



# What is Customer Journey Mapping, Really?

## CSPN Webinar Series

Prepared by:



Jessica Cryer, Managing Partner | [jessica@mycspn.com](mailto:jessica@mycspn.com)

Shawn Ashley, Manager CX Consulting | [shawn@mycspn.com](mailto:shawn@mycspn.com)



**Shawn Ashley**  
Manager, CX Consulting

## Lead CX Consulting Services at CSPN

- MBA, B.Comm, LSS Accredited
- 10+ Years Consulting Experience
- Various Industry & Domain Exposure
  - Global Brands to Agile Start-Ups

## Specialization:

- CX Operational Excellence
- CX Strategic Design
- Digital Transformation
- Human-Centered Design
- Customer Journey Mapping



# What We Do?

CSPN partners with organizations in answering two strategic questions:

How do we create  
happy **customers**?

How do we create  
happy **employees**?



CONSULTING



TRAINING



COMMUNITY





As a Trusted Advisor,  
we Partner with Clients  
to Improve their  
Customer & Employee  
Experiences



20+  
Years of Service

1,000+  
Clients

13+  
Industries

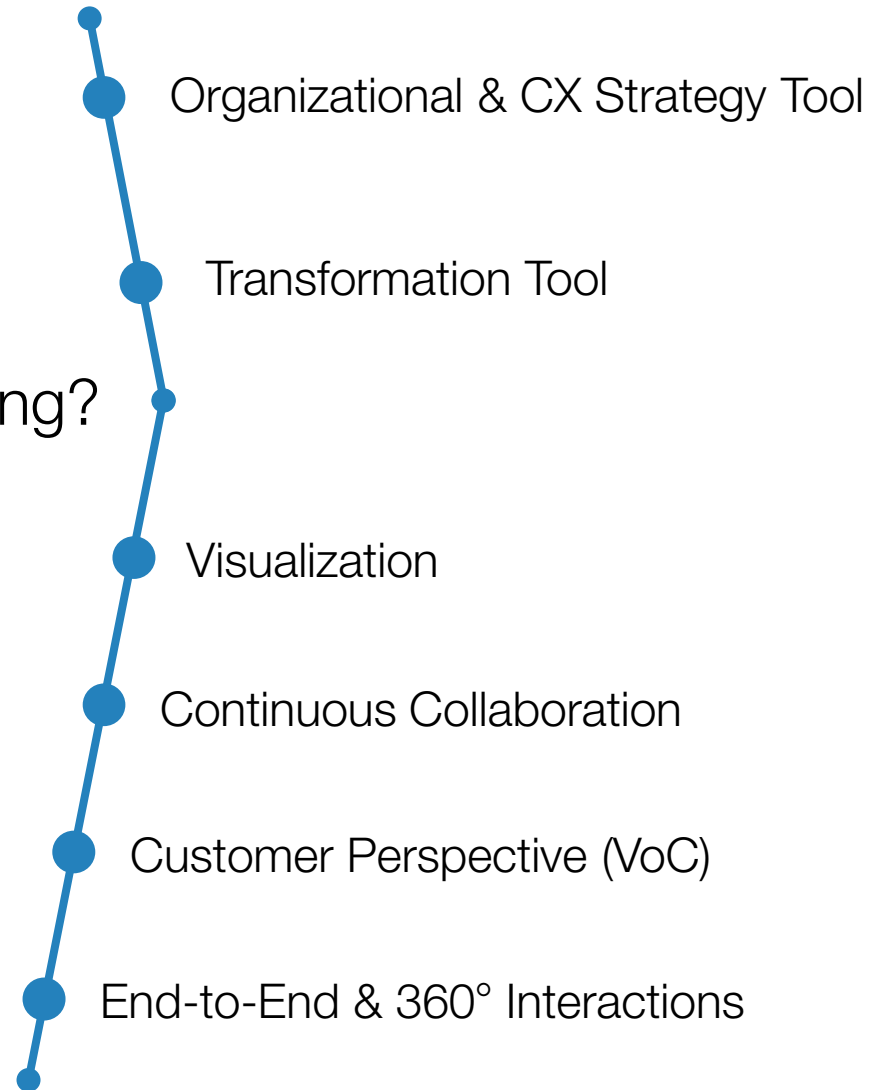
10  
Designations & Certifications

15,000+  
Community Members

# CJMM

## What is Customer Journey Mapping?

*An “experience” driven methodology used to understand customers – through diagrams, a Journey Map illustrates the steps customer(s) go through when engaging with a company to achieve a goal, whether it be a product, online, retail, or service relationship... or any combination.*



# ~~C~~JM

**PURPOSE**  
Current/Future  
Improve/Ideate  
Tinker/Transform

**TYPE**  
Experience  
Journey / Story  
Blueprint

**PERSONA / JOB**

## What's in a Journey Map?

*Journey & Stages*



*Touchpoints*



*Drivers*



*Attitudes & Emotions*



*Moments*



*Actors & Systems*



*Metrics*



*Opportunities*



VALUE

## The Customer Perspective



Build understanding of real customer expectations, attitudes & emotions



Tailor offerings to meet critical customer needs for various personas



Dispel the assumed “internal” from the actual “external” experience / journey

## The Tangible Map



Uncover the “where” and “how” of the customers when interacting



