Journey Mapping: Applying Customer Experience Principles to ITSM

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Session Description

Today’s employees are demanding the same choices about technology and services at their workplace as they do at home. Organizations need to focus on going beyond measuring point-in-time satisfaction to delivering an outstanding customer experience throughout the entire lifecycle. In this session, you’ll learn how to apply some of the leading customer experience (CX) principles, tools, and frameworks to help design IT services from the outside-in. Through real-life examples and techniques, you’ll discover how personas, journey mapping, and communication strategies can help your organization deliver a great experience.

Speaker Background

David Murphy manages consulting projects, applying Forrester’s research and methodologies to support client projects in the customer experience domain. David specializes in leveraging customer insights for persona development and customer journey and ecosystem mapping. Previously, David was a senior research associate on Forrester’s Application Development and Delivery team, where he worked with Forrester analysts to research how emerging technologies, such as Big Data and predictive analytics, lead to deeper customer insights and more personalized customer experiences. Prior to joining Forrester, David worked on Honeywell’s product and marketing management team, where he helped lead market share and competitive intelligence initiatives across a number of product lines.

Chris Gallacher serves as a principal consultant in Forrester’s BT Strategy consulting practice, helping clients with technology infrastructure challenges. He authored research on service portfolio insights and provided guidance to clients on service management and workforce enablement. Chris has also worked as a principal consultant in the IT practice of PA Consulting Group, where he helped clients implement ITSM programs. Prior to that, Chris spent ten years at BP in multiple roles within its global infrastructure and operations group.
Journey Mapping: Applying Customer Experience Principles to ITSM

Agenda

- Why CX for IT, Why Now?
- The Competencies of Customer Experience
- ITSM Design – Customer Journey Mapping and Personas
- Applying CX to ITSM
- How to Get Started
- Q&A
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Power has shifted to customers
We Have Entered The Age Of The Customer

A 20-year business cycle in which the most successful enterprises will reinvent themselves to systematically understand and serve increasingly powerful customers

Age of manufacturing
Mass manufacturing makes industrial powerhouses successful
- Ford
- Boeing
- GE
- RCA

Age of distribution
Global connections and transportation systems make distribution key
- Wal-Mart
- Toyota
- P&G
- UPS

Age of information
Connected PCs and supply chains mean those that control information flow dominate
- Amazon
- Google
- Comcast
- Capital One

Age of the customer
Empowered buyers demand a new level of customer obsession
- Zappos
- Salesforce.com
- USAA
- Amazon

And your employees’ expectations and perceptions are being shaped by their personal experiences outside of the office

Customer Experience (CX):
How customers perceive their interactions with an organization

Design, implementation, and management of interactions that happen across all touch-points of the entire customer journey and customer lifecycle

Definition Check!
Consider “customer” as your internal customer or employee
Customer experience is not...

**Customer Service**
Interacting with customers to handle their specific requests and needs, or recovering from problems

**User Experience (UX)**
Design, test and deploy specific user interactions (mainly) with a digital interface

**Lean Six Sigma, Agile, Value Stream Mapping, etc.**
Streamlined, optimized delivery (people, process, technology)

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**Why does CX Matter for IT organizations?**

We have a more “Empowered Consumer”...

...and guess what? They are bringing these expectations into the workplace.
..and when users feel like their voice isn’t being heard you get....

Workarounds

Bureaucracy of NO!

Outsourcing/Shadow IT

Wasted Money/Duplication of Efforts

Improve the experience, customer perception, and business value by taking an outside-in approach

Company-Centric

Inside-out

Company Perceptions

Company “Moments that Matter”

Company Value

Customer-Centric

Outside-In

Customer Perceptions

Customer “Moments that Matter”

Customer Value
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Companies develop six competencies around a CX Vision to master customer experience
The right CX grows out of a clear, succinct, compelling CX vision statement that helps ensure harmony across touchpoints for customers and clarity for your team.

