Podcast

Customer first thinking.

The B2B Journey Map

An Interview with Jim Tincher, President, Heart of the Customer

Jim Tincher:

Jim Tincher is the President of the CX consulting firm Heart of Customer and author of the book "Do B2B Better".

Make it – ship it - sell it.

That's pretty much the way B2B companies have operated forever. Usually product-centric and sales led, they view customers as "buyers" who are pigeonholed as decision makers, influencers or users. The only thing that truly matters: the size of the sales pipeline. How many marketing-qualified leads? How many sales qualified leads? How many proposals? How many conversions? And then, once the final deal is agreed to, the handoff to the "customer success" team whose job mainly is to make onboarding go as smoothly as possible.

According to this old-school selling model, the customer journey is the path to purchase. That journey typically ends with a signed contract. No one thinks too much, if at all, about the post-sale experience: what happens when things don't go exactly as planned. When products fail to work as advertised. When shipment dates are missed. When the customer urgently requires on-the-spot help. When product needs change. When questions come up that can't be answered through a routine service call.

Accountability for keeping the customer happy gets lost somewhere between sales, field support and service. And certainly it is never within marketing's purview, whose only job is to keep sales happy. On the executive floor, experience metrics like NPS and customer satisfaction are never part of the conversation, overshadowed by the latest market share and revenue figures.

All of that explains why most B2B companies are rated at or near the bottom of the CX Maturity scale, according to the XM Institute[1]. However, that has finally begun to change in the last few years, mainly due to B2B digital disruption.

The buying process has become infinitely more convoluted. More stakeholders got involved in decision making. Buyers no longer want to see a sales person until much later in the buying cycle. They prefer to communicate through digital channels. They are more research driven – more knowledgeable – more demanding – more inclined to shop around. Their expectations are based on their own personal digital lives.

As a result, marketing's job has changed: now B2B marketers need to create a richer digital experience for both customers and buyers, giving equal attention and weight to all stages of the customer lifecycle. Sales is no longer the exclusive owner of the customer relationship. Marketing has a much larger role to play in securing customer loyalty by enhancing the experience.

Around a decade or so ago the concept of customer journey mapping came into vogue as a way to improve the post-sale experience. By visualizing the steps customers took in their interactions across touchpoints, while identifying their thoughts and emotions as their journey progressed, companies could design a better, more rewarding experience, making it easier for customers to do business with them. So journey mapping became a foundational step in addressing customer satisfaction and loyalty.

The problem, of course, is that, a lot of the time, those journey maps end up as just pretty wall posters due to a lack of follow-through. Transformation of the B2B experience can be a complex undertaking due to siloed organizational structures, multiple stakeholders, internal pockets of resistance and a lack of systems integration. It takes commitment and resources to fix pain points by working across functional lines and business units. Executive management has to be fully behind the effort, making CX a priority. And, above all, it takes internal champions with the courage and fortitude to be "changemakers", according to Jim Tincher, whose book "Do B2B Better" outlines how companies can take a more systematic approach to customer experience design.

I began by asking Jim what led him to become an early pioneer in customer journey mapping.

SS **Stephen Shaw (SS):** You started your business Heart of the Customer about 11 years ago. I think those were early days, relatively speaking, for customer journey mapping. What made you decide to take that entrepreneurial leap and start your own company?

JT **JIM TINCHER (JT):** Well, to be honest, I got fired a lot. So I started my business small, business we have to be really customer focused. Went to BestBuy, US retailer again, very customer focused, and went to a large health insurance organization. Came in as a product guy and recognized that not everybody is customer focused. At that point I literally thought every company is customer focused. That's how you do business. And this organization, nobody in marketing and product development had ever met a client. And we led the nation in sales. We also led the nation in churn. And it wasn't close but you know, when you're growing, that covers up a lot of sins. And so I started getting this idea about building around the customer, understanding more about the customer. Started blogging.

And then left there, went to a consulting company, got fired went to a research firm. And while I was there I was asked to build a journey map. Had no idea what a journey map was. I said, well, here's a PowerPoint slide with some bubbles on it, but use this. Now I think you know from our work that that offended me. You can't take the richest of the customer experience and toss them bubbles on a PowerPoint slide and say that's it. It's got to be much more immersive, much more visual. And I didn't want to do it, but you know, it was my job, I had to do it.

But I wrote in my blog about how I would do journey mapping. The top 10 requirements. I showed 10 plus 4 requirements of a customer focused journey map. And my blog was the ugliest website you've ever seen. It was bad. I had a friend of mine at church built my logo. It was ugly. But that ugly little blog post went viral. For customer experience - 60,000. I mean we're not cat video viral, but 60,000 hits at that point.

