Customer Journey Mapping workshop

- Presenter: Nigel Greenwood

An introduction to customer experience

There are only 3 reasons someone will become a customer of a commercial organisation:

1. Price
2. Product (including the service you offer).
3. Customer experience.

For non-commercial organisations, getting the customer experience right maximises satisfaction, minimises complaints, reduces costs and employee turnover.

What is customer experience?



My definition

Everything that an existing or potential customer can see, hear, feel or touch about your organisation

In short

- **A memorable, consistent customer journey across all channels**
- **Focus on building customer loyalty**
- **Understand what different customer types want – use of data**
- **Create Wow moments**
- **Pay attention to detail**
- **See your organisation through the customer's eyes**
- **Recruit on culture and values**
- **Rewarding the right behaviours**
- **Welcome and act on customer feedback.**

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How good is the customer experience that your organisation delivers?

$$5 - 4.8 = 6$$

The 6 things that all customers want

1. Make it easy

- As few steps as possible
- Make it obvious
- Minimise the work they have to do
- Provide information and support where, when and how they need it

2. Set expectations

- Make it clear what will happen and how and when it will happen
- Don’t oversell your services
- Be consistent through the journey
- Make clear promises you know you can keep

3. Keep your promises

- Explicit and implicit
- Key promise – if we let you down, we will fix it
- Clear and monitored service standards through the organisation
- Internal and external service level agreements

The 6 things that all customers want ...(cont'd)

4. Keep them informed

- Progress updates
- Engage on social media
- Send only information relevant to them
- Use their language – no jargon!

5. Treat them as an individual

- Use their name
- Understand their situation
- Listen and find their needs
- "What we can do for you is" rather than "our process is"

6. Put it right if it goes wrong

- Empathise and apologise they have had to call
- Use active listening
- Don't ask them to do any work
- Aim to put them in the position they would have been in if it hadn't gone wrong

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The impact of the recent pandemic & energy crisis for housing association customer experience

Greater tenant focus on:

- My home
- Feeling safe (and warm!)
- Advice and knowledge
- Opportunities for value for money and saving money
- Being local and a sense of “my community”.

Survey for the BBC in September 2022:

- 85% of people are worried about increased costs
- 90% are delaying putting their heating on
- 56% expect things to get worse in the next 6 months
- 67% of tenants are struggling to pay essential costs
- 60% say this is impacting their mental health

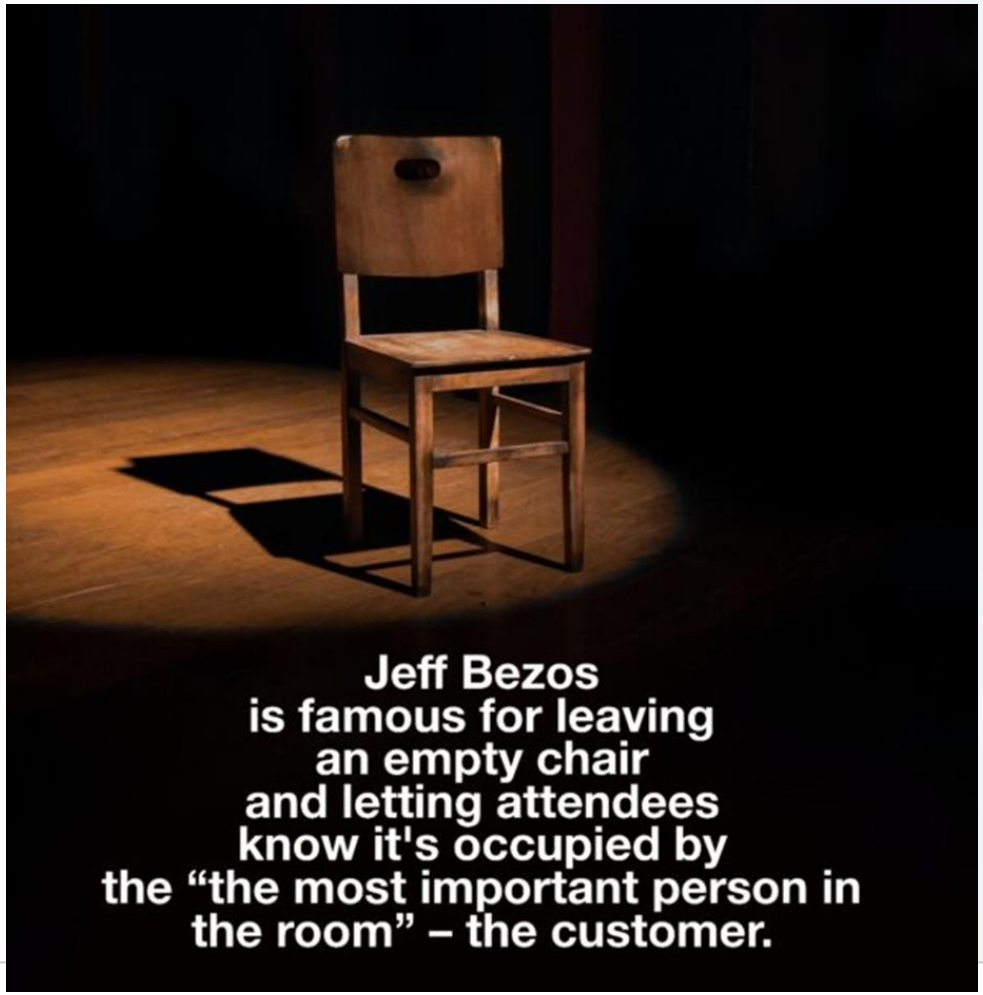
The questions your tenants ask themselves

“Do I think that this organisation has my best interests at heart?”

“Does this organisation demonstrate the trust levels that I would expect it to?”

“Does the organisation design its services and experiences around me?”