Identify critical pain points and moments of truth for your customers



Determine the operational, HR and technology impacts and gaps on the CX

## The Mapping Activity



Drive and support genuine long-term organizational change focused on the customer



Dispel silos, increase communication & streamline services across departments



Build organizational awareness and focus on customer-centricity

CJM

# Building an Effective Journey Map

What are the Purpose & Goals?

How does the map align to organizational strategy?

Who's Going Through the Journey?

Who should be involved in activities?

WHAT ARE CUSTOMERS TRYING TO ACHIEVE?



JOURNEY MAP

Where does the journey fit?

Where can we get quality insights?

WHAT LEVEL OF DETAIL DO WE NEED TO UNCOVER?

How will the maps be used?

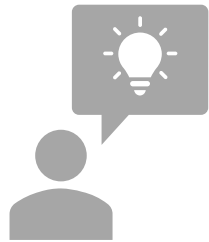
How is the customer group unique?

What information do we need?

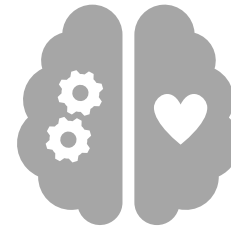


# Identify the Right Customer Groups

---



What “Goals” are they  
Trying to Achieve?



What Makes them  
“Unique”?

Identify the Interaction Drivers

*Core Needs*

*Jobs-to-be Done*

Identify Characteristics & Attributes

*Demographic*

*Psychographic*

*Behavioral*

*Geographic*

*Socioeconomic*

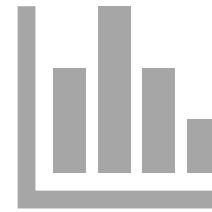


# Gather the Right Data & Insights

---



Qualitative



Quantitative

*Uncover the Journey “Intangibles”*

*Focus Groups*

*Formal Shadow / Immersive*

*Journaling*

*Ethnography*

*Interviews*

*CJM Workshops*

*Uncover the Journey “Measures”*

*Surveys*

*Feedback Scoring*


*Internal Tracking*

*CRM-Based Tracking*



# Customer Group

**X ARCHETYPE**  
**NON-ACCOUNT HOLDER**



While I don't always understand everything about X and the ways they can help me, I know that they're the electrical safety people.

When I access X's services or products, I expect simplicity and transparency. Knowing what I need to do, how I can get it accomplished, and when to schedule my time accordingly (while sticking to that schedule) are simply the "table stakes". Friendly and knowledgeable interactions help me feel confident that X is more than just an additional cost—it's a valuable service.

