

Customer journey mapping research report 2018

A GLOBAL STUDY EXAMINING
MATURITY AND BEST PRACTICES



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Foreword

Customer experience is a primary differentiator for many organisations in a world where price and product are no longer sole consumer considerations. And customer journey mapping (CJM) is the start of the process for companies wanting to deliver exceptional customer experience.

The following research report demonstrates the value of CJM, with those companies using the methodology reporting an improvement in customer satisfaction by a huge 81%.

Customer journey mapping enables organisations to ensure that they are serving customers on the right channel at the right time, but also that they can deliver communications at the right time, place and format as well.

Quadient has seen evidence of this first-hand, with our CJM SaaS offering helping organisations to move towards a more customer-centric culture and deliver a better service.

Clients of Quadient testify that better customer communication results in an improved customer experience. It can drive improvement in customer loyalty, help to reduce costs and improve brand and message consistency across communications channels - even compliance and regulatory communications.

In addition, Quadient research across its client base has shown more than 50% of customer experience is activated within the message and content received (the remaining being external influences), underlining why organisations should focus on getting this right.

Customer experience is the new competitive differentiator leading companies to change their mindset, reorganise their internal processes while keep costs under control. Customer-centricity is a cultural shift in many organisations, and CJM represents the start of that process.

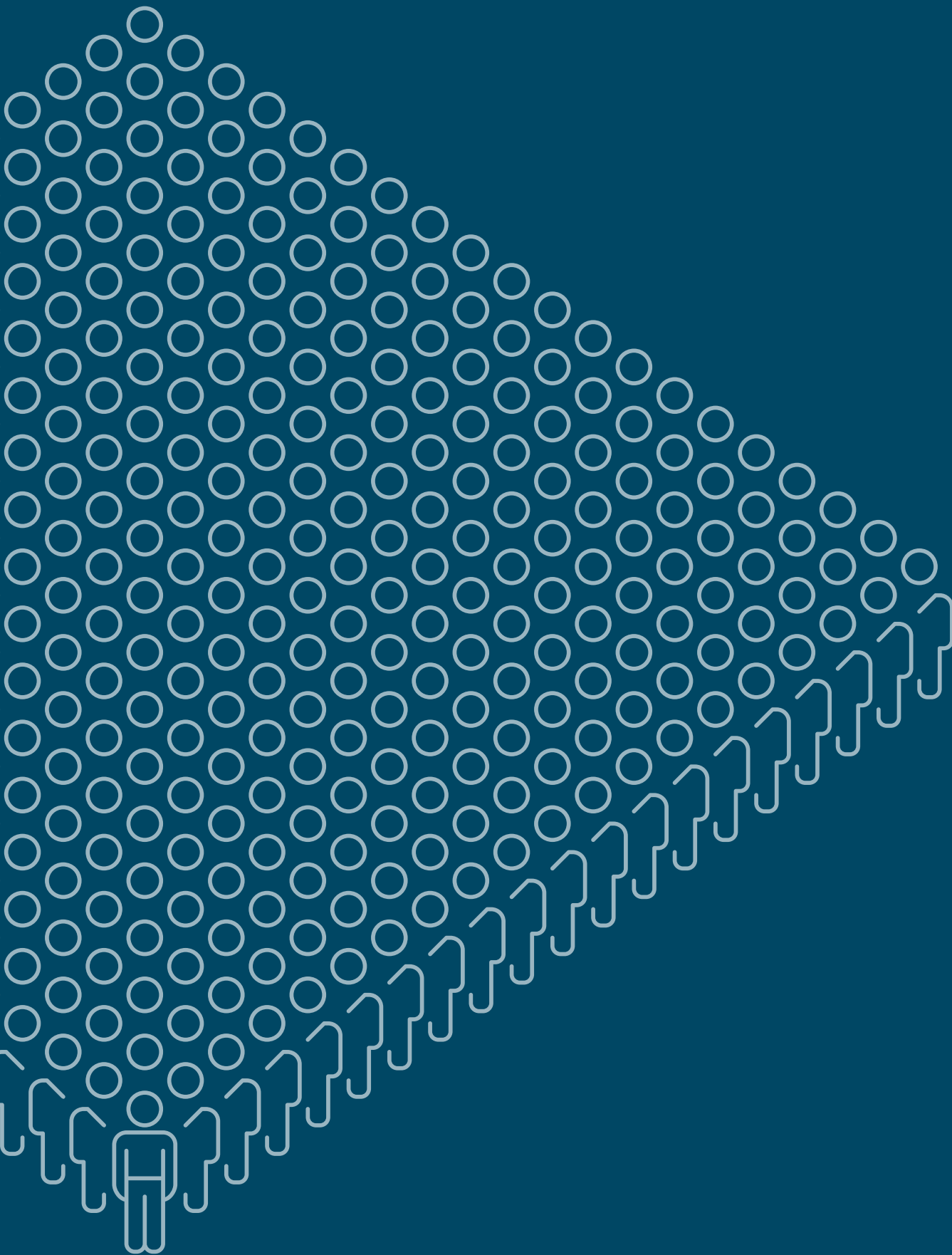
For any enterprise keen to initiate a change in the mindsets of employees and directors alike, this research demonstrates the importance of customer journey mapping and the long-term growth it can deliver.

Laurent Ghio

Strategic Marketing CX SaaS Solutions

Quadient





EXECUTIVE SUMMARY

Customer journey mapping is a discipline that allows organisations to step into their customers' shoes; to gain valuable insights that enable them to improve the customer experience. But how well-adopted is it - and how successful are practitioners at using it?

MyCustomer's 2018 customer journey mapping research report is based on a global survey of 248 customer experience professionals across EMEA, North America and Asia-Pacific.

The research looks at the maturity of the practise of customer journey mapping, exploring how long organisations have been utilising journey mapping, and how successful they feel they are at it.

The research also examines what trends are emerging in the execution of customer journey mapping, including who typically has ownership of the programme and what tools are most commonly used to support it.

We have also attempted to tease out best practices from organisations whose customer journey mapping programmes are most mature and/or most successful.

Key insights from this research:

Two-thirds of respondents told us their organisations are using, or have used, customer journey mapping.

Customer journey mapping is far from a new discipline, with around a quarter of respondents having employed it for over five years.

However, for a large proportion of respondents, customer journey mapping is a relatively new development. A third of respondents who told us that they use customer journey mapping have been doing so for under a year. A further third have been using it for under three years.

Nearly all practitioners of customer journey mapping reported that it has delivered positive results, covering a range of benefits.

Almost 90% of the customer journey mapping practitioners we interviewed told us that their programme is delivering a positive impact. And over a third of those reported that the impact was ‘extremely positive’.

The most common positive impact attributed to customer journey mapping by our respondents is an increase in customer satisfaction – reported by nearly three-quarters of practitioners.

Other benefits that are commonly cited include an increase in Net Promoter Score (NPS), a fall in customer complaints and a reduction in customer churn, all reported by around a half of practitioners.

There is little consensus regarding who in the business should take ownership of customer journey mapping – but those programmes led by the CEO are most likely to report extremely positive results; and those without any project leader at all are most likely to deliver no value.

Around a third of practitioners told us that their customer journey mapping programmes are run by a head of customer experience or equivalent role.

But the remaining two-thirds of practitioners have programmes led by CEOs, COOs, heads of customer service, CMOs, insight teams or indeed any combination of the above.

Half of the practitioners running programmes led by multiple stakeholders or the COO reported ‘extremely positive’ results, compared to under a quarter of practitioners running programmes led by a head of customer experience or equivalent.

Over two-thirds of the practitioners running programmes led by the CEO reported ‘extremely positive’ results, making it the most successful. The caveat here, however, is that these are practitioners at smaller (under 50 staff) organisations, where perhaps the CEO has a more hands-on role than the typical CEO at an enterprise.

It was also found that a fifth of practitioners whose programmes have no leader at all reported that customer journey mapping is delivering no value. None of the practitioners with a programme leader (or leaders) reported no value being delivered.

There is little consensus regarding how often customer journey mapping should be conducted, but those that use it most frequently are more likely to report extremely positive results.

Around a quarter of practitioners we interviewed conducted customer journey mapping on a monthly basis. A further quarter conducted it every six months. And around a quarter conducted it annually. The remaining quarter either performed it at rarer intervals, or conducted it as a one-off.

56% of practitioners who conducted customer journey mapping monthly reported that the programme’s impact is ‘extremely positive’. This drops to 37% for those who conducted it every six months, 22% for those who conducted it annually, and 28% every other year.

Half of the practitioners running programmes led by multiple stakeholders or the COO reported ‘extremely positive’ results.

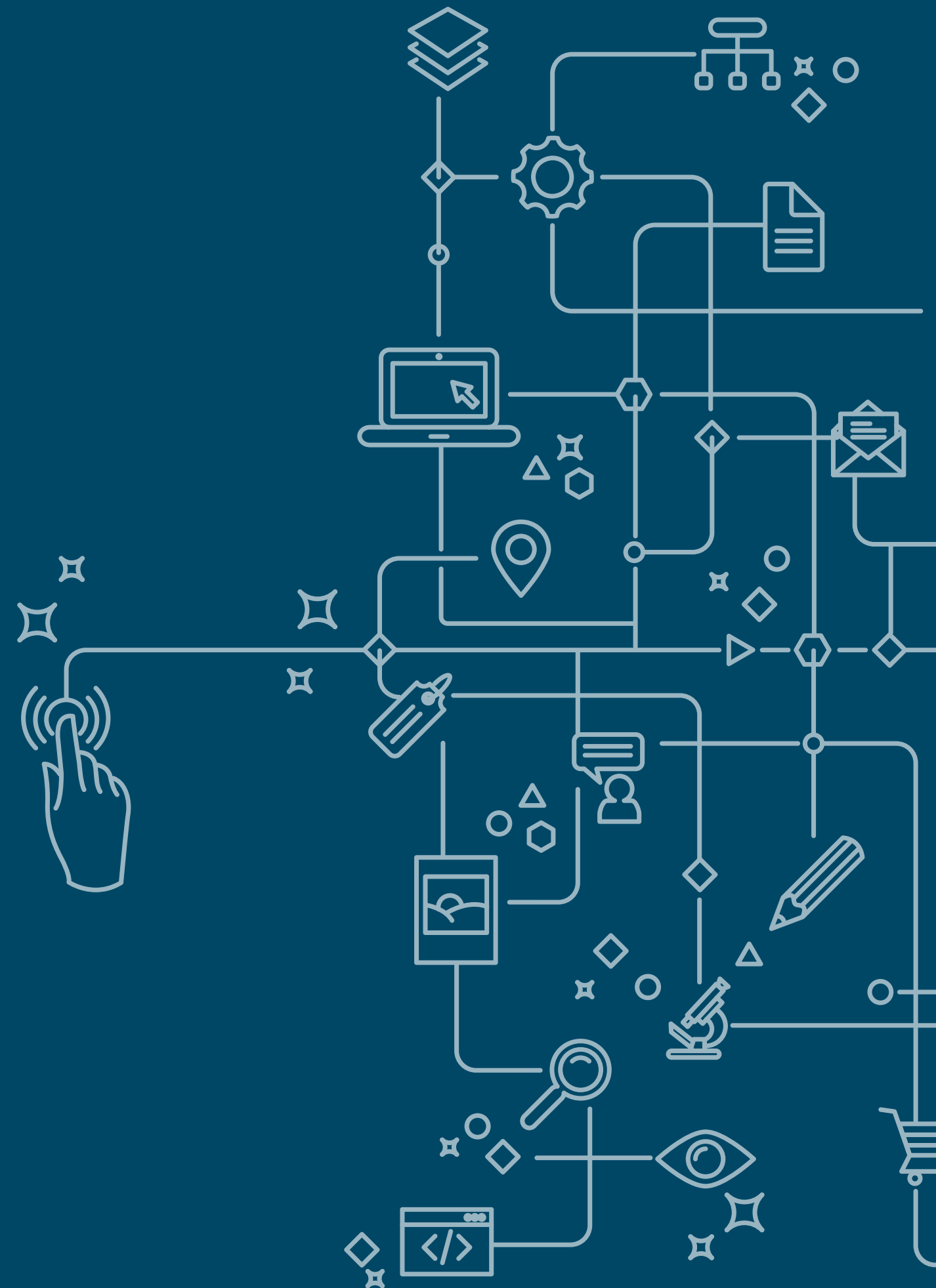
Despite those who conducted customer journey mapping reporting such positive results, a third of organisations are still yet to embrace it – with a lack of understanding/awareness the most common obstacle. However, many are expecting to roll out journey mapping programmes in the near future.