2 tactics for being customer focused



Customer/User personas



"All life is precious"

Valentina is 24 and works for a charity helping homeless people. She rents a room in a shared house in Leicester with 5 other people, 3 of whom she works with. At some point she wants to get her own place, but her job isn't that well paid so she's trying to put some money aside each month until she can afford to rent a small house or flat. Her parents still support her financially but she knows that can't last forever.

Money has never been really important to Valentina although she is now starting to understand how expensive life and work can be. From an early age, she has wanted to do charity work and finds it fulfilling. She would like a long career in the Third Sector, ideally working abroad at some point although homelessness is very close to her heart as one of her friends was homeless for 6 months after they gave up on University and fell out with their parents.

Valentina has a small number of close friends but doesn't socialise much – most evenings she is out on the streets of Leicester handing out food and supplies to the homeless. Once a week she does manage to meet up with friends at a local vegan restaurant run by former refugees.

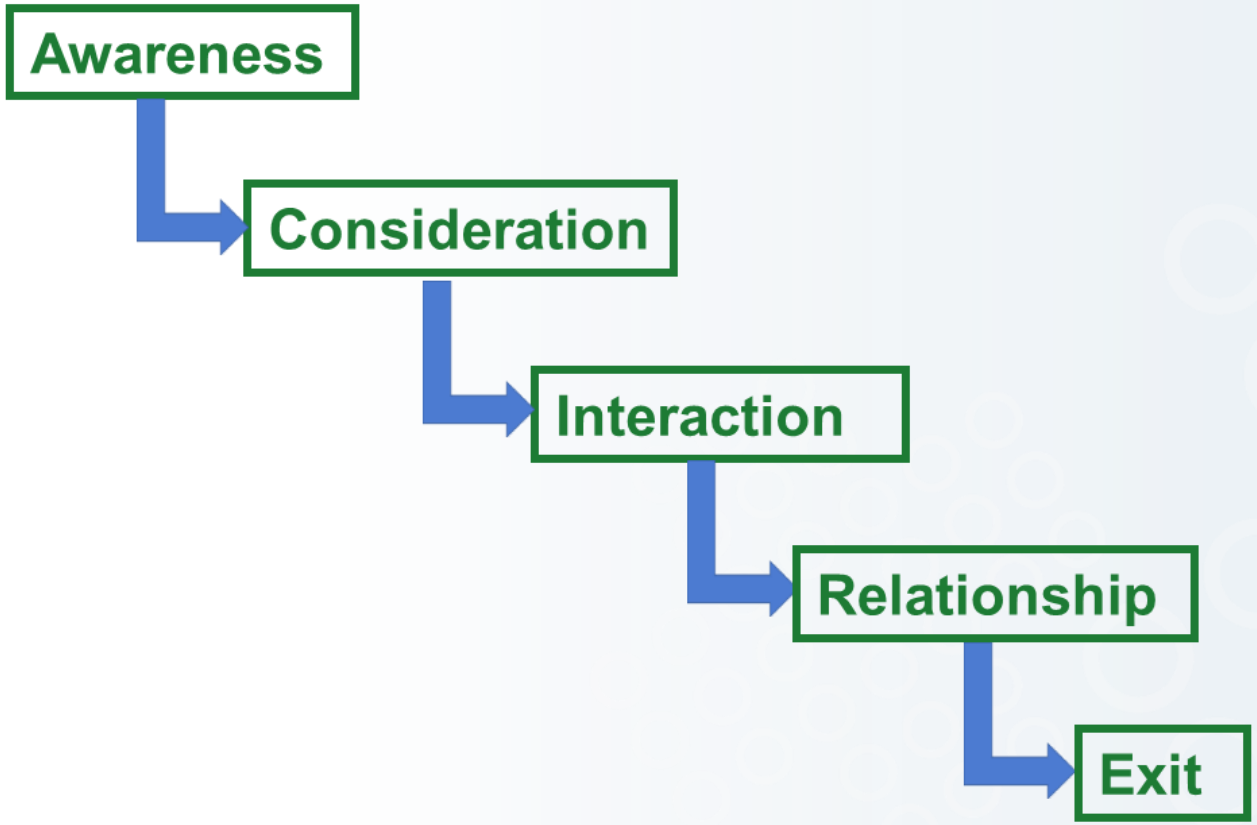
She became a vegan at 16 and hates the idea of an animal being killed to supply her with food. She spends a lot of time online sourcing sustainably made clothes and footwear and regularly signs petitions asking consumers to boycott companies that have been found to be exploiting their workers (she has never bought anything from Amazon!).

Although it can cost more, she would rather support a local shop than a large corporate. Although she does use Facebook, Instagram and Whatsapp because her friends do (and she finds them a good way of getting information), she resents having to do so because she feels in thrall to large, evil corporations but she loves watching vegan cookery and environmentally conscious videos on YouTube.

Valentina enjoys cooking vegan meals for her friends, searching online for more injustices against people and animals that she can post, blog or talk to her friends about. She plays in a local netball team and does dog walking at the weekends – partly for exercise, partly for some extra money but mainly because she would love a dog but can't have one in the shared house!

- Detailed written descriptions of "typical" customers/users
- Name, photo, personal details
- What are their needs?
- What are their circumstances?
- What keeps them awake at night?
- What annoys them?

What is a customer journey?



