

# 7 Customer Journey Mapping

## Putting Yourself in the Customer's Shoes

**W**hen a company truly embraces behavioral marketing, the most fundamental shift is to reorient the entire effort around the customer. This might seem obvious, but walking that proverbial walk can be tough work for even the most progressive marketers.

The litmus test is no longer which product the business wants to push this quarter. The most popular—or highest margin—product isn't featured in every email in a given week or month. The marketer's job is to optimize the customer's buying journey, in whatever form that takes. Some days it'll be inspiring a prospect to become a first-time customer; other days it'll be perfecting the repeat buying behavior among your best customers that drives long-term, meaningful revenue growth.

### The Current State of Customer Journey Mapping

Although there are some very advanced (and developing) concepts and tactics around customer journey mapping, I'm going to discuss it from the position of the typical digital marketer whose primary job is designing and delivering customer-facing campaigns. I make that distinction because there are increasingly important disciplines such as customer experience management that are still growing into a function that's common across industries and are housed within marketing departments.

Many of today's brands that are defining the best practices rise from industries such as financial services, consumer product goods, and automotive. And the reality is the function is still a bit like the total quality management of the 1980s and 1990s. Its function is concentrated in a small group that has to work in a matrixed environment across marketing, operations, finance, and so on. My take is that this keeps the function seminiiche, and we'll continue to see innovation come from Fortune 100 brands and high-dollar agencies.

Let's take a much more practical look at how to think about factoring our own marketing efforts for customer journey mapping.

## **Starting with the Big Three**

Although you could go crazy mapping dozens of customer journeys (or become obsessed with mapping a single, massive path to advocacy), let's focus on some more component pieces that turn out to be most actionable and meaningful to your revenue growth. We focus first on the pure acquisition journey, followed by the path to first purchase, and finally the path to repeat purchase (from the second buy through to implicit loyalty). As a means to illustrate this, I'm going to use a B2B software company as an example in each section.

### **Acquisition**

Beyond the natural motivation marketers have to grow their lists, we need to clearly map out the first step in the journey with our prospects. First, we need to understand the existing match between our company's unique selling proposition and our prospect's needs and wants. Remember, if you have a fundamental disconnect at that level, no amount of brilliant marketing is going to save the day.

It's also critical to understand how to optimize your top-of-the-funnel resources to make sure you're spending time and money most

effectively to create great prospects that convert to repeat customers. Relentlessly tracking conversion rates by unique lead source will highlight when we produce great content or buy the absolutely optimal paid media. Over time, this data should be used to guide content strategy, inform which events you invest in, and determine what (if any) paid media channels are reliable sources of paying customers for your business.

When mapping out the acquisition journey, make sure to factor for both demographic (gender, location, or level of spending) and behavioral (site visits or email opens) details along with lead source data. You should be seeking to build a persona-level profile of an ideal prospect. Make sure to build your data schema to factor for key elements such as gender, lifetime spending, geographic location, and other individual attributes you can use later to segment the audience. If in doubt about capturing a data point, ask yourself if you'd ever use that information to drive dynamic content in an email. If the answer is yes, undertake the effort to capture and save it.

For example, I have at least two customers who are actively tracking anonymous users in their marketing automation platform in order to understand which specific banner or keyword led them to an initial site visit. This data is also easy to track with web analytics tools like Google Analytics, but most often that places the data in an unfortunate silo. If click source is integrated at the record level within the marketing automation platform, we can then extend backward from all our known conversion events to determine which advertising sources (or keywords) are most predictably creating great customers. This data directly informs future ad spending, and the optimized circle is complete.

One of the questions I get often relates to how many data points to capture; but the real motivation of the question is return on investment (ROI). The real question should be: "How much time and effort should I spend on my data-collection strategy and implementing that can go into my campaign execution?" The answer is about 125 percent more

than you think you should. Clearly not every two-person marketing department is going to have a 500-element customer record for 90 percent of their database, but most marketers could easily do more than they are doing today. And this increased customer understanding—at *any* point in the customer journey—is your best chance of driving deeper relevance and, therefore, more revenue.