Most of those respondents not using customer journey mapping reported that their organisation was not satisfied with the level of insight they had into their customer journeys. But a number of barriers are preventing them from using customer journey mapping to glean greater insight.

Half of those respondents that don't currently use customer journey mapping said that a lack of understanding and awareness of the benefits of the discipline was hampering them. While customer journey mapping has been a recognised discipline for some time, this suggests there is still work to be done to educate more organisations of its value.

Other obstacles to adoption commonly cited by our respondents included a lack of technology/tools, and a lack of appropriate skills, both reported by a third of the sample who are not using customer journey mapping.

However, despite these barriers, a third of those not currently using customer journey mapping told us that their organisations were planning to invest in customer journey mapping in the next 12-18 months.

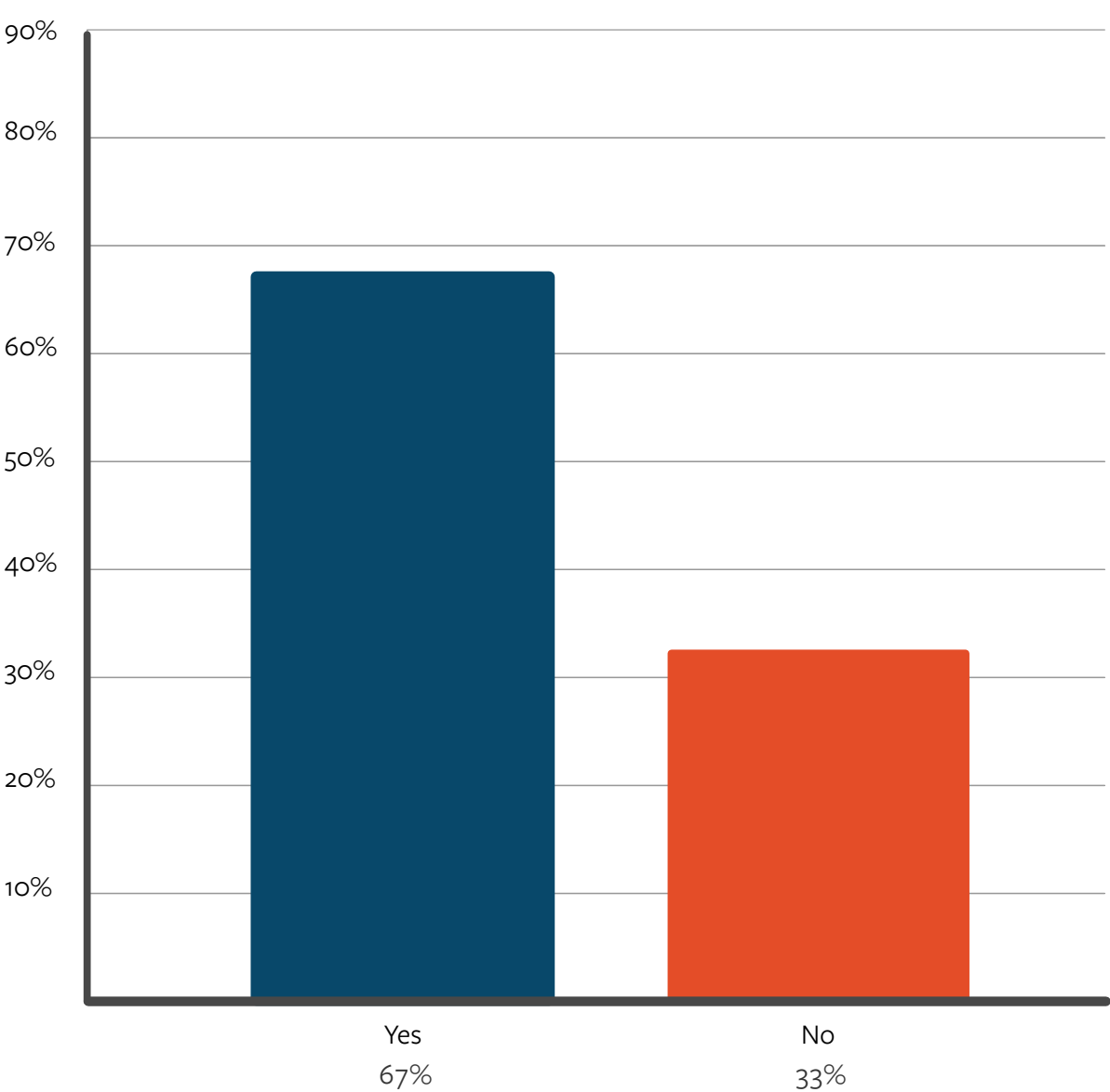


RESEARCH FINDINGS

How many organisations are using customer journey mapping – and is it benefiting them?

Two-thirds (67%) of individuals surveyed said their organisations were currently using customer journey mapping. One-third said their organisation isn’t mapping the customer journey at present (33%). This proportion was consistent irrespective of company size, refuting the notion that the discipline is more popular amongst larger organisations.

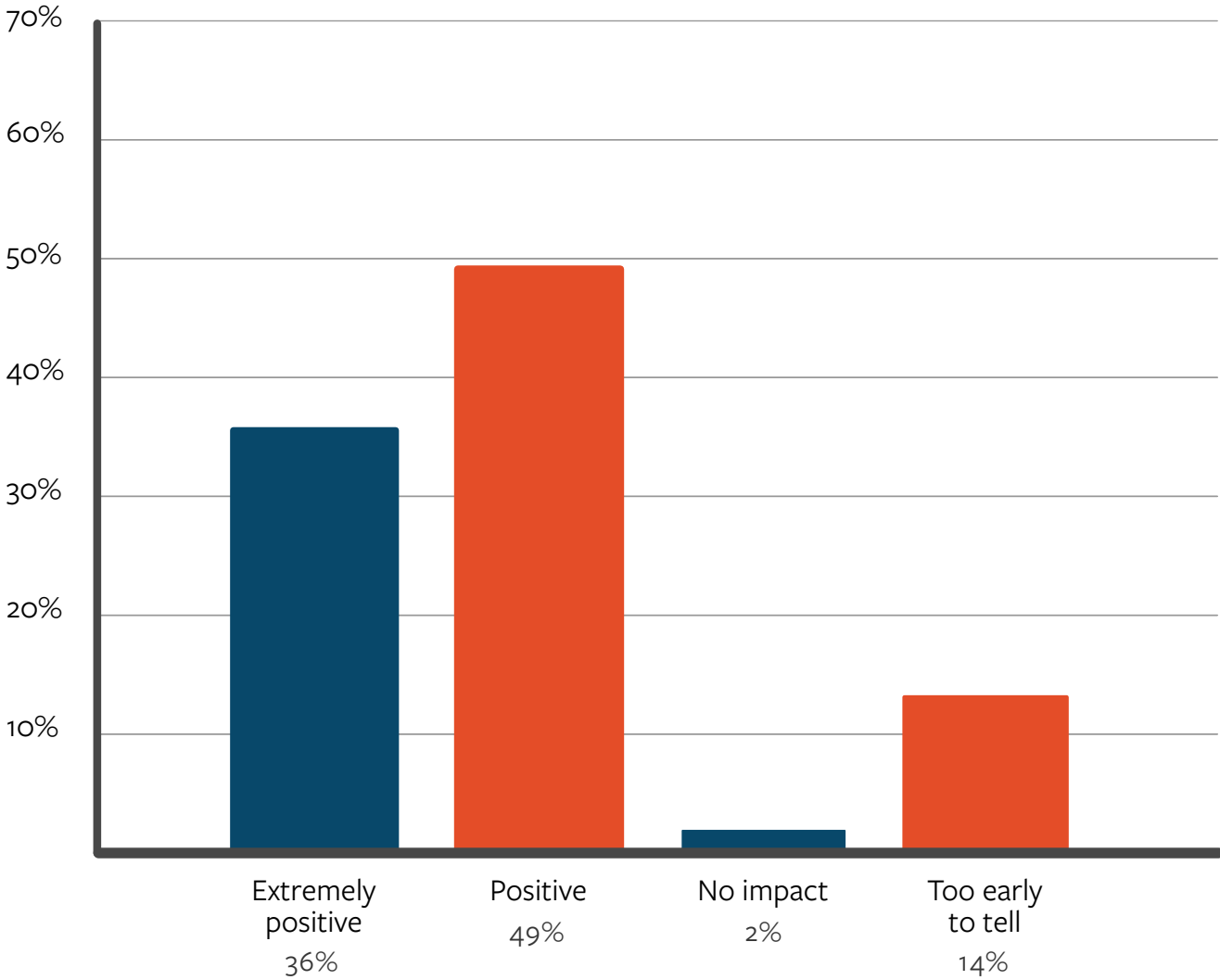
Does your organisation currently use customer journey mapping?