Example of Customer Journey Map for Online Travel Agency

Persona	Goal
Donna Redding, Suburban mom	Go on a family vacation

Stages of journey

Desire for travel → Explore options → Select Vacation → Book travel → Schedule meals and events → Travel to location → Experience vacation → Travel Home → Remember experience

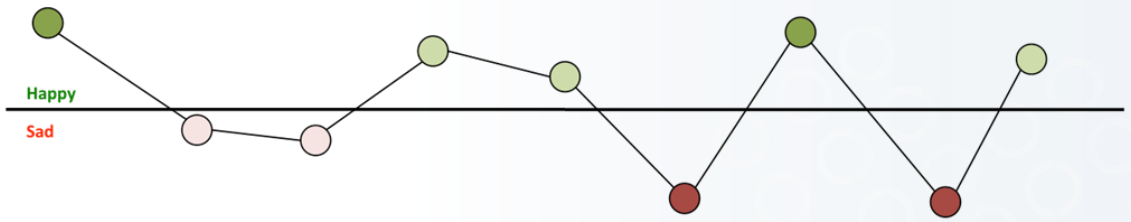
Customer needs and activities

Desire for travel	Explore options	Select Vacation	Book travel	Schedule meals and events	Travel to location	Experience vacation	Travel Home	Remember experience
• Find out about school vacations • Find out about family events	• Discuss with family • Discuss with friends • Read magazines • Review online travel sites • Get sense of costs	• Discuss with family • Search online for details on top options	• Book cheapest flight and hotel that meets needs of the entire family	• Book a few reservations for dinner nearby • Find and book a couple of interesting tours and excursions	• Figure out what to pack and pack family • Print tickets and travel information • Plan for transportation to and from airport	• Arrange for activities at hotel • Keep track of all of things that have been scheduled • Post fun stuff on Facebook	• Pack up family • Plan for food and meals during the trip • Plan for transportation to and from airport	• Create digital photo album • Send pictures to friends and family • Tell people about the good and bad parts

Expectations for online travel agency (Customer perception of experience: **Good** | Neutral | **Bad**)

Desire for travel	Explore options	Select Vacation	Book travel	Schedule meals and events	Travel to location	Experience vacation	Travel Home	Remember experience
• None	• **Compare prices of different travel destinations and packages**	• **Compare prices of different itineraries**	• **Book cheapest flight that meets needs** • Book cheapest hotel that meets needs	• None	• Notify when flights are late • **Rebook flights when there is a missed connection**	• None	• Notify when flights are late • **Rebook flights when there is a missed connection**	• None

