Create Actionable, Insight-Driven Journey Maps

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CX leaders are now joined by their leadership in realizing the value customer journey maps offer. However, recognizing their importance is only the first step. Use this research as a guide to prepare for, create and utilize customer journey maps — a foundation upon which you can build your CX success.

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Analysis

Journey maps are an essential component of the CX framework that organizations need to deliver and prioritize effective, innovative customer experiences. CX leaders have long understood their value, and Gartner research finds that those that use journey maps effectively in their CX initiatives exceed or meet customer expectations. However, Gartner’s Customer Experience in Marketing Survey found that almost one-third of organizations still face difficulty incorporating them into their CX efforts (see Figure 1 and “Survey Analysis: Marketing Leaders Struggle to Align Personas and Journey Maps to CX Efforts”).

Why is this? There are a number of reasons, ranging from stakeholders who do not understand their role to using incomplete or incorrect data sources or not addressing the entire customer journey. Journey maps that lack governance and oversight can undermine even the best maps’ ability to drive action. This research serves as a guide in preparing for, creating and utilizing customer journey maps that will serve as a foundation upon which to build your CX success.

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Research Highlights
The goal of journey maps is twofold:

- Identify specific customer experience problems and opportunities in a way that leads to strategies to resolve them.
- Gain alignment and consensus. The journey mapping exercise is a way to encourage people from across the organization to agree to the needs of customers, the journey they want and the next steps the brand must take to deliver on those journeys.

Whether you are new to or experienced with the journey mapping processes, reviewing these recommended steps will help you obtain the actionable insights and results you seek.

Put Foundational CX Elements in Place First
Laying the groundwork for journey mapping initiatives helps projects progress smoothly. Journey map creation is no exception. CX leaders responsible for the creation and management of journey maps should gather necessary support from peers, determine the availability and needs for data, and be informed as to who they are building the journey for (see Figure 2 and “How to Prepare for a Journey Mapping Initiative That Will Improve Your Brand’s Customer Experience”). Complete these essential steps before beginning your journey mapping:

- Affirm leadership and key stakeholder support. Customer journey mapping requires data and support from others in your organization who are not necessarily within your sphere of influence or control. It will make it easier for you to get access to data, resources and other assistance you need from peers not directly accountable for the journey map project.

Collect what is needed before beginning journey mapping

- **What do you need to do...**
  - to create a successful journey map that drives action?

- **What does the team need...**
  - to create an informed journey map based on customer preferences?

- **What does the customer need...**
  - to become a satisfied, loyal advocate?

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Figure 2. Prepare for Your Journey Map Initiative

Assemble the right team

Acquire the right information

Build or use the right personas

Source: Gartner
• Build a cross-functional team composed of representatives from all departments who support the customer experience. Building a team from across your company establishes broad support, breaks down silos and helps you capture diverse perspectives and data. This support will also be necessary when it’s time to take action, as the journey map will contain touchpoints that are managed by other departments.

• Assess data sources and needs. Actionable journey maps are built from customer insights and knowledge, not opinion or guesswork. Before you turn to third-party sources for customer insight that may not reflect your actual customer base, evaluate the data your company already has. Consider sources like CRM systems, Contact Center and VoC platforms, and existing customer and user research. Analyze results and insights from marketing programs (such as search, email and social media). (For more potential sources of data and insight, see “Where Marketers Get Data to Inform Personas and Journey Maps.”) Determine where you may have gaps in your data and develop plans to obtain the missing data (see “How, When and Where User Research Can Improve Your Customer Experience”).

• Know who you are mapping the journey for. The most effective journey maps are created for specific and unique personas, archetypical representations of your most important customers (see “How Marketing Leaders Make Personas Actionable”). Journey maps that attempt to reflect the needs of all of your customers result in diluted customer experiences that fail to deliver expected value or results. Creating persona-driven journeys captures the touchpoints that are most important to your highest-value customers. It also ensures you accurately allocate resources and efforts to delivering the experiences they need or expect at those moments (see “How to Design Customer Experiences Using Persona-Driven Customer Journeys”).

Create Actionable, Accurate Customer Journey Maps
Determining and building successful customer journeys requires clear communication among the team and an understanding of the entire journey your customers want, from their perspective.

