

It is important to understand that a customer journey, at its core, is a process. It may seem limited from the customer's point of view, but it is a process nevertheless. iGrafx allows you to capture these journeys and relate them to the internal business architecture. This includes processes, resources, and systems that are required to make that journey happen successfully. Of course, a successful journey is not always the best experience. By aligning internal business architecture with the customer's journey, we are now in the best position to identify improvements that will simultaneously benefit the customer and be a strategic fit for the overall business.

So where do we start?

1. Identify and Catalog the Journey(s)

To begin we will engage the stakeholder community to identify potential Experiences. Each experience may have multiple journeys that will be mapped and captured in the platform. A few examples of an Experience may include::

- customer buys a new car
- a new home, new mortgage
- opens a new account
- requests a new service, OR
- requests to close an account
- move/transfer service

Once the Experiences have been identified, we can begin to Map out the journey(s) from the customer point of view. This may include identifying and capturing the “moments” or distinct interactions a customer may have throughout the journey. These moments may include the trigger event that caused them to begin looking for a product or service, all the way through to obtaining and using the product and any support they received afterward.

- For example, a prospect looking to purchase a software product might go through 1) Trigger, 2) Research 3) Web Demo 4) Custom Demo & Sales Advisement 5) References 6) Offer 7) Order, 8) Implementation 9) Training / Support

Now that our journeys are identified and mapped, we are ready to move on to the next step.

2. Connect the Dots Between Your Customer Experience and Business Architecture

Remember – a Customer Journey is merely a process that focuses on the customer point of view. If we have a process centric platform in place, we can now identify and relate the internal processes that are required to support that journey.

Close collaboration between your stakeholders, business analysts, and Business Process Management (BPM) team is required here. The iGrafx Platform provides a variety of Business Objects to help organizations clearly track relationships between Customer Experience, Internal Process, Resources, Systems, Regulatory or Operational Risk, Mitigating Controls, all the way to Corporate Strategy.

- Helpful Hint: Workshops and collaboration with your customers/stakeholders who understand the process are key to breaking down the moments in your overall journey

With our processes documented and aligned. Now we move to step 3.

3. Identify What and How to Measure

Having measurements provides visibility of pain points in the customer journey. Additionally, it establishes a baseline for tracking improvements and proving results and ROI later. To do this, we will need to identify what you currently measure and what may be useful. **Now ask** – *does my customer agree that those are the important metrics?*

- Note: According to a recent report 82% of brands think they are delivering a quality customer experience. However, only 10% of customers agree that brands meet their experience expectations.

Create key performance indicators (KPIs) for these measurements and begin capturing data to establish your baseline metric.

- Helpful Hint: You may utilize technologies such as process mining to help extract these data points as well as possibly identify systems, resources, or activities not previously identified when performing your mapping exercise.

These KPIs will also help identify process deficiencies that may be impacting overall customer experience, which brings us to the next step.

4. Focus on Process Improvement

Having completed step 3, you have clear data points that identify areas for overall process improvement. To do this you may decide to use a variety of Business Process Management (BPM), Lean, Agile, or Six Sigma methodologies. You also will understand the relationships between the customer's journey and your internal business processes, systems and resources required to support them. Additionally, because of the iGrafX platform, you can also identify gaps in risk, compliance, and ownership, as well as see which journeys are directly aligned to the overall corporate strategy.

The whole point of mapping the customer journey, is to help bring prioritization and visibility to where your process improvement and transformation efforts must be focused.

5. Improve the Experience

WARNING: If you started reading here, please go back to the beginning. If you start here, you are likely to miss some vital steps and embark on a very costly journey.

To improve the customer experience, we need to first understand the actual expectations of the customer vs how they actually interact with our organization. In order to improve the experience, we must also have a clear understanding of the internal structure required to support that experience. It is only then that we can make recommendations for process improvements, OR technological solutions to support your Digital Transformation objectives such as Chat Bots, Robotic Process Automation (RPA), Process Automation, Artificial Intelligence (AI), etc.

- Helpful Hint:
 - Rules before Tools. Implement technologies to support your process and improve experience. Never adjust the process to fit the limitation of the technology.

Congratulations! You just completed a customer experience project. However, as with any transformation journey it is important to remember that it is in fact a journey. Customer expectations are always changing. What was innovative today, is standard service tomorrow. When it comes to your overall Transformation journey, a process centric approach based on customer experience is the only way to improve our capability for success.

Key Takeaways

Think Strategically and Prioritize your customer experience projects.

- Pick a project that is easy to implement (limited scope)
 - High Impact / Low Risk or Complexity
- Pick a project for which you will get good interaction with stakeholders
 - Stakeholders understand their processes and the customers expectations
- Pick a project where you either already have or can get quality data or metrics
 - If you do not have a baseline you will not have any way to prove ROI or experience improvements
- Pick a project where the supporting processes are clearly documented
 - This will help you in uncovering pain points, and then measuring improvements once the customer journey has been mapped and individual moments have been improved.
- Pick a project which will solve a problem which brings strategic value to the business
 - Rules before Tools. Understanding the processes, systems and resources supporting the customers experience, provides visibility on where and which process improvement methodologies or technology to apply.
- Pick a project - which can be a "success story" for your BPM team.
 - If your team can use customer journey mapping and continuous process improvement methodologies to effectively provide value, you will have the foundation for further adoption among the business, as well as justification for executives to fund future BPM projects.

Additional Resources to Help:

- There are some subtle but foundational concepts around iGrafX' "object model" which facilitates the modeling of your overall business / organization. These Business Objects allow you to document and model the complex connective tissue that makes up your business. The iGrafX Services Team can help identify and capture your business architecture and the relationships to the various components of your business processes and customers experience.
- iGrafX can also assist with creating visually compelling customer journey diagrams and reports