Emotional state of persona

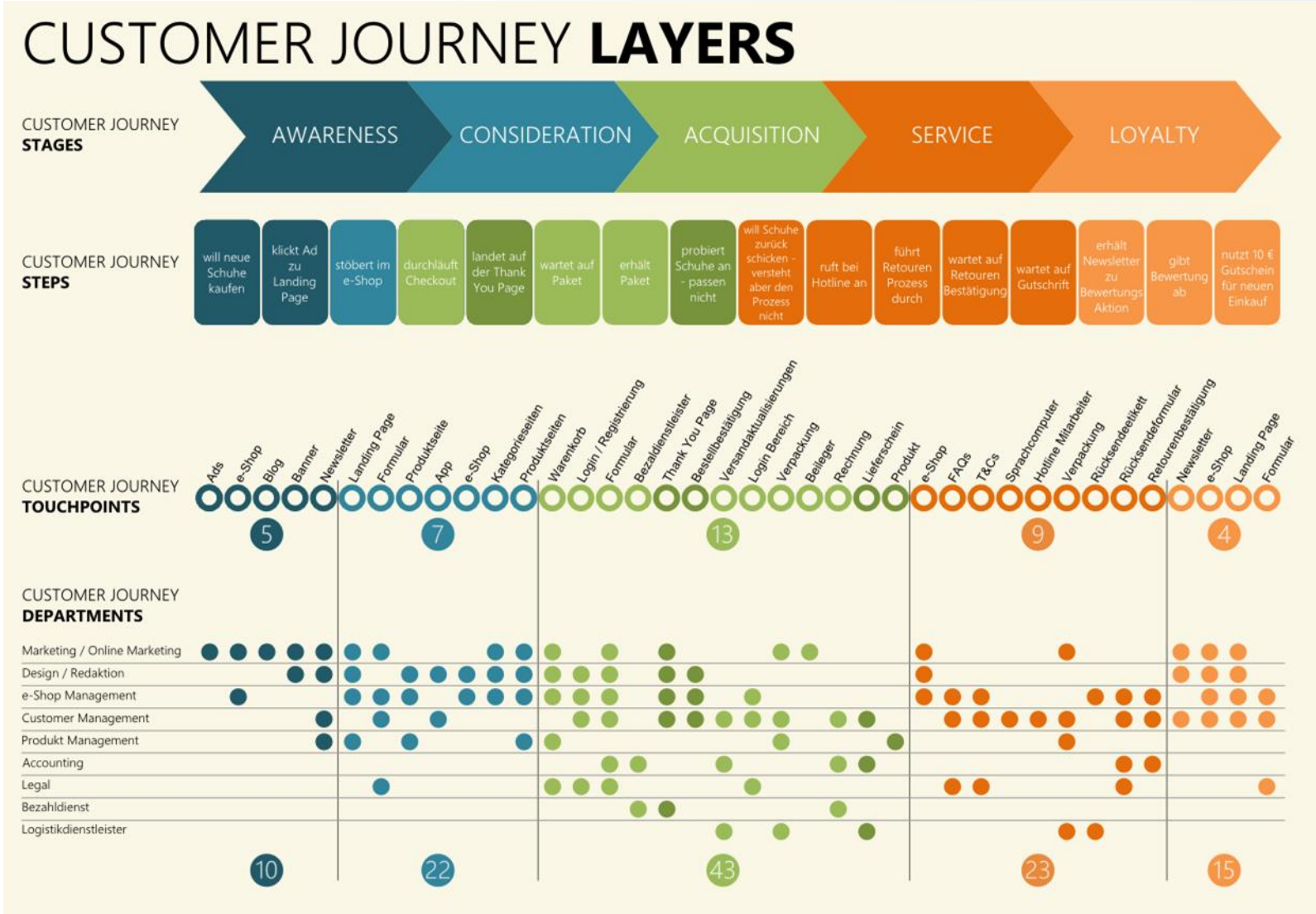


Potential opportunities for improvement

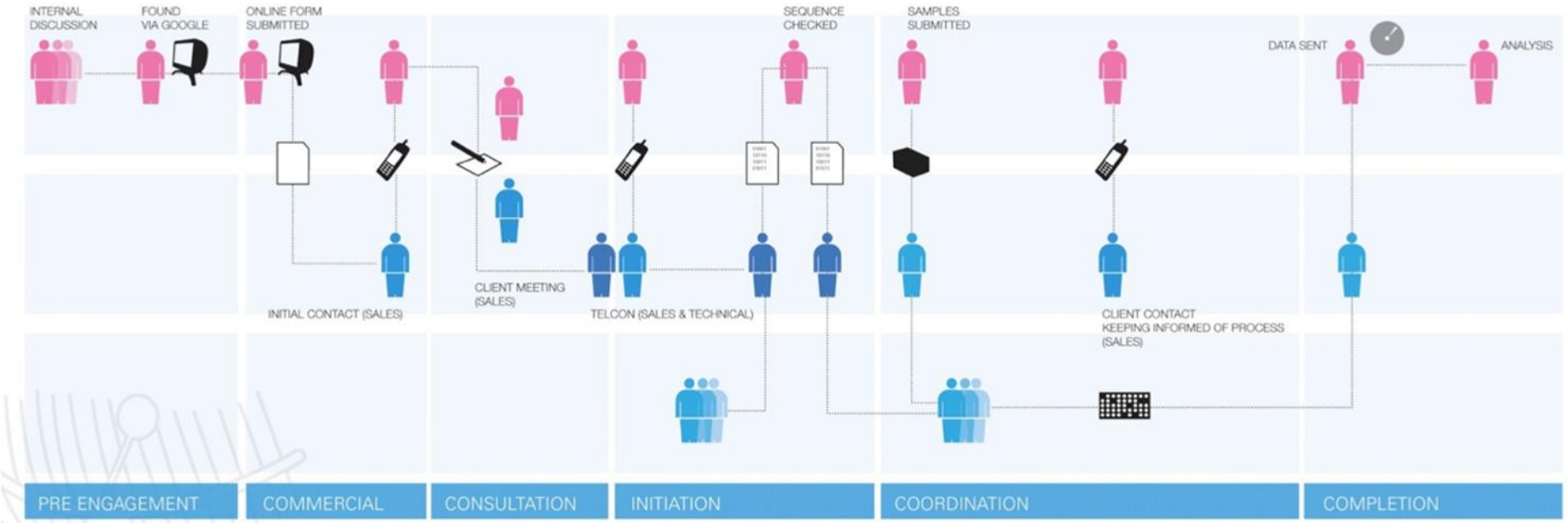
Explore options	Select Vacation	Book travel	Schedule meals and events	Travel to location	Experience vacation	Travel Home	Remember experience
• Offer sample itineraries for family vacations	• Allow searches across multiple destinations, e.g., lowest cost options anywhere in Caribbean	• Provide reviews of hotels from previous families on vacation at hotels	• Explore closing "white space" with vacation scheduling that includes restaurants & excursions	• Develop proactive rebooking based on family traveler profile	• Explore closing "white space" by sending targeted offers based on family itinerary	• Develop proactive rebooking based on family traveler profile	• Provide capability to easily share photos, comments and details of itinerary

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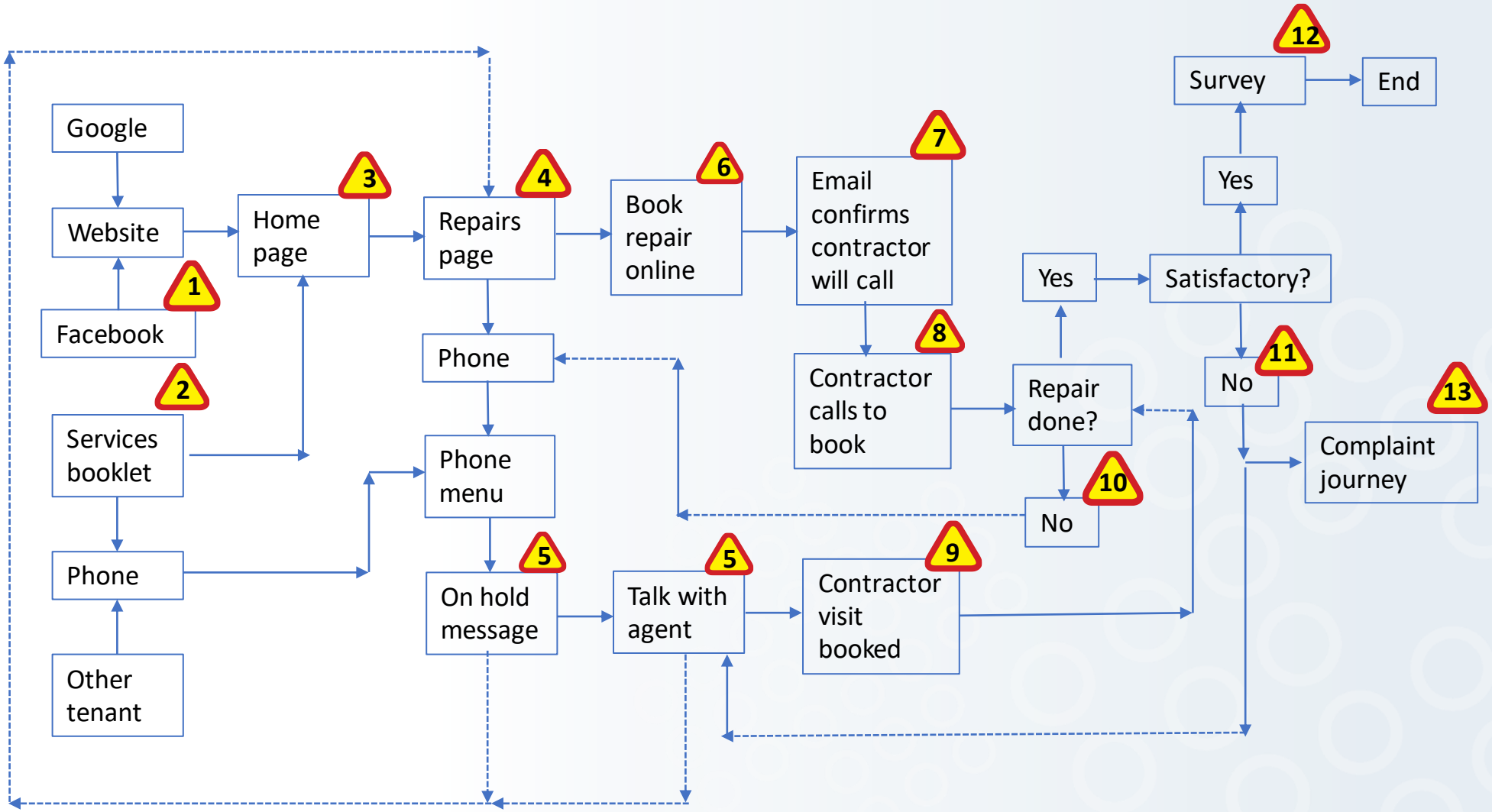
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When experience matters