• Align team goals and expectations. The first order of business is to ensure each team member understands what role they play, how it fits into the overall project and what the desired outcomes for your journey map are. Make sure you also understand their expectations of you, so you know what is needed to make team members feel heard and remain engaged during the process (see “How to Manage a Collaborative Journey Mapping Initiative That Uncovers Customer Experience Opportunities”).

• Create the journey from your customers’ perspective. Using your own customer research and data is fundamental in creating actionable, accurate journey maps (see “How, When and Where User Research Can Improve Your Customer Experience”). Organizations that rely only on an inside-out perspective to map the journeys they think or want their customers take end up with flawed, ineffective and nonactionable data. It only serves to reinforce internal behaviors, procedures and opinions, and reinforces the status quo. Journey maps need to be formed from the customer viewpoint and reflect their perspectives, thoughts, feelings...
and actions. By understanding and building the “as is” journey that your customers and their data say it is, you will be able to provide, build and innovate the experiences that are needed to deepen your relationship with them.

- **Map the entire customer journey first.** Turning prospects into loyal customers and advocates requires understanding their entire journey. Map only a portion of the entire journey, and you risk overlooking pivotal moments or connections that exist with other stages that would move your prospects and customers further along or deepen their relationship with your brand. Use the Buy/Own/Advocate Model (see Figure 3 and “Use Gartner’s Buy/Own/Advocate Framework to Map Customer Journeys and Deliver Better Customer Experiences”). It provides a framework that all organizations, regardless of industry or vertical, can use to determine the true end-to-end customer journey. Once the entire journey is understood and you’ve identified portions of the journey with challenges or opportunities, you can move onto creating micro journeys of those specific stages.

- **Validate your journey map with customers.** The validation that the data you’ve captured accurately depicts the experience, feelings, thoughts and actions customers take or have in their customer journey is an important step. While validation isn’t as critical if your journey map has been formed using customer insight and data, it is still helpful to do. If your journey mapping process started using an “assumptive” or “hypothetical” map, validation is essential to ensure you obtain the customer perspective. Validating your journey map helps to identify if you have extra or missing touchpoints, confirms that you have the touchpoints that resonate most for your customers, and certifies where you have opportunities for improvement. Going through this exercise will also highlight differences between what your company and customers need, experience or prefer. Validation can be conducted using online or offline methods, or a combination of both, but it should always be conducted using customers that are representative of the person you’re building the journey map for (see “Validate Your Customer Journey Maps for Accuracy and Effectiveness”).

Figure 3. Map the Entire Customer Journey Using Gartner’s Buy/Own/Advocate Model
Derive Value From Your Journey Maps

Many organizations falter with their journey maps once the design phase is over. Some lack the support, processes and procedures needed to convert and prioritize the outcomes from the journey map into an operational work plan. Others let their journey maps wither due to an absence of proper management and oversight. To get maximum value from your journey maps:

• Turn your journey map insight into action and experiences.
  Your journey map preparation and creation so far has been focused on and built from customer data and insight. You have defined the journey and understand where you have opportunity or need for improvement. Delivering on those moments requires that your perspective shift back to an internally focused one where you determine the processes, people and data needed to execute the experiences. Consult with your team and leadership to create a work plan that will translate the desired-state experience into specific, cross-functional responsibilities and tasks. Prioritize your deliverables by using customer goals and needs as determinants instead of internal metrics and values. Balance quick wins that gather momentum with larger initiatives (see “How to Turn Persona-Driven Customer Journey Maps Into an Actionable Cross-Functional Customer Experience Plan”).

• Keep your journey maps current.
  Promoting your journey maps, keeping them current and creating a system to manage them all go a long way in securing and maintaining their recognition as an essential asset. Develop a cycle of continuous monitoring that keeps your journey maps relevant via updated, accurate data. CX leaders who keep their journey maps relevant and create a governance and usage structure find their maps adopted and utilized more throughout their organization (see “How to Manage Customer Personas and Journey Maps to Maximize Their Business Value”).

• Develop a communications plan to reinforce progress toward realizing the customer’s desired journey.
  Devise communication plans for influential stakeholders and peers that shows them how the insights culled from the journey map help them meet their goals. Highlight and share quick wins. Create systems that offer easy access to access data and the ability to turn them into common, usable assets (such as presentation slides and charts).

To get maximum value from your customer journey maps, make them actionable, keep them updated, and communicate to internal stakeholders how they're helping them meet their goals.
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