



CUSTOMER
JOURNEY
MAPPING
TOOLKIT

INTRODUCTION

Customer journey maps harness valuable insights to illustrate the complete buying experience and help brands to identify how they can optimize their marketing efforts.

In fact, **almost 90%** of customer experience professionals who use journey mapping report increases in customer satisfaction, lower churn, fewer customer complaints, and higher Net Promoter Score® (NPS), making accurate journey mapping a valuable tool for business success.

With this toolkit, companies can learn effective ways to:

- Track customer activity throughout the customer journey
- Identify key engagement touchpoints
- Unpack the best research to drive and measure success



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USING YOUR CUSTOMER JOURNEY MAP

Customers want to feel seen and heard. With a completed customer journey map, you have a clear picture of how customers interact with your brand and products and the experience they expect. With insights into each lifecycle stage, your company can identify how to motivate customers to purchase, meet customers' expectations, predict and influence customer behavior to optimize conversions, and more. Your customer journey map can be used across a variety of initiatives, such as:

▶ REVEALING GAPS IN CUSTOMER SERVICE

Improve customer experience by using customer journey map insights to determine where you are not meeting customers' expectations. For example, if customers expect to connect with customer service representatives over chat but can only connect with them over the phone, you can investigate the benefit of adopting a chat feature on the website to improve the consideration phase.

▶ IDENTIFYING NEED FOR PRODUCT/SERVICE IMPROVEMENTS OR NEW PRODUCTS AND SERVICES

Your customer journey map can highlight the aspects of products or services that delight customers and those they would like added. For example, your retention step may determine customers are more likely to become brand loyal if you offer a 30-day free trial with a product, a feature that could be expanded to other products or services.

▶ HIGHLIGHTING AREAS FOR IMPROVEMENT AT EACH STAGE OF THE BUYER JOURNEY

Learn where customers experience road bumps during the customer journey in order to make each lifecycle stage pain-free. For example, customers may find the webpage for the product they wish to purchase is slow to load, clarifying a need to focus web development efforts on improving page functionality.

▶ SETTING MESSAGING AND MARKETING PLATFORM STRATEGY





Stages like awareness and consideration can pinpoint which platforms and messaging customers prefer. If customers enjoy testimonials on Facebook, you can increase posts or expand a campaign to other top-performing social media platforms.

By incorporating these insights into your strategic plan, your company can become more customer-centric and data-driven in its mission and initiatives.

TRACKING THE CUSTOMER'S JOURNEY

While it is important to view the customer journey as a whole, in practice it can be broken down into distinct segments according to where the buyer is in the customer lifecycle. From awareness and consideration to purchase and retention, each phase requires unique measurement methods and reporting metrics.

EXAMPLE CUSTOMER JOURNEY MAP

Lifecycle Stage	 Awareness	 Consideration	 Purchase	 Retention
Customer Action	Heard about product through word-of-mouth, viewed a company ad online	Compared and evaluated product features	Contacted customer service, made an order	Ordered again, shared experience with friends
Research Tools <i>How do I measure?</i>	Customer Surveys	Digital Shop Along	Customer Usage Data	Customer Interviews
Touchpoints	Web search, social media, blog posts, PPC ads	Product reviews, website information, landing pages	Product pages, shopping cart, online guides, customer recommendations	Online chats, discussion boards, online reviews, social media
KPIs	Social media impressions, number of people reached	Influencer endorsement, customer ratings	Cart abandonment rate, conversion rate	Customer service success rate, product reviews, social media sentiment
Customer Insights	Learns about products from Facebook	Likes to read customer feedback before committing to a purchase	Prefers to purchase on company website rather than Amazon, etc.	Considers a second purchase if first product was cost-effective and intuitive to use

PHASE 1: AWARENESS

In the awareness phase, companies are looking to open up the customer pipeline, capture customer attention, and begin to nurture relevant buyers as marketing leads. Companies need to identify these customers and where they consume information (i.e., their marketing watering holes) so they can introduce them to the company and its value proposition.

CUSTOMER ACTIVITY: WHAT IS MY CUSTOMER DOING?

In this stage, customers have realized they have a problem or need and are aware that your company could potentially solve it. The customer may visit your website or blog or interact with your company on social media.

ENGAGEMENT TOUCHPOINTS: WHAT SHOULD I MEASURE?

- Brand awareness and preference
- Web traffic
- Social media reach
- Earned media coverage

RESEARCH TOOLS:

How do I measure?

Customer surveys are the most common method for measuring the customer journey as they provide unique insight into awareness.

Awareness-focused surveys should test for:



Awareness and Consumer Opinions:

How familiar are customers with your company as compared to your competitors?



