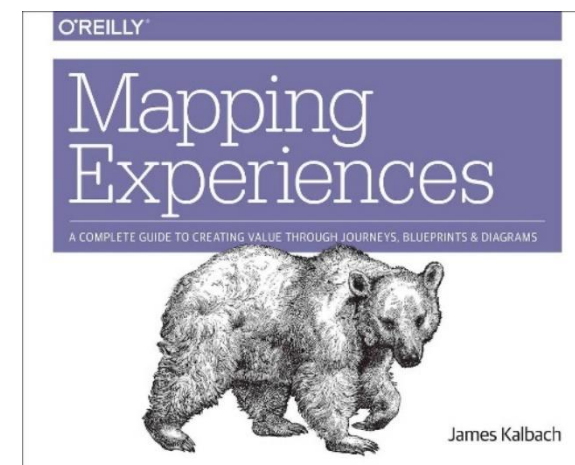
Action planning

Typically finishes in 3-4 weeks



Engage Your Patients and Stop the Leakage

Case Study from *Mapping Experiences*





Situation at Meridian

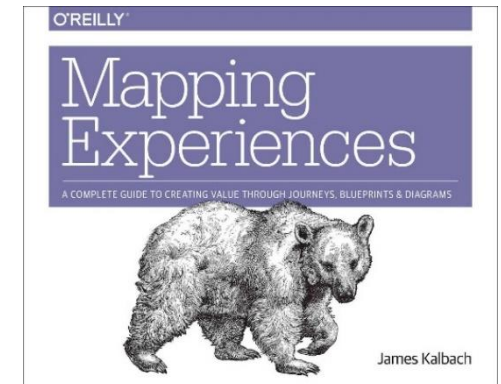
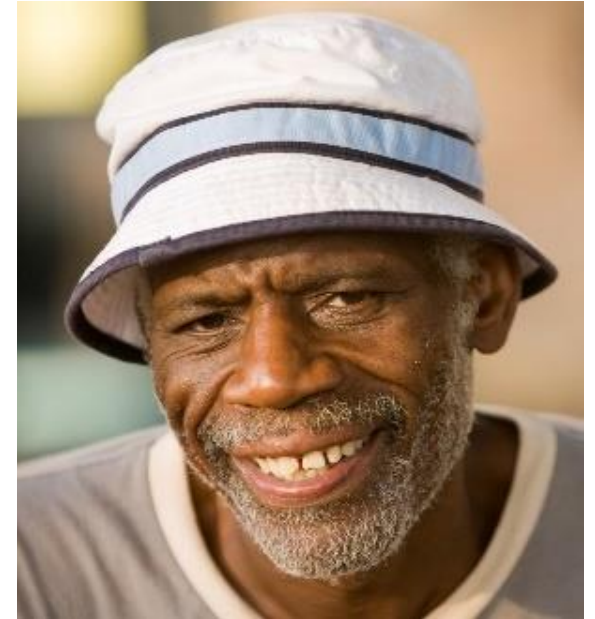
Faced with significant leakage in their advanced radiology services, Meridian reached out to Heart of the Customer to better understand today's patient journey, and to identify opportunities for improvement.





Seen-It-All Stanley

“Focusing on two of the journey maps HotC created for Meridian – those representing patients on either end of the experience spectrum - illustrates the unique value of customer journey mapping. On one end, there’s Seen-it-all Stanley, a heavy healthcare user whose familiarity with ‘the system’ tempers both his expectations and his anxiety level. He knows to leave a little extra time for parking, can relax and enjoy watching TV in the waiting room until he’s called in, and knows when he can expect his test results. Minor inconveniences or delays don’t faze him because he knows he’s in good hands. Meridian has already earned his loyalty, and needs only to maintain the high level of service it already provides to keep it.” – from *Mapping Experiences*



Seen-It-All Stanley

The Experienced Patient's Journey

Opportunities to Impact the Experience at Meridian Health



Seen-it-all Stanley

Age 65
Background Cancer survivor; heavy user of health care
Insight Stanley represents a core patient for Meridian Health: a heavy healthcare services user who has learned to navigate "the system." He trusts and appreciates the care provided to him and his family. His expectations are tempered by an abundance of experience.

