Journey Mapping: A Results-Oriented Approach to Understanding the Customer Lifecycle

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LandNExpand
AGENDA

• The Customer Life Cycle
• Customer “End Game” game goal
• The value of Journey Mapping
• Journey Mapping Process
• Use Case Example
The Customer Life Cycle
A Company Roadmap to Customer Success
What is a Customer Life Cycle?

The stages a customer goes through during their journey (partnership) with your company that creates a **Customer For Life**.
Who do you think is responsible for Customer Success?
Who do you think is responsible for Customer Success?

The Entire Company
The Customer Life Cycle

- Sales Exec
  - Renew
    - Renew
  - Expand
    - Expand
  - Customer Success
    - Monitor
    - Support

- Sales Exec
  - Evaluate
    - Evaluate
  - Purchase
  - Training
    - Training
  - Configure
  - Deploy

- Consultant
- Implement
- Evolve
- Customer
Customer Life Cycle - Customer Value by Functional Organization

- **Marketing**
  - Sets Perception of Company Value
  - Competitive Differentiation
  - Why You

- **Sales**
  - Sets
  - Expectations: Product
  - Capability
  - Services
  - approach
  - Value/ROI

- **Finance**
  - Customer’s Perception of Value/ROI
  - Easy to make changes
  - Easy to do business

- **Product**
  - Product Roadmap, Evolve product
  - improving ROI, value

- **Services**
  - Educates Customer, Design
  - Roadmap, Implements Solution, provides ongoing support
Customer “End Game” Goal

What customer state are you strategizing for?
Customer Risk Assessment Model

Indispensability

- **5**
  - Repeatable
  - A Few Loyal Teams
  - High Use
  - Limited Adoption

- **4**
  - Predictable
  - Loyal and Entrenched Customer

- **3**
  - Survival Mode
  - At Risk Customer
  - Not Engaged

- **2**
  - Project Focused
  - High Adoption
  - Limited Use
  - Replacement Risk

Engagement

Understanding how your maturity levels affect the quality of your customer experience delivery and impact on the customer’s use of your product.

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The Value of Journey Mapping

Understanding what your Customers experience
The Value of Journey Mapping

• Develop clear understanding of what the customer experiences in their engagement with your company.
• Determines areas of difficulty and/or lack of clarity from the customer’s perspective.
• Defines clear customer outcomes.
The Journey Mapping Process

Walking the Walk
The Journey Mapping Process

1. Determine the Stage of Customer Life Cycle
2. Define the Target Market
3. Define Customer Success Outcomes
4. Map out the current processes
5. Play Customer roles
6. Map out the ultimate process
7. Evaluate New processes deliver Outcomes & Make adjustments
8. Color code map
9. Develop plan for changes
10. Monitor Results/Evolve
The Value of Journey Mapping – Step 1

- Determine the stage of the Life Cycle, you will eventually map all the stages.
The Value of Journey Mapping – Step 1

- **Examples – Journey Mapping detailed processes for the following stages:**
  - **Business Development:** From lead generation to qualified accepted sales lead.
  - **Sales Cycle:** Following Sales methodology from qualified accepted sales lead to close. (This includes how you deal with loss reasons, from a customer perspective)
  - **Implementation:** Following best practices methodology for your industry and market segment to ensure repeatable customer outcomes that ensure a solid start to roadmap to entrenchment. Map from Sales transition to Go-Live (Production state).
  - **Value/Evolve:** From transition to Customer Success Management to qualified expansion opportunity.
  - **Expand:** From transition to sales to follow sales methodology cycle to close.
  - **Renew:** Can be the same process as Value/Evolve using a Customer Success Roadmap plan that leads to renewal. An Annual CSM plan.
The Value of Journey Mapping – Step 2

- **Define the Target Market**

- Some Companies have multiple target markets. If so, you may need to create a separate Customer Life Cycle model for each target market.

- Journey Map each stage of the Customer Life Cycle models defined for each target market.

