

Master Journey Management

The 5 levels of customer journey management explained

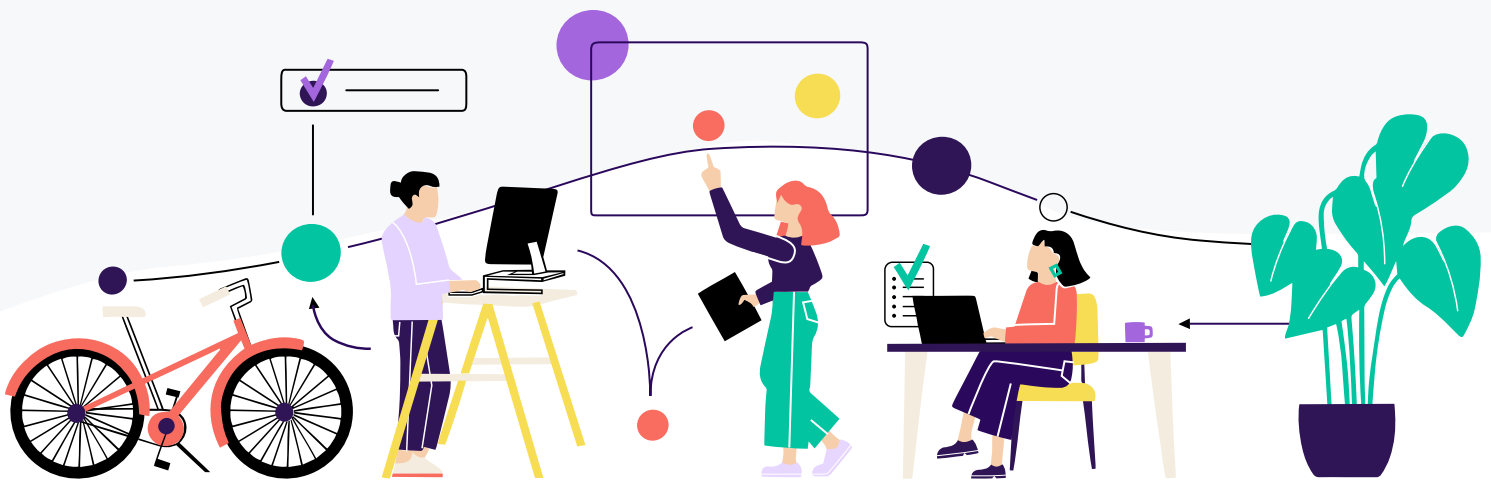


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Introduction

As the business world moves towards a customer-experience driven management style, it has never been more important to deeply understand your customers and their journeys.

When applied correctly, Journey Management will help you understand your customer's entire experience regardless of what part of your business they engage with.

So what is Journey Management?

Journey management is the ongoing practice of researching, measuring, optimizing, and orchestrating a customer journey to improve the customer experience for users and achieve business goals. When observing successful Journey Management workflows across different industries, countries and cultures, we see that three key areas are required amongst all teams:

Deep journey insight

Journey hierarchy

Customer-centric prioritisation



As the late Clayton Christen famously said:

“Your customer hires your product or service to do a job for them. Your product is not defining the journey; it’s the customer journey defining where your product or service fits in.”

Mastering Journey Management means mastering empathising with your customers while prioritising the opportunities that fit your business goals.

In this eBook, we lay out a step-by-step approach to achieve Journey Mastery in all three key areas. Before we start, we need to assess at what level you begin; this is called your Journey Management Maturity.