<table>
<thead>
<tr>
<th>Company</th>
<th>Statement of intent, experience principles, or customer promises</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aetna</td>
<td>Simplicity; focus; connection</td>
</tr>
<tr>
<td>Burberry</td>
<td>Welcoming stores; personalized service; product stories; Burberry heritage</td>
</tr>
<tr>
<td>easyJet</td>
<td>Safety first; on your side; a big smile; make it easy; open and upfront</td>
</tr>
<tr>
<td>ING</td>
<td>We make banking clear and easy. We are there anytime, anywhere. We empower you to make smart financial decisions. We’ll keep getting better.</td>
</tr>
<tr>
<td>McDonald’s</td>
<td>McDonald’s vision is to be the world’s best quick-service restaurant experience. Being the best means providing outstanding quality, service, cleanliness, and value, so that we make every customer in every restaurant smile.</td>
</tr>
<tr>
<td>The Ritz-Carlton</td>
<td>The Ritz-Carlton experience enlivens the senses, instills well-being, and fulfills even the unexpressed wishes and needs of our guests.</td>
</tr>
<tr>
<td>State Farm</td>
<td>Remarkable. Every day. Every customer. Every interaction.</td>
</tr>
<tr>
<td>Warby Parker</td>
<td>We believe that buying glasses should be easy and fun. It should leave you happy and good-looking, with money in your pocket.</td>
</tr>
</tbody>
</table>

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Understand your customers in depth and communicate that understanding to your team and partners.

**Qualitative**
- Diary/journal studies
- User interviews
- Participatory design
- Card sorting
- Ethnographic Field Studies
- Video ethnography
- Direct observation

**Quantitative**
- Customer support data analysis
- Automated usability testing
- User surveys
- Eye tracking
- Site traffic analysis
- A/B testing

**Goals and attitudes** (what people say)
**Behaviors** (what people do)
## PRIORITIZATION

Focus on what’s most important for your customer’s experience and your business unit’s success.

<table>
<thead>
<tr>
<th>Value to Customer</th>
<th>Ease of Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Long-term investments</td>
</tr>
<tr>
<td></td>
<td>High value quick wins!</td>
</tr>
<tr>
<td>Don’t bother</td>
<td>Investigate for strategic alignment, ROI</td>
</tr>
<tr>
<td>Difficult</td>
<td>Easy</td>
</tr>
</tbody>
</table>

## ENABLEMENT

Provide employees and partners with the resources they need to deliver the right experiences.
**MEASUREMENT**

Quantify the quality of experiences and their link to your organization’s overall metrics

**Measurement System**

- Share CX measurement insights
- Identify and act on CX issues
- Set targets for CX metrics
- Design data collection
- Select experiences to measure
- Select outcomes to measure
- PhD CX metrics

**Measurement Architecture**

- Descriptive metrics
  - Sales volume
  - Satisfaction scores
- Perception metrics
  - Key information available
  - Help available
  - Build trust
  - Easy
  - Empathic CX
- Outcome metrics
  - Actual outcomes (e.g., sales or retention rates)
  - Intended outcomes (e.g., expected performance)

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**CULTURE**

Create a system of shared values and behaviors that focus your team on delivering great customer experiences

**Hiring**

- Recruitment
- Criteria & Fit
- Selection Process

**Socialization**

- Onboarding & training
- Communication & Storytelling
- Rituals & routines

**Rewards**

- Compensation & promotion
- Awards & recognition
- Perks
Define and refine experiences based on your vision and research-based customer understanding.

Success requires walking in your customer’s shoes.
Two critical CX design tools are personas and journey maps

Personas

Journey Maps

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Journey mapping is a tool that captures insights and information related to customer behaviors, needs, and perceptions at key interactions with a company, product or service.

Customer journey maps are documents that visually illustrate customers’ steps, needs, and perceptions as they seek to achieve a goal.
Why do we map journeys?

To create a focused and shareable view of the customer experience (CX) that can be used to:

• guide internal actions and
• enable informed decision making about how to deliver value to customers.