- **Example:**

  - **Product A**
    - Target Market 1: Marketing
    - Sales Cycle Journey Map for Marketing
    - Implement Journey Map for Marketing
    - Target Market 2: IT
    - Sales Cycle Journey Map for IT
    - Implement Journey Map for Marketing
The Value of Journey Mapping – Step 3

- **Define Customer Outcomes**

- For each target market, you will define what customer success is and the outcomes that ensure entrenchment of your solution.

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**Product A**

**Target Market 1: Marketing**

- **Enterprise**
- **Mid-Market**

**Outcomes**

- **Executive Dashboard**
  - Automate process flow for production print products

- **All product deliverables by Customer (Organized)**

- **Improves Product Quality & Consistency**

- **Capacity per employee increase by 25%**
The Value of Journey Mapping – Step 4

- **Map the current processes**
- For each CLC stage, you will define what the customer experience is today.
- **Example:**

**Customer Experience Journey Map – Value Stage (Current)**

### One Year Plan

<table>
<thead>
<tr>
<th>Month</th>
<th>Enterprise</th>
<th>Midmarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check In Call</td>
<td>Check In Call</td>
</tr>
<tr>
<td>2</td>
<td>Adhoc Customer Meeting(s) (Based on AE needs)</td>
<td>Adhoc Customer Meeting(s) (Based on AE needs)</td>
</tr>
<tr>
<td>3</td>
<td>Check In Call</td>
<td>Check In Call</td>
</tr>
<tr>
<td>4</td>
<td>As per AE needs</td>
<td>As per AE needs</td>
</tr>
<tr>
<td>5</td>
<td>Check In Call</td>
<td>Check In Call</td>
</tr>
<tr>
<td>6</td>
<td>Renewal Call</td>
<td>Renewal Call</td>
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<td>12</td>
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</tbody>
</table>

### Customer Success Program

<table>
<thead>
<tr>
<th>Progress Evaluation</th>
<th>Value</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

### Accountability

- **CSM**
  - Continue Education plan as needed
  - Determine plan for next phase of maturity evolution
  - Services Team Support on-going recommended plan for follow on phases (Roadmap)
- **AE**
  - Review & Sell Expansion opportunities
  - DSA: Demo new functionality or areas required for next Phase
  - Services leadership – Plan for Expansion or follow on phases

### Goals

- Customer Satisfaction = 95%
- Customer Success Criteria/Goals = Met all
- Adoption = 100%, Usage = 75% (Engagement Factor = 75%, Indispensability Factor = 3/4)
The Value of Journey Mapping – Step 5 & 6

• **Play Customer Roles and Map the Ultimate Processes**
  
  • Playing the customer role; go through your current process and review the value, clarity, quality and consistency you deliver to the customer at every step of the process that a customer would experience.
  
  • Now map the process with the steps that you would want a customer to go through and remodel the experience to deliver the outcomes that will create more value and clarity for the customer.
  
  • *Note:* You may have a different Customer Life Cycle model by target market or you may have to create various work flows within each stage by target market
The Value of Journey Mapping – Step 5 & 6

- Play Customer Roles and Map the Ultimate Processes
- Example: Customer Experience Journey Map – Value Stage (Future)

### Customer Success Program

<table>
<thead>
<tr>
<th>Progress Evaluation</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>One Year Plan</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Enterprise

- **Month 1**: Define Agenda
  - Within 30 Days Go-Live Progress Review
- **Month 2**: Business Review
  - Follow Up/Action Plan
- **Month 3**: Check-In Call
- **Month 4**:
- **Month 5**:
- **Month 6**:
- **Month 7**:
- **Month 8**:
- **Month 9**:
- **Month 10**:
- **Month 11**:
- **Month 12**:

#### Marketing & Educational Program

- **MidMarket**
- **Month 1**: Define Agenda
  - Within 30 Days Go-Live Progress Review
- **Month 2**: Business Review
- **Month 3**: Business Review
- **Month 4**: Check-In Call
- **Month 5**: Auto Renewal Offers
- **Month 6**: Business Review & Renewal Offers