The five levels of Journey Management



Chapter

01



The maturity model explained

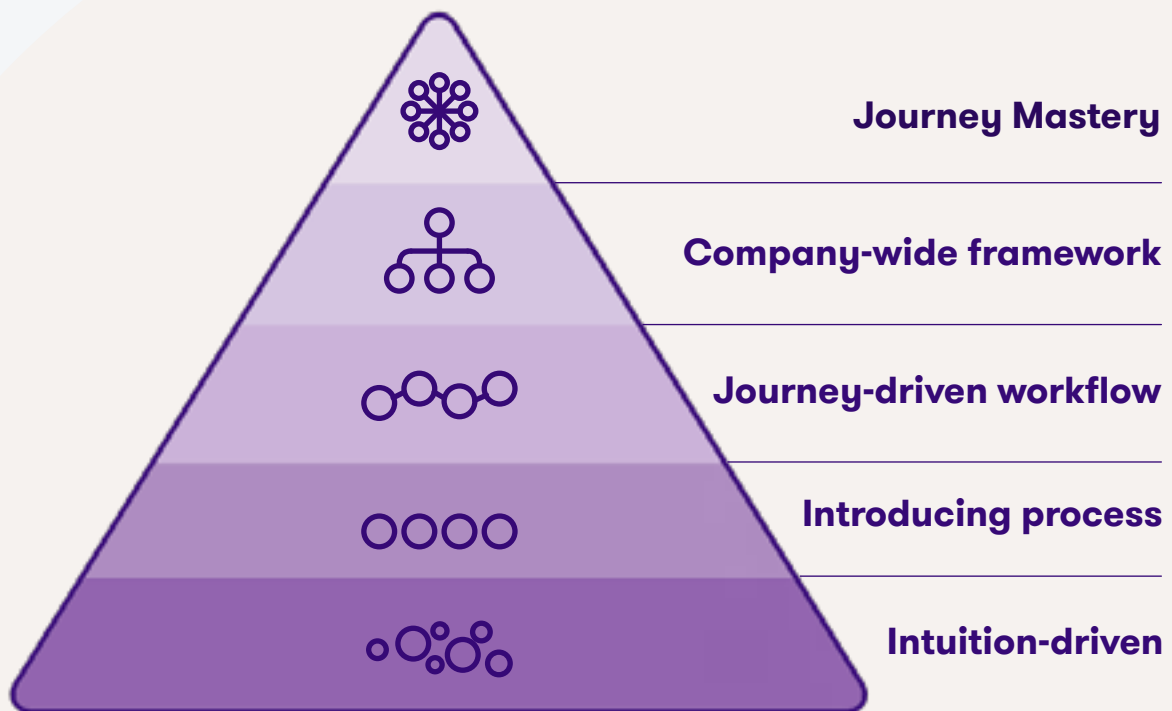


Customer Experience is not just a boardroom strategy; it's a way of working that ties back into having a deep understanding of all your customer journeys, knowing how they are connected, and prioritising the right opportunities across your product and service ecosystem.

Working with many organisations around the world, speaking to hundreds of managers and seeing thousands of journeys, we see most organisations transform towards Journey Mastery by completing five maturity stages. As teams progress through each maturity level, their way of working becomes more sophisticated and increasingly aligned with their customer needs. Typically the five maturity levels are independent of the age or size of the organisation. Though it's unlikely, we've seen startups reach the highest maturity level, while a few enterprises may find themselves performing at the lowest levels.

Regardless of what level you are at, we believe this book will help you and your team to excel in journey management. Our step-by-step process will guide you in making better decisions, faster.

The maturity model explained



→ To find out what maturity level your organisation is at, take our [free assessment](#) here.

LEVEL 1

Intuition-driven: life without a framework



Meet Christina, a CX lead on a mission to make her company more customer-centric.

Christina quickly realises that there's a big disconnect between her company's data-driven culture of measuring NPS and other KPI's and the agile delivery team's process-oriented delivery machine. To get buy-in and traction, she asks Sergio, the most experienced service designer in her team, for help...

They quickly realise that they need to host a lot of internal meetings to get alignment within the organisation when it comes to what to do next and why.

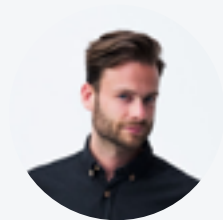
To lead by example and show progress, Christina pushes forward. She green-lights a few projects based on intuition and addresses the most urgent customer-centric KPIs. These KPIs have identified customer pains, but nobody really knows why they are there in the first place. Although most people have opinions about their existence, it seems to be impossible to reach an agreement as to why the pains are there.

Without a clear journey framework, it is hard to align around one truth. This often leads to people acting on intuition rather than facts, making them run in different directions, solving isolated and fragmented problems.