Those that use customer journey mapping are very pleased with its results, with half (49%) reporting that it is delivering a positive impact, and over a third (36%) describing the impact as ‘extremely positive’.

85% of those using customer journey mapping reported a positive or very positive impact.

How would you describe the impact of customer journey mapping on customer experience?



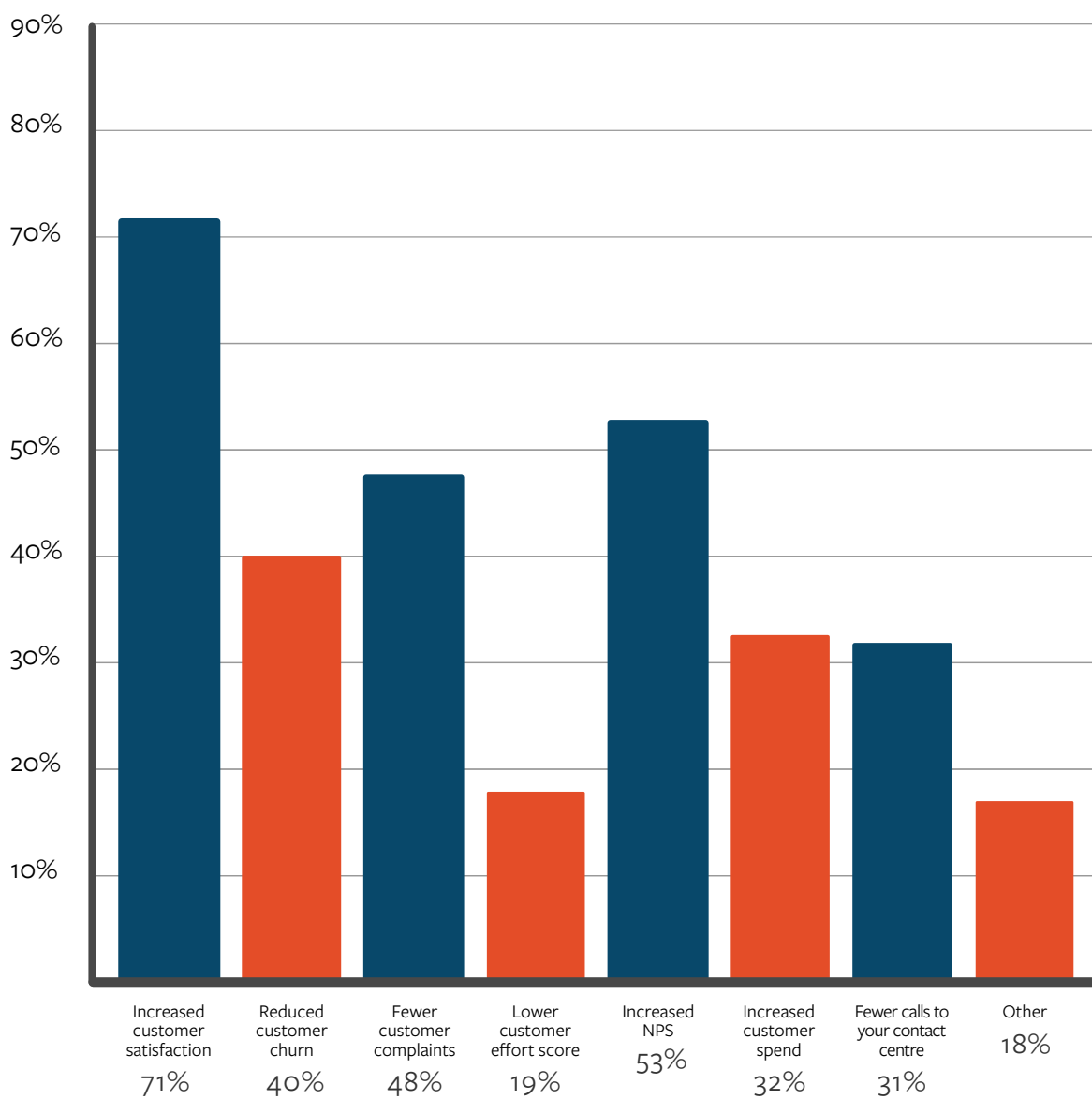
The process of customer journey mapping enables organisations to better understand and visualise interactions (often across different profiles). This in turn provides the insight necessary to improve business processes, operations and resources to improve customer interactions and deliver a more joined-up and streamlined customer experience throughout the entire customer journey.

The positive impacts of this manifest themselves in a variety of different ways, according to the findings. Nearly three-quarters (71%) believe that their customer journey mapping projects have led to an increase in customer satisfaction, representing the most common benefit.

However, around half of those questioned who use customer journey mapping also reported that they have enjoyed an increase in Net Promoter Score (53%), a drop in customer complaints (48%) and reduced customer churn (40%).

71% believe that their customer journey mapping projects have led to an increase in customer satisfaction.

If you have experienced positive impacts of customer journey mapping, where have you seen the benefits?



Respondents ticked all that applied

How mature is customer journey mapping at most organisations?

The almost universal success of customer journey mapping amongst our respondents is all the more surprising because the findings indicate that in many organisations it is still a relatively new discipline.

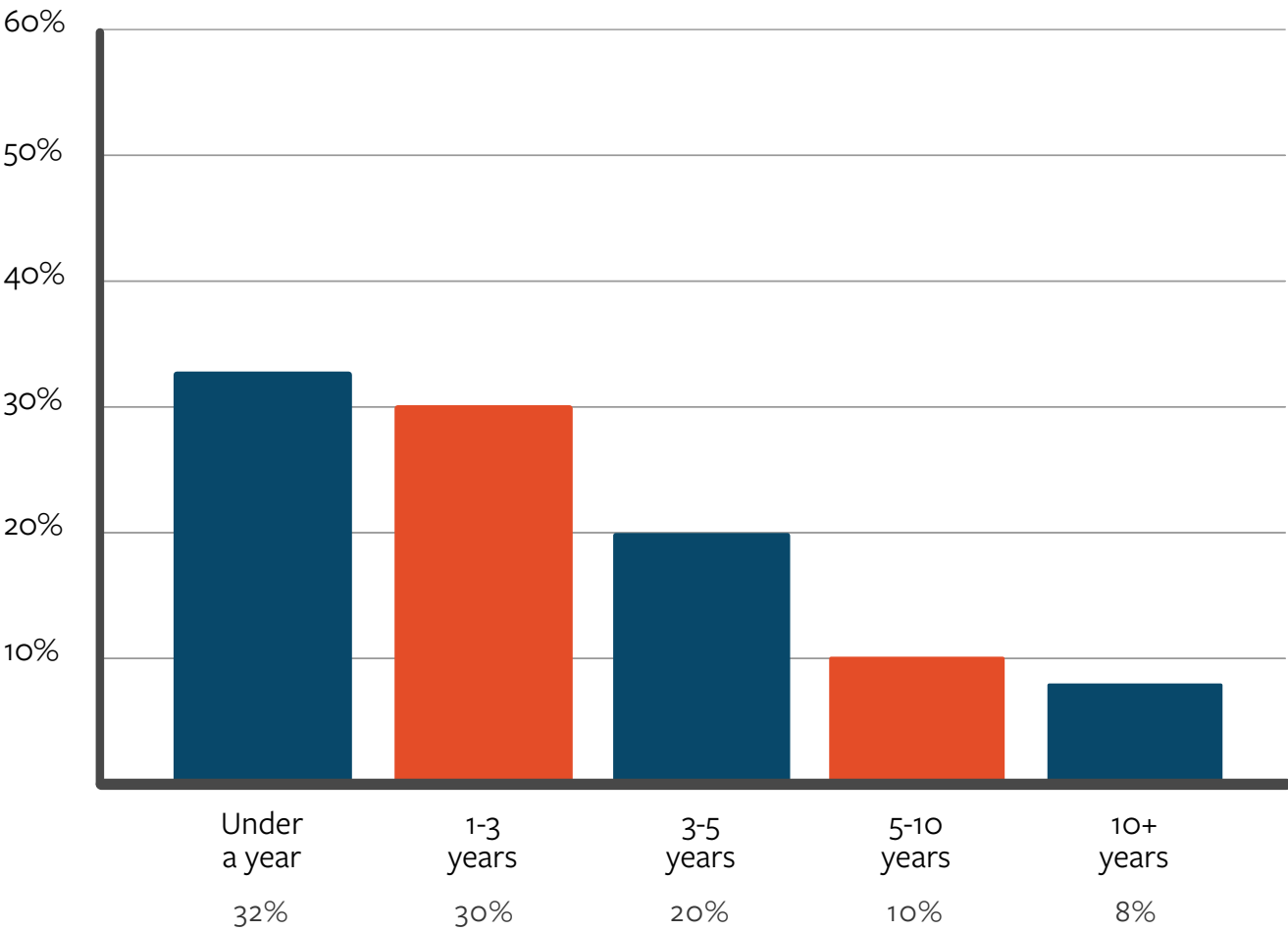
Nearly a third (32%) of respondents reported that they had been using customer journey maps for under a year. A further 30% have been using it for 1-3 years.

However, reflecting the fact that the discipline has been practised for many years, a notable proportion of respondents disclosed that they have been using customer journey mapping for some time. In fact, nearly a fifth (18%) have been employing it for over five years, with 8% having used it for over a decade.

Perhaps unsurprisingly, the more experienced practitioners, who have been conducting customer journey mapping the longest, are reporting the greatest returns for their efforts.

Around a quarter of those who have been utilising customer journey mapping for under a year (24%) and between 1-3 years (29%) describe the impact of journey mapping as ‘extremely positive’. But those that report ‘extremely positive’ results rises to 41% of those who have used it for 3-5 years, and up to 66% of those that have practised it for 5-10 years.

How long have you been conducting customer journey mapping?



The impact of customer journey mapping

We cross-referenced the length of time that respondents had been performing customer journey mapping with the impact that the programmes have had on the customer experience.