Journey maps are strategic tools that clarify where to focus efforts, and why.

Why use Personas?

Create Empathy
Establish Priorities
Provide Focus
Example Persona

- Typically one page
- Include a narrative such as a “Day in the Life”
- Are representative of the workforce
- Provide perspective of the end user during the design process by understanding what they want

What makes a good Persona?

- Name and Title
- Role Description
- Key Responsibilities
- Most Used Services
- Pain Points
- Wants & Needs
- Workarounds
What makes a good Persona?

A Day in the Life
As part of the finance team we have strict deadlines on a monthly basis to ensure we can close the books and so its imperative that I am not impeded with untimely software updates. I constantly have to access financial data across a number of systems some of which have been around a while and can be flaky. During the day I have to attend various meetings and sometimes my laptop struggles be operational when I dock and undock.

Primary inputs

<table>
<thead>
<tr>
<th>Qualitative research</th>
<th>Quantitative studies</th>
</tr>
</thead>
<tbody>
<tr>
<td>what</td>
<td>what</td>
</tr>
<tr>
<td>• One on one interviews</td>
<td>• Survey with ‘soft’ and ‘hard’ customer focus</td>
</tr>
<tr>
<td>• Focus groups</td>
<td>with who</td>
</tr>
<tr>
<td>with who</td>
<td>• Customers</td>
</tr>
<tr>
<td>• Customers</td>
<td>• Business stakeholders</td>
</tr>
<tr>
<td>• Business stakeholders</td>
<td>• Employees</td>
</tr>
<tr>
<td>• Employees</td>
<td></td>
</tr>
</tbody>
</table>

What to leverage

<table>
<thead>
<tr>
<th>Customer segmentation</th>
<th>Customer data</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Any existing segmentation constructs to focus the primary research inputs which will supplement from a behavioral and motivational standpoint</td>
<td>• Including existing customer data will provide hypotheses to test and guide the research tool (i.e. surveys or interview guides) development</td>
</tr>
</tbody>
</table>
Persona interview guides and customer surveys

Focus conversation around:
- Perceptions
- Behaviors
- Motivations and goals

Surveys should attempt to quantify customer perception and measure customer satisfaction to identify what is working and what isn’t.

A customer journey atlas is a tool for cataloging and assessing journey maps to help organizations systemically plan and prioritize journey mapping efforts.

Key features
- Key inputs & how to create
- Journey chapters (aka stages in the customer lifecycle)
- Individual customer journeys that can span one or more lifecycle stages.
- Journey health and / or importance.
- Journey assessment criteria and status.

Examining a persona:
1. What does your job involve?
2. What are the key challenges you face in your job?
3. What are the key tasks you complete daily?
4. How do you work with our products/services?
5. How do you perceive our company?
6. What do you think is the most valuable feature of our product/service?
7. What do you think is the least valuable feature of our product/service?
8. What are your expectations for the future of our product/service?
9. How do you feel about our company?
10. What are your expectations for our product/service in the future?

A hypothetical journey atlas for a health insurer:

<table>
<thead>
<tr>
<th>Discover / Evaluate</th>
<th>Join</th>
<th>Access</th>
<th>Use</th>
<th>Get Support</th>
<th>Reengage / Learn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find a healthcare provider</td>
<td>Contact a sales representative</td>
<td>Set up an account (if new)</td>
<td>Change policy (ex: lifetime benefits)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Explore coverage options</td>
<td>Sign up online</td>
<td>Make an appointment</td>
<td>Refill policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choose a doctor</td>
<td>Get mobile app</td>
<td>Verify coverage for a procedure</td>
<td>Cancel policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View records on mobile app</td>
<td>Make online payment</td>
<td>Fill a claim</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Deposit or receive a charge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fill a prescription</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Get printed medical records</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Journey mapping can occur at different levels

