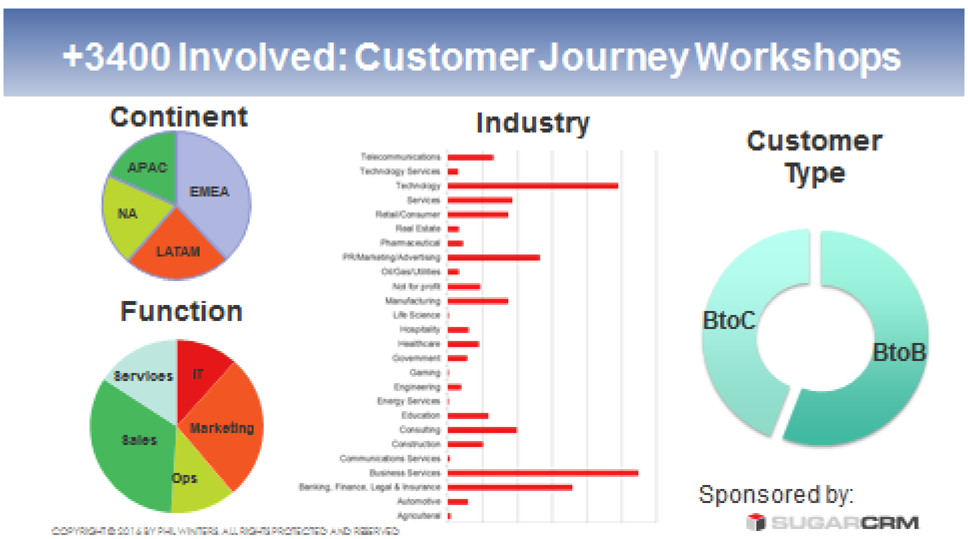
Mapping the Customer Journey – 3,400 Customer Perspectives

Believe it or not, I have 3,400 excuses for not writing a blog post every week these last 18 months!

I was given the unique opportunity to run public workshops on the Customer Journey in five different regions across the globe, for a total of 3,400 participants; working together with those attendees, we created Customer Journey Maps *from their customers' perspectives* – all based on my book, Customer IMPACT Agenda. By the end of my tour, we had done it in eight different languages, and for each participant I analyzed and wrote an assessment of the customer journey maps they had come up with in the workshop, not only providing them (hopefully!) valuable feedback but also netting me a lot of lovely anonymous data. Here's a quick breakdown of the categories those attendees fell into:



As you know me, I dug right into that data and came up with some real nuggets of gold.

Learning 1: BtoB eye-openers

One of the biggest "aha!" moments – not only for me but for all attendees – was that the majority were from BtoB organizations, not BtoC. But why was that such a revelation? Do BtoB organizations care so much more about their customers? No. I actually think that BtoB organizations are just coming a bit later to the table, so they're hungrier right now. Indeed, even among these workshop participants, the folks from consumer-oriented, and particularly from *service-focused* consumer-oriented organizations (including NGOs*[1]), either already understood or more quickly grasped the concept of taking the customer's perspective: they had probably paid more attention to the topic before attending.

But for a BtoB organization, taking the customer's perspective was something very new and – given the anecdotal stories of underperforming sales teams – extremely important. They all reported recent and fundamental changes occurring in the way their customers go about making major decisions. The salesperson was no longer seen as "the one and only touchpoint" but was expected to be involved only *much later in the decision process*, possibly with more specific support and knowledge. Before that point, however, the salesperson was considered by customers as anything ranging from unnecessary to a source of irritation.

Learning 2: Language counts – a lot

The principle of taking the customer's perspective can only be effective if you *use the language your CUSTOMER would use*, not the language of your organization. And when you do this in your native language (whatever that is), you can be far more accurate and descriptive, not only for yourself but for the colleagues who should be proactively using the journey in their day-to-day work.

A great example here came from my workshop with Sands China Ltd., who runs absolutely amazing Casinos and hospitality facilities on the Island of Macau. This is a very international organization, so the management team asked me to run the exercise in English. But to make it truly useful and practical, we knew that it would need to be re-expressed in Chinese, so that every member of staff could understand and internalize it.

Learning 3: The concept of customer decision phases is still hard to grasp, even after a whole-day workshop

Far and away the most common "error" the good people in these workshops made was in confusing the types of components that make up a customer decision journey. Those components include: phases or steps, milestones, touchpoints, occurrences – well, you can just read my book for the complete list. But far and away the most important part to get right is identifying the phases or steps of your customers' journey. And it turns out to be pretty darned difficult if you are on your own (instead of in a team of colleagues), even for very savvy people who understand their businesses.

Learning 4: The aggregate view is very enlightening, even across languages

So, you may ask: Phil, you aren't versed in eight languages, are you? No, just two – human ones, anyway! But I do have access to a great open-source and free text mining software contained in KNIME. I used it to help me not only to translate but to get synonyms for the words that kept popping up regularly, regardless of where the workshops were held, so that I didn't "get it wrong". (Plus, I had native speakers cross-check my results.) I also used KNIME to do data mining on all the data collected. It worked wonderfully.