Under a year

- Extremely positive 24%
- Positive 46%
- No impact 4%
- Too early 26%



3-5 years

- Extremely positive 42%
- Positive 52%
- Too early 6%



10 years +

- Extremely positive 50%
- Positive 50%



1-3 years

- Extremely positive 29%
- Positive 58%
- Too early 13%



5-10 years

- Extremely positive 66%
- Positive 34%



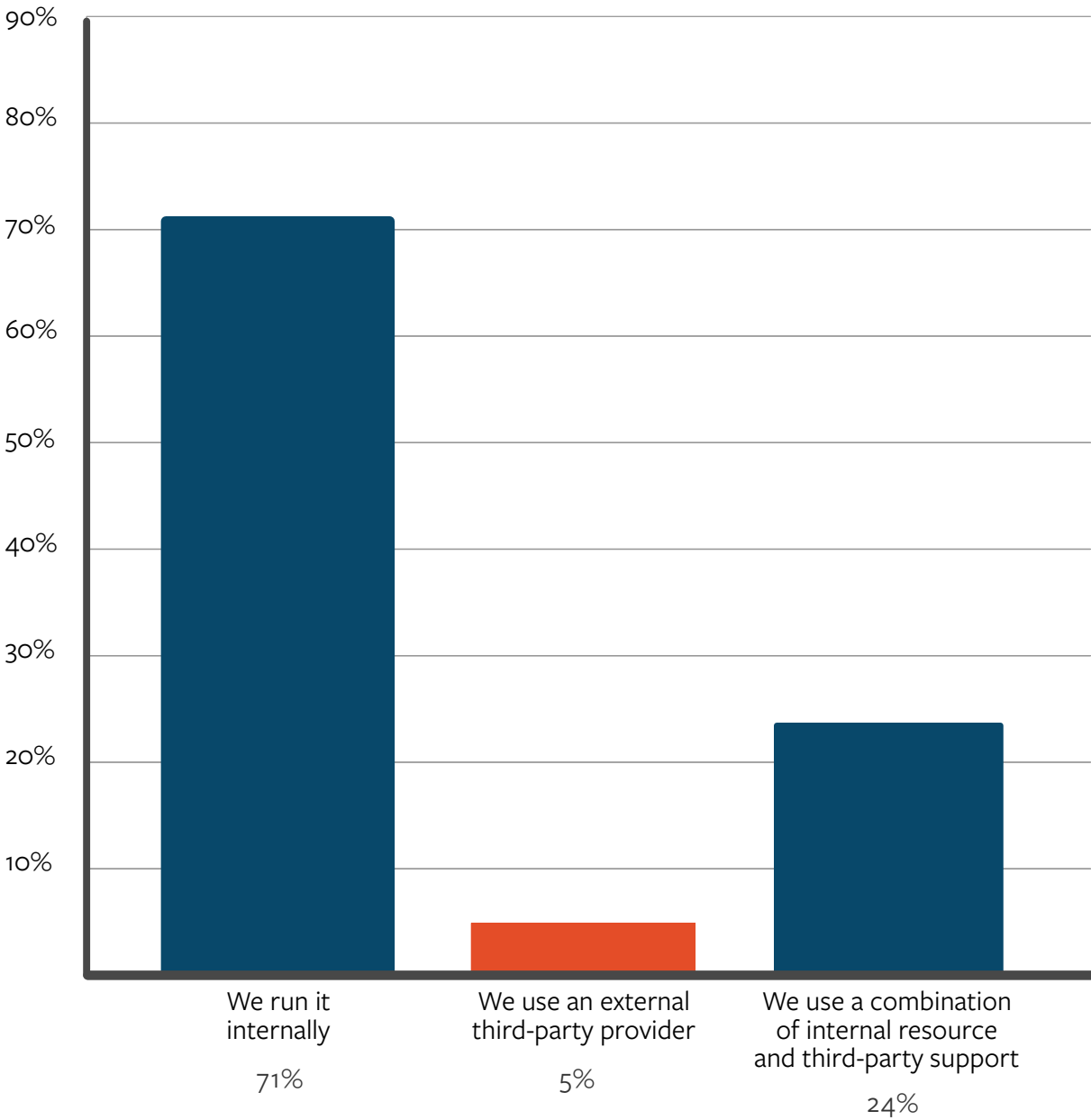
Who is managing customer journey mapping programmes?

Nearly three-quarters (71%) of respondents told us that their organisations perform customer journey mapping themselves, without any third-party (i.e. consultant) assistance. A quarter (24%) collaborate with a third-party to produce journey maps, while only 5% hand the entire process over to a third-party.

The research also indicates that the longer organisations have been using customer journey mapping, the more likely they are to use third-party expertise. Indeed, although no organisation that has used customer journey mapping over five years reports outsourcing it to a third-party entirely, a third (33%) are collaborating with experts.

Despite this, respondents report similarly positive results whether they perform customer journey mapping in-house (37% extremely positive; 48% positive) or in collaboration with a third-party (31% extremely positive; 54% positive) – although those outsourcing it entirely are less positive (only 14% reporting that the results are extremely positive).

Do you conduct customer journey mapping internally or use an external provider?



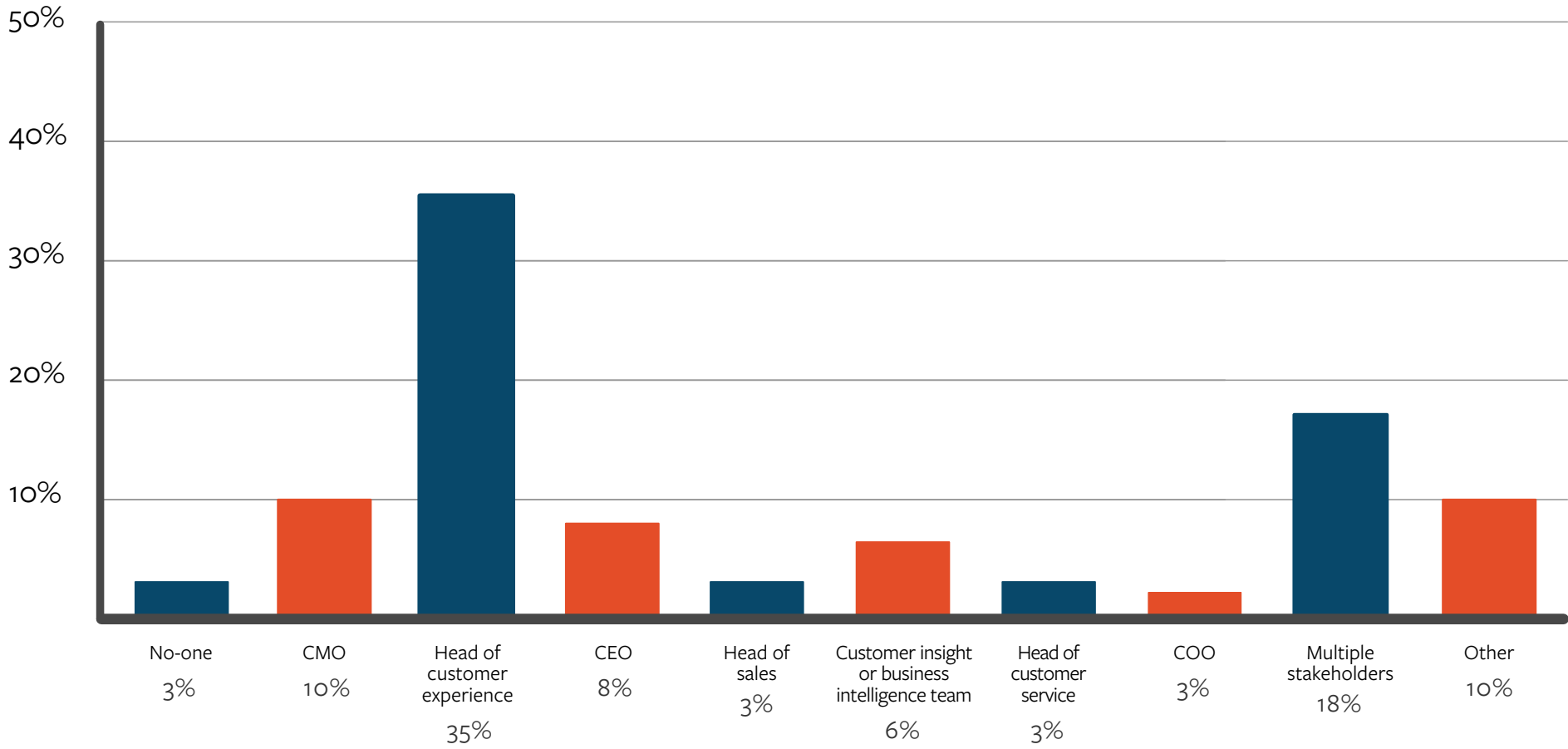
Responses from those that are conducting the project in-house or in collaboration with a third-party suggest that customer journey mapping can be led by a variety of different stakeholders. As of yet, there is no clear, common ‘owner’ of customer journey mapping.

Amongst our survey respondents, customer journey mapping is often led by a head of customer experience (or equivalent, such as chief customer officer), with over a third (35%) of those surveyed reporting that they were the project leader.

This is perhaps a sensible option for ownership, representing a role that sits across multiple departments, with a mandate to unite different parts of the business around the customer. However, heads of customer experience are still far from ubiquitous.

And perhaps in the absence of such a position, or perhaps simply because of a strategic decision within the specific organisations themselves, our respondents disclosed a range of other customer journey mapping leaders, including CMOs (10%), CEOs (8%) and customer insight leaders (6%).

Who has ownership of customer journey mapping within your organisation?



Respondents ticked all that applied

The second most commonly cited response to this question by our respondents was that there is no single person leading it - nearly a fifth (18%) revealed that they had multiple stakeholders leading their customer journey mapping.

This could be said to reflect the lack of clarity over which role or even department is most appropriately positioned to lead customer journey mapping. However, on closer inspection, those respondents who told us that their journey mapping is led by multiple sources reported some of the most positive results – with 46% describing the impact of journey mapping as “extremely positive”. The collaborative, cross-organisational approach appears to be delivering success.

Only projects led by the COO (50% extremely positive) and the CEO (69% extremely positive) reported a more positive impact.

That the CEO-led projects are reporting such a significantly larger number of extremely positive results than any other programme, is worth noting. But is ownership of customer journey mapping by the CEO realistic for larger organisations? Certainly our findings suggest not, with all CEO-led programmes hailing from organisations with under 50 employees, save for one in the 50-100 employees category.

Somewhat surprisingly, those programmes led by a head of customer experience or equivalent, reported less impact than most other programmes – with only 24% reporting ‘extremely positive’ results (although with a further 67% reporting ‘positive’ impacts, the results were still overwhelmingly positive). Similarly, those programmes led by a head of customer service are slightly less impactful, with only 20% reporting ‘extremely positive’ results. Meanwhile, none of our respondents with a head of sales leading customer journey mapping described the programme as yielding ‘extremely positive’ results.

Elsewhere, there are similar results reported where programmes are led by CMOs (31% extremely positive) and heads of insight/business intelligence or equivalent (33%).

Also noteworthy is the fact that while none of the aforementioned projects are attributed as having delivered ‘no impact’, irrespective of who in the business was leading the programme, of those that told us their programmes have no leader, 20% said that customer journey mapping had no impact. Perhaps a reminder that somebody (or several somebodies) needs to take ownership of the project, no matter where in the business they sit.