Christina and Sergio give the brief to Yuri, the lead researcher, to identify the core reason behind why the customer pains are there.

Yuri finds this helpful, as he normally gets scattered requests from stakeholders asking him to map journeys and do research for a range of projects.

“Without a clear journey framework, it is hard to align around one truth.”



Jochem van der Veer

Co-founder, CEO of TheyDo

LEVEL 2

Introducing process: structurally mapping the ‘why’

The team has had some small successes in improving the customer experience based on gaining deep customer insight from Yuri’s research. They’re not relying solely on big data and people are beginning to pay attention to the reason behind why things happen.

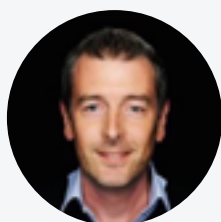
Sergio has done some great work in structuring all the essential customer journeys and for the first time, Christina is able to get some overview of the entire customer experience.

When presenting her findings to company stakeholders she begins to get requests to map their journeys, too, with the caveat that, “Our customers are different than yours”. Everyone seems to have a different definition of who ‘their customer’ is, and how to segment all customers into groups.

Journeys are hard to share and complex to understand, especially if you weren't involved in the research. As a result, Christina still struggles to get 'the business' to understand what her customer-centric strategy is about – let alone have everyone agree on who the customers are and what they need.

Christina is advocating to scale journey insights across the organisation, but she struggles with making them accessible and easy to understand. Slowly the realisation sinks in that 'something' is needed to manage all these journeys. Together with Sergio she begins to look into solutions to help them manage and structure their journeys so they can scale working with journeys across their organisation.

“We avoid a lot of opinions when our journeys are based on real customer insights.”



Jasper van Heusden
Strategy at E+

LEVEL 3

Journey driven workflow: the first real signs of alignment

Time progresses and Yuri and his team spend more and more time listening to customers and mapping out the entire customer experience, one journey at a time.

Thanks to Christina and Sergio he now can document all journeys in a system that enables all stakeholders to get access to the customer truth. More people ask to get trained in interview techniques and begin adding their gathered insights to the existing journeys in the system.

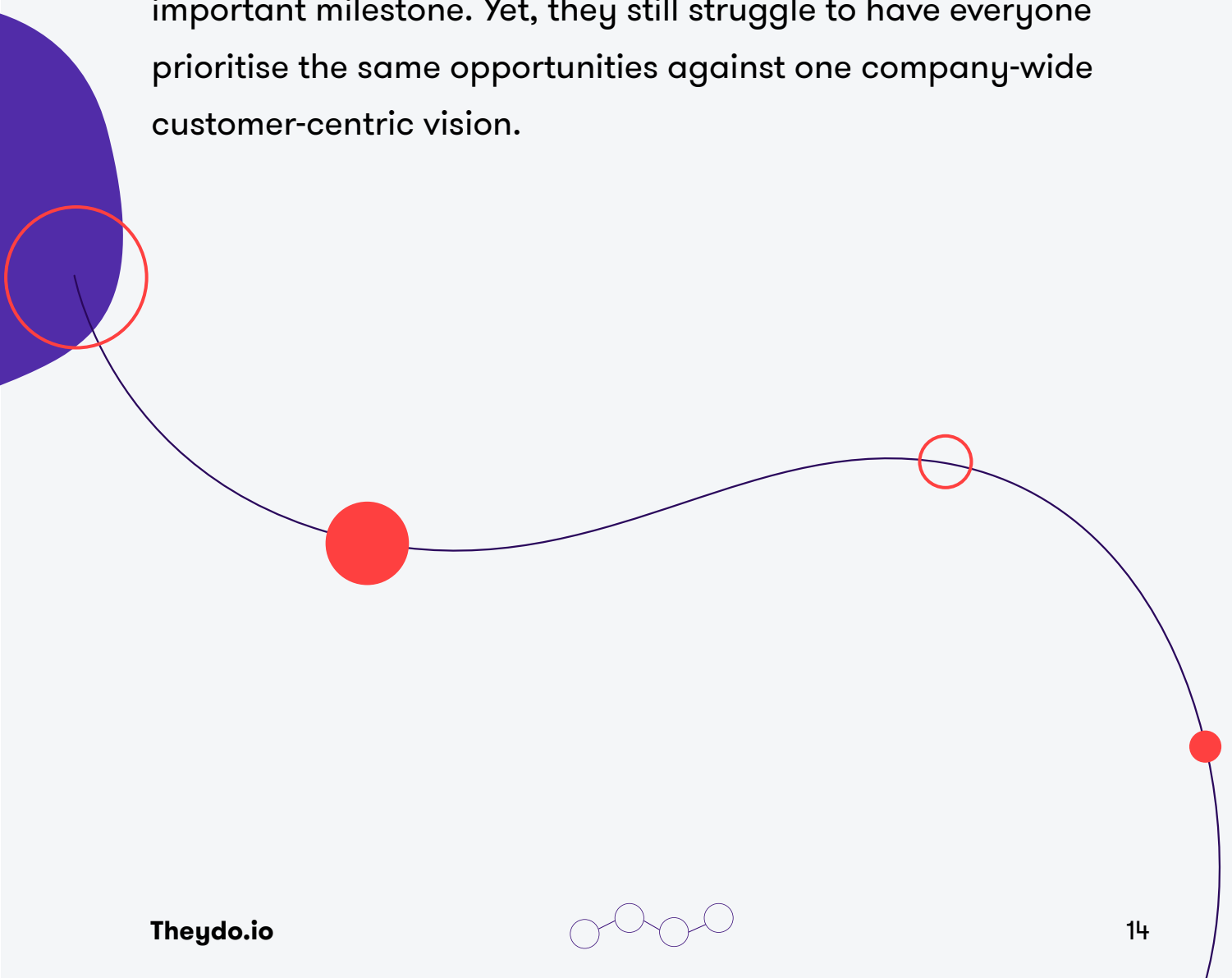
Over time, more people are trained in working customer-centric. Step by step, running customer-centric projects is becoming a standard method.