CUSTOMER JOURNEY LAYERS
CUSTOMER JOURNEY STAGES
AWARENESS
CONSIDERATION
ACQUISITION
SERVICE
LOYALTY
CUSTOMER JOURNEY STEPS
will neue Schuhe kaufen
klickt Ad zu Landing Page
stöbert im e-Shop
durchläuft Checkout
landet auf der Thank You Page
wartet auf Paket
erhält Paket
probiert Schuhe an - passen nicht
will Schuhe zurück schicken - versteht aber den Prozess nicht
ruft bei Hotline an
führt Retouren Prozess durch
wartet auf Retouren Bestätigung
wartet auf Gutschrift
erhält Newsletter zu Bewertungs Aktion
gibt Bewertung ab
nutzt 10 € Gutschein für neuen Einkauf
CUSTOMER JOURNEY TOUCHPOINTS
Ads
e-Shop
Blog
Banner
Newsletter
Landing Page
Formular
Produktseite
App
e-Shop
Kategorieseiten
Produktseiten
Warenkorb
Login / Registrierung
Formular
Bezaldienstleister
Thank You Page
Bestellbestätigung
Versandaktualisierungen
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Lieferschein
Produkt
e-Shop
FAQs
T&Cs
Sprachcomputer
Hotline Mitarbeiter
Verpackung
Rücksendeetikett
Rücksendeformular
Retourenbestätigung
Newsletter
e-Shop
Landing Page
Formular
5
7
13
9
4
CUSTOMER JOURNEY DEPARTMENTS
Marketing / Online Marketing
Design / Redaktion
e-Shop Management
Customer Management
Produkt Management
Accounting
Legal
Bezahldienst
Logistikdienstleister
10
22
43
23
15

CUSTOMER JOURNEY MAP



Housing provider repair journey



The journey mapping workshop

- 2 hours
- Ideally face to face
- The room
- The people
- The materials
- The agenda
- The questions to ask

Let’s have a break!



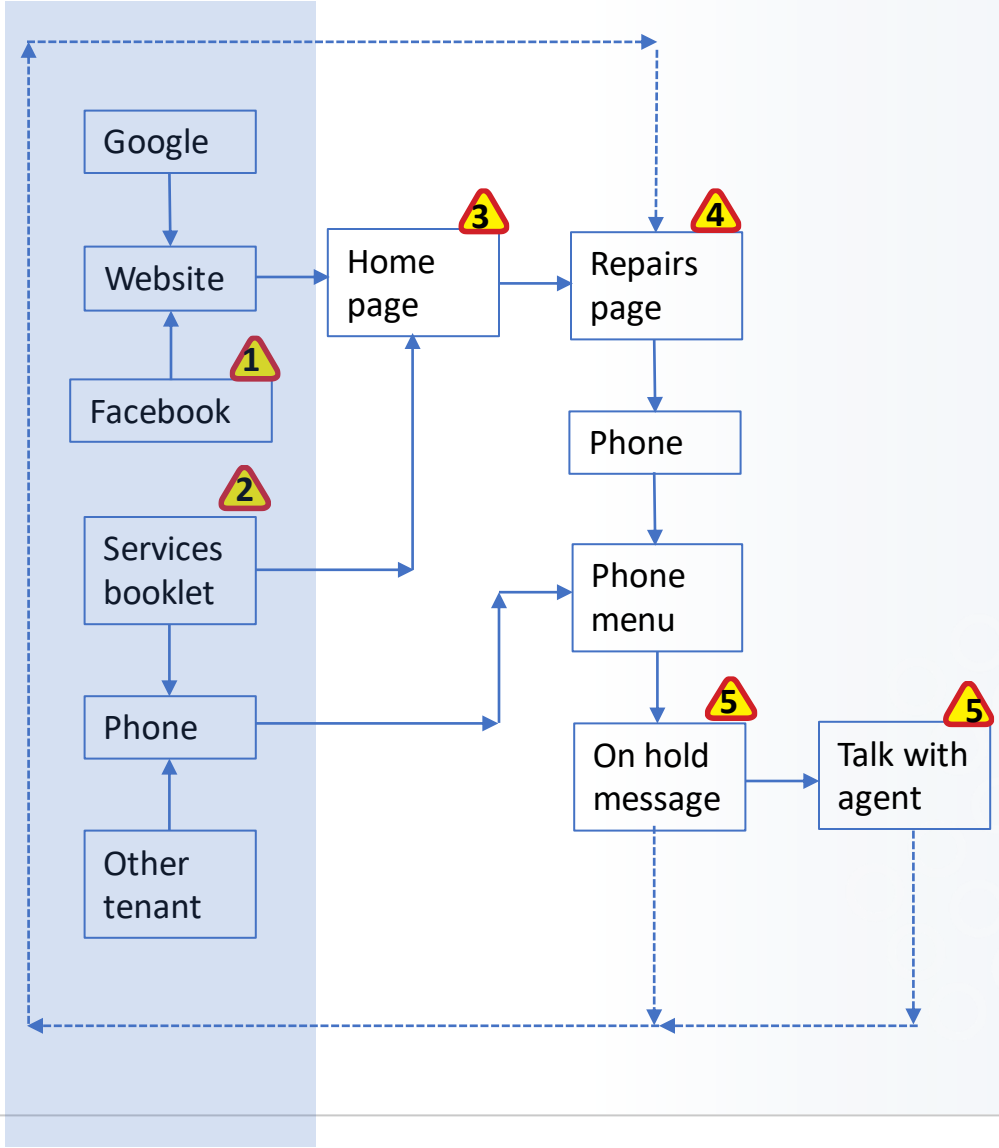
Other chocolate bars are available!