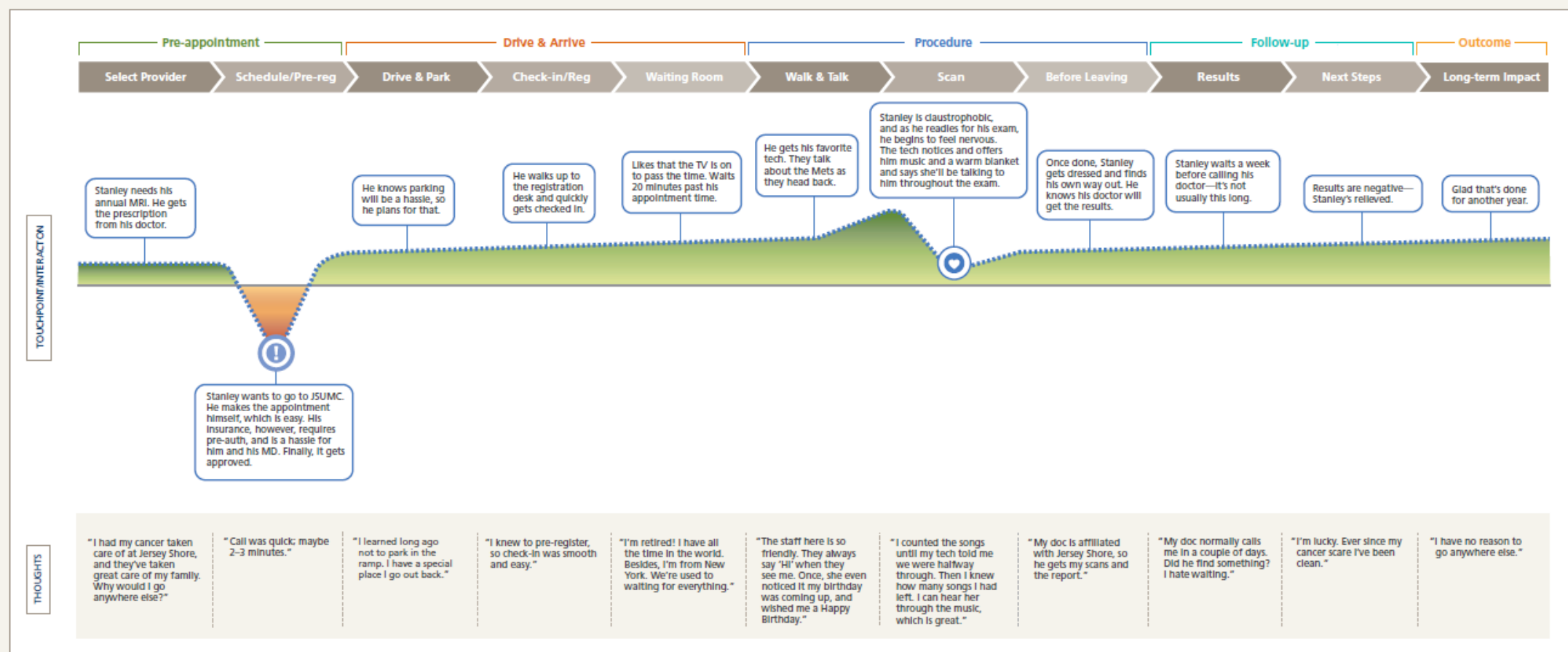
EXPERIENCE FACTORS Stanley knows how radiology works, and trusts his hospital to do right.



QUOTE "Jersey Shore is 'my' hospital. All my records are here, and I trust them. Sometimes I'm told I should go somewhere else, but I come back here. I usually expect my appointment to take a whole day. If it's less than that, I'm lucky!"

LEGEND

- Median level of satisfaction
- - - Stanley's Route
- Satisfaction up
- Satisfaction down
- ♥ Moment of Truth
A critical interaction that determines how the patient continues with their journey.
- ! Friction Point
An interaction that reduces engagement.



VERSION
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DATE
4.23.2015

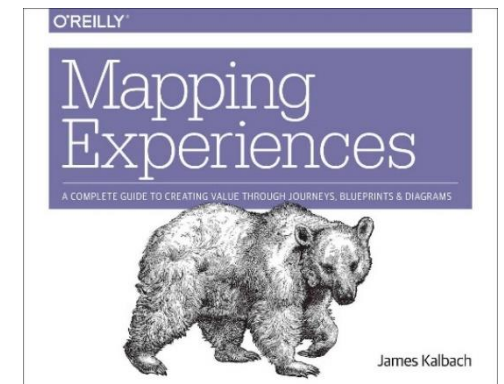


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Prepared by Heart of the Customer April 2015



Newbie Natalie

“On the other end of the spectrum is Newbie Natalie, who is ‘learning the ropes’ as she navigates Meridian’s Radiology services for the first time. Understandably, Newbie Natalie is more nervous, which magnifies the negative impact of friction during any touchpoint in her journey. Parking difficulties get her visit off to a bad start, and not knowing when to expect her test results unnecessarily adds to her already elevated anxiety level. As a result, even though she is satisfied with the treatment she receives, and even though those kinds of problems are unlikely to recur on subsequent visits, they negatively impact her overall experience.”