And then around the same time my boss came to me and said, we need you in sales, I said, great, okay, who's going to take my projects? What do you mean? Well, I'm going to be in sales. No, no, you still have to your projects. Okay, great. What accounts are I get to take over? No, no you're "new" sales. Okay, where are my leads? Leads? No, no, get out there. You're in sales. Well, shock. Number of months later I was fired because I hadn't sold enough. But at that point I was number one on Google for journey mapping.

In fact, journey mapping anything, journey mapping software. I was number one link, over Touchpoint Dashboard, which at the time was journey mapping software. And so I thought maybe there's a business here. I've been fired twice in two years. I never wanted to be a consultant, but I found that our approach to journey mapping, mine originally, really resonated. And so we started doing that work and really started to take off and grow. And so I hired on Nicole Newton from Thomson Reuters, my co-author in the first book. And we had a great time along with other members of the team as we grew, really working with companies to take a different, more deliberate approach to journey mapping.

SS Yeah, well, obviously your success speaks to how much of a pioneer you've been in this area. Now, let's talk B2B for a second. One of the stats that you cite in the book "Do B2B Better", is that 80% - 80%! - of B2B companies are stuck at the lower end of the CX maturity curve. Why is it so hard for B2B companies to get this right, to improve? Is it simply the complexity of the organizational structure? What have you seen that really represent the things that are holding companies back from getting the experience right?

JT I think I'd say three things. One is the complexity. You know, I remember when I was with Best Buy, we were amazed and overwhelmed because we had to talk to two decision makers, a husband and a wife. And of course, in B2B you might have 6, 8, 10, 20. You know, Gartner reports that the size of the committee making big B2B decisions is more than doubled in the last few years. And so you have that complexity, but that's only part of it.

The second part is that customer experience is tentative. We've established our own score, using the net promoter score or customer satisfaction. We've actually created our own science. We have our own data, survey data, our own outcome, net promoter score. And we talk about that and the rest of the business doesn't. And so, it's really hard to talk to finance because it's usually not a shared vernacular and they're scary people, so we don't talk to them.

I did a survey a few years ago of CX leaders of the top two answers to the question, how often do you meet with finance? Once a year and never. But the change makers, those who can show impact, they're meeting regularly, the more mature companies. But the third is leadership doesn't expect it. I am doing right now as part of my work with the CXPA, Customer Experience Professional Association, I've just until recently was on the board. I hired Roxie Strohmenger, who was the incoming board president. So she's going to take over that seat because you can't have two people in the same organization. But we're starting to interview executives.

When I ask executives what they care about the most, C-Suite specifically, the answer is universally growth. And when I ask eventually about the role of customer experience, they don't see customer experience as telling them anything important about growth. It's just not what they expect. Now in my world, my worldview, customer experience is the way to grow. It's the secret to organic growth, that when you do a great job of customer experience, customers want to buy more from you, stay longer. Interactive way is less expensive to serve. Leadership may believe that at a certain level, but doesn't act upon that and CX doesn't prove it to them.

Therefore the NPS score or whatever you use becomes its own outcome. And eventually leadership says that's not so important. Like, we're going to de-invest in favour of technology changes where we can see an ROI.

And so we look - back to your question - about why are so many low. A big part of it is they're not expected to do more and they don't try to do more, but we need to. And that's a big part of my mission is helping customer experience actually connect to the financial outcomes. The data is there, the proof is there, but you do have to prove it.

SS I wonder how much of this has to do with the financialization of decision making in corporations where the only thing that matters frankly is as you say, growth, profit margin, next quarter results. And you know, CX is a slow train. There's so much that needs to be changed. We're going to talk a lot about this later on in this conversation, but it's the hurry up offense of companies. They just don't have the patience to either stick with it or even buy the solution to what they don't even perceive to be a problem. But strikes me that's the central issue here.

JT You're exactly right. They don't see it as a problem. And it is. Now when we look at programs that are really effective, they're actually able to show that when customer experience gets better - metrics such as net revenue retention improvement, order velocity, margin per customer - they connect customer experience directly to that. And there's usually a lag to your point. You know, if you do a great job today, you snap your fingers, you create the perfect customer experience, you won't make more money tomorrow, depending on industry, could be three months. One of our clients is an industrial landlord with five year contracts. It's going to be two and a half years before they see the ROI. So it's going to take time, but it exists.

SS Well, and as much as you - as secondary data exists to prove all the points that you're saying - it's also mystifying that you could present all of those facts in front of a boardroom and they're still skeptical - there's a relationship there.

JT There's a quote in "Do B2B Better" from Olga and used to be with Aramax where she says that when CX brings these secondary data to executives, it actually costs them credibility. Executives want to see how the results play out with their data, with their customers. Just because, you know, Watermark has this great study that shows that stock prices go up as a result of better customer experience. They don't care. I'm not going to get paid because some other companies did better with their customer experience - saw a better stock price. I have to show how I am delivering results here. And so when CX tries bringing the secondary data, we hurt ourselves. You have to use your own data.