Internal meetings flow easier when Christina pulls up the company's journey overview, helping everyone to navigate complex stakeholder questions.

It becomes obvious that CX metrics are great pain indicators, and supported by customer journeys everyone is able to reveal the truth about why customers do what they do. Guided by big data metrics and the customer's voice, everyone is beginning to get aligned around what the customer needs.

Now, finally, stakeholders feel the urge to align their roadmap with customer needs. However, having a journey dashboard is one thing, while discouraging every department to jump into solution-mode is another.

With the journey framework in place, the team has reached an important milestone. Yet, they still struggle to have everyone prioritise the same opportunities against one company-wide customer-centric vision.



LEVEL 4

Company-wide framework and the beginning of 'future' states

With the new journey framework everyone can align on how to solve their customer's needs.

Different teams can focus on their own customer-centric projects, and any insights that are captured can be fed into the company-wide journey framework. When used correctly the journey framework reveals all customer pains and needs. This gives the teams an overview of what opportunities to work on and how to prioritise the workload across departments.

The aim is to have everyone aligned on which opportunities are being addressed. When everyone is working with the same framework it becomes easy to maintain and update all journeys in a consistent way.

This allows Yuri and his team to work with future states of journeys, thinking ahead and helping the organisation to plan forward rather than react to short term events.

**“Our Journey Framework
enables us to align our
understanding of our partners
and reveal what to do next
and why.”**



Marloes Bos

B2B Marketing Lead Bol.com

Using the journey framework, everyone can manage journeys and opportunities to see which solutions are currently being validated and implemented across all verticals.

This overview removes a lot of double work and prevents project overlaps. Thanks to the overview framework, Christina has gained trust in the organisation. She's now inviting BI teams and data experts to align their metrics with her journey framework.

With all the data in one place, the agile teams are able to align their epics and tasks with the opportunities. The Journey Framework is turning into a Journey Management.

Some product owners even practice two-way sync, to let everyone know how their solution deployments are progressing. Delivering a great customer experience begins to feel like a shared mission across the company.

From sales to marketing and product to customer success, everyone seems to be on the same page when it comes to the customer experience. And the best outcome is that big data shows that the customer experiences improvements across their entire journey.

