



USING PERSONAS & JOURNEY MAPS

Strategic Tools to Improve Customer Experience

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BEYOND THE ARCSM



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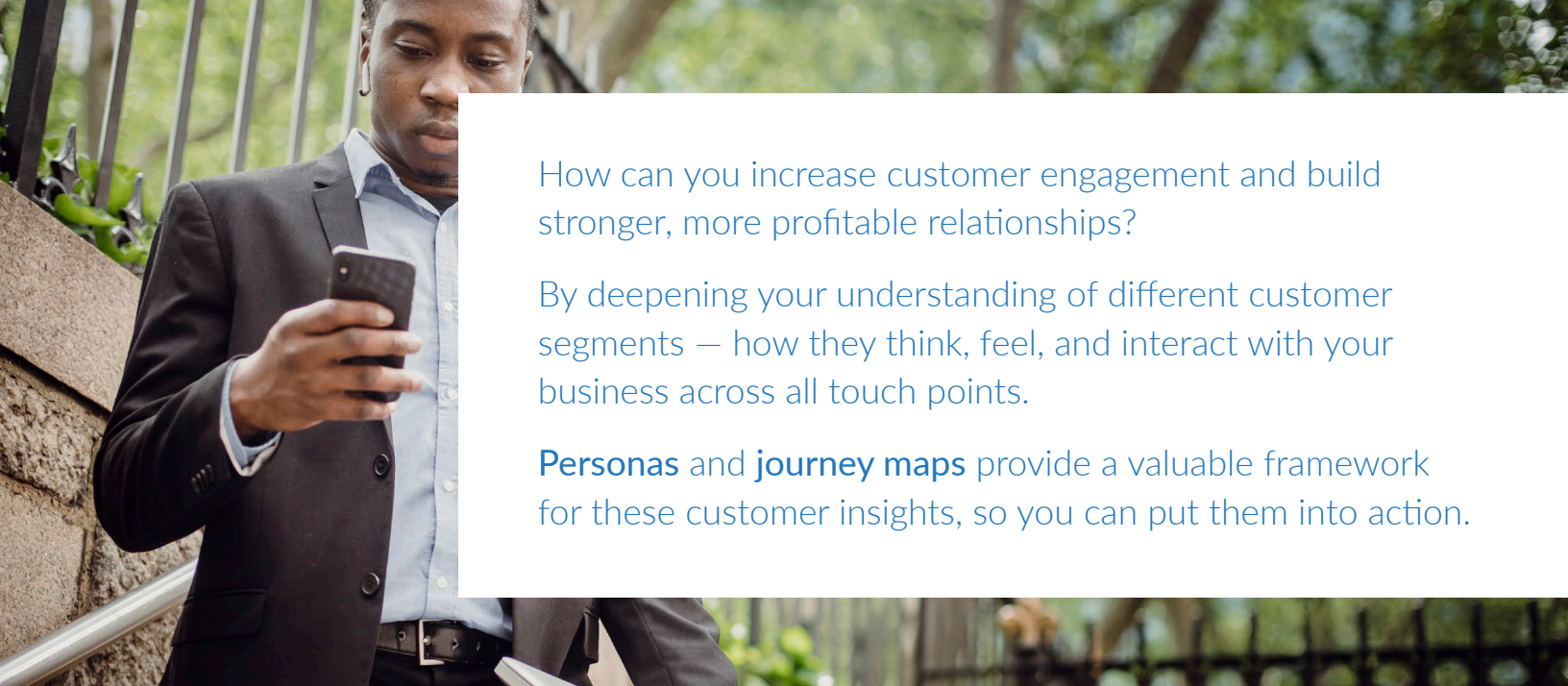
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How can you increase customer engagement and build stronger, more profitable relationships?

By deepening your understanding of different customer segments – how they think, feel, and interact with your business across all touch points.

Personas and **journey maps** provide a valuable framework for these customer insights, so you can put them into action.

Customer personas and journey mapping are also important tools to help you build buy-in for change and innovation, and guide internal teams on the right actions and messaging to resonate with specific audiences.