SS You mentioned Jon Picoult's company. His point of view about experience, generally speaking, is that the aspiration should be to create a memorable experience. In B2B, is that necessarily the case or is it more a case of we need to make it easier for our customers to do business with us? What's the higher order aspiration that will inspire employees to get behind a CX initiative within a company and convince the board, by the way, that they need to do this?

JT Well, it's not an effortless experience. I mean, I recognize the book had a great title. Everybody loved it. If you go and look at the methodology, it was entirely studied in the contact center. And so yes, if you're calling in the contact center, don't ask me about my kids, my grandkids. It's not about relationships there or a wow or memorable moment there. In that moment, it's about getting the job done as quickly as possible. But when you move beyond the context out of the call center and you look at what drives loyalty, and here, I mean true loyalty, customers buying more from you, staying longer, an effortless experience doesn't take you very far. It helps, until your competitors are [inaudible] even easier. And the research is quite clear here, the way you build loyalty is through an emotional connection. Now, a memorable moment is a good way of getting that to happen, but it's through an emotional connection.

I'm doing some analysis right now with a client and they asked customers to rate the importance of different things. And it's interesting because when they asked to rate the importance of relationship with an account manager, it was 9th out of 10. But when you derive what actually drives intent to grow, it's the most important factor. Relationships, emotional connections, these drive behaviours.

And I didn't put this in Do B2B Better, the phrase that come to me after the book was published. But if I look at the difference between a "hopeful" who hopes their work matters, they're working hard, they hope their work matters, and a "change maker" who can prove the work matters, the big difference is that hopefuls report on sentiment, change makers study and change behaviours. And so if you want to understand what's going to drive loyalty, you actually have to measure that loyalty. Look at the data, see what customers are doing and then compare them with your survey to see what parts of the survey are driving that.

I have a great interview with the former customer experience leader at Dow, Jen. She's still there, she's just in a new role. She's employing experience where she shows that if you create an effortless experience, they don't really see a difference in their customers behaviour when they say it's easy to work with Dow. But when they say it's enjoyable to work with now something I never thought would be the case. But that's when they start to see behaviours change where customers are going to buy more often, they buy more types of products and they're far more willing to invest in joint innovation - found that it surprised me. I didn't expect to find this but that the change makers are more frequently measuring emotions in their experience. And so if you want to build loyalty, you need to look at the emotions you're creating in your customers because how we feel drives what we do.

SS Jon makes that same point by the way, that it's really about how people feel about you that really governs loyalty. You call it out in the book, you say, emotion is the best predictor of loyalty. I want to pursue this a little bit more because one of the points you make in the book is that to really improve the experience you need to understand the drivers of trust. You start there, which is, you know, if you secure trust, you can secure loyalty. And the latchkey to that is what you call an emotional north star. Can you explain what you mean by that? And also you talk about emotional gainers and drainers. Maybe you could elaborate a little bit around that as well.

JT So first of all, it's not always trust. You need to start with not just guessing an emotion and going, the emotions that matter vary. Yes, the Veterans Administration here in the States, they have found trust matters for them. UKG, it was confidence. Hagerty, it was happiness. Dow, it's enjoyability. So the right emotion varies. But you start with understanding what you care about, which is often growth, and what leads to that growth? It's typically an emotional connection. So understand what emotions - that's through quantitative research - leads the outcomes you care about and then you create that as an emotional north star. The one thing we focus on as an organization. And again, that could be confidence, enjoyability, trust. We worked with the women's leadership group. For them it was feeling connected to other members.

But understand what's that emotion that drives what you care about? And then start saying, where do we create that? And a good way to do that is actually bring in your operational data as well as behavioural data and see, do customers who interact with you entirely digitally have more or less, let's say, trust than others? There's a big effort to drive everything to digital, but are you actually lowering trust by doing that, in which case you get some short term cost savings, perhaps at the expense of long term growth.

And so that's where you start looking. What are the drivers of trust? And again, I will look at survey questions, but even better is to look at your operational behavioural data and say what's common to the customers who feel trust in you versus those who are frustrated? And now we look at emotional gainers and drainers, which are the ones that are actually leading to that, versus the opposite?

So what we'll often do is we will identify one emotional north star, but we'll measure six to eight total emotions, and we start seeing what in the data creates those outcomes. We worked with a software company, not UKG, to be clear, a different software company. And what we found is that if the implementation process went past a certain length, the emotion generated was one of exhaustion. I don't know if you've ever implemented software. I have. And there are times when you feel pretty exhausted and when customers feel exhausted, their intent to buy more from you is almost zero.