Key Watering Holes:

Where do your customers turn to learn more about topics, challenges, and potential solutions?



Intended Usage:

Why are customers considering your product or others like it?

Using the survey findings, marketers can begin to target specific platforms for their channel plan and develop key messages.

PHASE 2: CONSIDERATION

In the consideration phase, companies are looking to move potential buyers through the marketing funnel and convert them into sales-ready leads. Companies need to effectively communicate why their product or service is the best fit for addressing the customer's problem.

CUSTOMER ACTIVITY: WHAT IS MY CUSTOMER DOING?

At this stage, buyers are evaluating their options. They are reading product reviews, watching video tutorials, and viewing case studies to determine which type of offering will solve their problem.

ENGAGEMENT TOUCHPOINTS: WHAT SHOULD I MEASURE?

- Lead conversions
- Influencer endorsements
- Email engagement
- Website use data

RESEARCH TOOLS:

How do I measure?

Customer usage data provide insight into which customer behaviors are likely to lead to a purchase and can shed light on which product attributes are most important to emphasize to customers. Important customer use data to collect at this phase includes:



Website and online behavior



Product ratings



Demographic, behavioral, and psychographic data (location, income, gender, occupation)



Purchase data



Time on site

By filtering in data about the individual customer and grouping in customer segments that are meaningfully similar, companies can create sophisticated customer segmentations and tailor marketing content that moves prospects toward conversion.

PHASE 3: PURCHASE

In the purchase phase, the company is attempting to move the customer actively through the sales funnel with a focus on giving product demos and incentive offers to garner a sale.

CUSTOMER ACTIVITY: WHAT IS MY CUSTOMER DOING?

At this stage, the customer has gathered the information they need about what your company and your competitors can offer and they are actively considering a purchase. Potential outcomes can include purchasing your product, deciding to purchase from a competitor, and not making a purchase at all.

ENGAGEMENT TOUCHPOINTS: WHAT SHOULD I MEASURE?

- Purchases
- Cart abandonment
- Product and pricing page metrics

RESEARCH TOOLS:

How do I measure?

Digital shop alongs, or ethnographies, involve observing customers in their own environments. There are two types of shop alongs:



Digital Shop Alongs:

In digital shop alongs, a customer shares a computer screen with researchers who observe as they search online, and ultimately decide whether to purchase a product. Digital shop alongs can identify improvements needed in the online purchase experience as well as website functionality, search results, and messaging.



Traditional Shop Alongs:

In traditional shop alongs, researchers observe shoppers in brick and mortar stores, evaluating how the shoppers move through the store and make a purchase. These shop alongs can reveal how shelf placement in store and packaging affect the customer's decision to purchase.

Shop alongs paint a complete picture of the motivations and key drivers of customers at the point of sale, revealing key painpoints, areas of improvement, or unanswered questions.

PHASE 4: RETENTION

In the retention phase, companies must ensure that the product or service meets customer expectations, service is prompt, and that assets exist to help the consumer use the product and troubleshoot any issues that may arise. The goal is to delight the customer, keep the relationship going, and foster brand loyalty.

CUSTOMER ACTIVITY: WHAT IS MY CUSTOMER DOING?

At this stage, the prospect has now become a customer and is using the product. The customer wants to validate that he or she made the right decision in their purchase and whether or not they would like to become a repeat or loyal customer.

ENGAGEMENT TOUCHPOINTS: WHAT SHOULD I MEASURE?

- Social media comments
- Online customer reviews
- Customer retention rate

RESEARCH TOOLS:

How do I measure?

Customer interviews are a powerful way to identify which elements are driving repurchase or dissuading buyers from recommending your product to others.



In-depth Interviews:

In-depth interviews can uncover rich data on the overall customer experience, usage trends, and satisfaction with your brand. Based on a carefully designed interview guide, each interview is shaped by the interviewee, adapting to the flow of conversation, and incorporates customer feedback to probe for detailed information.



Voice of Customer:





A voice of customer analysis is a type of interview designed to investigate the needs, concerns, and goals of customers. They are ideal for identifying problems or challenges that drive a customer to seek out a brand and which solutions they expect from your product.

Additionally, customer surveys can help track retention trends and issues, including ongoing surveys of Net Promoter Score® and customer satisfaction.

YOUR CUSTOMER JOURNEY MAP TEMPLATE

CUSTOMER GROUP: _____

Divide your customers into groups based on similar characteristics and choose one group to study.