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[1] Non-Governmental Organization

So how does one compare and contrast 3,400 surveys in eight languages from all those companies? I created a large dictionary with the over 4,000 different words used to describe the phases in a customer journey. I then rated each one: was it a word a customer would actually use, or was it company jargon? Was it short and succinct or too long or even vague? Furthermore, I judged whether the word described:

1. A need or an emotion
2. A touchpoint or channel possibly used during that phase, but not the phase itself
3. Something that an organization would care about, but not a customer
4. A milestone that might indicated an end of a phase, but not the phase itself
5. Something that would forever remain the participant's secret (= I couldn't read/understand it!)

These five categories were then labeled "bad" words, with real customer words (including those too-long ones) were labeled as "good" customer words. I then came up with a relative percentage of "good" words for each journey, regardless of the number of phases or language used. First let's take a close look at the words themselves.

The most common words used that were NOT customer words

Search (or Google) – This is actually a touchpoint and not a phase, because it can be used in so many ways across the entire customer journey. Search for … background information, for news, for vendors, for references, for support, etc. – that's all ok, but without specifying the object of the search you don't really know what your customer *is really doing in that touchpoint*. It's probably the biggest challenge for organizations interested in "digital channels" – they get carried away with all those new and fancy touchpoints. My golden rule? Identify the phases, THEN focus on the touchpoints.

Contact – This term is extremely vague and came up very frequently. You could almost call this a word used EXCLUSIVELY by an organization (and never by a customer); but even then, it was used in so many different ways that it became confusing.

Contract – This is definitely the most-abused organizational word I met, and it's actually a milestone indicating the possible completion of one phase before moving to the next. But be careful, "contract" is simply a word WE LOVE to use internally. The "delivery date", "project start" or "user acceptance" may be far better milestones to describe things from the customer's perspective.

Shortlist – Again, a milestone word that MIGHT be used by the customer, but it actually indicates the ending of a phase and not a phase itself.

Visit, Meeting – All touchpoints used by sales, but not phases in and of themselves. A visit or a meeting (or a phone call or email, etc.) can be used in many different phases. Don't let your internal counting metrics get confused with the customer perspective!

And what about those "good" words that a customer would use?

There were many! For B2B, clearly the best were descriptive words that indicated not only an outward-facing series of activities (that a vendor might be involved in) but also indicated the INTERNAL activities that – particularly for a team working on a complex BtoB procurement process – would be involved in.

Examples include:

Research & Gain Internal Agreement

Compare Vendors & Complete Requirements

Choose Preferred Vendor & Gain Budget Approval

Understanding "The Customer Perspective" – easier for some than others

From the data, you can actually get a good feel for which departments understand the concept of taking the customer perspective. These people usually can create a customer journey map that describes that decision journey pretty accurately. See if you can guess who from the following list were the "best" and "worst" at understanding the customer journey:

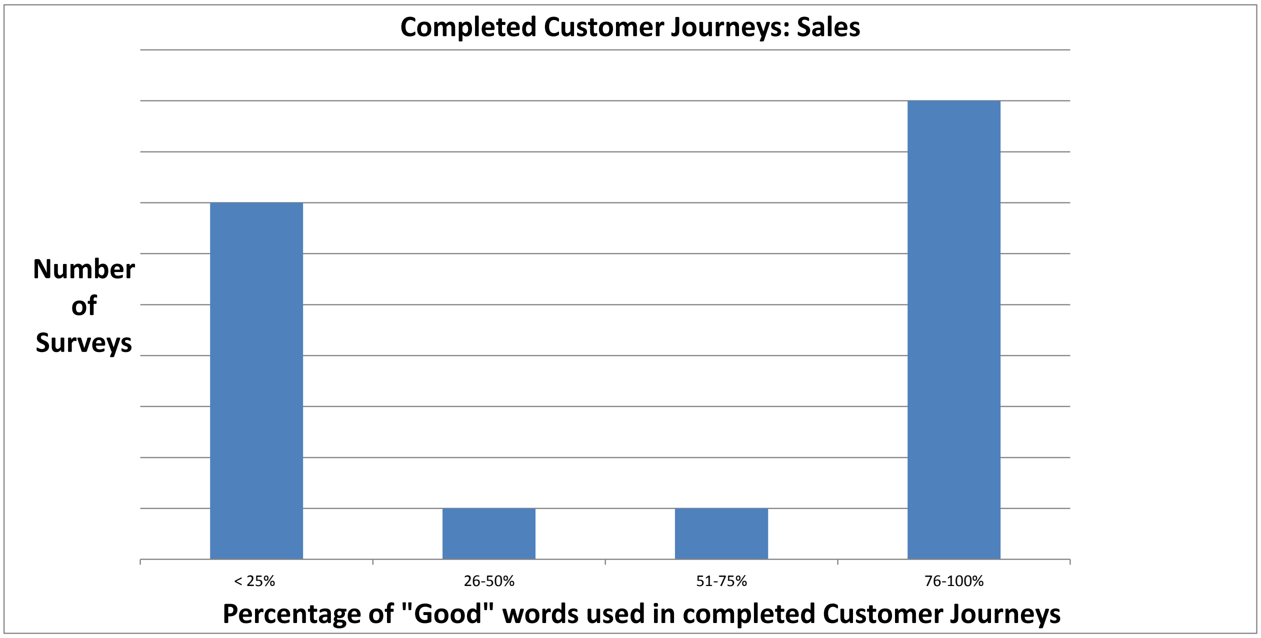
- Sales
- Marketing
- Operations
- Services
- IT