From an acquisition perspective, it's not difficult to map out a prospect's first two or three likely journeys through your site. You should clearly articulate how you and the visitor both get your needs met, and how much insight you end up with at the conclusion of the initial visit. If it's a one-way street with you providing important information but not improving your customer understanding, that's a failure on your part that will cost you real dollars in uncaptured revenue. If you're asking for all the information without providing real value, you're in an even worse spot—and should probably seriously rethink your strategy.

Bottom line: the acquisition process is a value exchange. You provide insight, market data, and optimization strategies while your prospect provides behavioral and demographic data about themselves that gives you the necessary information to build great models. If it sounds like you have the hard job, then you're exactly right. If everyone was a great marketer or seller, or if crafting great content and campaigns were simple, there'd be no reward in the form of increased sales. You're in search of one elusive thing: a process that produces first-time buyers in a repeatable model. Understand and solve for that, and acquisition marketing will be a professional strength forever.

So for acquisition, our hypothetical B2B software company should be thinking very critically about where they spend their paid media dollars and tracking the interactions at the individual level in each location. By understanding the source of their most profitable leads over time (which requires solid lead source analysis) this can clearly inform where next year's dollars are going to be spent.

Also, understanding what types of message work best in the advertising is critical. Does your audience click and convert from deep product information or top-level market research content? Make sure there's enough diversity in your advertising content to be able to track the difference.

### **Path to First Purchase**

This is a journey many marketers don't view as their primary job. Most marketers I know are happy enough to drive a certain quantity of leads to their sales force or to their ecommerce store. I'd argue this could be the source of the most improvement (and revenue growth) for any marketer. Let's look at two key reasons.

First, there's simply more responsibility and budget flowing to marketing departments as we become more measureable and able to succeed at a scale a sales force couldn't replicate. For example, even the biggest B2B sellers have moved to an aggressive presales process that has two critical outcomes: (1) it delivers an insanely qualified and quantified prospect to a sales resource; and (2) if the buyer's presales informational needs are straightforward, the sale actually closes without human intervention via a well-oiled marketing program. (This is a classic objective of great SaaS marketing in which your goal is often to qualify, sell, and onboard as efficiently as possible so your direct-sales resources are reserved for 10 huge-dollar deals as opposed to 1,000 small-dollar deals.) Sure, this means thinking more about self-service tools so these high-velocity customers don't have to revert to an old-style account support role, but imagine if stepping up your marketing game translated directly into an 8–10 percent lift in revenue.

Second, you absolutely cannot underestimate the importance of the first purchase experience in the customer's mind. Sure, they've invested their time hoping that you could help them be more effective, but they haven't voted with their wallets yet. And regardless whether someone

buys a \$15 ecommerce item or begins a monthly recurring service subscription worth \$150,000 annually, crossing the payment threshold is a critical moment. There's now trust, either in the form of sharing credit-card details and forming a critical impression of your order handling, or in the continuing value that your service delivers.

For example, imagine the first time Zappos convinces you or your significant other to buy shoes via ecommerce. Getting past the barrier of not trying them on (backed by a great return policy) and offering both an extended selection and ultra-aggressive pricing is a strong value proposition—and one that can change the way a shopper buys shoes.

When we map out this journey, it's critical to understand both the history and the desired outcome. We need the data surfaced throughout the acquisition process, and we should have a solid idea of what we're trying to sell if there are multiple options. Oftentimes, the history comes through in the form of a behavioral-driven activity score, and the product preference should be a result of well-orchestrated content strategy and some timely sales contact.

This is also a moment when we need to deeply understand our own business. If you've got a sales team that closes very well, you need to figure out how to route the maximum amount of qualified leads to them. If marketing closes the sale, you need a one-to-many version of the same exact process.