LEVEL 5

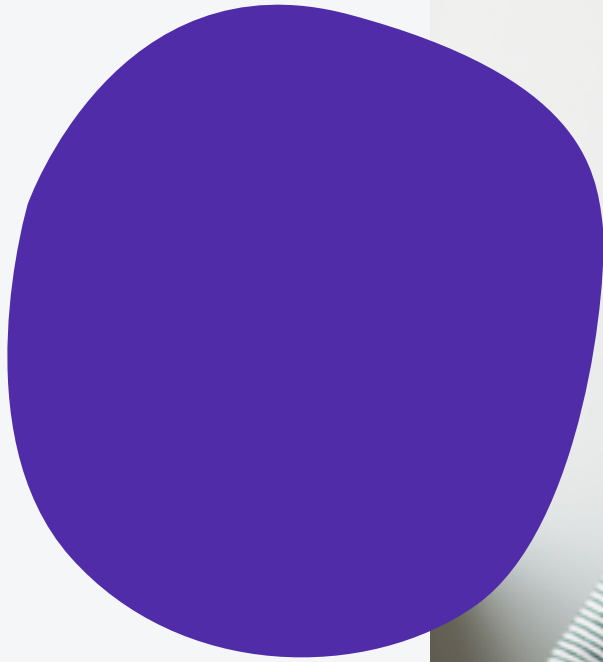
Journey Mastery

As time progresses Christina and Sergio begin to meet with their C-level executives on a regular basis.

They report identified opportunities using the journey framework system and can easily show where things are going great and where work needs to be done. Christina is confident about the overall company strategy and Yuri knows exactly what to do next and why.

The executive team, on the other hand, see revenue increase month over month and frequently receive delegations from companies from different industries to share the way they work. All their coordinated efforts to deliver excellent experiences across every touchpoint begin to pay off.

Their CX metrics soar, and so does their customer base. More and more customers become brand ambassadors. It's all the amazing result of hard work, persistence and dedication, if you ask Christina. As a result the executive team is experiencing how others are now seeing their company as a benchmark for how to steer their strategic and operational decisions based on a company-wide Journey Management Framework.



“Christina can proudly look back and say that her company is now practicing Journey Management vertically and horizontally – an amazing result of hard work, persistence and dedication.”

**“The key is standardisation
and creating transparency
across teams”**



Selma Loor

Global Sr. CX Marketeer
Webfleet Solutions

→ Do the test

(Journey Management Maturity Test)

What Journey Management looks like in practice:

Company leadership is able to create and maintain a long-term strategy everyone agrees with, including the customer.

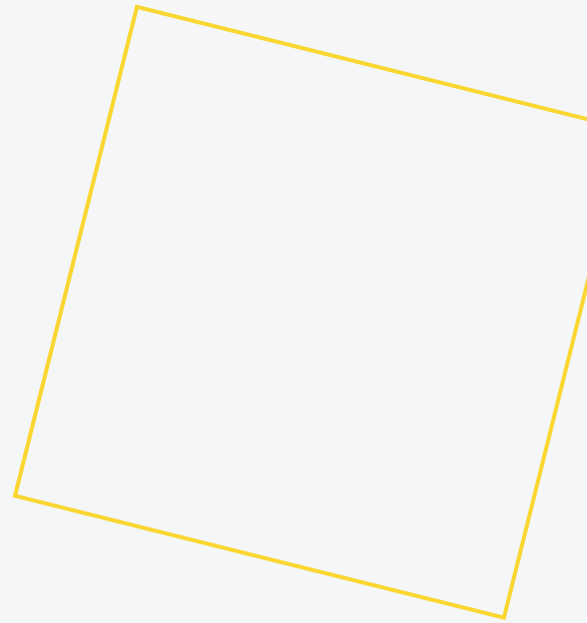
Sales and marketing are aligned on who the customer is and more importantly, how to address their needs. It's easy to find people who agree with the company and helping them to buy is something everyone knows how to do.

Research now drives all project decisions, and customer insights become available to everyone instantly through a shared living repository connected visually with a system of journeys.

Product teams are able to align and prioritise their roadmap against customer-centric opportunities identified in the journey management system.



