Customer Journey Mapping & Ecosystem Mapping – A Forrester Workshop

Background and Objective

Forrester defines customer journey maps as *documents that visually illustrate customers’ processes, needs, and perceptions throughout their relationships with a company*. Forrester believes that they are a critical tool for enterprise-wide customer experience efforts. When used effectively, journey maps help customer experience professionals plan improvement projects and reframe discussions in terms of customer experiences rather than internal operations.

Forrester recommends creating and leveraging Journey Maps to clearly paint the picture of the customer journey, ultimately creating alignment internally. Before you can create these Journey Maps, however, your team members need to understand the purpose of the exercise, what makes them most effective, what the process is for creating them, and what the options are for outsourcing or in-sourcing the research and production required for Journey Maps.

In addition, Forrester’s research shows that many companies – despite making customer experience a strategic priority – still fail to deliver a great customer experience across all customer touchpoints. This failure often stems from a lack of understanding of how behind-the-scenes activities connect to customer interactions. In other words, companies don’t understand their customer experience ecosystem.

The customer experience ecosystem is *the complex set of relationships among a company’s employees, partners, and customers that determines the quality of all customer interactions*. 
For companies to make significant and lasting customer experience improvements, they must first understand what's really happening within their ecosystem, identify the root causes of customer experience problems, and prioritize initiatives to resolve the root causes.

To understand both the customer journey and your customer experience ecosystem, Forrester recommends processes called Customer Journey Mapping and Ecosystem Mapping.

**Project Approach**

Forrester proposes conducting the following onsite workshop with members of your organization to prepare your team for creating the Journey Maps and Ecosystem Maps.

The agenda that Forrester recommends for this full day, onsite workshop is:

- **8:30-8:45** Welcome And Introductions
- **8:45-9:45** Introduction To Journey Mapping
  - A tool for documenting all of the steps that your customer go through as they interact with your company and attempt to accomplish their goals
  - Examples of journey maps from leading organizations
• 9:45-10:15  Exercise: Identifying Key Personas And Pain Points
  ▪ Creating the foundation for the journey maps

• 10:15-10:30  Break

• 10:30-11:30  Exercise: Mapping The Customer Journey
  ▪ Identifying the steps in the customer journey
  ▪ Identifying all relevant touchpoints and problem areas

• 11:30-12:00  Presentation: Intro To The Customer Experience Ecosystem
  ▪ A framework for understanding the complex interdependencies within your company that shape all customer interactions
  ▪ Examples of companies that have taken control of their customer experience ecosystems

• 12:00-1:00  Lunch

• 1:00-1:45  Exercise: Identifying The Components Of The Ecosystem
  ▪ Assessing the quality of key customer interactions
  ▪ Identifying the people, processes, policies, and technologies that affect key pain points

• 1:45-2:00  Exercise: Assessing The Health Of The Ecosystem
  ▪ Determining which people/groups are receiving appropriate value from the ecosystem – and which are not
  ▪ Identifying experience enablers and detractors

• 2:00-2:30  Exercise: Root Cause Analysis
  ▪ Uncovering the underlying drivers of experience

• 2:30-2:45  Break

• 2:45-3:15  Exercise: Ideation Of Potential CX Initiatives
  ▪ Brainstorming potential initiatives to remedy root causes

• 3:15-3:45  Exercise: Prioritizing Key Customer Experience Initiatives
  ▪ Vetting potential initiatives against a prioritization framework

• 3:45-4:00  Small Group Readouts of Findings
  ▪ Groups readout and discuss their findings from the exercises

• 4:00-4:30  Wrap-up Discussion
  ▪ Sharing of key insights, surprising root causes, and areas that require more exploration
Discussion of how you can begin leveraging Customer Journey Mapping and Ecosystem Mapping at your organization

Key Takeaways
During this full day of presentations, hands-on exercises, and discussions, Forrester analysts help you:

- Map out a specific customer journey and key touchpoints.
- Identify the people, processes, policies, and technologies that influence those customer interactions — both the parts of the ecosystem that are in plain view of customers as well as those parts that influence the customer experience from behind the scenes.
- Identify the root causes of customer experience problems.
- Prioritize fixes to these problems.

Questions We Will Answer

- What are the key elements of an effective journey map and ecosystem map?
- What are the key steps to creating journey maps and ecosystem maps?
- What are good examples of journey maps and ecosystem maps from other firms?

Investment: $20,000

Please note that this document is a Discussion Document. As a next step, should you want to move forward, Forrester will schedule a call to further scope the project approach and timeline. As a final step, Forrester will deliver a formal proposal that outlines step by step methodology, and final timeline and pricing details.