

Customer journeys: Involving customers and internal resources in the design and management of services

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Abstract

The customer journey approach is increasingly being taken up by practitioners and researchers to support the design and management of services. As part of this approach, customers and internal resources are often involved as contributors of input in design and management processes. In the current literature on customer journeys, a broad variety of involvement practices has emerged. No coherent framework has been proposed to structure these practices. In this short paper, we provide an overview of the different purposes and implementations of emerging involvement practices with the customer journey approach. We then contribute a simple framework for these practices, where we classify involvement according to its purpose, implementation, and output. Finally, we point out future research needed to further develop the ways customers and internal resources are involved within the customer journey approach.

KEYWORDS: Customer journeys, service design, customer involvement, methods

Introduction

The customer journey approach has generated much interest in fields concerning the design and management of services. In a recent McKinsey report, Stone & Divine (2013) argue that the customer journey approach represents a needed paradigmatic shift in how we understand a customer's experience of a service. Zomerdijk & Voss (2010), in a study of successful experiential service providers, found customer journeys to be widely used in the design and management of services. Likewise, Segelström & Holmlid (2009), found customer journeys to be a prevalent approach to structure early phase user research in service design projects.

A number of practices have emerged concerning the involvement of customers and internal resources, that is, personnel internal to the service provider, in customer journey work. Such involvement is conducted for a wide range of purposes and conducted in a variety of ways, such as, for example, the mapping of customer journeys with customer representatives (Croiser &

Handford, 2012), the mapping and redesign of customer journeys with company internals (Wechsler, 2012), the co-design of customer journeys with customers (Kankainen, Vaajakallio, Kantola, & Mattelmäki, 2012), and the measurement of customer satisfaction for key customer journeys (Rawson, Duncan & Jones, 2013). This variation in purposes and involvement practices reflect the versatile character of the customer journey approach. However, in the face of such variation, a framework is needed to get an overview of the different purposes and implementations as well as to foster a common understanding of how the involvement of customers and internal resources may be conducted within the customer journey approach.

In this paper, we provide an overview of involvement practices that has emerged within the customer journey approach. On the basis of this overview, we provide a simple framework to systematize these practices. Finally, we use the framework to highlight needed future research.

The presented overview springs from a systematic literature review of customer journeys in the scientific literature, a preliminary version of which is presented in an open technical report (Følstad, Kvale & Halvorsrud, 2013). Due to space limitations we do not go into detail on the review here. The interested reader is referred to the technical report.

What are customer journeys?

The concept of customer journeys has been used, at least since the early nineties, to describe services from the customer's point of view (Whittle & Foster, 1991). Even so, the literature on customer journeys is still in its emergence, though some key works (Parker & Heapy, 2006; Voss & Zomerdijk, 2007) have made a marked impression on the field. Stable definitions and uses of key customer journey terminology are yet to be established (Følstad et al., 2013).

In the literature, a customer journey is seen as the process that a customer goes through to reach a specific goal, that involves one or more service providers (Følstad et al. 2013). Customer journeys are typically detailed as a series of touchpoints or interactions between the customer and the service providers (for example, Clatworthy, 2011; Stickdorn & Zehrer, 2009). The importance of a customer journey perspective increases as the complexity in service provisioning increases, for example, when services involve multiple touchpoints for which different organizational units are responsible (Wechsler, 2012).

Overview of involvement practices within the customer journey approach

A variety of practices for involving customers and internal resources in the analysis and design of customer journeys is described in the literature.

For example, involvement practices to support analysis, that is, the gathering and processing of data concerning existing customer journeys, are much reported. Proponents of such analysis are, for example, Croiser & Handford (2010) who, on the basis of data gathered from customer observation and interviews map customer journeys as they are experienced by their participants. Or, for example, Wechsler (2012) who describes workshops with internal resources for collaborative mapping of touchpoints and customer journeys. The mapping of customer journeys typically has an exploratory character, with qualitative methods for data collection to allow for surprise insights.

The analysis of customer journeys may also concern quantitative measurement of the customer's experience. In the scientific literature, such measurement is typically conducted as part of the mapping process to quantify changes in experiential quality during the customer journey (Trischler & Zehrer, 2012). However, measurements of customers' experiences during a customer journey may also be conducted on a routine basis, without being associated with an ongoing mapping process (Rawson et al., 2013). Quantitative measurements are, for example, implemented as questionnaires.