Lifecycle Stage Measure how customers move through the buying experience by dividing your map into four lifecycle stages.	 Awareness	 Consideration	 Purchase	 Retention
	Determine how well your customer knows your brand and their potential interest in your product.	Educate the customer on how your product will meet their needs through case studies, blog posts, and more.	Show your customer why they should purchase from your company rather than from competitors.	Find out how the customer felt about their buying experience and identify ways to inspire brand loyalty.
Questions to Answer Ask key questions to understand how your customers experience each lifecycle stage and determine where to improve their experience.	<ul style="list-style-type: none"> • What triggered the need? • Was there a specific product/solution in mind? 	<ul style="list-style-type: none"> • What, if any, research was conducted? • What are the purchase drivers/motivators? • What brands, retailers, and channels are considered? 	<ul style="list-style-type: none"> • Where did the purchase happen (channel, retailer, etc.)? • What brand was purchased? • What was the budget vs. the actual spend? 	<ul style="list-style-type: none"> • Are customers satisfied? What drives satisfaction? • When will they purchase again? • Will they increase/decrease their budget? • Will the purchase process change? If so, what will be different?
Customer Action Identify actions customers take as they move through the buying journey.				
Touchpoints Pinpoint how customers discovered your brand or moved through each stage of the purchase.				
KPIs Identify Key Performance Indicators to measure and demonstrate success at each stage of the buying journey.				
Customer Insights Highlight any insights that illustrate unique ways customers move through the buying process. Note any gaps in the experience that should be improved.				

ADDITIONAL RESOURCES

ENHANCE CUSTOMER EXPERIENCE WITH A VOC PROGRAM

Customers have more options and resources to make informed purchase decisions than ever before, making it crucial for companies to identify customer needs and pain points. In Enhance Customer Experience with a Voice of the Customer (VoC) Program, Hanover Research provides an overview for how to approach VoC work and embed the customer across the brand experience.

This guide discusses:

- ▶ The benefits of VoC programs best practices
- ▶ Best practices in developing resilient enrollment strategies
- ▶ How to define meaningful goals that enhance customer experience
- ▶ Elements of a successful program

THE CUSTOMER SEGMENTATION TOOLKIT

Customer behavior is changing faster and more frequently than ever – leaving companies that haven't adapted with disinterested consumers and, consequently, lost revenue. To resonate with customers, companies need to understand their audience, what motivates them, and how to reach them.

Download the toolkit to:

- ▶ Get to know your audience by understanding who they are, what they value, and how to reach them
- ▶ Collect the data you need to inform your segment profiles
- ▶ Build your customer segments and develop targeted strategies that resonate with customers

THE STATE OF MAPPING THE CUSTOMER JOURNEY

To help organizations understand how to best leverage customer journey maps, we surveyed 422 business leaders to determine how they approach creating their journey maps and the value these maps provide across their organizations.

Download the report to learn:

- ▶ Who is using customer journey mapping
- ▶ Why organizations use journey maps
- ▶ How organizations create journey maps
- ▶ Secrets for successful journey maps



ABOUT HANOVER RESEARCH

We leverage a deep understanding of your business challenges to provide critical intelligence that helps you uncover new opportunities, minimize risk, and accelerate growth.

OUR BENEFITS



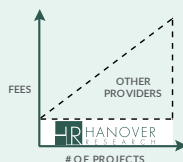
EXPERT
200+ analysts with advanced multiple methodology research expertise



FLEXIBLE
Ongoing custom research agenda adapts with organizations' needs



DEDICATED
Exclusive account and research teams ensure strategic partnership



OUR CORPORATE SOLUTIONS

MARKET ANALYSIS

Drive growth and outperform competitors through targeted exploration and analysis of hard-to-quantify markets.

- Market Entry Strategy
- Market Penetration Strategy
- Trend Analysis
- Market Share Identification
- Market Segmentation
- Merger and Acquisition Opportunity Analysis
- Competitive Analysis

PRODUCT LIFECYCLE

Optimize each stage of a product's lifecycle from ideation, development, launch, and marketing.

- Product Lifecycle Management
- Product Development
- Product Portfolio Review
- Package Design
- Pricing Strategy
- Product Message Testing
- Channel Strategy
- Customer Needs Assessment

CUSTOMER EXPERIENCE

Understand the complex customer journey to pinpoint problem areas and uncover opportunities for high-impact improvement.

- Voice of the Customer
- Consumer Decision-Making Process
- Customer Segmentation
- Customer Needs Assessment
- Buyer Persona
- Customer Satisfaction
- Customer Journey
- Lead Scoring
- Pathway to Purchase

BRAND STRATEGY

Identify and measure the most important metrics for assessing brand and cultivating effective messaging.

- Brand Equity
- Brand Awareness
- Brand Perception
- Brand Tracking
- Brand Development and Positioning
- Content Marketing



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