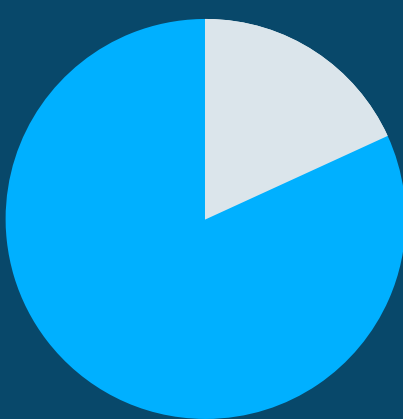
Who has ownership vs. success

We cross-referenced the ownership of customer journey mapping programmes with the stated impact on the organisation’s customer experience. As you can see in the following charts, the most positive impact was felt when a CEO, COO or or multiple stakeholders had ownership of the programme.



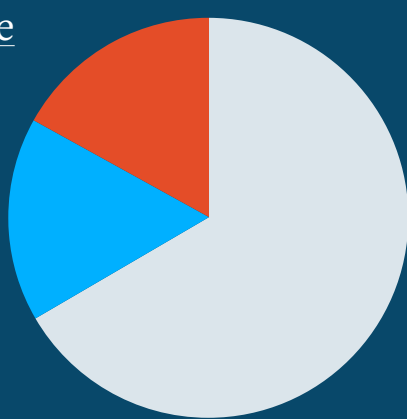
Chief marketing officer

- Extremely positive 31%
- Positive 43%
- Too early to tell 26%



Head of customer service

- Extremely positive 20%
- Positive 80%



Chief executive officer

- Extremely positive 69%
- Positive 15%
- Too early to tell 16%



Head of sales

- Positive 50%
- Too early to tell 50%



Head of customer experience, or equivalent

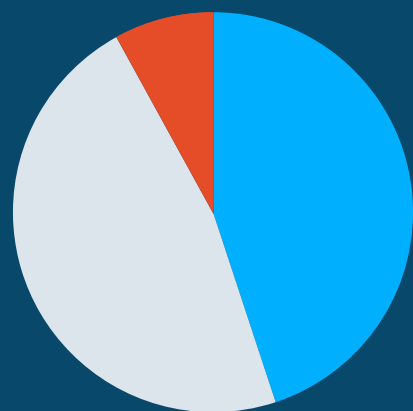
- Extremely positive 24%
- Positive 67%
- Too early to tell 9%



Chief operating officer

- Extremely positive 50%
- Positive 50%





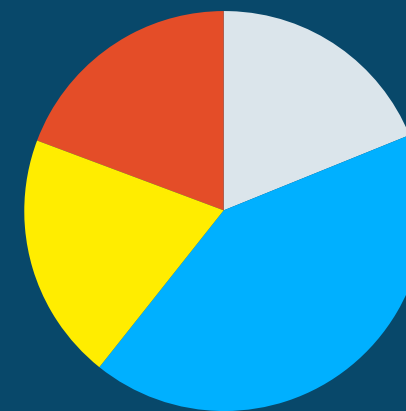
Multiple stakeholders

- Extremely positive 46%
- Positive 46%
- Too early to tell 8%



Customer insight /
business intelligence

- Extremely positive 33%
- Positive 33%
- Too early to tell 34%



No-one

- Extremely positive 20%
- Positive 40%
- Too early to tell 20%
- No impact 20%

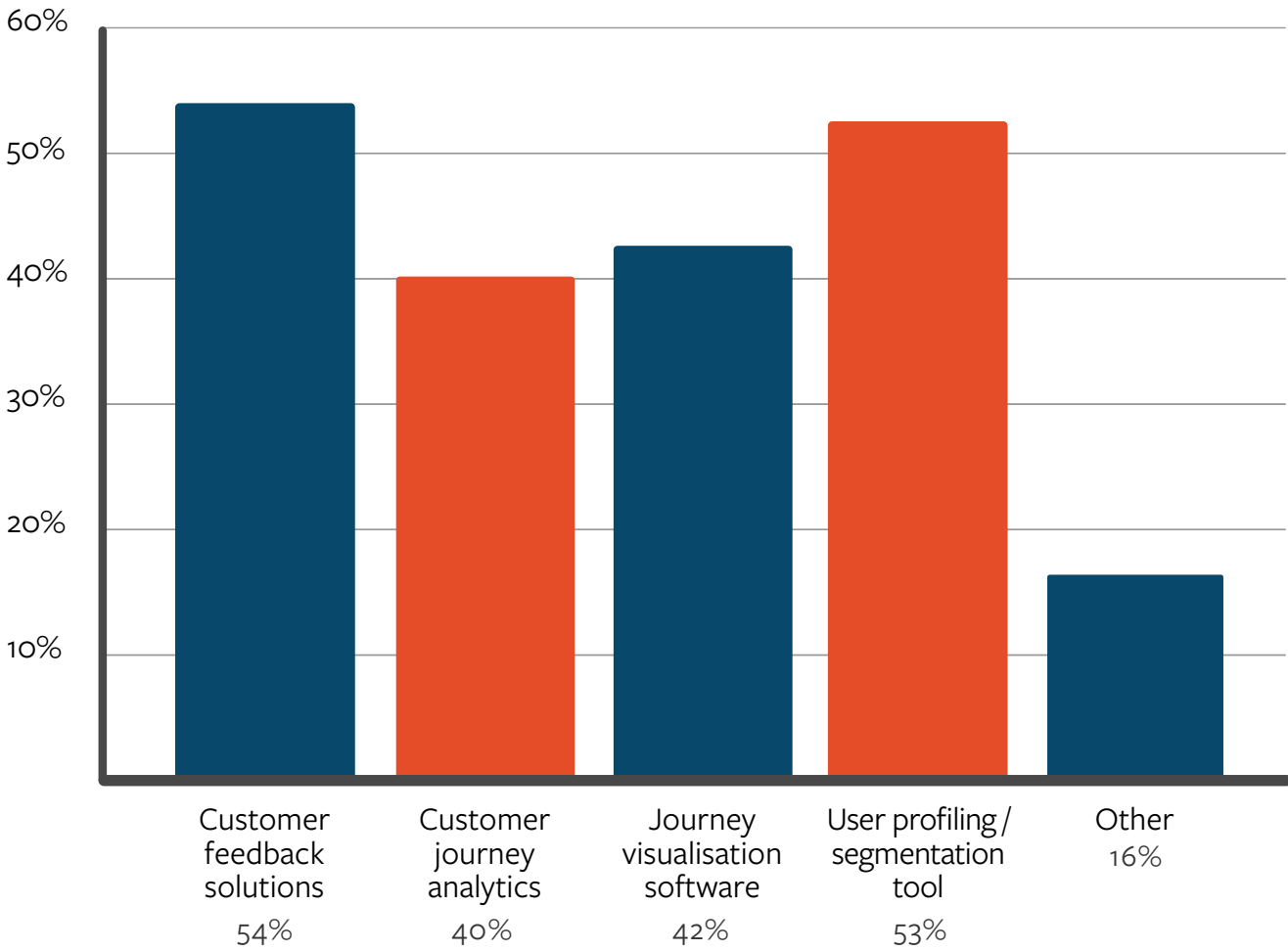
How are practitioners executing customer journey mapping?

Respondents tell us that they use a variety of tools to support their customer journey mapping projects. Customer feedback solutions are used by over half (54%), representing a useful way to glean insights to bake into the map. Over half (53%) also utilise user profiling and/or segmentation tools as part of the mapping process, reflecting the emphasis that many journey mapping projects place on persona building to provide added rigour.

Journey visualisation tools are reported as being used by nearly half (42%) of respondents, in contrast to the post-it notes and pads, or Excel documents used by a small number of interviewees.

Most respondents reported using a combination of different tools. Those that report using customer journey analytics solutions as part of their toolkit overall reported a slightly more positive impact of their journey mapping, with 42% saying that the impact was ‘extremely positive’, compared to users of journey visualisation software (39%), customer feedback solutions (38%) and user profiling/ segmentation tools (35%).

How are practitioners executing customer journey mapping?

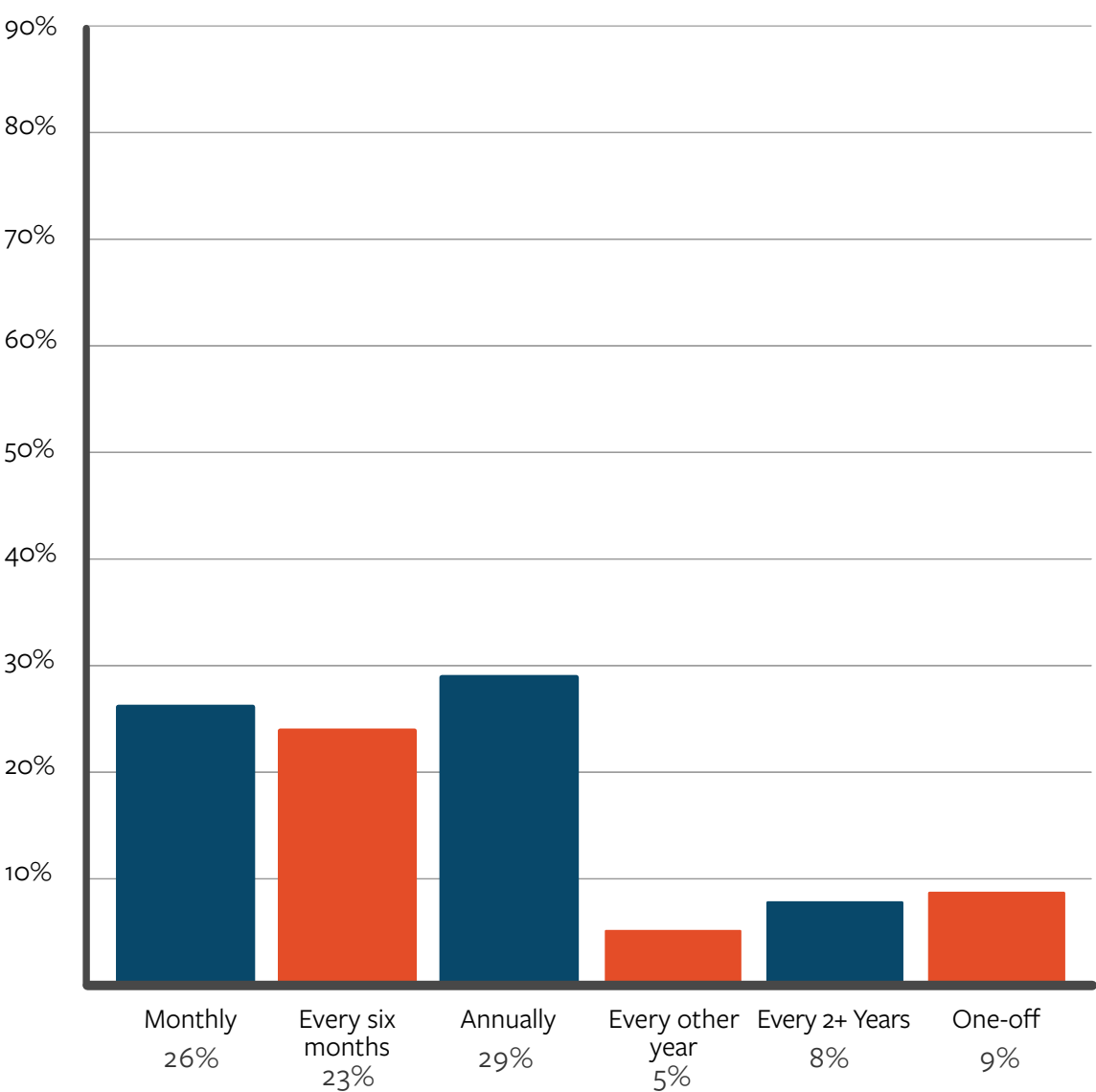


Respondents ticked all that applied

The findings indicate that there is little consensus regarding how frequently journey mapping should be conducted, with around a quarter of respondents each telling us that they map customer journeys monthly (26%), every six months (23%) and annually (29%). Even when drilling down into this area by industry, there is no consistency in terms of the frequency that it is conducted.