The good news is that the business driver stays the same: how do you qualify the best prospects and then deliver offers that drive conversion? Your journey maps are going to include different touchpoints and customer buying levers depending on how and to whom you're selling.

For the first-purchase path, our hypothetical B2B software company should be absolutely focused on channel orchestration. By beginning with the lead source knowledge they've built over time, the question becomes what combination of marketing and sales programs reliably convert prospects into customers? Do you require a sales

resource to close every deal over \$1,000 or can a prospect educate themselves and move easily into the purchase phase? Determining what's most efficient for your business, and whether you spend more money on salespeople or website builds are key questions this analysis should answer.

### **Path to Repeat Purchase**

If the path to first purchase is your chance to turn awareness into revenue, then this step represents the ability to architect an extremely profitable relationship over time. Lots of marketers I work with think of this in its most complicated format: a loyalty program. I've written extensively on loyalty and I have led retention marketing practices at Big 5 digital agencies, and I would contend almost any marketer can embrace the concepts of world-class loyalty programs without the astronomical costs associated with most.

First, I recommend some good old-fashioned regression analysis within your customer purchase data to determine the organic baseline for how often your customers currently buy. Assume this number is driven by the whole of your multichannel marketing effort, and in my experience more than 85 percent of marketers don't have specific programs to drive repeat purchase over time at the customer level. (If you're one of the rare ones who do, just make sure to factor your current programs into the baseline you've built—it just means you're going to have to work a bit harder to drive lift.)

There are also many scenarios where you won't have historical data to even run regression analysis. Maybe your company is brand new, or all your purchase data is locked up in an old ecommerce system. Regardless of the problem's source, here's where the art of marketing comes into play.

Scour your competitive landscape for purchase data. Spend time with market and financial analysts trying to understand sales cycles and

revenues of similar businesses. If you're a new firm selling security software to businesses, understand how that spend fits into the rest of their technology stack. You're going to have to make an educated guess at a baseline number, so gather up as much raw information as possible and simply make the call.

Along with making the baseline assumption, you need to be focused on tracking the correct data points that will lead to clear benchmarks in the future. Maybe this means enhancements to your commerce tools or new reports from finance, but capturing the data in a usable format is the single most important tactic in this phase.

When it comes to mapping out the key journeys here, think deeply about three key elements: channel delivery, your cost-to-serve model, and revenue per transaction. In many cases, your path to first purchase will involve more resources and time than the second, third, or fourth purchase. And the combination of your costs and expected revenue should provide very clear guideposts on how best to sell.

For example, if you're an ecommerce seller of commodity items (books, sporting goods, toys, etc.), that means more up-front customer nurturing and convincing someone you're both price competitive and easy to buy from. In this case, your repeat purchase path should focus on architecting great offers to customers based on their behaviors that highlight purchase intent. A business traveler who bought a rolling carry-on suitcase from you six months ago may well show up again looking for a larger bag for an international trip. When you capture that browsing behavior, having an automated program running that delivers preferred customer pricing can be pure gold.

Conversely, if you're selling higher-dollar services to business buyers, this means you'll invest a lot of people time in presales activity to get to first purchase. Your journey map should factor for all the postsale touchpoints such as support and services to ensure satisfied customers who will renew their annual contracts. And you'll also want to factor for four to five sales touches throughout the year to both

check customer satisfaction and maybe even begin an upsell conversation. It takes a ton of skill to be successful at scale, but you should be thinking about how to move direct, high-touch buyers to an increasingly self-service model.

Although these three key journeys are the most important, I know many marketers who architect journey maps for many more expected customer actions. For example, there's a postpurchase, first-support-call journey, or a subscription renewal journey. All these critical customer moments can and should be designed at this level of detail but bandwidth is always a challenge.

The good news is I've seen hundreds of marketers become increasingly more successful in this discipline. The benefits are almost always twofold: increased revenue with the same resources (an excellent outcome by itself), and much smarter deployment of resources to grow the revenue (paid media spend becomes conversion-driven, not someone's opinion).