A 3-step plan towards Journey Mastery



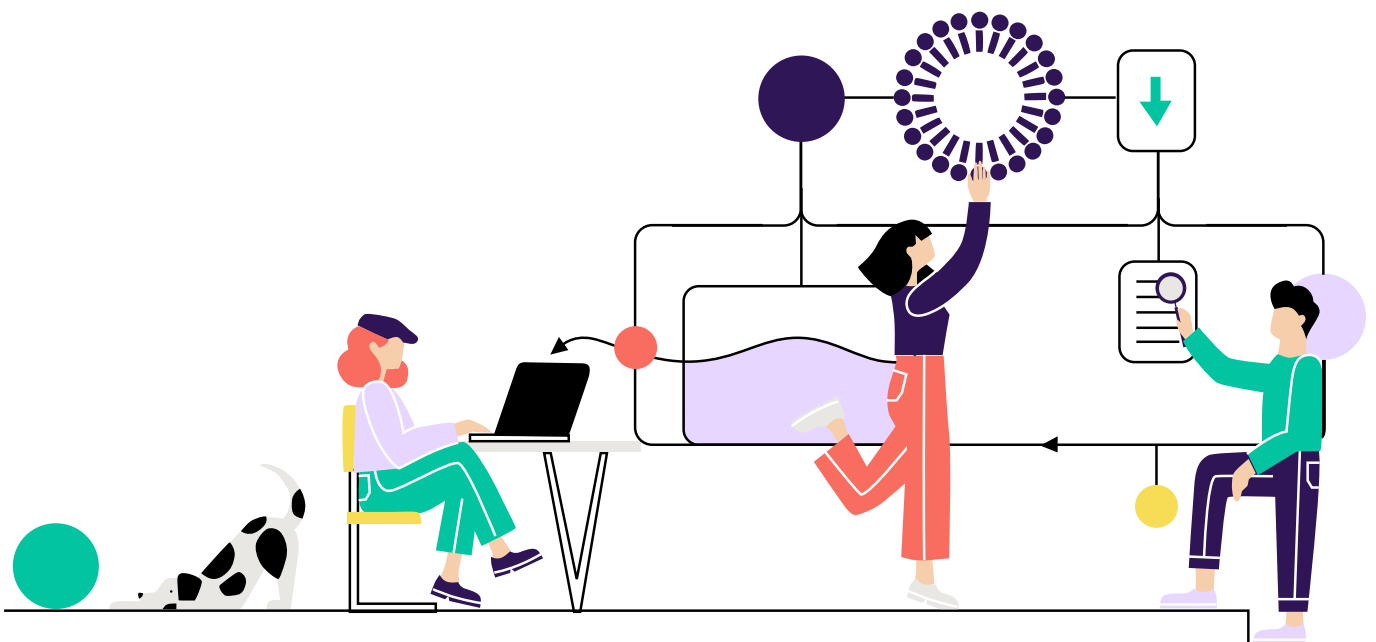
Chapter

02

STEP 1

Gaining deep journey insight

You can never have enough qualitative insights. Executives still think that collecting qualitative insights is a time-consuming effort. With remote work tools now at everyone's disposal, it's actually easier than ever. To foster a culture of talking to customers, we developed a Customer Insights Accelerator that helps your team capture and structure the most vital insights, fast. If you don't have an established research practice yet, [enrol in this founder-led course here for free.](#)



Here's how CX teams can start gathering and using customer insights

1. Audit all existing user and customer inputs.

Consider previous research reports, customer feedback, research and sales deal flow. Start organising insights into journeys from there, using need-based profiles as your customer persona.

2. Create processes to align your findings with customer-facing teams such as support, sales and marketing.

You need to continuously share and compare customer insights across the entire customer journey.

3. Set up a few basic processes around journey mapping.

Make templates and train people in basic mapping and research methods. This is essential as it'll help you work and use customer journeys and personas across all business verticals.

4. Motivate everyone to talk to customers – not just your team but also the intern and the product managers.

Nothing beats the power of getting direct feedback. If people are hesitant to talk to customers, record your encounters so they can experience them asynchronously.

STEP 2

Create a Journey framework

Have one company-wide hierarchy of journeys that add up to one universal customer truth. This truth can be based on many customer experiences. Together, it forms your very own ecosystem of customer journeys, products and services.