56% of respondents who conducted customer journey mapping every month reported that the impact was ‘extremely positive’.

How often do you conduct journey mapping?

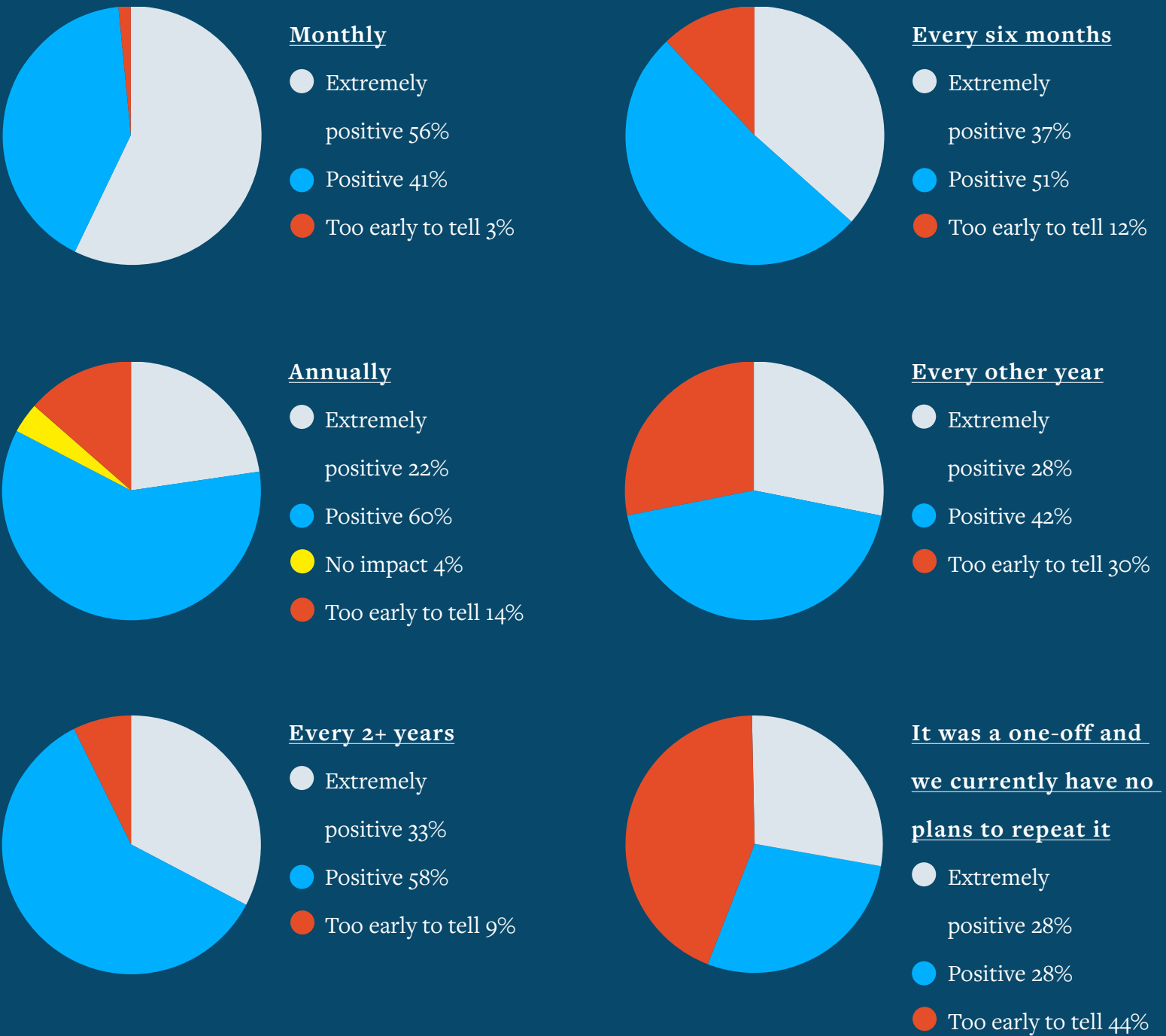


What we have found, however, is that those who conduct journey mapping more regularly are more likely to report the impact as very positive. 56% of respondents who conducted customer journey mapping every month reported that the impact was ‘extremely positive’, this compares to 37% for those who conduct it every six months, 22% for those who conduct it annually, 28% every other year and 33% for those who conduct it every 2+ years. This would seem to suggest that organisations are most satisfied with the results if customer journey mapping is conducted very frequently.

This also appears to be reflected in the behaviour of the more experienced practitioners. Nearly a third (31%) of respondents who have used journey mapping for three years and longer at their organisations perform journey mapping on a monthly basis, with a further quarter (24%) performing it every six months. Less than a fifth (19%) conduct it annually.

How often mapping is conducted vs. CX impact

We cross-referenced how often respondents performed customer journey mapping with the impact they reported it had on customer experience.



What is preventing wider use of customer journey mapping?

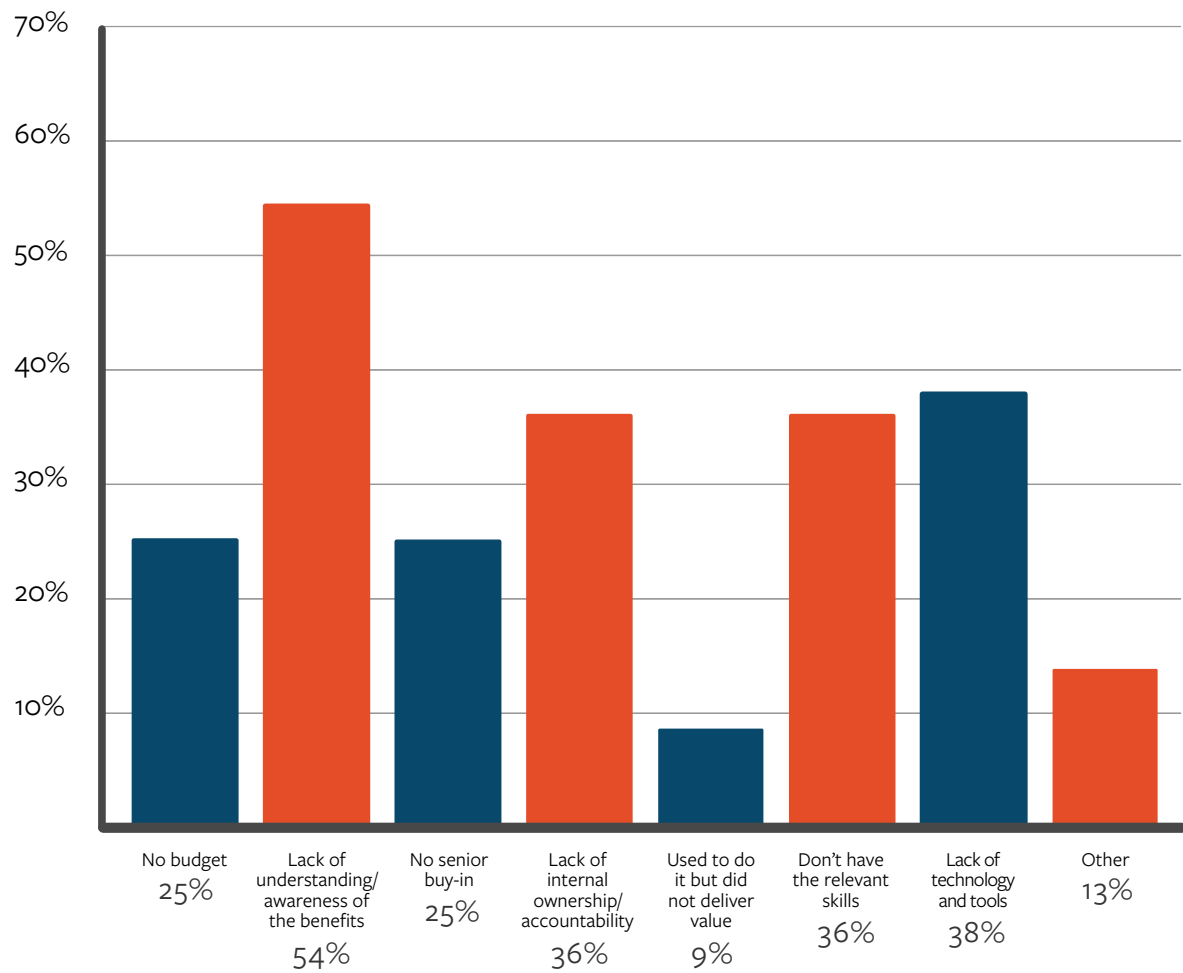
So with such strong results being reported by practitioners of customer journey mapping, what is preventing the other third from running a journey mapping programme? Those that don't utilise customer journey mapping claim that there are multiple factors preventing them.

Over half of respondents (54%) say that a lack of understanding and awareness of the benefits is a barrier to customer journey mapping, suggesting that while the discipline has been in play for many years, there are still a significant proportion of organisations and leaders that are not very familiar with it. Arguably related to this is the fact that a quarter (25%) noted that they are lacking senior buy-in to deliver a programme.

Elsewhere, a third of respondents also reported that they have been hampered by a lack of technology/tools (38%); a lack of appropriate skills (36%); and a lack of project ownership (36%).

Interestingly, 8% claimed that they used to map the customer journey but that the project was dropped as it failed to deliver value.