<table>
<thead>
<tr>
<th>Altitude</th>
<th>Example</th>
<th>Use Case</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>End-to-end</strong></td>
<td>• Application / service lifecycle</td>
<td>• Prioritize CX efforts</td>
</tr>
<tr>
<td>Set of scenarios</td>
<td></td>
<td>• Assess overall health of the experience</td>
</tr>
<tr>
<td>across the life cycle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>of the relationship</td>
<td></td>
<td></td>
</tr>
<tr>
<td>with IT</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Scenario</strong></td>
<td>• Request support</td>
<td>• Improve satisfaction</td>
</tr>
<tr>
<td>Set of interactions</td>
<td>• Deploy a new technology</td>
<td>• Streamline cross-channel interactions</td>
</tr>
<tr>
<td>to accomplish a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>business / user goal</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Task</strong></td>
<td>• Complete a request form</td>
<td>• Design an interview</td>
</tr>
<tr>
<td>Set of interactions</td>
<td>• Navigate a helpdesk IVR</td>
<td>• Improve usability</td>
</tr>
<tr>
<td>to complete a discrete</td>
<td></td>
<td>• Define key features or technical requirements</td>
</tr>
<tr>
<td>task or milestone</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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### The anatomy of a journey map

Overview and Key Persona Information

Customer Journey

Ecosystem Details
TUI created a vision video to bring the future-state journey to life and make it feel real.

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Case Study - Background

Client: Government Agency

Client Challenge:
The central IT organization for this government agency had developed a reputation of being unresponsive and ineffective in communicating their capabilities and responsibilities. They need to devise a strategy that focused on delivering the best employee experience and establishing themselves as a trusted advisor to help the agency make the right technology decisions that will benefit them in the future.

Case Study – Approach

Create CX Vision
- Interview customers (users) across the agency and held a workshop to synthesize and identify what the intended experience should feel and mean

Develop Personas
- Co-developed 3 personas that represented key user groups
  - Identified their wants, needs and pain points

Perform Journey Mapping
- Identified a key journey that is a priority for each persona
  - Held journey mapping sessions with actual customer to capture actual experience

Develop Recommendations
- Identified and prioritized key recommendations
  - Utilized the CX vision created to define how the experience should be in the future for journeys mapped
Case Study – Key Observations

1) Slow or non-existent support resolutions from the Help Desk

- Root Causes and Additional Color: High turnover in the “How-to” Help Desk and poorly accepted contracts & SLAs.
- customers don’t get onsite assistance and focus on solving the problem quickly—even if it’s not the right answer.
- A lot of users have “low expectations” at 17, they just expect to have to wait or that their request won’t get through the bureaucracy at all. They resign themselves to operating at a lower standard.

2) Difficulty knowing who to go to for training and new tech support

- Root Causes and Additional Color: There is no central knowledge base around cloud solutions deployed here.
- Training is ad-hoc and not consistent. This leads to many different support scenarios and training.

Not knowing who to go to for help wastes a lot of time and causes frustration when it comes to training and support requests.
Case Study – Key Outcomes

• Utilized a prioritization matrix to gauge value vs feasibility
• Focused on top 3 initiatives

Get the most out of your journey mapping efforts over time

Document and socialize future state
Make outputs visual and compelling.
Tailor format/design for intended audience/use.
Stay focused on the real goal: action.

Measure and track changes
Track journey-level metrics.
Correlate to actions and outcomes.
Develop a standard measurement framework.

Add data and refresh regularly
Engage with customers to build out the story.
Call out frequency, volume, and other data.
Revisit “unknowns” and develop research plans.
Co-creation: The process of face-to-face, active collaboration for the improvement and/or innovation of mutually beneficial products, services, or experiences.
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Next steps / Recommendations

- Socialize and garner support for journey mapping and an outside in approach
- Develop a complete picture of your employee customers and the universe of customer journeys they can experience with you
- Conduct any initial research to build out persona details and understand which journeys are most critical to the customer experience
- Prepare for and conduct your very own journey mapping session!
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