Customer Journeys and Journey Maps: AN EXCITING CONCEPT FOR INTELLIGENCE TEAMS AND TRADE SHOW INTELLIGENCE

by Jonathan Calof, PhD, and Jana Sedivy
Customer Journey is an exciting new concept that is attracting a lot of attention. A recent webinar on it given by Jana Sedivy (one of this article’s authors) in December 2015 had over 500 attendees, IBM recently put two papers out about it (IBM Silverpop, 2015 and IBM 2015) and even Harvard Business Review has had a focus on it (Edelman and Singer, 2015). Consulting firm McKinsey has spent more than six years studying consumers’ decision journeys. IBM in their study on it reported that companies they looked at were planning to increase spending across every stage of the journey by an average of 50% over the next two years (IBM 2015).

What is a customer journey? IBM Silverpop summed it up best with the following definition “A customer journey (or buyer journey) encompasses all the steps users, prospects or customers go through in engaging with a company as they consider a product or service and then become users of these products and services.” All of these interactions make up the Customer Journey, and the visual representation of is called a Customer Journey Map. Proper development of the customer journey map and then management of the customer journey (the entire experience) has been linked with “enhanced customer and employee satisfaction, reduced churn, increased revenue, lowered costs, improved organizational collaboration and competitive advantage” (Rawson et al 2013). It’s no wonder that as mentioned earlier IBM found that companies are significantly increasing investment in all aspects of the journey.

The intelligence opportunities inherent in the customer journey are significant. By definition this is about understanding an important aspect of your external environment (the customer) and everything they do in both becoming a customer and what they do when they are a customer. It’s about making recommendations to the organization on what to do to enhance the journey both in terms of changes inside the organizations (all the touchpoints) and managing information and opinion that can impact the company’s brand from outside the organization (this will be described in more detail later). These are definitely intelligence related challenges. Further, trade shows and other events provide great opportunities to collect the information needed to develop, enhance and validate the map given that these are places where customers, both existing and potential are in attendance in great numbers and as mentioned in earlier columns, places where these people are eager to talk about their needs, experiences and concerns.

DETAILS ABOUT CUSTOMER JOURNEYS

This article has started with an overview on customer journeys. To help intelligence professionals better plan the intelligence needs around understanding and mapping it a more detailed description of the journey is provided here. The starting point in mapping the journey is to understand that there are several different phases in the journey that need to be understood and mapped.

Experiencing a problem/looking for an opportunity

People buy products or services because they have a problem, and they believe that investing in a product or service will fix it. They also look for new products or services as they are looking for opportunities or expanding their operations. Understanding what triggers the search for a solution is essential to understanding what drives purchasing decisions. The first phase therefore that customer journey mappers look for is understanding what signs to look for that would indicate that customers (current or potential) are going to be looking for solutions. It’s about knowing what the client wants before they have articulated the need. Intelligence professionals seek to know about customers’ needs before they put out a request for a proposal, before it’s articulated. Therefore, understanding and mapping the first phase of the customer journey can be key in getting a head start on the competition.

At trade shows it’s about eliciting from customers or potential customers about their future plans. Last year one of the authors was at a trade show looking at future equipment developments to identify potential acquisitions 5-10 years down the road.
Looking for a solution to the problem/opportunity

Although the specifics will vary by industry and product, every purchasing decision begins with a “let's see what's out there” step.

In this step, customers will often encounter their first touchpoints with your organization. They will visit your website, download some whitepapers, make inquiries at a trade show, talk to sales reps, and notice you on social media. In many business-to-business ecosystems, a key part of this step involves customers inquiring within their professional network of colleagues, which means that creating customer advocates will play an important role in getting on the radar for your potential customers. In business-to-consumer industries, advertising and social media might play a more prominent role.

What are the signs that customers or potential customers are looking for new products/services? They are visiting different parts of your website that they normally do not visit. They are asking you questions indicative of looking for a solution (both of these are where analytics would be most helpful). But they are also talking to others outside your organization, examining or participating in social media conversations about acquisitions. For example, the Chief Technology Officer (CTO) of a leading mobile phone company, looking at acquiring new equipment (in the hundred million dollar range), talked to one of this article’s authors about conversations they had with CTOs of other mobile phone companies around the world on their experiences with the particular telecommunication equipment vendor.

Trade shows once again are a great place both for identifying customers and potential customers looking for a solution to the problem/opportunity and learning more about the steps they are going through and also for talking to the experts/friends they talk to (and who write in social media) about what they are saying about you and your competitors.
Onboarding

Once the customer has made the decision to purchase your product, they go through another series of touchpoints to make the purchase, receive it, and then integrate/use it within their organization. These touchpoints involve things like sales people, online shopping carts, and/or accounts payable. It can involve shipping and quality control when received (and the frustration when the wrong item is received or the wrong quality). Customers also go through an onboarding process which, for complex technical products, can involve installation, testing, training and so forth. For consumer products, the onboarding process is usually brief but not less important, because this is where critical impressions can be made.