What are the barriers to using customer journey mapping in your organisation?



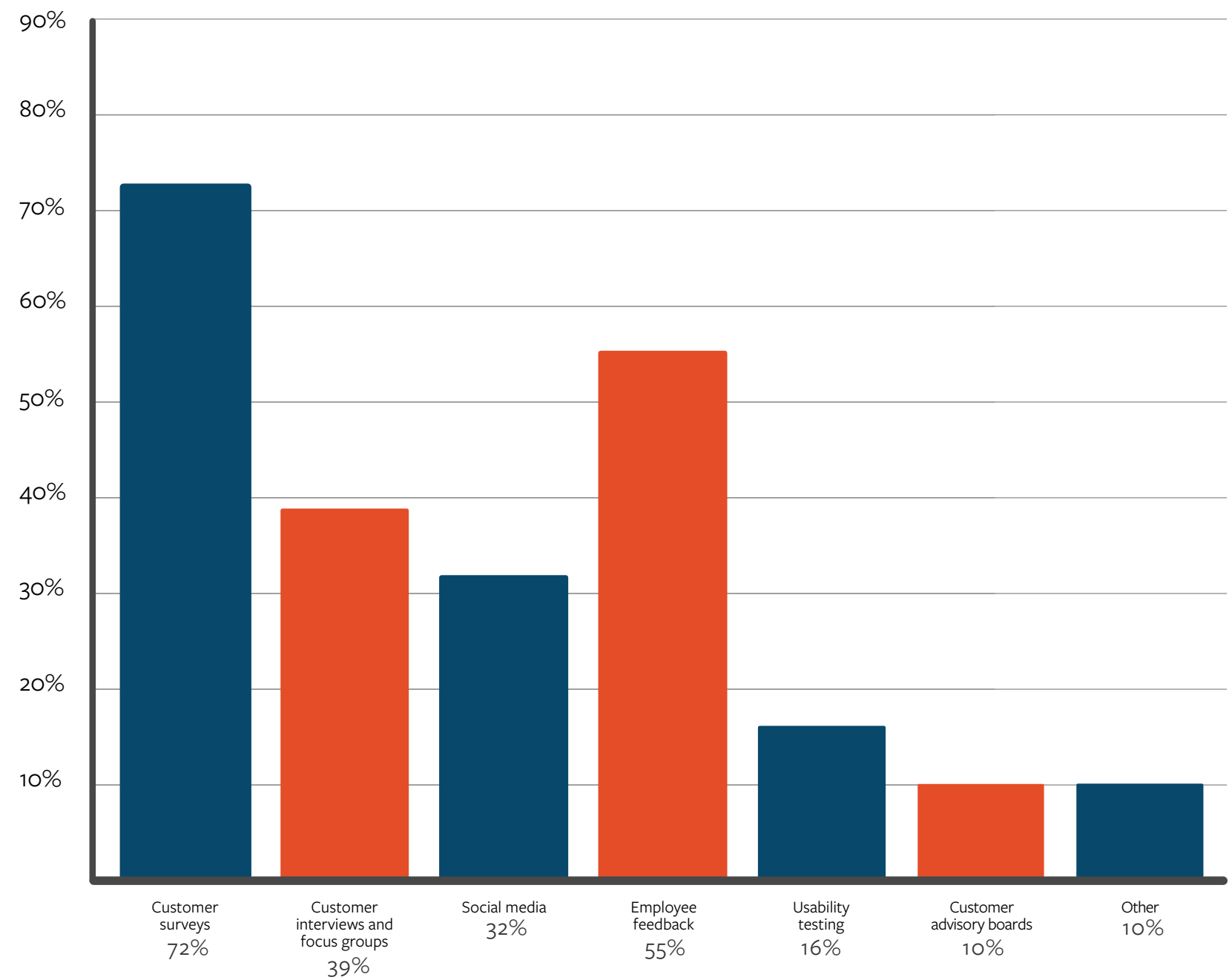
Respondents ticked all that applied

25% noted that they are lacking senior buy-in to deliver a programme.

With a third of respondents reporting that customer journey mapping is not being used at their organisations, the research explores what alternative steps are being deployed to understand the customer and their interactions in its absence.

Customer surveys are most commonly used, with almost three-quarters (72%) conducting surveys for customer insight. Employee feedback is also used by most respondents (55%).

How do you gather insight around your customer journeys?



Respondents ticked all that applied

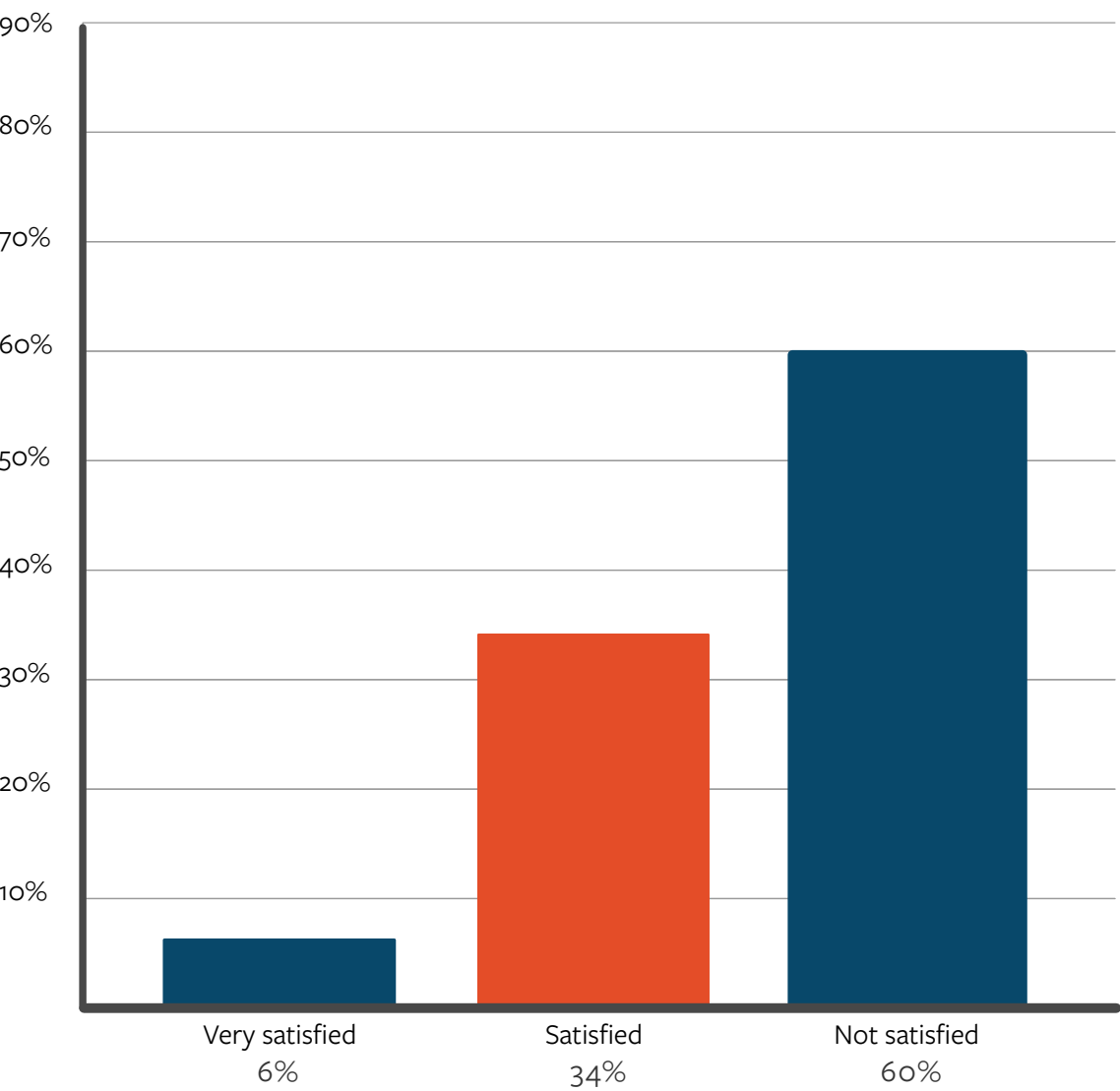


Despite the similarities in tools used to gain customer understanding, there is an enormous discrepancy in how satisfied the respondents are that these methods deliver adequate insight into the customer journey.

60% of organisations that do not use customer journey mapping report that they are not satisfied with the insight that they have into customer journeys. This compares poorly to those that use customer journey mapping, with 64% reporting they are satisfied with the insight they have achieved and 25% reporting they are very satisfied.

With a very similar set of tools being used by both groups, this could indicate that the process of translating customer feedback and data into a visual representation teases out insights that are otherwise overlooked, or that those that conduct customer journey mapping are simply more rigorous with their other customer research.

How satisfied are you that these methods give you enough insight into the customer journey?