Newbie Natalie

The New Patient's Journey

Opportunities to Impact the Experience at Meridian Health



Newbie Natalie

Age 34
Background This is Natalie's first time for an MRI, so she's a bit anxious about it.
Insight Natalie's doctor's office printed out some WebMD pages about MRIs to help her understand what to expect.

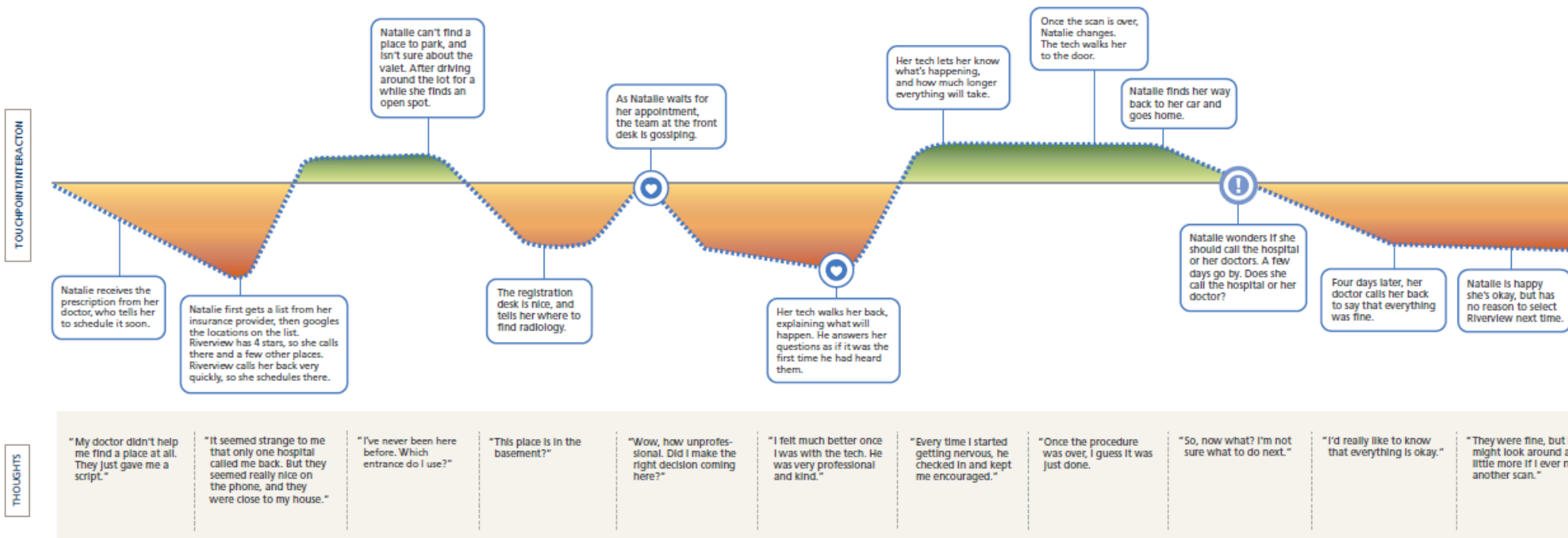
EXPERIENCE FACTORS Natalie has little healthcare experience overall, including advanced imaging, so she's anxious.



QUOTE "I wish they'd have helped me a bit more with where to go, and with what to expect. I was surprised how much I had to figure out on my own."

LEGEND

- Median level of satisfaction
- - - Natalie's Route
- Satisfaction up
- Satisfaction down
- ♥ Moment of Truth: A critical interaction that determines how the patient continues with their journey.
- ! Friction Point: An interaction that reduces engagement.