And so we, our recommendation to our client is that they needed to look at resources. We looked at the journey map. The most frustrating times, the times most exhaustion of the map, were the points of the map where our client wasn't involved. They went to system integrators and so they really had to rethink their customer experience because they were outsourcing pieces of it. And as a result that was causing frustration and exhaustion to customers, which is leading them to be less willing to buy more software.

SS I remember that anecdote in the book. But there's also, I think, one system integrator that was actually getting it right. And they latched onto that to say, well, what are they doing right that's leading to greater trust here.

JT And you can't get there unless you're looking at the data, you're measuring the emotions and then you're looking at, in this case the descriptive data to say who's involved. You say, oh, wait a minute, this one SI - system integrator - is having all these great outcomes. Let's learn from them.

SS I'm just a little vague though, on the center of gravity here. The one emotion that you run with, whether it's happiness, or confidence, or joy, or whatever that may be, how do you actually end up zeroing in on that one specific emotion?

JT We start with qualitative research and customers will never say, I feel enjoyable - I find it enjoyable working with Dow. They don't use that language, but you derive that from the interviews, what's really going on there? And we come up with 30 different possibilities. Some are more extreme, happiness versus delight. And thus we get the 30 emotions. Then set aside all surveys, look at the data. Who is having a good experience, defined as if they're growing with you, that's a good sign having good experience. If they have a lot of complaints, there's a sign they have a bad experience. If you're a manufacturer and you have low on-time delivery, you can assume that's a bad experience. If you're a software company has a lot of outages so use the data and you separate here's ones having great experience. Here the ones having a not-so-great experience, they take those 30 emotions and build a survey across them and use that to start understanding. Here are the emotions that are most correlated with the outcomes we care about. Now I'm deliberate, my term, correlated, not causative because you're at the same time. But then we typically see is that you can see a lag that when confidence, for example, builds that then customers will start to build buy more from you in the future. And that's as close to causation as we're going to get.

But you can start to see that leading emotions become a leading indicator of what we care about because again, how we feel drives what we do. One of my favourite stats on that is from the XM Institute, which showed that if your customer has a positive emotional experience with you and something goes wrong, 74% of the time, three out of four times, they'll forgive you for the problem. But if they're not having a good emotional experience with you, that drops down to 19%, one out of five. And we've all seen it creates this cognitive bias or confirmation bias really.

You know, if you pick on your favourite company you don't like, Comcast is easy. Comcast doesn't show up on time. Well, it's because Comcast is a horrible company because you have a negative emotional experience with them. If for example, my vet, I have an in home vet and comes to visit us and he's late, I'm sure he was busy, things just happened because again, I have a positive confirmation bias for him. Those emotions establish confirmation bias. And so if you're not measuring the emotion, you don't understand what the biases of your customers are.

SS You emphasize measurement quite a bit both in the book and in this conversation today. And there's some very interesting chapters in the book around customer health dashboards. You're suggesting a couple of types, an overall CX dashboard. And then you also are suggesting though that you need to set up individual journey dashboards. Can you give me a sense of the metrics that would appear in each? And maybe, you know, use a standard sub-journey as an example, whether it's onboarding or something else. But give me a sense of how those dashboards operate and who the audiences for them are, by the way.

JT Sure, the overall, those are going to be more, again outcome oriented. Who is buying more from you, what percentage of customers, what is your net revenue retention? Now for those not familiar with that, again, my favourite metric around customer experience, it's a combination of churn and buying more or buying less. A lot of our clients don't have a direct issue with churn. They still worry about it. But if we use Dow for an example, Dow makes products that are unique to their customers. It takes a lot of work to lead Dow, but they can lose business on individual products that are more common. So we call that SKU churn, SKU level churn, but those high level metrics there that are outcome oriented to get the interest.

Now on the journey, when we do journey mapping, we will start to look at what is happening in the operations behind it and bring in the operational and behavioural data. Let's use an example of manufacturing, I'll go with that and product availability and delivery. And so we'll look at data like when the customer calls in and they ask, can I have a thousand pounds of this on this date, or can I have 50 windows like this on this date? Can you say, yes? Those companies using SAP, that's called "Availability to Promise", ATP. And it's a really good indicator of the overall customer experience.

Then we'll start moving on later. Like how many times did our client change the date? How often does the end client change their date? And start collecting that data? Because that starts happening, especially if our client is changing the date on the customer, that's a bad sign. And then we'll move on to, okay, for example, on- time delivery. And how is that? Complaints. And so what we're doing is we measure the customer journey from the customer's viewpoint. We then go inside the organization and say, what data do you have that reflects what we're seeing?