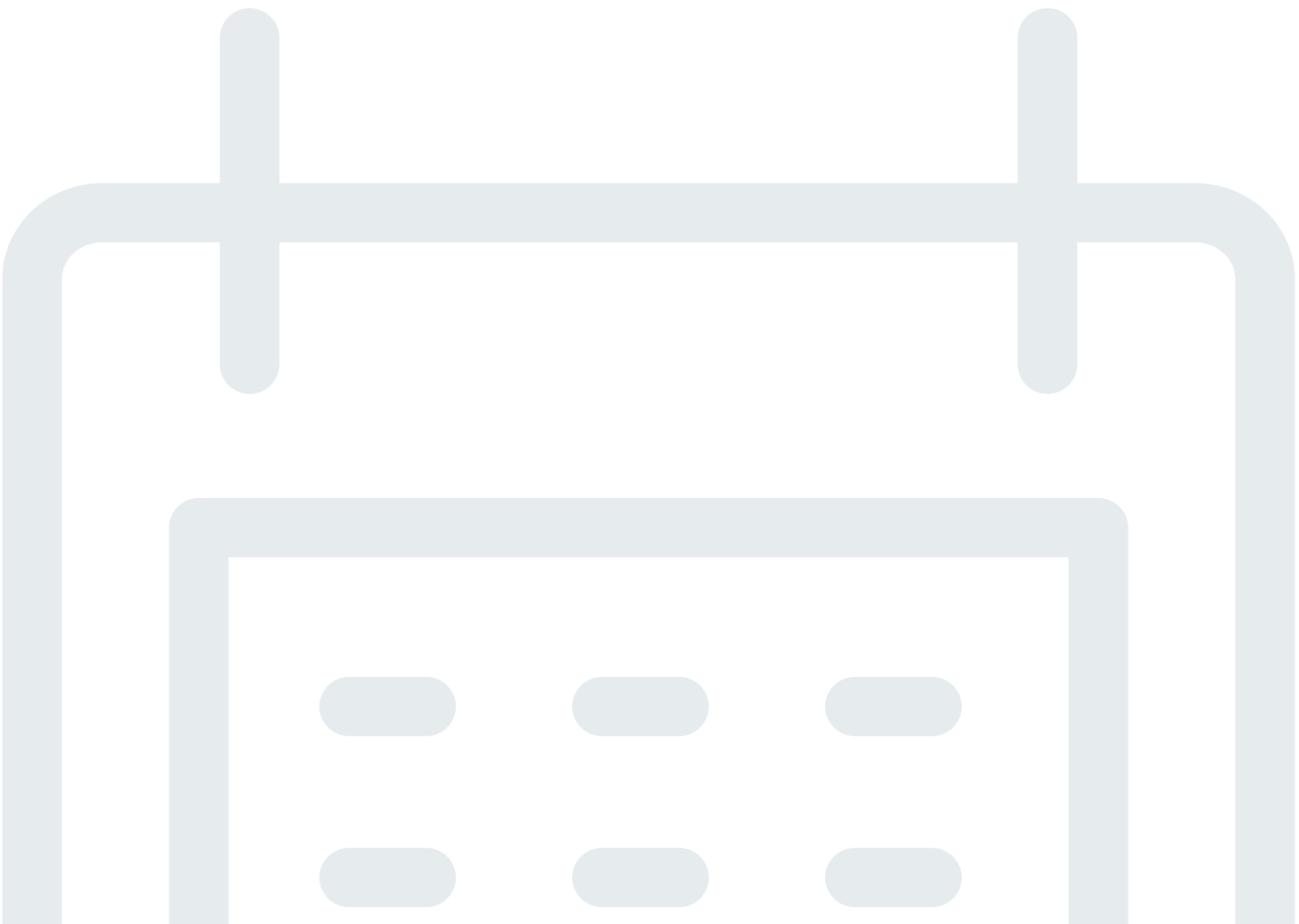
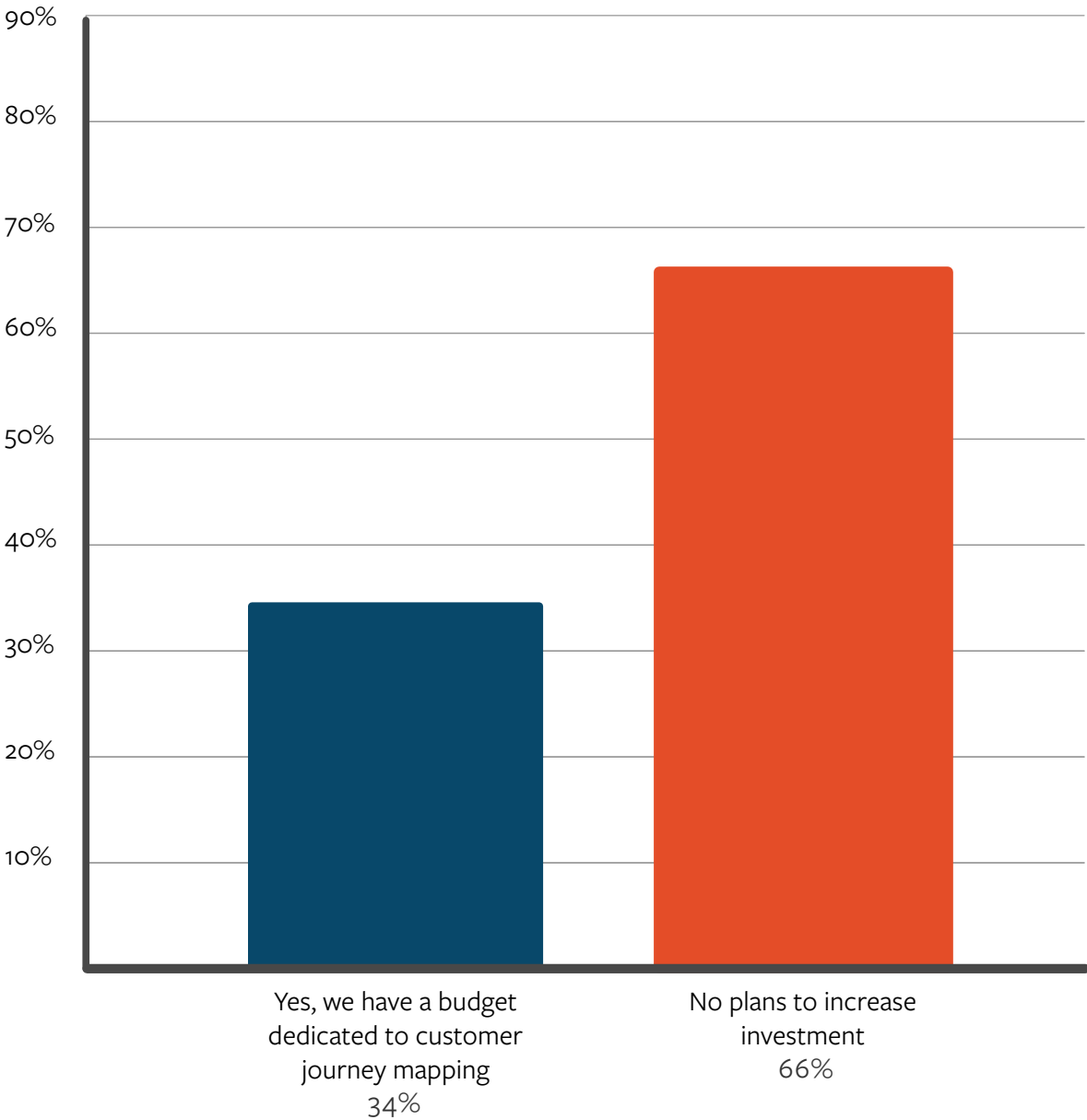


60% of organisations that do not use customer journey mapping report that they are not satisfied with the insight that they have into customer journeys.

The positive news for those that are yet to capitalise on customer journey mapping is that a notable proportion have plans to implement the discipline in the immediate future.

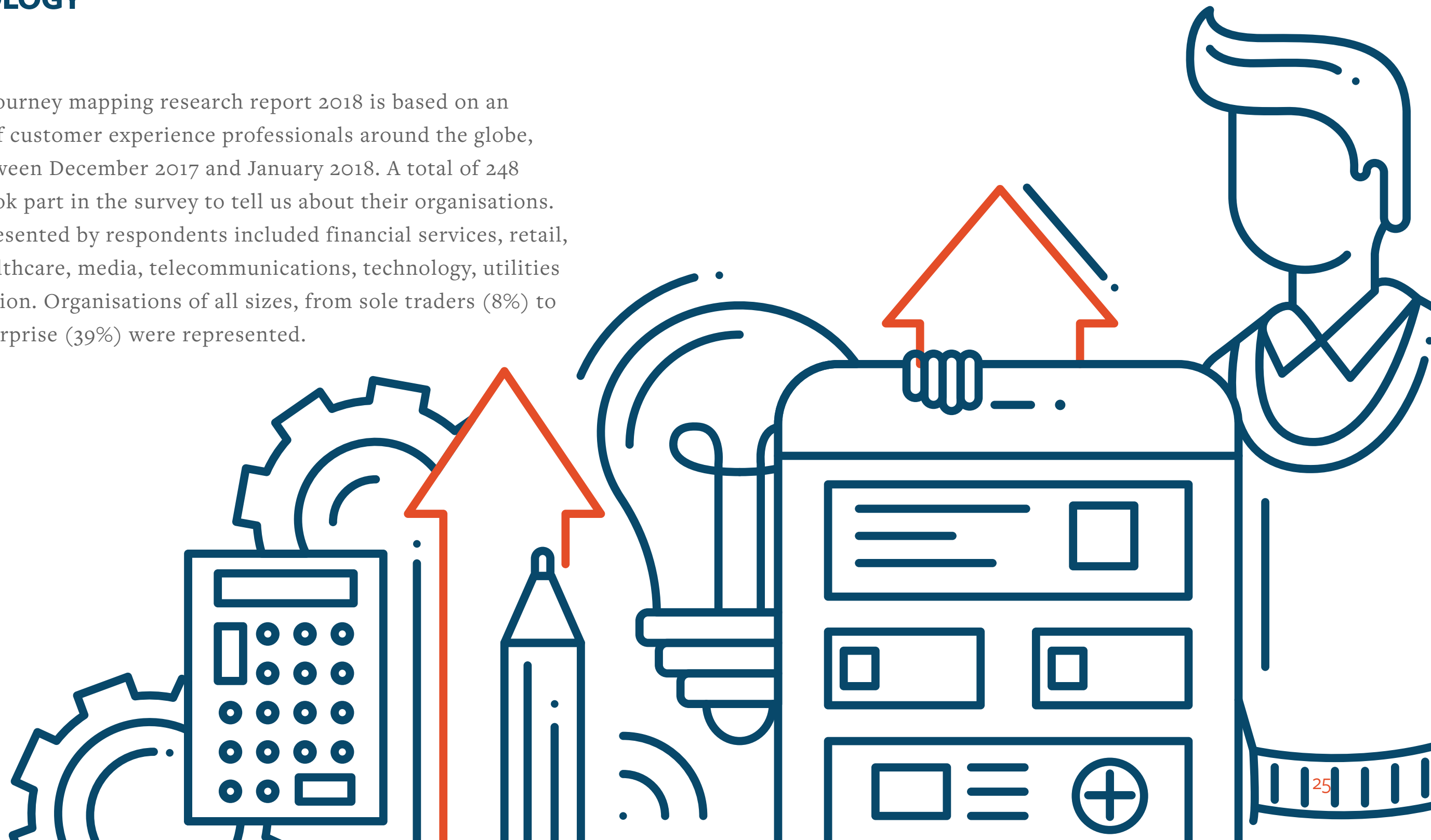
A third of respondents (34%) told us that they are planning to invest in customer journey mapping in the next 12-18 months and have a budget in place.

Are you planning to invest in customer journey mapping in the next 12-18 months?



METHODOLOGY

The customer journey mapping research report 2018 is based on an online survey of customer experience professionals around the globe, carried out between December 2017 and January 2018. A total of 248 respondents took part in the survey to tell us about their organisations. Industries represented by respondents included financial services, retail, hospitality, healthcare, media, telecommunications, technology, utilities and transportation. Organisations of all sizes, from sole traders (8%) to large-scale enterprise (39%) were represented.





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Our solutions bring together and activate the entire organization in the name of customer experience, through better collaboration and visibility into the customer journey. Quadient supports thousands of clients and partners worldwide in the financial services, insurance and service provider industries in their quest to achieve customer experience excellence via mobile, digital, social media and print technologies.

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