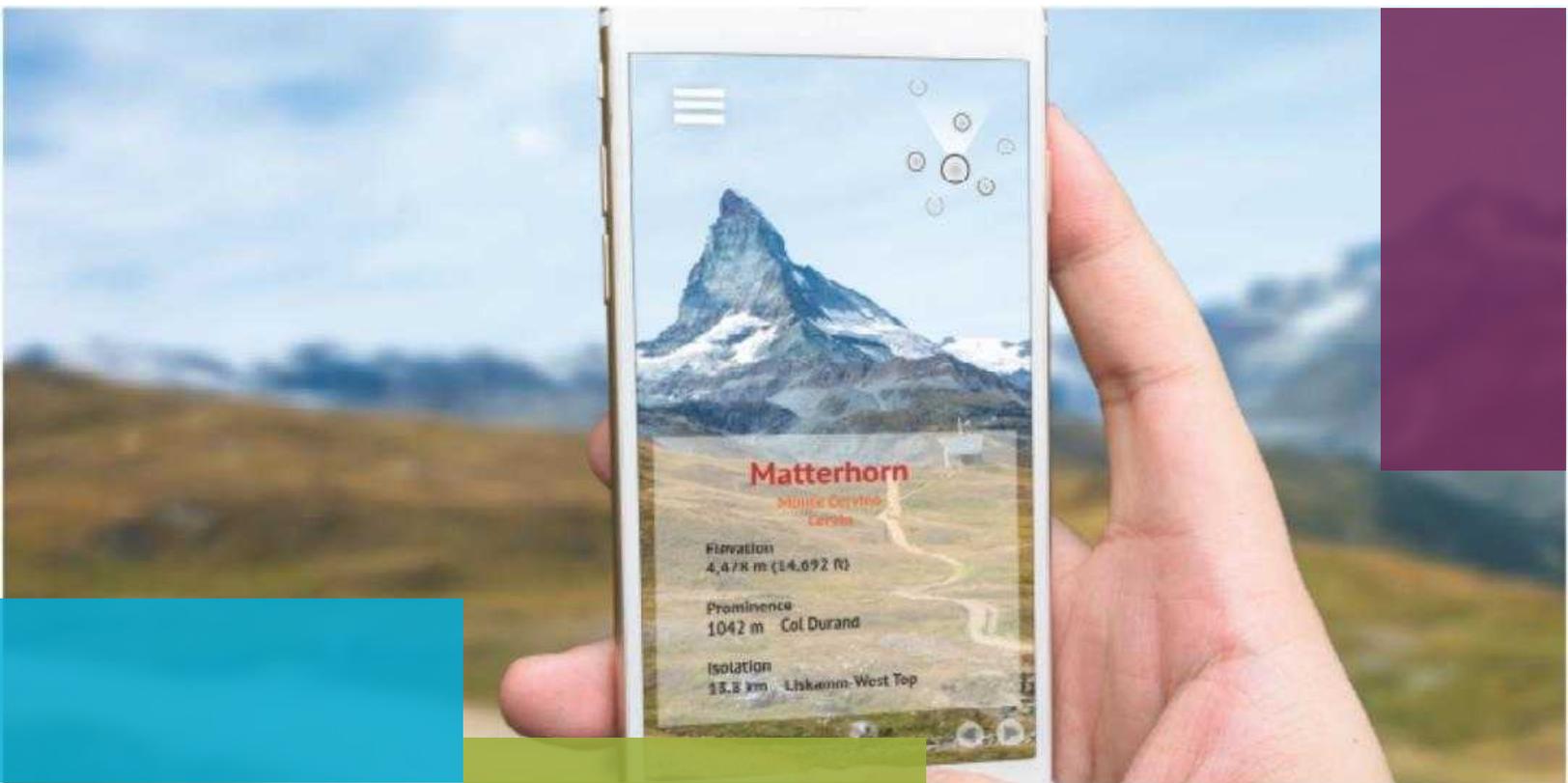


SIX STEPS TO JOURNEY MANAGEMENT



Journey management promises to be one of the best methods an organization can use to optimize its customer experience (CX). It may appear that journey management is a two-step process: (1) build journey maps and (2) manage them. If only it were that simple. There are actually six steps we will explore in this brief, but first, let's revisit the definition of journey management. As defined in *"An Introduction to Journey Mapping, Journey Prioritization, and Journey Management,"* journey management is "an active process used to optimize the journey over time as the organization and customers evolve." Organizations use journey management to reach desired outcomes as it facilitates the discipline of understanding, planning, implementing, and optimizing a portfolio of journey maps to create loyalty through an improved experience.

Journey management helps an organization remain on track as it transitions from the *Current State* experience to the *Future State* experience. It enables an organization to remain on course in its efforts to optimize the journey and the customer experience.

According to organizations successfully using journey management, there are three main elements essential to success:

1. Journey management becomes a routine practice
2. Journey management is used across a portfolio of maps
3. Journey management has a direct link to action

With our six-step process to get from journey visualization to results, connecting journey maps to action plans, within a routine, doesn't have to be daunting.