In your journey framework, capture the reason why customers hire your products and/or services to do a job. Equally, map their customer experience across the entire value chain.

Alongside the current experience, try to identify what the customer experience should look like 3-5 years from now. Map this ideal customer experience in future journeys. The delta between the current and the future experience becomes a great opportunity framework.

The best way to identify the current experience is to look at the current customer lifecycle. It often helps to design a macro-journey, depicting the big picture customer experience through stages of the customer lifecycle.



These questions will help you create a skeleton of stages for all your journeys:

What do people do before becoming a customer?

You're looking for the triggers that start moving people. A great place to start is asking existing customers if they remember when they first started to think about finding a solution or switching to your service.

Why do people become customers?

This is often a unique element of your product or service. Sometimes it's price, sometimes it's just a happy accident – in all cases there is a reason people buy your product. What is the job they are trying to do? Once you know, you'll have a better understanding of the customer journey this job is a part of and can identify the key journeys to optimise.



What do people do when they are a customer?

Let's do a short experiment looking at all of the different journeys your credit card is a part of. You probably can think of a lot. For example: paying a bill, booking a holiday, checking your balance to see if you can buy this amazing new pair of shoes, and so on. For a company that issues cards, all these small journeys are relevant to understand what customers need.

What do people do when they stop being a customer?

Looking at why people leave is a great place to find information for which to optimise. What's the best place to start digging? Customer Support. Ask them about cancellations, returns and specifically about the common reasons customers abandon ship.



Tip: turn the answers into stages of the lifecycle.

[See the example here.](#)

STEP 3

Enable customer-centric prioritisation

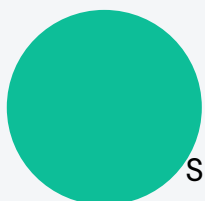
When making decisions around customer needs, try to have clear and measurable strategic business goals in place.

When you merge both customer needs with business goals you can make powerful priorities that everyone can agree with, including your customers.

Here are 6 ways we see organisations thrive when it comes to decision-making:

1. Establish a clear process for capturing insights across products and services using consistent customer journeys everyone can understand.

2. Open the journey management system for everyone in the business, not necessarily to edit but to align against.
Let them browse around and adapt the overall customer experience that is the bigger picture.



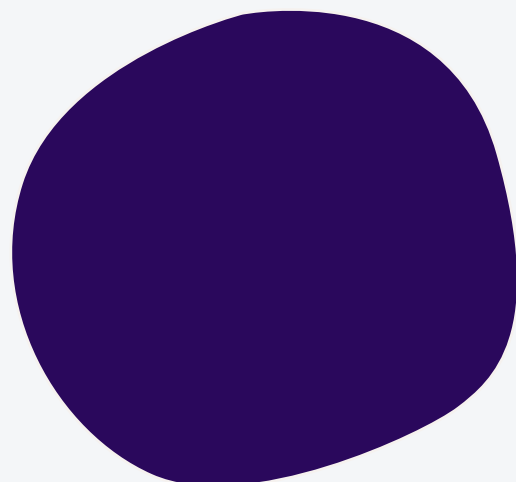


3. Set regular prioritisation meetings where stakeholders are involved to refine the customer-centric opportunities in your ecosystem.

4. Make it a habit to present the journey framework at company-wide meetings and always show why projects are initiated both from the business and customer perspective.

5. Encourage team leaders to connect with other teams through the use of journeys. This way they will make decisions across their verticals.

6. Expose everyone in your organisation to customers. Talk to them directly or indirectly, allowing others to listen in and to see why people do what they do.



**“Shortening the sales cycle
thanks to customer-centric
prioritisation means winning
back about 40% of valuable
time a month.”**



Jeroen Nas
Founder VEMT



Next Steps

Journey Management is a method to focus on the right opportunity for the right reasons. When you achieve Journey Mastery, your Journey Framework and way of working can scale across the entire organisation.