The customer journey approach also encompasses involvement practices targeting the creative phase of the design process, in particular, through co-design activities. Clatworthy (2011) describes, as one of the purposes of the AT-ONE service design method, how internal resources may be engaged in the co-design of services through deliberate rearranging the sequence of touchpoints in a customer journey map. Kankainen et al. (2012) report on the use of customer journeys for co-design, where customers formulate "dream journeys". The co-design activities reported by Kankainen et al. and Clatworthy (2011) were conducted as creative workshops. Such co-design may be integrated within involvement processes that also encompass analysis. For example, the AT-ONE method covers mapping and idea generation (Clatworthy, 2011).

In general, two distinct groups of participants are involved in analysis and design activities within the customer journey approach: Customers and internal resources. Interestingly, quite a few studies in the literature only concern one of these groups; either internal resources (for example, Clatworthy, 2011; Wechsler, 2012), or customers (for example, Crosier & Handford, 2012; Trischler & Zehrer, 2012). However, as argued in the HM Guidelines on customer journey mapping (HM Government, 2007), these two participant groups may contribute complementary insights. When comparing mappings of customer journeys as they are expected by internal resources to mappings of journeys as they are experienced by the customers, important gaps (Bitner, Zeithaml, & Gremler, 2010) in the service provisioning may be discovered, which in turn may generate suggestions for improvement in the service delivery process.

A framework for involvement practices within the customer journey approach

The variety in the emerging involvement practices within the customer journey approach may be confusing. To improve our understanding of these practices, and thereby support their further evolution, we suggest a simple framework as a structure against which to map current and future practices. In this framework, we structure involvement practices according to three main dimensions: Purposes, implementations, and output. The purpose concerns the objective of the involvement practice. The implementation concerns its practical arrangement, in particular in the form of participants and methods. The framework is presented in Table 1.

The purposes of involvement practices may broadly be distinguished as concerning analysis and design. Analysis practices include mapping and measurement. Co-design practices may or may not be associated with analysis.

The implementations of involvement practices concern participants and methods. Within the customer journey approach, emerging involvement practices target customers, internal resources, or both. The methods used for involvement of customers and internal resources include qualitative methods for mapping or co-design, and quantitative methods for measurement. The qualitative methods may target individuals, such as interviews and observations, or a collaborative setting, such as the workshops for mapping or co-design.

The output of involvement practices depends on their purpose and implementation. Choosing an adequate involvement approach require knowledge of the output to be expected.

Purpose	Participants	Method	Output	Example refer.
Mapping	Customers	Qualitative - individual	Journeys experienced by the customer	Croiser & Handford (2012)
	Internals	Qualitative - collaborative	Journeys expected by the service provider	Wechsler (2012)
	Both	As above	Gap - expected vs. experienced journey	HM Gov. (2007)
Measurement	Customers	Quantitative - when mapping	Satisfaction - during journey	Trischler & Zehrer (2009)
		Quantitative – routine	Satisfaction - at journey level	Rawson et al. (2013)
Design	Customers	Workshops	Ideas from customer needs	Kankainen et al. (2012)
	Internals	Workshops	Ideas from knowledge of possibilities	Clatworthy (2011)

Table 1: A framework for customer journey involvement practices

Implications for future research

The presented framework allows us to point out areas for needed future research. We will in the following address three such areas.

Efficient customer journey mapping: Different practices have emerged to involve customers and internal resources in the mapping of customer journeys. However, there is a lack of research concerning how these two participant groups should be involved in a coherent process to efficiently identify gaps between customer journeys as expected by the service provider and customer journeys as experienced by the customers. Such research may, for example, be important for customer journey mappings to generate awareness concerning customers' experiences within the service provider.

Fully integrated mapping and redesign processes: Although some authors have suggested processes that integrate mapping and redesign of services with internal resources (for example,

Clatworthy, 2011), there is still a lack in processes that fully integrate mapping and design with both internal resources and customers. Possibly, such a process could have as its pivotal point a gap analysis for the expected vs. the experienced customer journey.

Adequate measures of customer satisfaction: Customer satisfaction is currently measured on the level of touchpoints or journeys. However, we lack knowledge concerning how these two levels of measurement may complement each other. This is an important field of future research as it may be far more challenging and resource demanding to collect satisfaction measures for each relevant touchpoint than for the complete journey.

We hope that the simple framework and future research needs presented in this paper may motivate a continued interest in the development of customer journey involvement practices. Such development is important for customer-centric service design and management.

Acknowledgements

This study was conducted as part of the project Customer Care 2015, supported by the Norwegian Research Council BIA programme (NRC project number 219800).

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