Again, this is not a competency that's built overnight—or hired in with two new staffers—but it's based on a relatively simple four-step process. The preceding sections focused on what a great journey map contains, but consider the next section as your road map on how to arrive at great journey maps.

## Four Steps to Greatness

Instead of always taking orders from your marketing or business colleagues, the behavioral-driven marketer is mapping out multistep interactions over time designed to support the buyer's intent. We're not spending eight hours testing the color or drop shadow on our buy button. We're not cutting new Excel lists that we upload each time we need to send a message. Yes, we care about optimizing each individual message, but more goodness is driven from mapping out the overall

customer journey and designing campaigns to make the experience as frictionless as possible.

My most successful marketers set aside three to four days per month to think deeply about campaigns and strategy, as opposed to staying on the treadmill of execution. This time is typically spent on four key actions: (1) data analysis; (2) meeting with business and marketing stakeholders; (3) defining new programs; and (4) optimizing existing programs. Let's take a deeper look at each of these:

**1. Data analysis:** One of the key drivers of understanding is the data you have access to. It might be something as “big picture” as looking at your web analytics or marketing-automation platform tracking to understand where your web visitors are getting hung up. Think of each of those stopping or abandon points as opportunities to craft an automated program to help the user.

For example, if you see an increased traffic on a specific product, but don't see a parallel increase in purchase actions, ask yourself what's missing. That would be a great moment to kick out a two-touch browse abandon program designed to test a unique value proposition or discount to see if you can drive the visitor to purchase.

The same level of analysis should be applied to your own campaign performance metrics. How are your messages performing in terms of simple KPIs like opens and clicks? Is your multiple message interaction remaining constant during multistep programs indicating your audience is finding strong value in your content? Is your customer reactivation program effectively rescuing 8–10 percent of the people who qualify?

The bottom line is that you need to get comfortable taking in data points, and building educated hypotheses based on them. Do not get hung up on needing bullet-proof evidence before acting. At the same time, don't be rash or overly quick to kill a program that doesn't bring in results right away.

My most successful marketers look at data to define potential testing approaches. When you truly embrace this way of thinking, you'll find more opportunity than you can ever take advantage of. Decide which of the solutions represent the clearest path to increased revenue or a better customer experience, and go hard on two to three solutions a quarter.

- 2. Stakeholder relationships:** Although no one wants more meetings, most marketers could stand to be more in sync with their internal stakeholders. Understanding their success criteria and major business challenges allows you to increase your net value to them. And when you deliver value, the trust factor rises and typically everyone is more successful.

If you're in a pure digital marketing role, it's critical to understand your business at a deep level. And I don't mean face-value things like product information and pricing—I mean comprehending your product-level cost-of-goods (so you can understand how much margin could be given away in discounting) and understanding how your multichannel sales processes work (so you can map the buyer's journey and match it to key marketing and sales moments).

If you're in more of a customer relations management (CRM) role in which marketing is your primary customer (as opposed to the business side), you need to be the reference source on data quality, contact depth, and segmentation. Your marketers are going to look to you for segment-level insights and specific customer counts. You may well be asked to target a segment such as multiple-purchase customers in a specific city in a specific age range with a customer lifetime value (CLV) over \$600. Or—if you're really killing it—you're going to them with these opportunity segments to discuss customer contact strategies and selling opportunities.

- 3. Building new programs:** All the analysis and meetings don't mean jack unless you're building and deploying new programs that

address issues in the customer journey. Maybe your campaign is a short-term fix ahead of bigger web-based changes that will address the real problem, or maybe it's an epic cart abandon program that drives \$750,000 a quarter by solving a real customer problem.

For example, I've worked with an ecommerce-based travel site who drives more than \$1M a quarter with very well done cart abandon emails based on an average trip purchase in the \$2,500 range. Once they understood how effective this behavioral marketing program was at capturing all-new revenue, they looked at other customer sticking points in the buying process.