STEP 1: DEFINE



DEFINE

Build a plan that clearly defines the goals of journey management and secures sponsor support. Explain why journey management is necessary and how it will benefit not only the customer experience but also the organization's bottom line.

Key activities include:

- Creating a charter.
- Assembling the right people, data, and materials.
- Preparing logistics, agenda, and invitations for journey mapping workshops.

The definition phase is paramount to the success of a good journey management program. It is framing the foundation to get the appropriate buy-in from company leadership.

STEP 2: PREPARE



PREPARE

Gather and understand your existing data before engaging the cross-functional team that will map the customer journey. Look for insights in customer types and where they intersect. Preparation accelerates the mapping process and ensures participants have the background materials necessary to successfully map the journey.

Key activities include:

- Analyze the data gathered for channels, distributions, pain points, stories, owners, etc.
- Document customer types (personas) to create a more human, empathic lens to view the journey.
- Create an agenda to guide the journey mapping process.

The PREPARE step helps to keep the journey mapping process on track. Participants are more likely to stay focused when they have all of the data and analysis needed to support decisions about the journey path. Use a general customer type for broad categories, and personas for detailed journeys to create a map with the right perspective.

STEP 3: BUILD



BUILD

This is when the organization actually maps the customer journey from the customer's perspective. Typically, the main stakeholders gather over one or several days to discuss all the steps along the journey. The best journey maps include both rational and emotional elements.

Key activities include:

- Review of the journey mapping process with participants, sharing the agenda.
- Identifying touchpoints along the customer journey and linking or mapping them into customer paths. Many organizations begin with a journey mapping template.

Because customer journeys are not always linear, are often complex and seldom well known across the organization, building a journey map takes time.

STEP 4: VALIDATE



VALIDATE

During the validate step, organizations obtain the customer's perspective on the journey to understand what matters most to the customer and their satisfaction with the company's performance. This information enables the organization to prioritize the journey.

Key activities include:

- Defining the research and validation plan.
- Coordinating the validation logistics.
- Executing the research.
- Analyzing and understanding the results for prioritizing touchpoints in the journey map.

Journey validation can occur through a variety of methods: contextual observations, in-depth interviews, focus groups, and surveys. Each method has advantages and disadvantages, including cost implications. This step is critical to execute before validating assumptions regarding the:

- Touchpoints: does the journey include all of the possible touchpoints?
- Order of touchpoints: does the journey map the touchpoints in the normal order or do customers have their own steps?
- Importance customers assign to the touchpoints: how valuable is each touchpoint to the customer?
- Satisfaction with a company’s performance at each touchpoint: Is this a pain point? Is there room for improvement, or are things working well?

The results of validation research drive action plans. Validation improves stakeholder comfort with resource allocations that investments that will become necessary to support action planning and journey improvements.

STEP 5: COMMIT



COMMIT

Once the journey has been mapped and prioritized, successful organizations generate commitment to improvements across the customer experience through inspiration and action plans.

Key activities include:

- Building a stakeholder assessment.
- Inspiring behavior change with the journey map, storytelling, and validation outcomes.
- Developing stakeholder activation and action plans.

The COMMIT step is where the rubber meets the road. If done properly, a stakeholder assessment will allow the journey mapping team to speak to stakeholders in a style they will understand (emotional and/or rational). The captivating aspects of the journey is brought to life with stories and validation results. These items are followed with a specific request for stakeholders to commit to action plans.

STEP 6: MANAGE



MANAGE

Successful organizations ensure that the journey maps they create are living, breathing tools to help drive change. These organizations develop governance processes and measurements to track improvements across each touchpoint of the customer experience to ensure they occur and are maintained.

Key activities include:

- Creating the governance structure.
- Tracking and reporting KPI progress.
- Prioritizing initiatives, managing resources, and celebrating success.

Journey management is brought full circle with this final and ongoing step. Journey maps are brought into a governance structure to track progress against important KPIs. The governance team is then able to report to leadership answers to four key questions:

1. Are we completing our action plans?
2. Do we see an operational impact?
3. Is customer loyalty improving?
4. Do we see a financial impact?

The six steps to journey management provide a blueprint to improve the success of journey mapping efforts. When organizations make journey management part of their routine, when they tie outcomes to KPI and other metrics and continually assess which touchpoints are in need of improvement and important to customers, journey maps are no longer a point-in-time exercise. They become powerful tools to increase customer loyalty and ultimately profits.

About Peter Haid

Peter Haid is the Chief Product Officer of Touchpoint Dashboard. He has more than 16 years of B2B/B2C experience in the areas of Customer Experience Management (CEM), market research, advisory/consulting services, engineering, operations, M&A, strategic partnerships, performance measurement, and product management. Haid offers insight into real-world action, offering corporations and brands the tools, training and thought leadership they need to become fully customer-centric.

About Touchpoint Dashboard

Touchpoint Dashboard is the world's first and largest SaaS journey management toolkit that allows major brands to evolve from journey mapping visualization to journey management of initiatives. The method we use allows large enterprises to build, discuss, validate, analyze, present, act, and manage all of their customer's journeys from one CX command center.

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