Even if I'm not ingrained in the electrical industry or just starting out as an electrical practitioner, I trust X because I believe they're experts and have all the electrical safety information I need. I look to them to help me find a path forwards, within my own projects or towards a safe, standardized industry.

**INTERACTION DRIVERS**

**WHY do I interact with X?**

- ✓ INFORMATION helps me understand why I need to be compliant
- ✓ COMPLIANCE ensures I get done exactly what I need to be safe
- ✓ CREDENTIALS help me grow my career and profile


**HOW do I prefer to interact with X?**

	Self-Serve	Indirect-Serve	Direct-Serve
INFORMATION	③		
COMPLIANCE			③
CREDENTIALS	③		

**WHAT matters to me most when interacting with X?**

- A CLEAR, FAIR, AND EASY-TO-ACCOMPLISH PATH FORWARD
- TECHNICAL INFORMATION PRESENTED IN PLAIN LANGUAGE
- WELL-DEFINED VALUE FOR MY TIME AND MONEY

**X ARCHETYPE**  
**NON-ACCOUNT HOLDER**



While I don't always understand everything about X and the ways they can help me, I know that they're the electrical safety people.

When I access X's services or products, I expect simplicity and transparency. Knowing what I need to do, how I can get it accomplished, and when to schedule my time accordingly (while sticking to that schedule) are simply the "table stakes". Friendly and knowledgeable interactions help me feel confident that X is more than just an additional cost—it's a valuable service.

Even if I'm not ingrained in the electrical industry or just starting out as an electrical practitioner, I trust X because I believe they're experts and have all the electrical safety information I need. I look to them to help me find a path forwards, within my own projects or towards a safe, standardized industry.

**I WANT TO...**

	1	2	3	4	5	6	7
<b>Gather INFORMATION</b>							
Understand X and how they can support my electrical needs							A E S
Understand general / technical industry knowledge							E A S
Understand the steps to achieve compliance / get approval							E A S
Understand what to do in an emergency situation							E A S
<b>Achieve COMPLIANCE</b>							
Report non-compliant activity / hazard							A S E
Schedule a visit from an inspector							A E S
Obtain a final certificate of inspection							A S E
Appeal an inspector's decision							A E S
Receive statement and certificate							A E S
<b>Earn CREDENTIALS</b>							
Obtain formal training for myself							A E S
Manage my training and certification needs							A E S
Obtain a formalized license							A E S
Receive specialized electrical-focused training							A E S
Take a quick refresher or industry-required course							A E S

E How easy it is to accomplish (1 = Very Difficult, 7 = Very Easy)  
S How important it is to me (1 = Not Very Important, 7 = Very Important)  
A How much it impacts my satisfaction (1 = low impact, 7 = High Impact)



**LACK OF UNIQUE-VALUE EXPERIENCES**

While Non-Account holders may be a one-off, the lack of a signature experience or unique benefit may be impacting their desire to interact with X while encouraging "workarounds" contrary to X mandates.

**SAFETY DEMANDS SIMPLICITY**

Customers are looking for the clearest, simplest path to compliance. By reducing regulatory burden, X can position itself to increase the reach of its mandate and increase conversion of customers to Account Holder status.

**PAYMENT EXPECTATIONS**

X's flexibility in payment requirements causes a learned behaviour from customers to round or disregard outstanding invoices entirely. Understanding the equilibrium between achieving mandates and business performance is key.

**MULTICULTURAL SERVICE-FOCUS**

With Ontario's large and overgrowing multicultural population, the ability to interact with X across languages is a critical component to providing a "warm" introduction as well as minimizing the potential for customers to circumvent / avoid interactions.





25 Royal Crest Court, Suite 201  
Markham ONL3R 9X4

Tel: 905-477-5544 | Fax: 905-940-1278

Website: [www.myCSPN.com](http://www.myCSPN.com)



@myCSPN



CSPN – Customer Service Professionals Network



Customer Service Professionals Network