Welcome back - it’s nearly time for me to shut up and for you to do some work!

Housing provider repair journey - awareness

- Google
- Website
- Facebook
- Services booklet
- Phone
- Other tenant

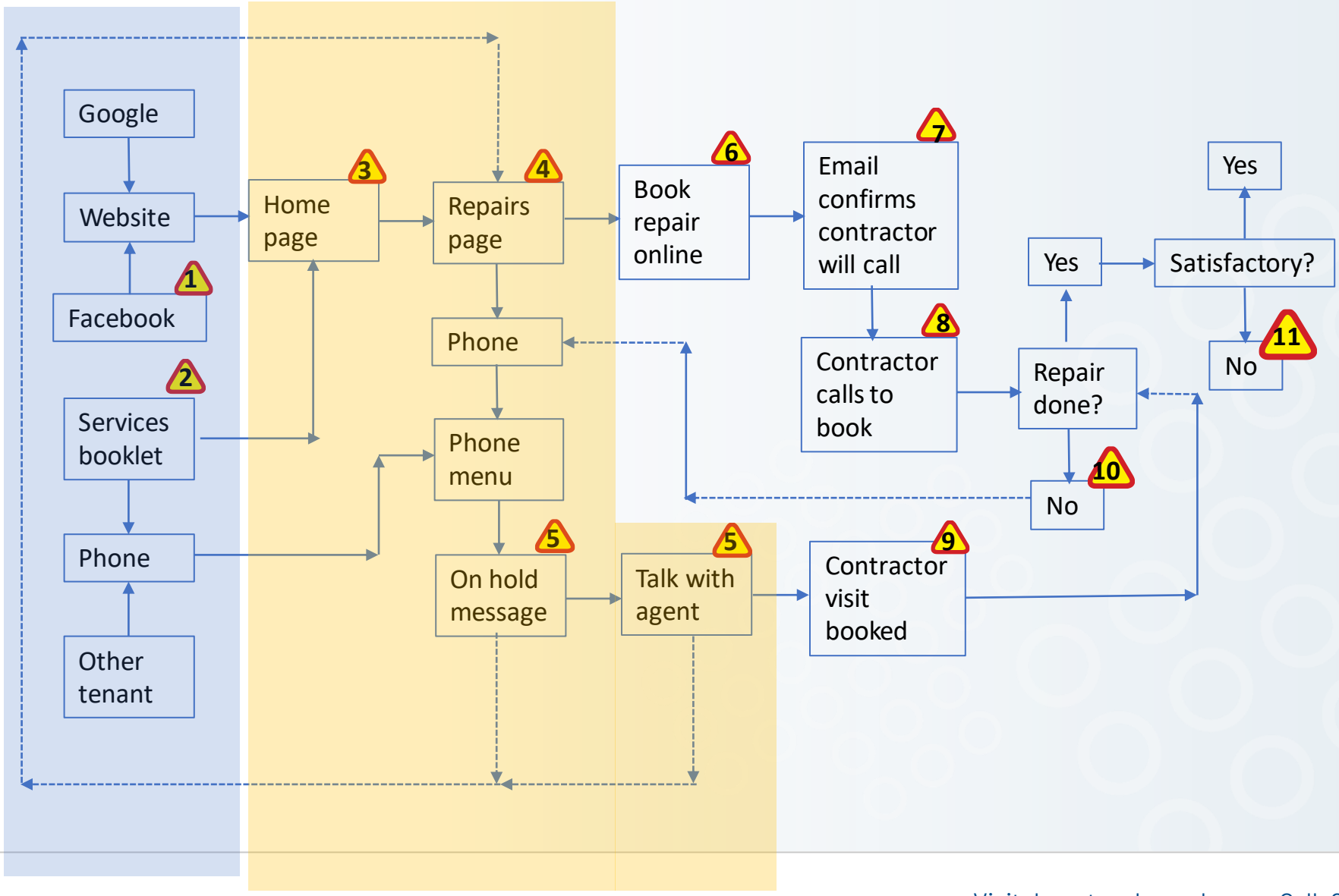
Housing provider repair journey - consideration



Adding the issues

	Customer	Organisation
1	No contact number on FB page, just link to website so more steps in journey	Reduces tenant satisfaction
2	Service levels quoted in booklet are out of date – raises unrealistic expectations	Increased complaints
3	Difficult to find repairs link on homepage	Customers phone main number – increase in calls
4	Page isn't clear on what are urgent and non-urgent repairs.	Increases expectation repair will be done quickly – increase in complaints
5	Message and agent promote going to website	Reduced satisfaction, worsens call for agent