Now, in the case of software implementation, with one of our clients, we found is a really good indicator of a bad implementation is if the client, the end client, changes their project manager. Now sometimes they happen just naturally, but often it's because they're not getting the job done. They're replaced. Well, that's going to cause you a lot more angst. And, did actually your company cause the problems? And so we'll again, we start with the customer, their journey, and then we work with subject matter experts inside to say, what data do we have to reflect what the customer is viewing? It could be behavioural data, things the customer does, which is a great form of voice of the customer, could be operational data, but let's use that and then build a dashboard around that.

SS You referenced technology. What point did you want to make about that?

JT So many want to use their survey platform if it has dashboards to do the dashboard. You know, Qualtrics, for example, is a common one. But if your executives aren't in Qualtrics, which they probably aren't, you have a beautiful dashboard that nobody ever looks at.

Now in the case of Dow, and again, I have more, I have more ability to talk about Dow than others. My favourite business problem they had is at the time, Qualtrics gave them a thousand licenses and they ran out of licenses. So for them, Qualtrics was the place to be. For most of us our executives are somewhere else, Power BI, Tableau, the CRM. You need to find out where your executives are and put your dashboard there. Use their technology rather than your technology.

SS And is there a decision that gets made as to which dashboard serves which audiences? You know for example some of those sub-journeys there are cascading scores right. That overall dashboard is going to have some dependencies with those lower level dashboards. Do you try to juxtapose those or how do you work around that?

JT Well we both use the same data, depending on what we're trying to understand there, though there'll be cases like in net revenue retention that'll probably show up the overall as well as the specific one underneath it because that's the outcome we're driving. Although depending on what the journey is not everybody may go through it and so we may that we may do a different calculation based on that. But generally what we're doing - so the overall we're, we're talking to customers to see what they value - but the overall is typically more inside out how we're selling, how we're upselling, how we're retaining customers. So on the journey dashboard is more outside in.

SS I want to move on to your core expertise which is around journey mapping. And in the book you state that your preference, as a process, is to start with the end to end experience, mapping that, and then to move on to individual sub-journeys, versus a you know fix the leaky faucet first sort of approach. When do you actually start with one versus the other? How does, how do you make that decision?

JT It's not my choice, it's what the research shows. So, I first ran across this in work from Customer Think had done, and they found that what they called the "winning" CX programs has. I always wondered what about choosing winning as a term that seemed like an odd term for customer experience program but it's great research and they were more likely have done the end to end map first. And then as I was researching for Do B2B Better we did a survey with hundreds of customer experience leaders and we found the change makers were also 50% more likely to have done the end to end journey first. So it was not my preference. It's what the data showed, and it makes sense.

We've had clients say we really want to map for example the specific sub-journey. Like one client said we want to map the "asking for a sample" journey because if we win with the sample we'll get the orders falling. Thought it was really important. And they did the journey mapping not with us and they found that it was a fine journey, and they invested all that effort to learn that there was nothing really to change. That's the risk of starting with a specific area.

If you do the end to end first, you understand from the customer viewpoint where are the real issues and then you can go deeper into that. Now that's the research, that's the theory. That is not the practice. Some of our clients do listen to the research and go end to end. It's a small subset because most of them are under pressure. If they're going to invest all the time, energy and money in journey mapping, they need to do something right away.

SS They need a win.

JT Yeah, I remember when we were working with a health insurance organization, and I had a first call on them and I talked about this trade off of end to end versus sub- journey. Great hour long call, she's all excited. The next month she's got another time, a month later brought another co-worker, had a great conversation about end to end versus sub-journey. They couldn't decide where to focus, had a third conversation. Finally they went out to an RFI and I went out and talked to them and they still couldn't agree. But the chief operating officer said, I don't want to do an end to end journey. We're not going to spend all this money just to get a list of pain points. We have to fix something. All right, well that's pretty clear then. They then put out the RFP. And the first part of the scope of the RFP was "help us figure out what journey to map".

So it is hard, but most of our clients do start with a specific area of pain. Now one client, for example, they did a huge survey, 40 or 50 questions. And they took the area that scored the lowest and had us work on that. Okay, that's not bad. I mean, you know, it's customer pain. Better than just guessing. Many others will look at win-loss studies and say, when we lose, what did people have to say? Or more importantly, churn studies. We lost customers. What were their biggest areas of complaint?

SS So let's say though that you do your end-to-end experience. I imagine that's a significant effort. Oh, incidentally, I wanted to ask you around that: What's the architecture for that? Like how do you align that with customer life stages? Like what's the central organizing principle around that kind of grandiose journey map?

JT Well, we'll start. We do first thing is hypothesis mapping. We get the employees together to say, what do you think the journey looks like? There is no such thing as an "invoice to cash" journey. That's not how customers view it. But we start with the inside out view. What do you think it looks like?

