

# Understanding the Customer Journey:

6 Key Steps to Building Better Customer Relationships & Increased Loyalty







# Delivering better customer experiences

Today's shopping landscape has effectively obliterated the traditional marketing funnel. As digital brand experiences weave seamlessly in and out of physical experiences, customers have never been more empowered to chart their own course. The stakes are higher in this new reality... but fortunately, so are the rewards. Understand your customers' many paths and take an empathetic, informed approach to improving their experience, and you'll win brand advocates for life.

**As consumer-brand interactions become increasingly harder to navigate, it's never been more essential to define a customer journey that identifies opportunities, reveals hurdles and helps prioritize investments.**

At Kelton, we rely on six key principles to build a meaningful journey map and help our clients reach the right consumers with the right products and messaging, through the right channels, and at the right time. We're sharing them today in the hopes they will help you get more from your next customer journey project.



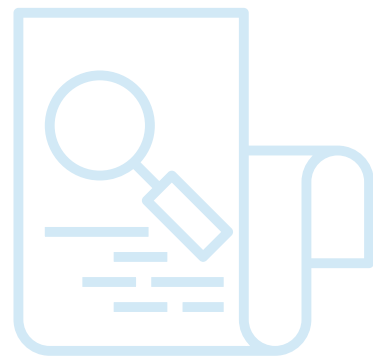
## 3 things to keep in mind

# As you prepare to define your Customer Journey...

# 1

### Remember: a customer journey is an ever-changing set of real-life experiences.

That means it's never 'done', and your process has to be flexible to account for the dynamic nature of the experience.



# 2

### Think fluidly (beware of silo bias).

Your company might be organized into business units, departments, and channels – but your consumers aren't. Assemble a cross functional team, and be mindful to approach the omni-channel experience from your customer's POV.



# 3

### Be willing to innovate.

Journey mapping is about inspiring new ideas for innovation and transformation. To truly get the most from the work, you have to be ready to experiment with new experiences, communications, and channels. Test and learn your way to a better journey.



**So, how do you build a journey map that empowers you to improve the always-on customer-brand relationship across every touchpoint?**



# Map What you Know

No one knows your customer better than your internal cross-functional team. Use existing knowledge and data to sketch out what you currently know about your consumers and their journey, from awareness to advocacy. Generate a robust list of hypotheses about how, when and why your customers shop for your product or service. Getting visual early will focus exploration and reveal critical gaps:

## What Goes In

- Inventory of touchpoints customers use to interact with your brand, both digitally and physically
- Common occasions, moments or need states that might prompt brand interaction
- Dominant and emerging trends in your category
- Barriers, opportunities and knowledge gaps

## What You Get

- A skeleton map of the consumer journey





# 2

## Let Your Customers Lead the Way

To understand the current customer journey, put yourself in the customer's shoes and explore the many options at their fingertips. Empathize with them at each touchpoint and allow them to dimensionalize what they think and feel about every experience. Dive deep into prioritized interest areas (such as Category Entry, Inspiration, Consideration, Need States and Purchase Triggers), but be sure to approach each from your customer's point of view.

### ▶ What Goes In

- Online SmartCommunities go deep into the journey, unpacking the reasons and ways shop.
- Digital and real-world Shop-Alongs illuminate real time reactions, and allow us to compare stated perceptions with actual behavior.
- Social Listening uncovers motivations, need states and emerging trends you may not have thought to ask about.

### What You Get

- A fully articulated map of the current customer journey.





# 3

## Widen Your Lens with Cultural and Competitive Context

Because people's worlds are complex and constantly evolving, it's important to look beyond the current journey to the macro trends influencing the way your customers are starting to think, feel and behave in their wider lives. Cultural Insights can help you forge new experiences, new relationships and new paths for your customers, and translate cultural change into business opportunity.

### ▶ What Goes In

- Cultural Immersions like safaris promote big picture thinking about the forces influencing your customers.
- Expert and influencer input (like panels, dinners, and one-on-one interviews) give you foresight into where your journey could go.
- Semiotic analyses of category trends and shifts identify white space opportunities.
- Best-in-class consumer journeys inspire new ways of thinking about your current map.

### What You Get

- An overlay of insights, trends and opportunities to help you continue improve and evolve your customer journey.



# 4

## Prioritize and Optimize

Paired with the right measurement tools and smart analyses, customer journeys can drive strategic investments by helping you understand which touchpoints to lean into. Contextualize your journey with key emotions, behaviors, need states, and influences associated with each phase to get a sense for the big picture. Overlay your media plan and customer sales data onto the journey to assess touchpoint performance at each stage and identify which touchpoints have the most impact for each of your key audiences. Repeat annually and track progress against activation plans, so you can refine investments as needed.

### ▶ What Goes In

- Perceptual Survey Data link emotions, behaviors, need states, and influences with points along the journey.
- Digital Cookie Tagging measures and validates digital channel effectiveness.
- Statistical Modeling prioritizes touchpoints based on their impact on loyalty, affinity, or sales.
- Media Plan and Customer Data Overlays help predict touchpoint impact and ensure efficient spend.

### What You Get

- A validated, prioritized Consumer Journey Map and Key Performance Indicators in total, and for each of your key audiences.
- Strategic understanding of the impact of incremental spend on the various touchpoints along the journey.





5

## Get Visual to Gain Momentum

Even the most articulate, informed customer journey will fall flat if stakeholders don't understand and embrace it – which is why it pays to get creative when translating your findings for a wider internal audience. Present the journey in a clear and inspiring format that is visual, thought provoking, and interactive. Describe the nuances of how, when, and where customers engage with an easily interpreted, dynamic layout that depicts the interplay

### ▶ What Goes In

- Succinct communication.
- Illustration of key touchpoints and opportunities.
- Inspirational messaging.
- Application of the journey to business decisions.

### What You Get

- Active, engaged stakeholders.

CEAN  
BERRIES  
DENIM  
ADNESS  
FESHADOW  
MAILBOX  
HYDRANGEA  
SAPPHIRE  
MOUTHWASH

# 6

## Put the Map to Work

The masters of this game don't just map the journey – they know what to do with it. Since customer journeys are constantly evolving, the paths and touchpoints you define today must evolve along with it. Practically speaking, this means leveraging your current journey for innovation projects, and getting stakeholders activating instead of just thinking. A clear, accurate customer journey should inform strategic decisions, optimize spend, and improve the overall customer experience.

### ▶ What Goes In

- Innovation work sessions (or collaborative “design sprints”) with cross-functional teams and specialists to generate ideas around priority touchpoints.
- Overlay marketing and advertising spend to maximize impact and efficiency.

### What You Get

- A prioritized innovation pipeline based on consumers' needs.
- Optimized marketing and advertising strategies and spend.
- Enhanced, transformative touchpoints that foster authentic customer relationships.





# 6 steps

## to Build an Effective Customer Engagement Journey:

1. Map What You Know
2. Let Your Customer Lead the Way
3. Widen Your Lens with Cultural Context
4. Prioritize and Optimize
5. Get Visual to Gain Momentum
6. Put the Map to Work

We **love** talking about this stuff.

Need more help articulating your brand's customer journey?

**Give us a call or drop us a line.**

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### About Kelton

Kelton Global is an insights and strategy consultancy that helps global businesses grow and thrive.

We combine research with creativity to help companies all over the world answer the question: what comes next? With a heritage in journalism, curiosity about the human experience is at the heart of everything we do.