



# Research Brief

## Customer Journey Mapping for B-to-B Storytelling

Customer journey mapping's storytelling approach is an ideal way to connect customers to the business

Customer experience teams should include customer journey mapping as a core competency and shared service

There are seven fundamental elements of customer journey mapping

Sweden's blood donation service has developed a two-step approach to help blood donors feel connected with the good they are doing. The system initially sends donors a thank-you text, then texts them again whenever their blood is used to help someone. This gives donors direct knowledge about how they've helped their fellow citizens, which encourages them to donate again.

The focus of many customer experience leaders has evolved from firefighting when problems occur to connecting organizations to their customers by using customer journey mapping. Customer journey mapping's storytelling approach is different from mapping the buyer's journey, because it focuses on what happens after buyers become customers. In this brief, we show how customer experience teams can use customer journey mapping to enable the organization to see the connections between actions and impacts.

### The Role of Storytelling

An improved customer experience contributes to growth and profitability (see the brief "The B-to-B Customer Experience Function"), and storytelling is an important tool for gaining perspective about real-world customer experience – not just use cases. When organizations are in tune with customers' needs, they can meet those needs more effectively. Customer experience practitioners should use journey mapping to create and share a common understanding throughout the organization. Storytelling with empathy can be especially valuable in the b-to-b world, where there is a tendency to think of customers as accounts rather than individuals.

Begin by documenting how customers interact with the organization's products, services and personnel. Customer experience leaders should bring a neutral, non-judgmental approach to telling customer stories. This differs from how content, communications, and even reference or advocacy practitioners (e.g. for case studies, white papers) use storytelling. In those instances, there is a particular end in mind, whereas customer experience focuses on listening and interpreting to both the good and the bad, which reinforces the resulting stories' credibility and helps them be heard. The stories should be simple and evocative; using customers' unedited words or capturing them on video are two great ways to present them.

### Customer Journey Mapping as a Core Competency

As the customer experience function evolves, so does customer journey mapping (which is sometimes referred to as customer experience mapping).



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At its most basic level, customer journey mapping provides a visual representation of an organization's customer touchpoints throughout the customer lifecycle, documents the role that each touchpoint plays, and brings empathy into the customer engagement process (see the Core Strategy Report "Customer Experience Mapping: Basic Components"). Traditionally, organizations selected one of two approaches for journey mapping:

- **A time-consuming, extensive project.** This approach typically involves a small army of consultants who conduct broad-based interviews and analysis. Eventually, the project produces a visually appealing map, which is then laminated and distributed to team members. Unfortunately, these maps become obsolete as soon as the business made any significant changes (e.g. merger, divestiture, go-to-market shift).
- **An internally focused approach.** With this option, representatives from customer-facing functions serve as proxies for customers. This approach, while relatively quick and inexpensive, misses the critical element of true customer voices. Without directly involving customers, organizations can make dangerous assumptions. Additionally, this type of journey mapping tends to optimize for improving ease of use for internal functions, which can be helpful to the customer experience but is woefully incomplete when trying to understand the customer's perspective.

Customer journey mapping can be quite complex and requires a skill set that evolves over time. Therefore, best-in-class customer experience functions deploy customer journey mapping with a focus on implementing reliable, repeatable storytelling processes as a core competency and shared service.

## Storytelling Fundamentals

Apply the following required elements of b-to-b storytelling to improve the quality and impact of customer journey mapping:

- **Customers.** Although it may seem elementary, many customer journey mapping efforts do not include, or even consult, customers themselves. Understanding specific internal processes, systems and personnel – based on the results of customers' actual experience – shines a light on

whether interactions are meeting expectations, need to be re-engineered, or are so positive that they should be broadly leveraged. Seeing things from the customer's point of view leads to a more holistic understanding across the organization.

- **Stakeholders.** Customer experience should engage leaders throughout the organization, especially those who control significant budgets. The organization should ensure that key stakeholders are consumers of the customer journey details and make a strong connection with customer stories. Customer journey details must be developed and delivered at the leadership level to enhance credibility and ongoing support.
- **Sources of customer insight.** A well-executed customer journey map certainly helps add qualitative perspective, but customer experience should not build the map in isolation from existing customer insights and analytics. There are several sources of qualitative data that can help the journey map reflect the true current state – e.g. relationship surveys, transaction surveys, user group summaries, customer advisory board readouts, buyer studies, brand studies, business performance metrics. Additionally, these vehicles may help the organization create a list of which customer journeys to map first.
- **Manageable portions of data.** Organizations can make journey mapping relevant and make progress in the short to medium term by approaching customer journey mapping as an iterative effort that will ultimately result in an understanding of customer experience at process, product, segment, region and customer role levels (see the brief "B-to-B Personas: Customer Role Attributes"). After the organization completes each mapping exercise, it can leverage learnings and efficiencies for future maps. This helps ensure that the map can be acted upon more quickly and with clearer ownership, which increases the likelihood of success.
- **Business objectives.** Once the organization maps the customer journey, it must prioritize how to act on the map's findings. While it's tempting to throw resources at the areas of most concern, customer experience teams should view the map in terms of strategic business objectives to maintain organizational focus and properly allocate resources.



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- **Customer check-ins.** When including customers in the initial journey mapping processes, organizations should ask if they are willing to continue to interact as improvement initiatives evolve. Very few customers decline, and this core group can provide continuous validation and triggers for course correction. Customer check-ins should be timed to the schedule of improvement rollouts. In other words, the organization should not ask for a monthly check-in if it knows that improvement efforts may take a quarter. A member of the customer experience team should own the care and feeding of this group, perhaps aligned with advocacy efforts underway within customer marketing (see the brief “Building a Customer Marketing Function”).
- **Technology options.** Early customer journey mapping efforts depended on existing business technologies (e.g. Visio, PowerPoint, Excel). Although some platforms are very good at using visuals, very few are interactive or changeable, let alone purpose-built for customer journey mapping. This technology category is still somewhat immature, but there are vendors emerging that provide an easy mapping interface and can graphically depict, design, evolve and manage journey maps to help customer experience teams tell customer stories (see the SiriusView “Customer Journey Mapping 2015”).

## The Sirius Decision

An increasing number of b-to-b organizations are adopting customer journey maps as a foundational tool for leveraging the post-sale customer lifecycle. Once organizations realize the power of engaging with their existing customer base vs. continuously chasing new logos, they understand that shifting the context of decisionmaking from traditional business performance metrics toward an approach driven by customer experience makes good business sense. Creating a function that excels in mapping customer journeys and telling customer stories in a simple yet evocative fashion can help jumpstart improved customer engagement.