Then the important thing we do next is we throw that away. Not literally, but I remember leading a roundtable in journey mapping once when somebody said we take that map, and we show it to customers to see if we got it right. Well, if you want to feel good about yourself, terrific methodology, but you've anchored the customers. So we throw it away. Not literally, but we just set it aside, use it up, develop the discussion guide. We'll ask customers, what do you do first, what do you do next? And we look for the language of how they talk about the stages because they always have language for it. And then we use that to replace the internal talk without customers viewing it. There's never a selection phase. It's a buying phase. Or you know, I just should say there's never a selling phase. There's a buying phase. Our clients will call it the selling phase. It's got to be for the customer's language.

SS But again, does that go through the relationship stages of first time, buyer, repeat purchase, sort of retention? Like I'm just trying to straighten my head what, what those buckets are when you're, when you're looking at this.

JT And we'll work with clients to define that. You know, often it will be many of our clients want us to get involved right at the purchase and behind, because A, the folks hiring us are usually not involved with pre-sales and also it's a little bit more easier to control. And so often we get involved either right at the moment of sale or right after. Because also the problems to solve pre-sales are often very different. The problems to solve post sales - yes, there are issues with handoffs where your sales team goes away, and the account management team comes on. There's some there. But typically our clients start either at the sale or post sale.

SS Just with respect to sub-journeys. And I realize this is like asking how long is a piece of string, but typically how many sub-journeys would company eventually pull together? And I realized that, you know, it could get very granular. But typically speaking, how many sub-journeys might exist within a company?

JT Well, you are asking how long a piece of string is.

SS Yeah, I know.

JT It can be three to 10. We've seen, you know. Yeah, well, yeah, it depends how granular you want to get. You know, we start bringing in, for example UX journeys. Well then you are in the hundreds measure in there. We don't usually go that granular. We're looking more at, you know, 3 to 10 to go afterwards. More commonly around 6, 7. That areas of focus, we're still pretty high level there and then within there are sub-journeys.

SS And just to be clear too, this isn't process mapping. This is what the customer is going through.

JT A hundred percent. We've had a lot of people confused by that, that they're looking at. And they said we've already done the work. We look at what they've done is they have a hundred step process map. Now that's really important. But it's also very different. It's never from the customer's view, it's from what do I do as an employee? Which again, is really valuable, you can't improve the journey if you don't know the process. But it is then fits within the customer journey.

SS But in addition if you fix the journey, that's going to affect the process clearly.

JT Typically to fix the process, to fix the journey. So that's the idea there. And so it's important to have that information. We have done process mapping as part of our work. It's not as much what we do. Typically that's done by an internal team, like a Six Sigma team or something.

SS Personas. Where do they fit into this whole process?

JT They're front and center in the journey map. We worked with a distributor once and they had seven personas, and nobody could keep them straight. Just too complicated. We came out with two. We were able to consolidate the seven into two that really mattered. This was an area of durable goods or durable medical equipment I should say. So think like beds, think like wheelchairs. And the customer was not the patient. The customer was the company that sold the DME. Our client was the distributor who sold to the retailers and others. And we found two types of personas. In this space, by the way, a little backstory. Half of the companies have gone out of business in the last year. Half of the DME retailers have gone out of business in the last five years, last four years. And we could see another half of go out of business the next four years. And what we found is that most of them had been in business for 20 or 30 years trying to do same things the same way, but with compressing margins, were just suffering. But others came from the outside and would do one thing really well. Maybe they had a great website, maybe they're great at retail, maybe they chose a specific subset of customers. But they were the innovators. And so we had the "maintainers" versus the "innovators" of the two that mattered. In the case of B2B more often we're using a different definition of personas, which is based on roles.

SS Based on roles.

JT Early on I didn't want to do that. I really didn't want to use personas to mean roles. But we find it matters. We worked with a large company that was redoing, they redid their digital experience, and nobody used it. So they called us up and said, okay, let's start over again. Let's figure out what they need. Their belief was that we had to do the digital experience differently for every business unit they had. Our research showed that it didn't matter about the business unit, it mattered about the role of the person using the site. And so that allowed them to create one site for all their business units. Little tweaks here and there, but instead to offer different experiences based on the role. You choose your role, it will hide parts that don't apply to you and profile and really bring up front those that do. And so even though I thought using job titles or roles as the persona, it actually does matter.

SS Is that a case where you're taking into account the two personas as you're architecting the CJM or do you actually have two journey maps?

JT It varies. So we often get asked, I mean always get asked at the beginning, how many journey maps will I get? The answer is I don't know. We will give you as few journey maps as possible to adequately tell the story. You'll make it as simple as possible, but no simpler. I remember who said that. I love that phrase. And so in that example of the innovative versus the long term folks, that was on one map. If we look at different roles, often the moments of truth are different and so where they're involved is different. So in that case we will create separate maps.