To get started, you'll want a clear understanding of what customer personas are, why they're important, and what makes a good persona. Once you've created your personas, you can take a walk in your customers' shoes with journey maps that explore the end-to-end customer experience.

WHAT ARE CUSTOMER PERSONAS?

Personas are fictional, yet believable archetypes that represent key traits of various types of customers. Unlike generalized segmentation, customer personas have individual names and stories that reflect personal attributes and behaviors such as needs, motivations, attitudes, and pain points.

Like Jeff Bezos' empty chair that represents "the most important person in the room," personas help you empathize with customers. Each persona imagines what different types of people may think and do as they engage with your business, and what influences their decisions and actions.



71% of companies that exceed revenue and lead goals have documented personas.¹



90% of companies using personas have gained a clearer understanding of their customers.²

WHY ARE PERSONAS IMPORTANT?

Customer personas originated as a tool for developing user-centered design. Now, personas are often used to gain insights for optimizing many aspects of customer experience, from sales and marketing, to customer service, operations and HR.

Whether you're trying to attract new business, increase value for existing customers, or improve processes to eliminate pain points, personas can help you make smarter decisions. They equip you to:

- **Gain deeper understanding of your customers**

With a detailed, relatable picture of various types of customers, you can better anticipate how to help them meet needs and solve problems. Insights from personas can also spark innovation by highlighting opportunities that could increase competitive advantage.

- **Design processes with the customer in mind**

Personas help you clarify how different customers interact with your company across a lifecycle. For a given persona, do your processes meet expectations? satisfy needs? deliver delight? Or do they reflect issues in your operations that may create delays, confusion, or disjointed experiences? Personas provide awareness of the various journeys your customers may take, so you can take action as needed.

- **Build stakeholder buy-in and alignment**

Personas can also play a critical strategic role within your organization. Data-driven personas provide a tangible way to gain actionable support from executives and stakeholders. They're a valuable tool to help you explain pain points to fix, gaps to fill, or targeted offerings that could improve customer experience and increase lifetime value.



TIPS FOR CREATING HIGHLY EFFECTIVE PERSONAS

What makes a good customer persona? It's a tool to help you tell a story, so each persona needs to be believable, ownable, and serve a meaningful purpose. Here are some tips to build value into your efforts:

- **Align with business objectives**

You want personas to serve as powerful tools that help teams across your company achieve their goals. Engage key stakeholders from different lines of business or departments to understand how their objectives, processes, and issues influence the overall customer experience. These insights will also be helpful when you're ready to map customer journeys.

- **Use data and research**

To identify and shape personas, use market research, surveys, interviews, focus groups, even social media analytics. You want insights that deepen your understanding of customers beyond what they do, but also *why*. It provides important nuance and detail that humanize your personas.

- **Bring your personas to life**

Craft engaging, first-person narratives that are realistic representations of various customers. Give each persona a name and photo to make them relatable as real-world people. Include attributes such as:

Demographics: Age, location, education, job role, income, household

Personal attributes: Their attitudes, motivations, and influences when they interact with your company

Needs & goals: Problems to solve, milestones to meet (e.g., need to do things easier, faster, better)

Customer lifecycle: How their needs may vary for different channels and touch points; how their needs may evolve over time

- **Make personas eye-catching and memorable**

You want to build buy-in for teams to use and relate to the personas as real customers. Design them to be as "real" as possible, with high quality photos and polished, easy-to-read layouts. Ideally, the personas will help your organization align their own attitudes and actions toward delivering experiences that matter most to these different types of customers.

USING PERSONAS TO MAP THE CUSTOMER JOURNEY

Once you've created distinct personas, you can use them to create customer journey maps. What is a journey map? It's a visualization of the process a person goes through to accomplish a goal or multiple goals over time.

But a journey is more than just where people go and what they do. It's about the experiences they have along the way, and how they feel about them. So an effective journey map is also an experience map – it really brings your personas to life.