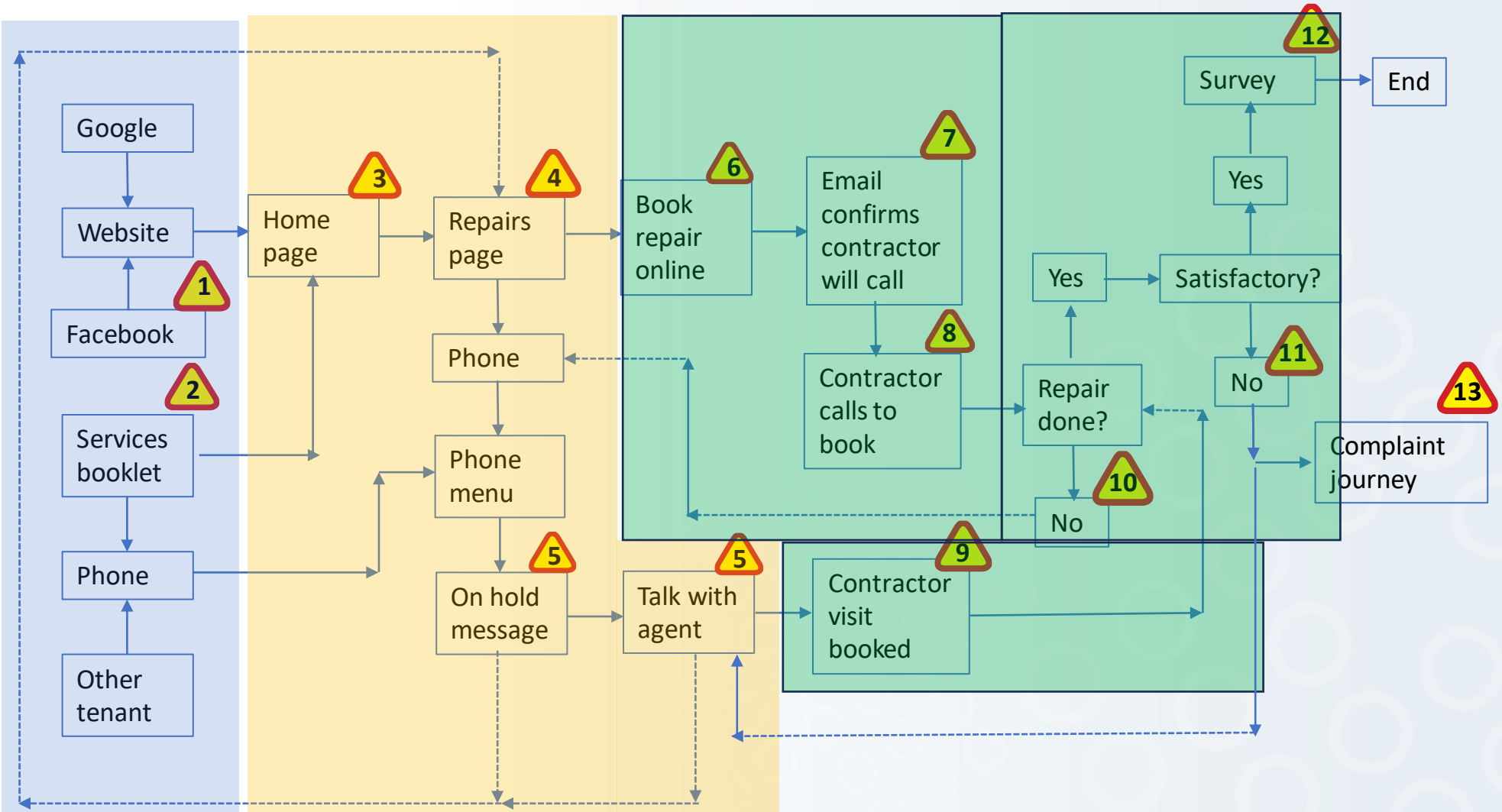
Housing provider repair journey - interaction



Adding the issues

	Customer	Organisation
1	No contact number on FB page, just link to website so more steps in journey	Reduces tenant satisfaction
2	Service levels quoted in booklet are out of date – raises unrealistic expectations	Increased complaints
3	Difficult to find repairs link on homepage	Customers phone main number – increase in calls
4	Page isn't clear on what are urgent and non-urgent repairs.	Increases expectation repair will be done quickly – increase in complaints
5	Message and agent promote going to website	Reduced satisfaction, worsens call for agent
6	Tenant can't choose time or day	Increases phone calls
7	Tenant expects email to confirm time and day	Increases call volume
8	Often contractor doesn't call in agreed timescale	Increases call volume
9	Customer only given one option	Impacts customer satisfaction
10	Often repairer doesn't show or repair not done fully	Increased complaints and cost
11	Repair often not completed satisfactorily or mess left	Increased complaints and cost