It really comes back to what is the story your customers are telling us? And are the personas doing dramatically different things or do they value things dramatically differently or not? You know, we looked at an example in life insurance where we had two different types, we had four personas, and we created two maps because we had two that came into the life insurance journey very positively and two that came in anxious. They had slightly different needs, but that incoming emotion really predicted what happened.

Those who came in positive and neutral almost universally came out positive. Again that confirmation bias when things might have a little hiccup. Well there's, I'll be fine, not a big deal. But those that came in negative almost always ended up negative. But occasionally, occasionally there would be an agent who would recognize the anxiety and intervene and turn them into a positive. And so one of our big outcomes was that, and this is before I'd done all the research in "Do B2B Better", is that you need to measure the emotions because the entire journey pivots based on how they feel coming in.

So we look at, for example, in life insurance, you have to have that medical appointment often. If you are feeling confident, all you want to know is when and where. That's it. But if you're anxious, you want to know what are they going to do, how long is it going to take, who's doing it? You want all this detail. And if you try to create one journey for everybody, well, either you're under communicating for one or you're annoying the other with lots of information they don't want or need. And so by understanding who is this person, the journey, you can then customize it for their needs.

SS It's a branch of the overall journey, in other words.

JT 100%. Yep.

SS So I want to ask too. We've been talking a lot about current state maps. Obviously critical to this is actually understanding how we actually create a memorable experience, a differentiated experience. And that involves future state mapping.

JT Oh, yeah.

SS What's your process for that? And should that be preceded by an overall CX vision and charter for the organization? Do those two things have to go hand in hand?

JT We often find them happening more interactively. So after we do the current state, we start to recognize that there are opportunities. Those opportunities often. not always, lead to a new vision of customer experience and strategy. At the same time, we're building the future state map, and what we're doing is working with the teams, we work our teams might have 30 or 40 people across the company. We're getting them to create this vision of what we want the future to be.

My very favourite ever journey mapping workshop was with a financial services company. And we typically do them two days long. We come in at day two and we start showing a few videos. Just remember the emotions, because when we do this, we record the videos, we do a lot of video work. You might have 50 videos. And we did another set of videos to remind them of the pain they're causing customers. And then one of the leaders said, let's stop for a minute. Let's recognize everybody here contributed to this pain our customers are feeling. And it's going to take everybody here to make it better.

And that started this incredible collaboration. One of the problems they had was this was a claims journey. Their claims documentation, written by legal, was impossible to read. In fact, when we took out the VP of Marketing, she was there in somebody's home. And the person said, I don't know what I'm supposed to do. She gave the paperwork to our client, the VP of Marketing, and asked her, can you tell me what I'm supposed to do? The VP read the paper, read the letter, read it again, read it a third time and said, "I'm sorry, ma'am, you're going to have to call your claims expert. I can't tell you what this says".

By being there in that moment and having that, I mean, she was a champion for we have to do this better. And what they did, luckily, they involved legal in the journey mapping work. So legal was there instead of throwing over the wall and saying, is this okay or not? And legal writing, bunch of red stuff, throwing it back. She was there with them to build the new journey. So it was built in a legal way, and they didn't have to have a whole bunch of redding. They created two sets of documentation. The legal, all detail, but also a short summary in English that they could use then to help understand what to do.

SS Makes total sense. So your point here is that it's indispensable. Current is not enough. You do need to have future states. But about the CX vision and charter again, is this something that gets initiated at the front end of all this work or somewhere along the way? How does that fit in? Because without the vision and charter, really you've got a bunch of projects going on. Right? What brings it all together?

JT Well, we do. So we do the journey mapping first the current state and then we actually start building the future state in the workshop and getting them aligned. That here are the outcomes we want. Now, if we're doing an end to end map, that work fits perfectly with the CX vision. Not always for sub-journey, it might, it often does. But there may have to be a separate ongoing work stream. Also, we don't usually involve all 40 people in the CX vision. That's done more by the CX team. And so it is a separate work stream for us that's happening around the same time as we're developing the future state map. But again, it's all based on, starting with what you're creating today and then what you want it to be tomorrow.