For each customer persona, a journey map describes a lifecycle of interactions with your business – in a broad sense across the relationship, or how they go about meeting specific needs. Each map should highlight that persona's experience at various channels and touch points, e.g., what they do, think and feel as they try to achieve their goals.

Journey maps can use many formats and approaches, but be sure to represent the true customer experience – good or bad. Base them on data-driven research and real customer behaviors so you create an accurate picture of areas for improvement as well as opportunities.

Journey mapping equips you to assess current and proposed processes, identify targeted actions to resolve pain points, and drive innovation for digital transformation and new offerings.



54% greater marketing ROI and **18 times faster** average sales cycle for companies that track customer journeys.⁴

Angela's CX Journey		Stages	Awareness	Planning	Purchase	Onboarding
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KEYS TO EFFECTIVE JOURNEY MAPPING

At the heart of a journey map is your customer, right? That's why it's so important to create the personas first. You can then map the various journeys from the perspective of each customer persona, considering how their needs, motivations, attitudes, desired tasks, and pain points might have an impact in each interaction.

Digital dashboards are helpful for tracking metrics, and they're also a great way to monitor each step of a customer journey. However you choose to visualize a journey, here are some essential factors to consider...

Persona & Scenario

Who is the hero of this story? And what is this journey about? (e.g., Persona of a millennial woman who needs new banking services for her business)

Everything about the journey should be from that customer's perspective.

Context

- What are the various goals, needs, and actions on that customer's journey?
- Where is each interaction taking place? (e.g., in-store, phone call, online or mobile app, social media) How does that align with the customer's preferred channels?
- What's going on around the customer at each step? And how might that context influence how they interact and what they want to do? (e.g., Distractions, stress, or multi-tasking might impact their attention span and decision-making, how they try to complete a task, or their ease in understanding information)
- How does timing impact the customer at various touch points? (e.g., Are long hold times making it hard to complete a task? Are the right messages reaching the customer at the right time to do the most good?)



Emotions

- How does the customer feel at each step? (e.g., are they engaged, bored, frustrated?)
 - How and why might their emotions and attitudes change in different channels or at different stages in the journey?
 - How do their expectations (met or unmet) influence their emotions?
-

Progression

- Are there phases to a certain journey? (e.g., awareness, planning, purchase, onboarding)
 - How does each step enable the next? Are there barriers or challenges making it hard to move forward? Is the path forward clear and inviting to the customer?
 - Is there a clear way for them to know the best action to take next toward achieving a goal?
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Call to Action

- What problems or opportunities did you identify on this customer journey?
- Who needs this knowledge, and how should they act on it? Can you provide recommendations?
- How will you measure the impact of changes? (e.g., new processes, improved communications, digital innovations)

CAPTURING QUICK WINS AND LONG-TERM VALUE

Data-driven **personas** and **customer journey maps** are valuable tools to help your organization empathize with customers and identify tangible ways to improve your customer experience. Think of it as strategic guidance on where, when, and how to take action.

Often you can achieve quick wins by delivering more effective communications at various points in a journey. Other times, you'll take the long view for broader changes that help deepen engagement, attract new business, and increase customer lifetime value.

Ultimately, it's about embracing a customer-centric perspective that empowers you to deliver what your customers want most, explore how to exceed their expectations, and create experiences that nurture brand loyalty.

Bottom line? Investing in these small powerful tools can translate into very big wins for your business and your customers.

Sources:

- 1, 2 [Buyer Persona 101: The Research and Insight for Success](#), Stephen Zoeller's Marketing Blog, Oct 2019
- 3 [Every Banking Brand Has a Story, But Marketers Must Tell Them Better](#), The Financial Brand, March 2020
- 4 [The Eye-Popping ROI Of Customer Journey Mapping](#), CMO.com

About Beyond the Arc

Beyond the Arc is an agency that helps companies build strong customer relationships and empower internal teams, with data-driven problem solving and strategic communications. We're agile, innovative thinkers who believe in highly personalized collaboration with our clients. From creative communications and content marketing to drive customer engagement, to data science and analytics for gaining deeper insights, we help companies take their business to the next level.



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