They realized that a very normal and critical step in the buying process was the discussion between spouses about when and where they wanted to go. Typically, the user would spend time searching the site for locations and pricing, and assemble sample itineraries. Maybe it was comparing two to three Caribbean islands or deciding between Rome and Paris, but there was a natural browsing behavior before someone got serious.

Once their users began moving down the purchase path in the ecommerce platform, they were showing strong buying indicators. If the potential buyers didn't move all the way to purchase, they'd offer to email a PDF itinerary directly to the browser as a last-step rescue strategy. Of course, that email featured a very prominent buy-now button.

And guess what? That email converted at over 15 percent and drives more than \$500,000 of top-line revenue every quarter. Why? Because it's brilliantly simple—it captures the buyer's intent and immediately provides a solution to the very real human problem that prevented the initial conversion.

So don't hesitate to build and deploy new programs that get to the heart of customer sticking points. They might end up just being a really smart customer touchpoint that your customer

appreciates—or it might drive half a million dollars in new revenue. You won't know until you execute.

- 4. Optimize your existing programs:** Once you set up an abandon or reactivation campaign that works well, it begins to influence how you think about almost all your marketing efforts. When you think behavioral first, it's tempting to spend time making more and more programs, but keeping your existing programs sharp is critical.

For example, many brands that have an unfortunate email delivery incident (like hitting the Spamhaus list or catching a blacklist at Gmail) undertake a manual list scrub to get back on the right track. It's typical to look at open statistics, and segment a list back to openers in the last 6 to 12 months—and then begin a slow, deliberate road back to solid deliverability.

My counsel is always to build an automated program that achieves similar results so they don't find themselves back in that tough spot. Best practices today call for an always-on program that enforces a 12-month (or less), zero-interaction policy on your database. When a recipient reaches those milestones (and maybe a few more such as no purchases or warranty registrations and a CLV of less than \$50), they're immediately moved out of all mass-distribution lists into a specialized multistep nurture program designed to reactivate them. Most marketers think in terms of a three- or four-step program with about two weeks of space between communications. Each message should have an elevated degree of importance (and offer, if that's appropriate for your business). Many of the final messages I see simply ask the recipient to click one button as a minimum viable action. If they don't, add them to a separate suppression list (different from your primary opt-out list), and incorporate that new list as the final step in all your queries.

To further illustrate the point of optimizing programs: what drives this reactivation could clearly change by user type or buying season or as your own customer-facing value proposition changes.

Do not leave these automated programs running for months at a time without revisiting the creative and segmenting rules. In fact, go ahead and put a recurring meeting in your calendar reminding you to pull and analyze the KPI reports for the automated messages. Every once in a while I hear a marketer's horror story about an automated program they assumed was going along perfectly that hadn't been delivered in three months due to file name changes or other alterations that renders the automated program inoperable. Yikes!

So whether you've experimented with top-level journey mapping or if that still remains on your to-do list, the most important takeaway is to focus on reorienting your effort around the customer. Again, it's an easy thing to say—and an often harder thing to do. It requires us to break old product-focused habits and get out of our comfort zone.

But this is precisely what our customers want and need from us. I often remind marketers that their direct competitor is rarely the benchmark by which they're measured. Many customers' buying experience is baselined by Amazon, and their most used app is often the source of very timely notifications of friends joining.

The bottom line is buyers who receive hundreds of marketing communications daily have grown to expect those touchpoints to be relevant, timely, and to contain clear calls to action. And guess how they vote? With their time and their wallets.

So give them an equal amount of time and effort in the form of understanding their needs and wants. By laying out the specific tasks they're trying to achieve at each step in the process—and mapping those tasks back to your organization—almost every marketer I know has seen revenue growth. The simple act of increasing the relevance of your marketing will drive revenue in ways that small-scale content optimization or your legacy approach just can't reach.