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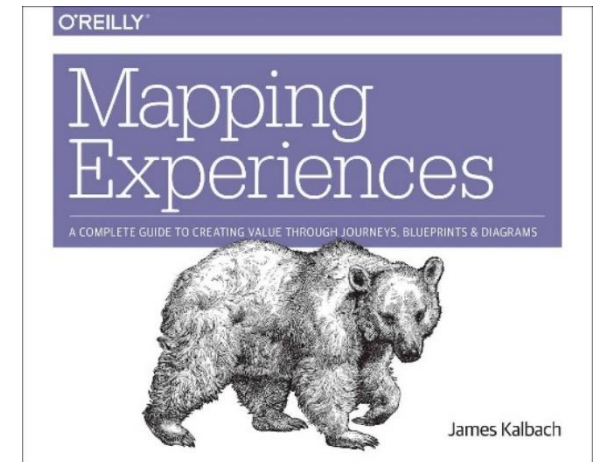
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Driving Change

“That finding was key to determining where to focus future customer engagement efforts, because Natalie won’t be a Newbie for long. If her first experience is peppered with uncertainty and inconvenience, regardless of how minor, she will have little incentive to choose Meridian next time around. So therein lay Meridian’s greatest opportunity: meet Natalie’s needs today, so that she can transition into a loyal, satisfied Seen-it-all Stanley tomorrow.”

- *Mapping Experiences*



High-Maintenance Holly

The Anxious Patient's Journey

Opportunities to Impact the Experience at

Case Study



High-Maintenance Holly

Age 51
Background Accesses advanced healthcare services regularly, having experienced a serious health event, which she still believes was not handled as well as it could have been.
Insight Holly insists on being a partner in healthcare decision-making, and feels that her involvement is critical to the right decisions being made.

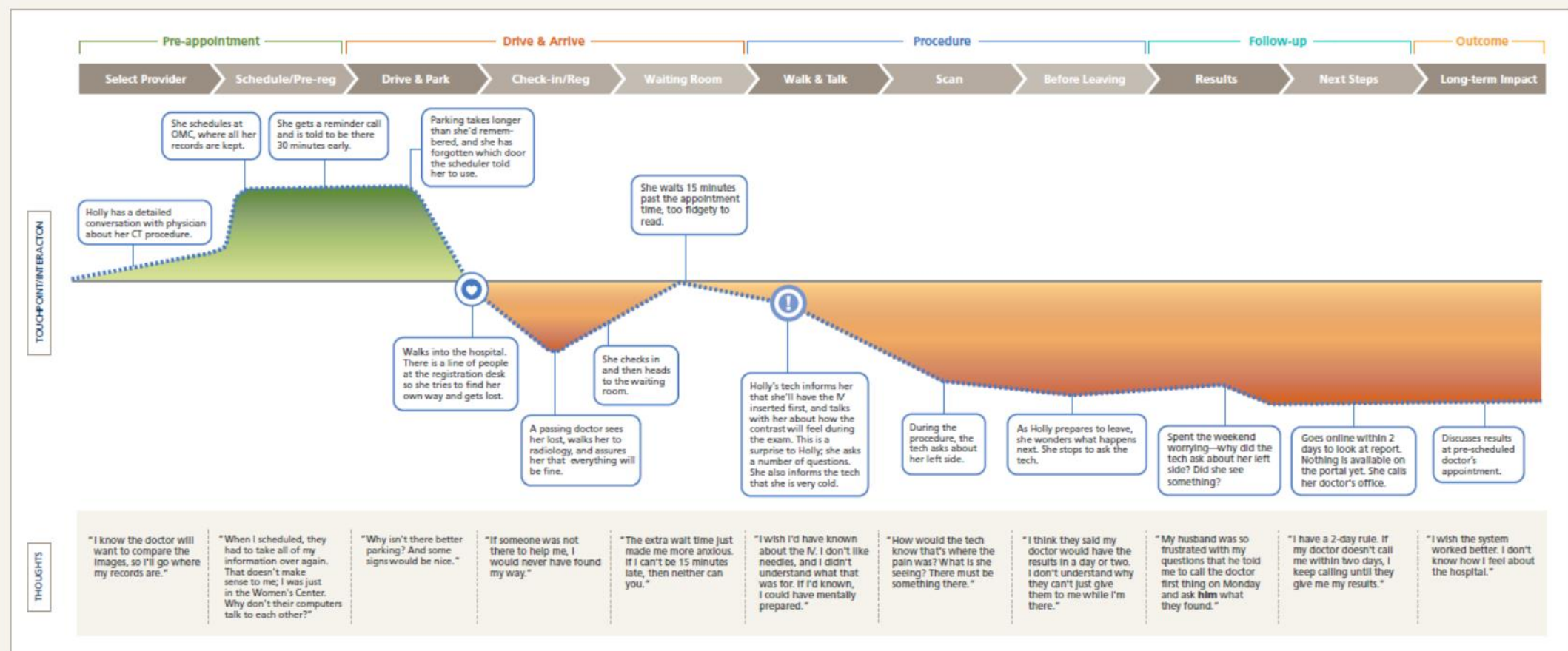
EXPERIENCE FACTORS Holly is quite anxious about her health. She is a very informed health care consumer, without a lot of trust in the system.