IT, you say? Not true! IT actually did very well, possibly because so many of the people at the workshops had something to do with CRM software. These individuals are already used to being the bridge between business users and IT systems, so they're already well-practiced in stepping into the shoes of their internal clients in the business departments. So it seems the jump from THAT perspective to the customer perspective was fairly natural for them.

Actually IT, Services and Operations all showed about the same level of understanding. All three charts showing degrees of "customer perspective understanding" look almost identical, with just a few struggling and the vast majority "getting it", either partially or actually very well.

The group that had the highest understanding of the customer perspective was Marketing, possibly because they had started to have their own "aha!" experiences with all the digital touchpoints. That and the understanding that those touchpoints can be used in many different ways, depending on where in journey the customer was.

On average, the group that most struggled with the customer perspective was – hold onto your hats – Sales. WHAT? SALES?! The folks RESPONSIBLE for the customer don't understand the customer's own perspective? That would make a very funny joke if it weren't real. Let's take a look at the saggy "good word" results for SALES:



This graph actually deviates significantly from all other groups, and I think it indicates that there are two distinct TYPES of salesperson: you're either a product person and can sell anything (but the customer's buying cycle isn't interesting / understood / relevant: that's you over on the left) or you're a consultative, long-term rep who DOES get it (and understands that it's all about making the customers and their buying processes successful, both now and in the future).

And it's pretty binary. You either get it or you don't; nobody's in the middle. Now, being a product salesperson isn't bad – as a matter of fact, there are certain industries where this is still very necessary. But without knowing about how YOUR customers are making decisions, it would be dangerous to employ the one type when your customers were expecting something else entirely.

This reminds me of a speech I gave at one of the famous conferences on sales and selling. Heads of Sales for over 500 companies were in the room, and as I explained that the customer's buying process is not the same as the selling process, about a third of the audience disagreed. But then, that was the same audience that later went on to say that things were no longer good in sales and it all had to do with bad staff, improper training and incorrect KPIs to ensure success. No mention that possibly – just possibly – the customer had changed the touchpoints they use in the buying process. Fascinating! I wonder where those sales managers are today; probably at yet another company.

The blind men and the elephant

One important aspect that the workshops DID do was open the eyes of the different departments. Sales tended to only know and understand the part of the process between “shortlist” and “contract completed” as milestones. Services understood very well what happened in the later parts of the customer journey, and Marketing spent too much time on the very early stages – in many cases long before the vendor was known by a potential customer.

That’s why, in my book, I emphasize that the best customer journey definitions are created when you have a large cross-departmental group of experienced individuals who all “touch the customers”. Together they can quickly develop a very complete and believable customer journey map by taking the customer’s perspective.

Learning 5: We all share some of the same issues

So what about country or regional differences? North America had had the most experience to date with Customer Journey/Customer Mapping exercises, but in general they were more dissatisfied with the results. In follow-on questions, I learned that this could have been because the majority of methods START with identifying touchpoints – which, of course, we now know can be used in different ways depending on where the customer is in their decision cycle.

To be honest, I didn’t see significant differences between countries and languages. In all the places I held workshops, there were a number of individuals who “got it” and a lot who were still struggling with the concepts.

From an industry perspective, any sector that was feeling extreme pressure from competition or saturated markets was more likely to have been exposed to, or be thinking about, customer journey mapping.

But one thing was clear: ALL BtoB organizations are trying to understand the changing customer buying cycle. This is compounded not only by the huge number of possible touchpoints in use but also by the different individuals involved in the different steps or phases of the cycle. All agreed that looking more closely at those individuals and thinking about how their choice of touchpoints was changing would be a key to reaching, acquiring and keeping new BtoB clients.

In conclusion

As there are now so many touchpoints where a customer could START any given phase, it’s more important than ever that we lead them back to sensible touchpoints from which we can effectively choreograph their interaction with us. The changing role and expectations of the “agent touchpoint” – whether that’s an internal sales organization, an external agent or even a partner company – was of great concern for everyone. Another topic of interest was ensuring that the customer journey exercise actually could be executed and used. These are just two of the reasons I extended the book to cover concrete examples around many kinds of agents, touchpoint choreography and practical implementations.

(If you've already purchased Version 1 of the book via my website, please drop me a line and I'll gladly just forward you the extensions.)

If you're interested in more details on taking the customer perspective and executing around it, then I can recommend the new updated and expanded current edition of my book, now available in both English and German from the website.

As always, I'm interested in your comments, your feedback and your experiences around taking the customer perspective. I'd love to hear from you!

Wishing you the best –
Phil

