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Successful Customer Journey Mapping - a five-step programme

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Transforming conversion and retention

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- Efficient customer journeys are a basic requirement for sales success:
 - Doubling online sales for one company
 - Increasing sales across all channels by 15% for another major UK Financial Services brand
- Moreover, there are few things more powerful for building lasting loyalty than creating ***distinct***, positive customer experiences that reflect a brand's promise

Few companies have a clear plan

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- How do you:
 - Understand the journeys customers make?
 - Quantify the realistic benefit from improving journeys?
 - Systematically improve performance?
- This step-by-step guide focuses on how you can:
 - Map, quantify and improve the journeys your customers make
 - Quantify the way people move from enquiry to purchase, how they move between channels and, most importantly, **where they drop out of the sales funnel**

A five-stage process

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Set up

Executive Director sponsor identified

Management Board buy into initial cross-functional exploration

Cross functional team created

Kick-off workshop. Set expectations, describe process.

Map

Identify channels and key individuals

Workshops to map touch points

Collect existing MI

Identify and collect missing MI

Draw maps with numbers

Sense check results

Create a Customer Journey dashboard

Size the prize

Identify drop out hot-spots

Quantify opportunity cost (using actual conversion rates)

Explore route causes for drop out

Customer research to add the human perspective

Present Map and hot spots to cross functional group

Design

Straw man hot spot strategies

- Communications
- Process & IT
- Staff training
- Cross functional alignment

Workshops to develop ideal touch-points and prioritise changes

Act & embed

Management board support for long-term programme

Performance targets set

Identify project champions

Develop business cases to meet target

Implement changes

Review and revise

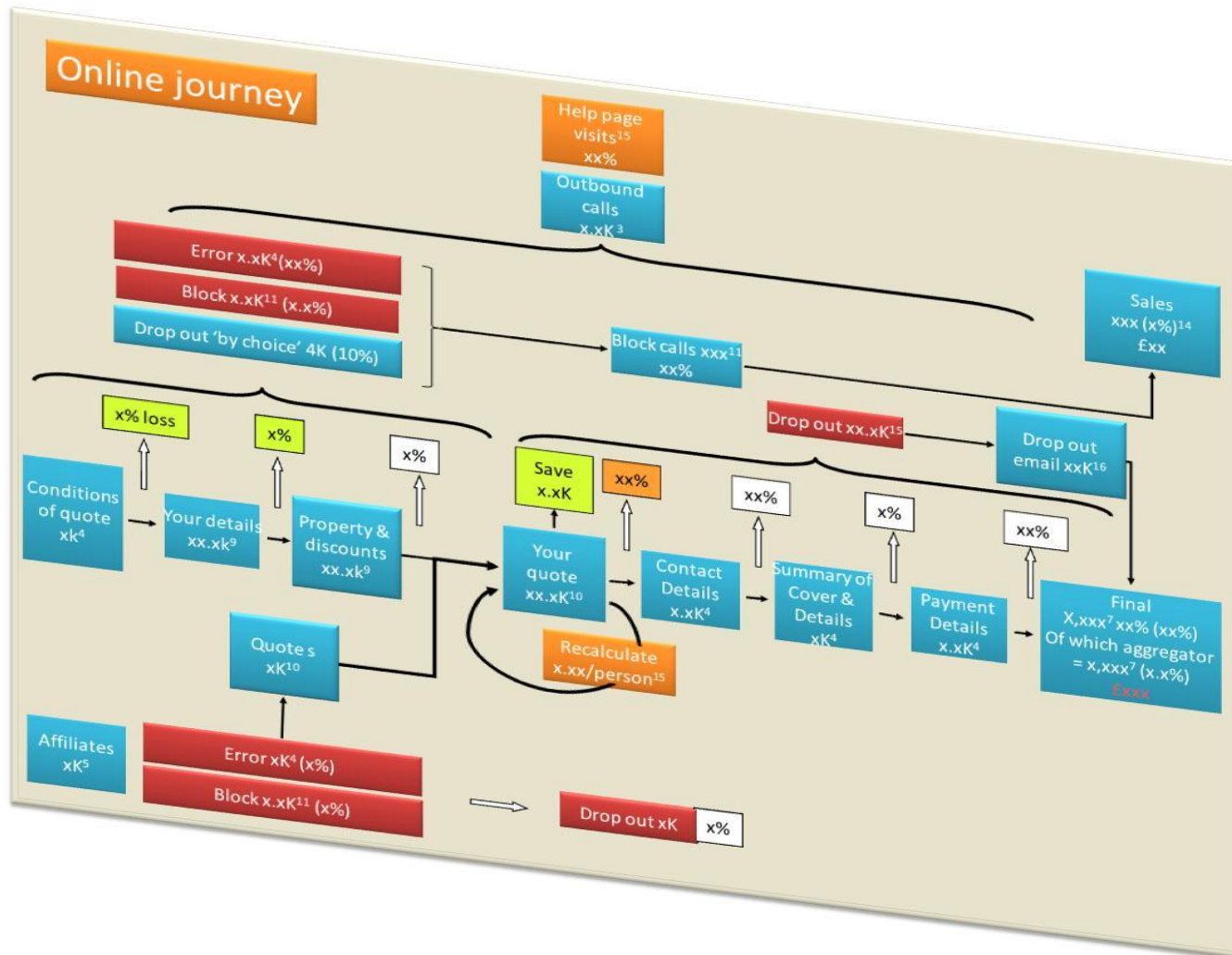
1. Set up

- Customer journeys cut across functions and a successful project design must cater for this
- The first requirement is of course a senior sponsor, so is informed support from the board
 - Access to MI and co-opting managers from across the business will meet resistance without it
 - Internal time costs at the ‘Act & embed’ phase rise sharply making board support necessary if the project is to make the change programme shortlist

2. Map

- MI and knowledge scattered across the business must be collated, distilled and calibrated
 - Businesses usually have sufficient data although it must usually be calibrated to create a common basis; ideally customer volume
- Now is also the time to specify a customer journey dashboard to enable ongoing monitoring

A typical map



3. Size of the prize

- Mapping enables the opportunity cost of drop out hot-spots to be quantified
- Reasons for hot spots can be explored through workshops and, ideally, qualitative research
 - Recording the authentic customer voice creates insight into what the customer journey *feels* like and can galvanise change across the business
- These simple maps provide a focus for Operations, Marketing and Finance to align efforts and overcome functional divides

4. Design

- At this stage the company needs to take increasing ownership of the customer journey.
- Potential hot-spot solutions are needed that span changes to:
 - Communications
 - Process or IT
 - Staff training
 - and cross-functional alignment
- Evaluating the impact and the difficulty of different options helps prioritise activity.

5. Act & embed

- Programmes must be incorporated into existing change management processes; targets need to be set and responsibility allocated across functions.
- The benefits of a single project can be high:
 - An Insurance Client identified a range of short and longer term changes able to deliver 15% growth pa
 - Another Client made simple changes to the web and call centre interplay, online sales doubled
- This programme helps a company to reshape itself around its customers. A CJ dashboard and regular review cycle make the approach BAU

Lets talk about your challenges

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- I'd welcome the chance to hear about your experiences or to discuss your challenges in more depth.
 - Email me on: martin@martinwrightassociates.co.uk
 - Call me on: +44 (7860) 633235 or +44 (1225) 336977
- If appropriate I'll respond with a free, no obligation analysis of your options and what I would do were I in your position.
- I will be happy to share my experiences; what worked well and what didn't work at all.
- I enjoy what I do and it would be a pleasure to meet you. I look forward to talking soon.