Housing provider repair journey – relationship and exit

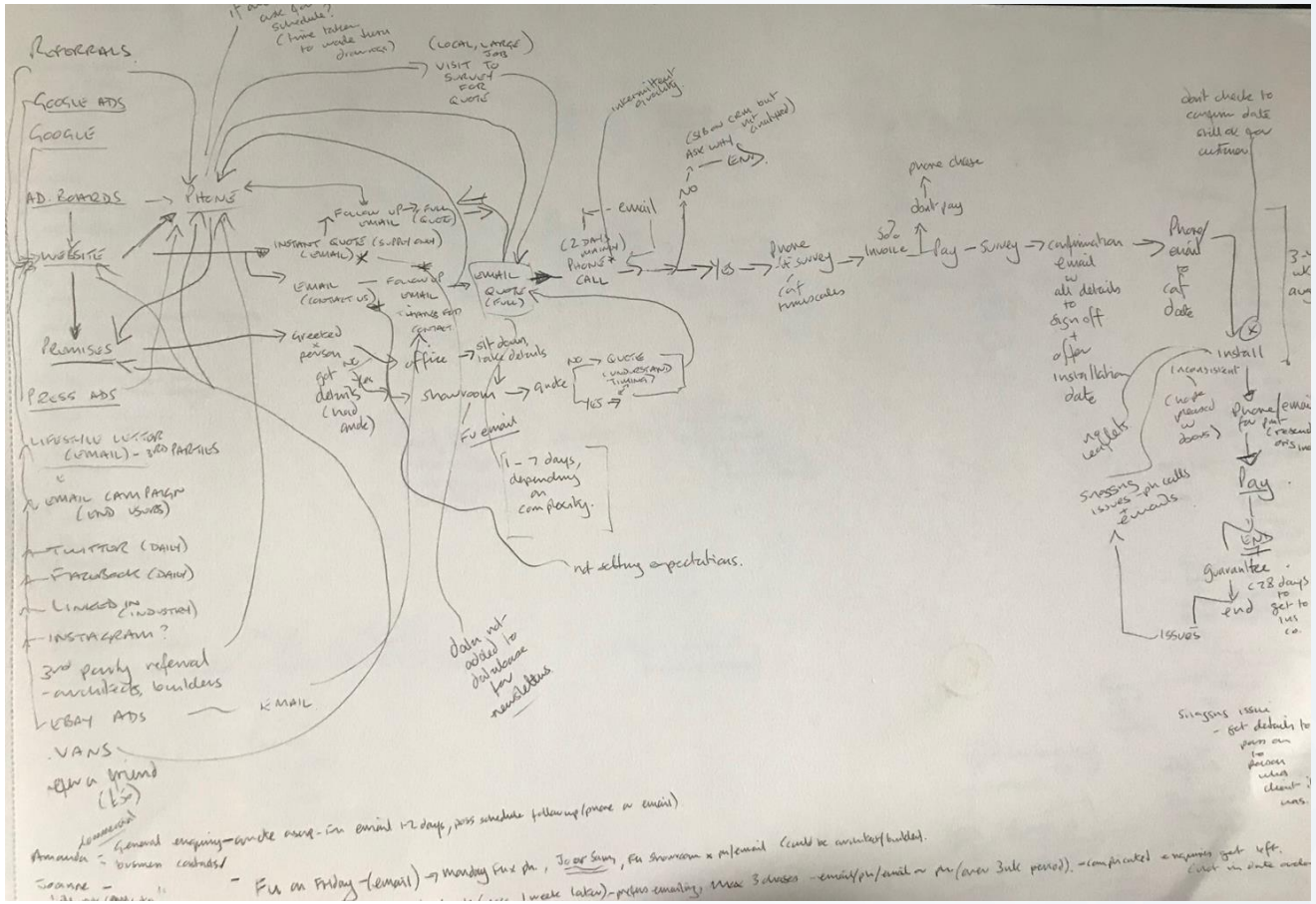


Adding the issues

	**Customer**	**Organisation**
1	No contact number on FB page, just link to website so more steps in journey	Reduces tenant satisfaction
2	Service levels quoted in booklet are out of date – raises unrealistic expectations	Increased complaints
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10	Often repairer doesn't show or repair not done fully	Increased complaints and cost
11	Repair often not completed satisfactorily or mess left	Increased complaints and cost
12	20 questions on survey and don't see any changes	Low percentage completed – less chances to improve
13	Gets frustrated and angry	Increased complaints, low satisfaction

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You probably have something that looks like this now!



Designing your map

Some available tools –

- PowerPoint
- https://miro.com/
- Lucidchart
- Visio
- Smaply
- Gliffy
- Design Thinkers Academy
- UXPressia
- Realtime Board
- Designing CX

Beginning the design

Touchpoint	Possible routes			
Referrals	Website	Email	Phone	
Google	Website			
Website		Email	Phone	
Social media	Website			
Networking	Website	Email	Phone	Social media
Email campaign	Website	Email	Phone	Social media

Validating your map and issues

- Distribute the map and issues to those who attended your workshop
- Ask them to check the touchpoints and routes for accuracy
- Ask them to review the issues and clarify or add more
- Only amend your map when you have everyone's comments in.
- If 2 or more colleagues disagree about touchpoints or routes, meet with them to get consensus.

The next workshop! – generating ideas

The innovation workshop – agenda:

1. Review map and issues
2. Brainstorm solutions for each issue
3. Assess and prioritise solutions
4. Agree action plan

The innovation workshop – materials:

- A large version of the journey map to display on a wall
- The list of issues
- Flipchart(s)
- Post-It notes
- Marker pens
- Chocolate!
- Idea assessment sheets
- Idea investigation sheets

Idea assessment sheet example:

Issue:		
Solution:		
Speed	Cost	Impact

Idea investigation sheet example:

Issue:		
Solution:		
People responsible:	What we need to know	When we need to know

Ensuring continual improvement

Most organisations don't use
customer or employee feedback.....



A simple process for customer/user and employee feedback

WHEN → HOW → WHAT → CHANGE → TELL

- Every interaction
- If they complain
- Every 6 months
- When they leave
- Monthly employee survey

- In person
- By phone
- Email

- What did we do well?
- What could we do better?
- What else could we do?
- Would you be happy to recommend us?

- Small
- Simple
- Regular

- In person
- Newsletter
- On website
- PR

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Tenant Perception Survey– my thoughts!

Taking everything into account, how satisfied or dissatisfied are you with the service provided by your landlord?

How satisfied or dissatisfied are you with the overall repairs service from your landlord over the last 12 months

How satisfied or dissatisfied are you with the time taken to complete your most recent repair after you reported it?

How satisfied or dissatisfied are you that your landlord provides a home that is well-maintained?

Thinking about the condition of the property or building you live in, how satisfied or dissatisfied are you that your landlord provides a home that is safe?

How satisfied or dissatisfied are you that your landlord makes a positive contribution to your neighbourhood?

Looking back at the 6 things all customers want, setting expectations and keeping your promises are key to these, as well as mapping and improving your customer journeys and having clear (and monitored) service standards throughout the organisation and with contractors and suppliers.

How satisfied or dissatisfied are you that your landlord listens to your views and acts upon them?

How satisfied or dissatisfied are you that your landlord keeps you informed about things that matter to you?

Getting a robust customer feedback process in place is vital (in addition to the Perception Survey).

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This quote sums up why customer experience is vital:

“People will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

Maya Angelou

Thank you!

I've been Nigel Greenwood (nigel@simplycustomer.co.uk),

you've been great!

What could I do better?

What else could I have done?