How to Map An Omnichannel Customer Journey

A step-by-step guide on how to create a seamless omnichannel journey for your clients

INTRODUCTION

As consumer shopping patterns and expectations are constantly evolving, it's important for retailers to adapt the way they deliver their services. To deliver an impactful service experience, organizations need to ensure that all customer touch points truly reflect their customer's shopping habits. Not only should the customer journey consider both the digital and physical customer interactions, but also how seamlessly they transition between one another.

Although ensuring an effective omnichannel customer journey is nothing new to retailers, many are failing to effectively meet the needs of their customers. According to a report conducted by Forrester Consulting, 85% of Canadian B2C businesses lack a seamless customer journey. The report indicates that this is a result of poor planning, as well as the inability to synthesize actionable insights from customer data.

Understanding customers and their habits is the most critical yet complex thing for any organization to get right. This worksheet will provide a step-by-step guide on how to map an impactful omnichannel journey for your organization. A key to developing a successful omnichannel strategy is identifying the right customer data to map out a journey that accurately reflects your customer's needs.

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WHAT IS AN OMNICHANNEL JOURNEY MAP?

An omnichannel customer journey is a visual representation of a customer's path to purchase of a product or service across multiple channels, emphasizing both the physical and digital touchpoints of your brand. These maps are unique to each retailer, regardless of industry, and are rooted in consumer data to reflect the actual shopping habits of a retailer's customer.

Omnichannel journey mapping ensures a seamless end-to-end client experience, regardless of the combination of touchpoints and interactions a customer uses. When a company comprehensively understands their customer and how they interact with their brand, it will become easier to harmonize the marketing and client service efforts across their interaction channels.

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STEP 1:
The Data Collection

In order to build the foundation of your omnichannel journey map, you should compile all of your customer data. Compiling user data not only allows you to map out their experience accurately, but also provides insight on who they are.

Many organizations utilize third-party omnichannel insights platforms to help centralize accurate customer data.

You should leverage both quantitative data from your Customer Data Platform (CDP) or Content Management System (CMS), as well as any qualitative data from interviews, surveys, or any documented feedback.

Data Collection Check List (If available)

☐ Web browsing/traffic data

☐ Mobile app data

☐ In-store/E-comm KPI Results

☐ Ad platform data

☐ Annual sales report

☐ Social media analytics

☐ Customer service data (NPS, CSAT, CES, etc)

☐ Loyalty program data

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STEP 2:
The Objectives

Before you start building your omnichannel journey map, you must outline the objective of your service delivery. Start by establishing the metrics your business is looking to improve, as well as the end goal of your consumer's path-to-purchase.

Setting these in stone at the beginning is integral, as these objectives will provide the foundation for your omnichannel journey map.

List the key metrics you're looking to improve in your service delivery.

_____

_____

_____

List the business goals you hope to achieve through an effective omnichannel journey.

_____

_____

_____

Identify the goals of your customer, what do they hope to achieve through interacting with your business?

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STEP 3:
The Persona(s)

Who is the customer you are targeting? Further defining your target user, their needs, goals, and motivations will help you map out a journey that will make a lasting impression. Leverage the existing customer data collected from step 2 to narrow down a targeted group of customers you are trying to reach.

At this stage, it will be beneficial to identify more than just one user group. You will eventually map out multiple journeys for various user groups as each have different ways of interacting with your business. For example, younger target demographics may begin their customer journey online through social media, versus older generations who may begin their customer journey through e-mail marketing or physical advertisements.

Persona Name:

Bio:

Demographic Brief:

Personality:

Pain Points:

Goals:

Motivations:

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STEP 4:
The Behavioral Stages

Now that the scope and personas have been established, the next step is identifying the key stages in your omnichannel customer journey.

The number of stages in a customer journey will be dependent on your persona's needs. How many steps do they need to take to achieve their goal? This will provide an overview of how your customer journey will be mapped as well as how they will transition between both physical and digital channels. A simple way to do this is through affinity mapping, a simple brainstorming tool used to organize complex data into groups and subgroups.

Affinity Mapping Exercise

1. With your team, brainstorm with sticky notes every step your user needs to take to achieve their goal through your service in no particular order.

2. Now with your sticky notes, group together the actions that relate to one another and place each grouping in chronological order, from the beginning of the user's journey to the end.

3. Identify which clusters contain digital or physical touch points through colour coding or marking.

4. On top of each cluster, create a heading for each section that encompasses the theme. (E.g. Discovery, Purchase, etc.)

5. You're finished! Each heading represents the behavioral stages of your customer's journey.

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STEP 5:
The Touchpoints

Now that the outline of your user journey has been set up, it's time to map out the touchpoints of your customer's journey. Leverage the existing touchpoints you brainstormed under each stage during the affinity mapping, feel free to add on any additional customer interactions you may have missed.

Consider the seamless and not-so-seamless transition your customer experiences as they move between physical and digital channels to reach their goal. Are the customer interactions at each touchpoint positive, negative, or neutral? How does their experience vary throughout your service? Be realistic with your target user and reference your persona's goals and motivations to understand how they might experience your journey.

Journey Map Plotting

1. Utilizing the brainstorming board used in Step 4, consolidate or eliminate any unnesessary steps in each cluster and then place the stickies in order chronologically. These will be your reference guide when plotting out your customer journey.

2. Reference the **journey map template (pg. 10)** and write down each behavioral stage for your persona along the top of the plotting area.

3. On the left-hand side, write down every channel of your business that your customer will interact with to achieve their goal.

4. Now, referencing the stickies on the brainstorming board, plot out the steps across the journey map template. Align the plotting dots to the channel used on the left-hand side.

5. If this is a future state journey map, take a look at the transitions between touchpoints. Reevaluate if needed to create a more smooth customer journey for your user.

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STEP 6:
The Future-proofing

A common pain point amongst retailers is that they are unable to adapt their services to meet the changing habits of their consumers. In order for your customer journey map to stay up to date and consistently reflect the needs of your customer, you will need to be consistently revaluating your customer journey on a regular basis.

Key indicators of a journey that doesn't meet your customer needs anymore include a dip in key performance metrics, decreasing Net Promoter Scores, decline in foot traffic, etc. Pay close attention to how your customers are interacting with your business and make changes to how you deliver your customer experience.

As businesses grow and consumer shopping habits evolve, so does the challenge to deliver an efficient cross functional collaboration between customer touchpoints. It's important to continuously analyze and adapt touchpoints to meet the expectations of your customer. This will allow businesses to stay relevant to their market and stay ahead of their competitors.

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Omnichannel Journey Map Reference Template

PERSONA IMAGE + NAME

PERSONA DETAILS

BUSINESS GOALS + OBJECTIVES

STAGE 1

STAGE 2

STAGE 3

STAGE 4

STAGE 5

CHANNEL 1

CHANNEL 2

CHANNEL 3

EMOTION

ACTIONS

EMOTION

ACTIONS

EMOTION

ACTIONS

EMOTION

ACTIONS

EMOTION

ACTIONS

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