### People

- **Customer Success Manager (CSM)**
- **Consulting Manager (CM)**
- **Account Executive (AE)**
- **Customer Success Manager (CSM)**

#### Accountability

- **CSM** Schedule Business Review Prep/Call, Evaluate Usability/Engagement/Top Issues/Reference ability/Check Success Criteria progress. Continue Education plan as needed Determine plan for next phase of maturity evaluation Services Team Support on-going recommended plan for follow on phases (Roadmap)

#### Goals

- Customer Satisfaction = 85%
- Customer Success Criteria/Goals = Met all
  - Adoption = 100%, Usage = 75%
  - Engagement Factor = 75%, Indispensability Factor = 3/4

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The Value of Journey Mapping – Step 7

- **Evaluate Customer Outcomes & Make Adjustments**
  - Evaluate the new processes to ensure they will deliver the customer outcomes that produce the highest value.
  - Make adjustments to elements and process steps as needed.

- **Example:**
  - If one of your customer outcomes for value is to create a perception that it is easy to do business with your company and the process has a complex 12 step program to getting a contract signed, then you would reevaluate how to get the contracts solid for your company while making it easier for customer to review and sign.
Color Code your Journey Map

Color coding your journey map provides an easy and quick way to understand the gap between your current processes and standards and your future map.

Example:
- Green: Exist today and work well
- Red: New and need to be created
- Yellow: Exist and need to be modified
- Blue: Possible options/need further review
The Value of Journey Mapping – Step 8

- **Color Code your Journey Map**
- **Example:**

Customer Experience Journey Map – Value Stage (Future)

<table>
<thead>
<tr>
<th>Customer Success Program</th>
</tr>
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<tbody>
<tr>
<td><strong>Progress Evaluation</strong></td>
</tr>
<tr>
<td><strong>Value</strong></td>
</tr>
<tr>
<td><strong>One Year Plan</strong></td>
</tr>
</tbody>
</table>

**Enterprise**

<table>
<thead>
<tr>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
<th>Month 7</th>
<th>Month 8</th>
<th>Month 9</th>
<th>Month 10</th>
<th>Month 11</th>
<th>Month 12</th>
</tr>
</thead>
</table>

**MidMarket**

<table>
<thead>
<tr>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
<th>Month 7</th>
<th>Month 8</th>
<th>Month 9</th>
<th>Month 10</th>
<th>Month 11</th>
<th>Month 12</th>
</tr>
</thead>
</table>

**People**

- **Customer Success Manager**: CSM
- **Consulting Manager**: CM
- **Account Executive**: AE
- **Customer Success Manager**: CSM

**Accountability**

- Continue Education plan as needed
- Determine plan for next phase of maturity evolution
- Services: Team Support on-going recommended plan for follow on phases (Roadmap)

- AE – Review & Sell Expansion opportunities
- DSA – Demo new functionality or areas required for next Phase Services leadership – Plan for Expansion or follow on phases

**Goals**

- Customer Satisfaction = 85%
- Customer Success Criteria/Goals = Met all
  - Adoption = 100%, Usage = 75% (Engagement Factor = 75%, Indispensability Factor = 3/4)
The Value of Journey Mapping – Step 9

• Develop a plan to execute transformation

• The best approach is to create a list by stage of the identified changes. These include new and modifications to processes and standards.

• Define the priorities based on the areas of the biggest pain points or where they can make the most impact. (note: there are some that require a logical order)

• A great exercise:
  • On a wall or whiteboard – Label all the stages across.
  • Put the changes/new elements all on stickies.
  • Let everyone put their elements/changes on the wall under each stage in the priorities of their choice.
  • Then discuss and negotiate until you have agreement on priorities.
The final step is to turn the board into a quarter by quarter phased approach to executing the delivery of the changes and new elements in the priorities agreed upon.
The Value of Journey Mapping – Step 10

- **Monitor & Evolve**

- The last step is to utilize technologies to put a monitoring program in place to evaluate the results.
- Establish a frequency for various teams to review the results and identify changes to improve results.
- You can establish small teams to own various processes, elements, content, etc. They would also be empowered to own the monitoring and evolution of the processes.
- The ultimate report is an awesome Customer Dashboard of information and metrics that provides the health score card for every customer.
# Example Customer Dashboard elements