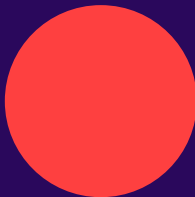
To see where you stand, here are a few checkpoints:

- If you have great customer insights and a journey framework, but a prioritisation model is not in place, you lack execution capacity. Talk to your team about how to rank and prioritise opportunities.
- If you have a journey framework empowering you to prioritise what to do next, but you lack customer insights and validation for new ideas, you are still working ‘inside-out’ and not ‘outside-in’. Time to bring in your customers! 
- If you have a method to prioritise opportunities and have gained deep customer insight but lack a journey framework, then you lack overview of what’s going on. Next action? Design your journey hierarchy. 



Are you creating a business case for Journey Management?

Use these tips to get started in your first month:



But first things first:

Define what level of maturity your organisation should reach within a defined time period. Be specific. Identify how you'll get there, who is sponsoring the process, what dedicated teams will be involved and own the project, and what tools to use, etc.

When you have a feel for what you want to achieve:

Assign dedicated people motivated to work together as a multidisciplinary team. The team's task will be to apply Journey Management as their main way of working and solving problems. Together with the team, identify a clearly defined project, including a deadline, to use as a Journey Management pilot.

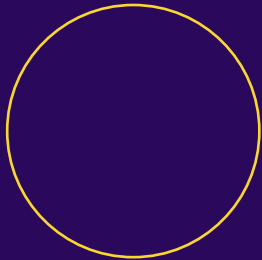


1. Set a reasonable goal.

Based on readily available insights, discuss which journey is the easiest to start with, and assess how you could improve the most important business metrics that contribute to a short-term business goal. Remember: at this point we want to focus on getting from insight to opportunity to solution, fast. Commit to a reasonable change to a KPI that you know will impress stakeholders, sponsors and management or board members. Be realistic.

2. Map your heart out.

Get the customer's perspective on the identified opportunity you've decided to solve. Get out and map journeys, talk to customers who are directly or indirectly impacted by the pilot project. In your journeys, validate if your assumptions were correct or if they need to be adjusted based on the captured insights.



3. Define and prioritise opportunities.

Based on identified customer needs and business objectives, identify opportunities and how to entirely or partly solve your pilot project. Prioritise opportunities by choosing ones that can drive maximum customer and business impact with the least amount of effort. This is the moment where you will have to choose between what's both good for business and experience, i.e. the customer.

Try to really put the persona front and centre and use it as a neutral ground and let team members speak as if they were that persona.

4. Ideate and validate solutions.



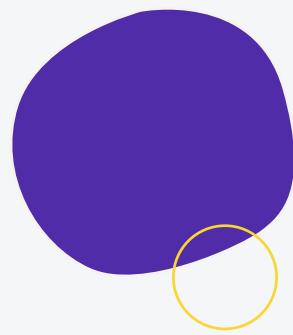
When you know what opportunity to focus on, you use your multidisciplinary team to come up with the best possible ways of solving your opportunity. A tip is to include your customers in the ideation process to validate any ideas as early as possible. Only keep ideas that will drive customer value and have positive business impact, according to your customers. Only continue with building and implementing validated solutions. Focus on achieving small successes rather than grand and complex results. Less is more.

5. Demo the outcome and repeat.

When your team has a tangible result of partly or entirely addressing your pilot project, demo the process of getting there and the outcome to your organisation and key stakeholders. Why not let the customer themselves tell everyone why they're so happy with the outcome? Learn from your achievements and inspire more teams to join this workflow when the second round begins. Now, repeat.



Some final encouragements



As a CX professional, you are more than capable of undertaking these steps in a short amount of time. Do not overcomplicate things; start simplifying by creating a Journey Management overview, one step at a time.

With the right sponsor there are no impediments, only a lack of insights that will bring you closer to your customer, as long as you have the willingness to push through and ask questions with the intent of creating an even greater experience.

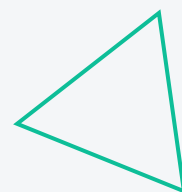
Our team is here to help. We try our best to make TheyDo as intuitive as possible.. You can schedule a demo or reach out via [this page](#) to get personal help from our founder.



We hope this eBook was useful in accelerating your journey towards becoming an experience-led organisation.

If it's anything less than that, please let us know!
We're here to help.

Team TheyDo



Good Luck and Happy Mapping Management.



Journey Management starts here

www.theydo.io