The onboarding touch points involve interaction by the customer with various parts of the organization meaning that for the intelligence professional there are numerous sources within the company that can provide you with information and insight into customer reactions to the onboarding process. At trade shows your customers can tell you about their experience with your organization’s onboarding process as well as their experience with your competitor’s onboarding process.

Ongoing usage

Once the customer has purchased a product and has been onboarded, ongoing usage takes over. Does the product deliver the value promised? If the customer encounters difficulties, is it straightforward to resolve them with your company? Ongoing interaction with your company, regular updates from your company’s sales staff, from senior management, and technical staff is part of ongoing usage. Customers’ experiences at this stage can determine whether or not they will become customer advocates or detractors, which will profoundly affect other potential customers who are just beginning their own journey and can impact whether the customer will buy from you again.

Back to the mobile phone company example, the CTO and the organization’s Chief Procurement Officer talked about problems in the ongoing relationship with one of their Telecommunication suppliers and not making future purchases from this supplier. Another customer talked about a meeting with the suppliers Chief Executive Officer that was particular unsettling and caused the customer to question the supplier’s long term viability. In another project one of the authors of this article was told by a customer how they had rejected an existing supplier’s bid on a $50 million service request because of problems with the relationship they had in the past.
For trade show intelligence teams, identifying ongoing usage experience from existing customers should be relatively easy to accomplish as they will willingly be talking about it both at your booth and elsewhere at the show. In addition, finding out best practices in ongoing usage should be easy as well. Simply ask the customers about the best experiences they have had with ongoing usage. This is also where sentiment analysis and word-mapping software are important as these analytical tools can help you understand what the customers are saying.

After gathering the information and developing the intelligence related to each phase of the journey, the next step is to map the journey and the customer’s experiences/sentiment at each phase. What steps do they go through at each stage? What has their experience been? What problems are they having? Concerns? This is the kind of intelligence that is required to map the journey. Figure 1 presents a customer journey map for a B2B product and Figure 2 is the journey a “customer” takes related to a U.S. hospital. Both these maps were developed by one of the authors of this article.
These journey Maps are a powerful tool to understand your customers because they highlight how customers transition through all of the phases. They can be used to identify where the experience could be improved. Note that not all customers take the exact same journey so understanding variations in the journey will also be important. The map can also be used to help, in a sense, “re-route” the customer’s journey. For example, if one of the external parts of the journey (perhaps a social media site) is negative towards your company, then you can work towards convincing customers to go to alternative social media sites, or talk to other experts. If this cannot be done, then working to improve your company’s reputation on these sites can be undertaken.

Intelligence practitioners should also recognize that the customer journey map and process involves many parts of the organization so integrating them into ongoing intelligence operations is critical and helps to extend the reach of your intelligence operation.

Customer journey maps really are about intelligence, and given their growth in popularity, provide enormous opportunity for intelligence practitioners to increase their role and responsibility within their organizations. In their Harvard Business Review article, Rawson, Duncan, and Jones list the challenge of developing customer maps, and without realizing it, put customer maps clearly in the domain of intelligence practitioners when they wrote that it’s about “acquiring new types of information and combining it in new ways. For many companies, combining operational, marketing, and customer and competitive research data to understand journeys is a first time undertaking, and it can be a long process”. Who other than the intelligence professional understands how to acquire new types of information from throughout the company? Who in the company is more focused on understanding the external environment than the intelligence practitioner? That's their full-time job. Learn more about customer maps (references are provided below), and start thinking about how to use them to make your organization more competitive. A few suggestions for intelligence practitioners:

- Assess the customer journey map and make recommendations to improve it.
- If there is a bump in the journey from externals (bad mouthing from existing customers, past customers, industry participants) look for ways to either improve what they say or neutralize its impact.
- Use the customer journey map to refine your customer profiles and remember not every customer will follow the exact same journey.
- Use the customer journey company touchpoints (that is the places where the customer interacts with your company) as an opportunity to collect information to refine the customer journey map, but also use these to collect other information needed for your intelligence program. Customers can tell you a lot about competitors at each of these touchpoints.
- Identify who in the company is part of the customer journey, who do your customers and potential customers interact with at each phase of the journey (from this article you now know it’s a lot more than just sales and marketing) and ensure that they have the proper training to collect the information needed for developing the customer journey map and know what to look for.
- Identify the indicators, the signs, the information to collect for each of the phases – in others, develop organizational wide intelligence plans for the development of the customer journey map.
- Ensure that your organization has the right analytical models, and if needed, software for assessing where customers are feeling stressed, anxious, annoyed, satisfied.
REFERENCES:


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