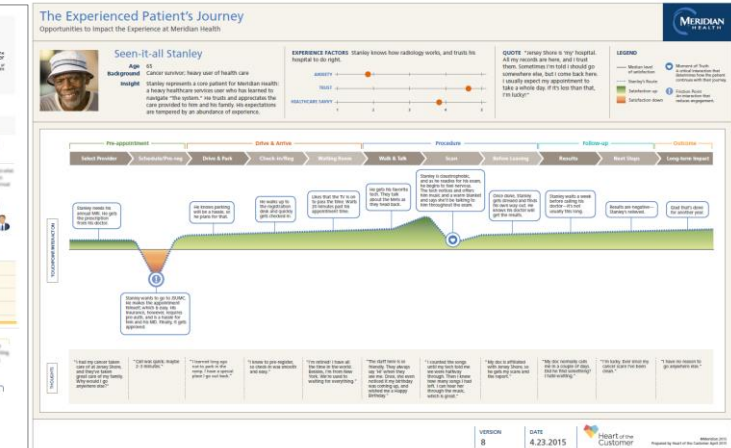
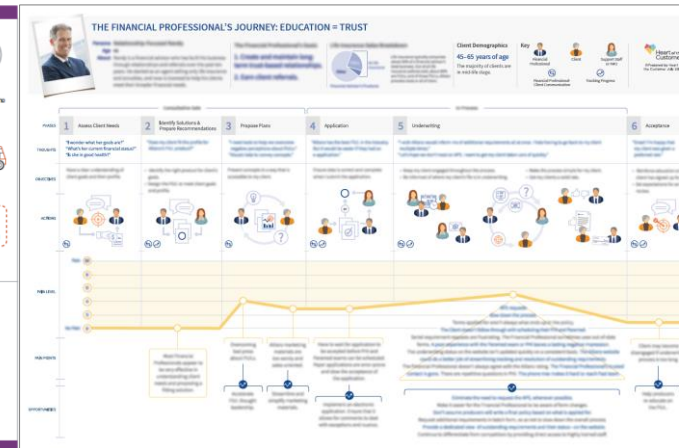
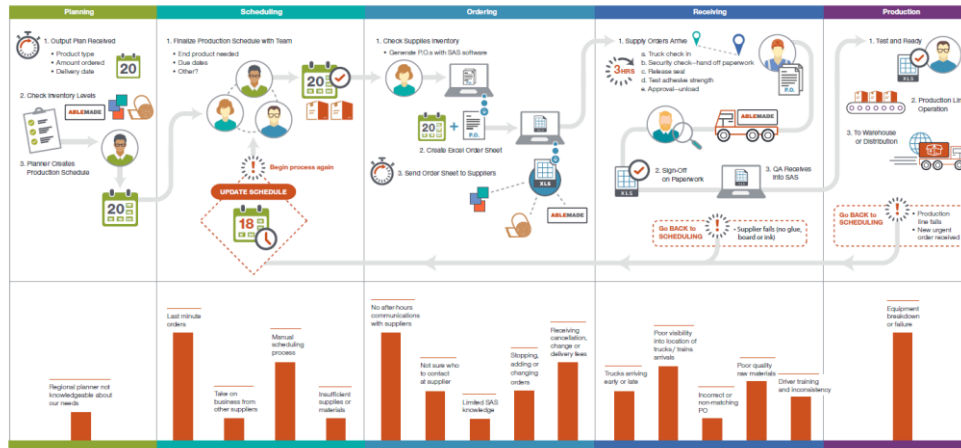


QUOTE "The tech asked about my left side. How would she know that's where it hurt? What is she seeing? Why doesn't she tell me? I spent the weekend worrying, and drove my husband crazy wondering what the results could be."

LEGEND

- Median level of satisfaction
- - - Holly's Route
- Satisfaction up
- Satisfaction down
- ⓘ Moment of Truth: A critical interaction that determines how the patient continues with their journey.
- ! Friction Point: An interaction that reduces engagement.





Best Practices in Journey Mapping

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