## Customer Dashboard

<table>
<thead>
<tr>
<th>Profile</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td></td>
<td></td>
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<tr>
<td>Employee Size</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td>Global Y/N</td>
</tr>
<tr>
<td>State</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Licenses</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>License #</td>
<td>License Revenue</td>
</tr>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Services Programs</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Consulting Program</td>
<td>Consulting Contract Hours</td>
<td>Consulting Hours Balance</td>
</tr>
<tr>
<td>Consulting Program Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Program Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support Program</td>
<td></td>
<td></td>
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<tr>
<td>Support Program Revenue</td>
<td></td>
<td></td>
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<tr>
<td>Total Services Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consulting Program Revenue</td>
<td>Consulting Contract Hours</td>
<td>Consulting Hours Balance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Engagement Performance</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maturity Stage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Implementation Status</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education Plan Progress</th>
<th># Customer Users Completed</th>
<th>% Completion to Recommended Program</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Engagement Factors</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Adoption %</td>
<td>Usage %</td>
</tr>
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|                         |                |                |                        |                |
|                         |                |                |                        |                |
Journey Mapping – Sample Use Case

- **SaaS Company**
  - Focused on IT Industry
  - Provides Resource Management and Capacity Planning solution
  - Description of Market – Enterprise/MM Companies: IT Organization
  - Customer Success definition – Annual Strategic Plan Initiatives Dashboard, Integration with Agile solution, Team Productivity Dashboard
  - Use the following map of current processes for Sales or Implementation stage
  - Break into teams and have each team create a new ultimate customer experience journey map for one stage.
Working Session – Use Case – Current Workflow

Customer Experience Journey Map – (Current State) Land Stage

Sell New/Expansion Customer

<table>
<thead>
<tr>
<th>Quality</th>
<th>Analyze</th>
<th>Solution</th>
<th>Validate</th>
<th>Negotiate/Legal</th>
<th>Close</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

Process

- **Prospect**
  - **Discover Call**
    - Tier I
    - Tier II
    - Tier III

- **Demo**
- **Tech Requirements**
- **Exec Sponsor**
- **Create Proposal**
- **Custom Demo (Use Case)**
- **Present Proposal**
- **Procurement Legal**
- **Business Terms Acceptance**
- **Finance Review/Approval**
- **Negotiate/Close WON**
- **Negotiate/Close Loss**
- **Marketing Nuture Program**

People

<table>
<thead>
<tr>
<th>AE - Account Executive</th>
<th>SE - Sales Engineer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Consulting Mgr/Solution Arch - Implementation/ roadmap expert</td>
</tr>
</tbody>
</table>

Accountability

- **AE** - Owner of Land Stage/Solution Sell/SF documentation
- **SE** - Validate Technology Fit to Bus Rents/Sucess Criteria/within CA version, Document Requirements in Standardized Questionnaire

- **AE** - Manage prospect to buy decision. Formal hand off to Services scheduled.
- **SE** - Develop Custom Demo focused on meeting buy decision and success criteria.

Goals

- **Goals:** Win Rate 10%
  - Sales Cycle Time = 90 days

- **Goals:** Services $/License $ = TBD
  - ASP = $25k

- **Goals:** Q3/Q4’s validated = 5%/month
  - Expansion Rev = 40%
Working Session – Use Case – Current Workflow

• What outcomes do you want the customer to realize at the end of this stage?

Land Stage: (Set the right Expectations)

• You have a clear understanding of the Customer’s goals and objectives including well defined outcomes.
• Customer understands the approach to implementing the solution including a summary plan.
• Customer is clear about what they are expected to commit to in time and resources and what you will be providing to ensure the outcomes are successfully delivered.
• The right license configuration has been sold for the agreed to plan.
• The customer is formally transitioned to their services team and understands the next step in your program.
Working Session
Presentation by a few teams
Q & A