SS So I want to move on to the meat and potatoes of the book, which is how CX is actually delivered within specific organizations. And you've been referencing changemakers, and changemakers are companies that are really best practice leader here. And that was the most fascinating part of the book, frankly, was hearing in their own words, their own experiences of how they got their organizations to adopt CX principles and then sustain that momentum. It's one of the best CX books I've read from that perspective because really, it drives home the challenges and how formidable this can be. And they're all organized a little differently around CX. So I wanted to ask you that question is, is the easiest path to get there to have a CX center of excellence, a go-to resource. But then my question is, well okay, but how does that get funded is on a project by project basis. You know, do they have sustainable funding for a certain headcount? I mean, how does that all work? Then there's this overshadowing by a CX governance committee. A lot of organizations that are set up, staffed in part by executives who may be held accountable. What is the optimal structure that you've seen work that you know, you would recommend. If a CEO asked you what's the best way to organize around this, what would your answer be?

JT Um, how long is a piece of string? We came out with a white paper creating your CX dream team. We partnered with CXBA, we did interviews with 30 some different organizations on how they do it. We found four strategies and those strategies are related to different types of structures. The first is hardly a strategy. It's keep costs low. We call that the small and sometimes mighty team because they usually weren't. It's usually one to three people. And because they're so small they spend all the time working on surveys and therefore they don't really create the impact. And so most of them stay small.

Gloria Gupta though from the American Medical Association, she [inaudible] was a great example of one. And unfortunately I can't call them small but sometimes mighty because she got funding to increase the size. That's not common. Most in the small but sometimes mighty group stay there. That's the first one. Limit investment, just have a few people. The problem is they're trying to offer all the different disciplines of CX, with a handful of people, and they just can't do it.

The second which you talked about is centralized where you have a center of excellence, high risk, high reward. One of the things we came across, this notion of specialists versus generalists in the small but sometimes mighty. You might have a VOC specialist, but the others are generalists in a centralized team which can be up to 40 people in our data set, you can actually have way more specialists, which means you can do really organization changing work. But you'd better, because that's a big headcount and it's all overhead.

And when I see companies that have just cut CX, it's almost always a centralized team because they're, they have a lot of headcount and all they're doing is talking about NPS. They're not able to show they're driving the business. Now again, there are also some wonderful examples. Sandra, over at Autodesk, for example, has a great centralized team. I think she's got like 15 people doing great work. There are a lot of really effective - Edward at Enterprise. They're doing great work, but you have to connect to the value.

The other two we ran across were distributed where if you have, let's say three to five business units, you have somebody in your team specifically assigned to each business unit. They're a generalist and somewhat of a relationship manager working with that business unit to advance CX. The good news is that they have somebody specifically to make that business unit shine. The risk is you have the person who can get the attention of the executives over there. When we see this fail, it's because the people are typically hired from the outside and there's no trust by the business unit and they won't give the time of day.

And so in this model, it's typically better to hire somebody from the inside from that business unit who represents CX to that organization. Now you have the strength of a centralized team where you can share notes, but you can then customize the work you do around the business unit strategy. Especially good if you have the same customers across business units. So you're creating a consistent experience. The fourth is a federated model. For example, Dow does this I talk about in the book. And in that case the federated model has a smaller CX team. Like today, Dow has I think five, but also has representatives throughout the business units who are responsible for CX there. Now the benefits of this is that you keep a small, centralized team who can focus on creating standards and then you can have the work happening out in the business units. It also lowers your overhead. But there is a risk if you don't have strong governance, that every business unit does whatever they want and doesn't follow the corporate mandate. So you need really strong governance so that you come across as one company and not a Frankenstein experience.

SS And so what's the funding model though? For all, it's just operational funds, hence Its exposure. If the CEO doesn't stops believing in the concept of CX, there goes that CX team.

JT Pretty much, yeah. I mean, if we look at the - so in the first two models, or first three models actually, they're all overhead. They're funded from their department, maybe marketing, occasionally, operations, strategy. The fourth one, you have the business units funding their portion of it and a small team that's paid for centrally.

SS Is it important to have ultimately a chief customer experience officer who will be the champion at the board level for these initiatives?

JT Well, yes, it's also important to have a chief strategy officer, a chief X officer, Y officer, and Z officer. So that's, that's, obviously I believe in that and I think it's really critical. But you certainly need a champion who can be represented at the board. And that varies by organization, who that is. But you need somebody who can speak to the customers.

SS It's funny, you know, we've had almost an hour conversation here. We haven't mentioned marketing once in all this time.

JT Right. And that is the research I've seen pretty consistently that the plurality of CX programs report through marketing. And I'll leave with some research from IBM 2021. They asked CEOs, which executives do you trust the most, who you rely upon most the next few years. But can you guess what the top two were?

SS Uh, the Chief Finance Officer and the CTO.

JT COO, actually. CTO, third, marketing was only mentioned by 18% of the CEOs.

SS That doesn't surprise me.

Podcast

JT Again, they can mention three executives and only 18% mentioned marketing. Marketing is commonly where we sit, but marketing is not usually really good at connecting to ROI and not connecting to net revenue retention, not connecting to financials. And so if you find yourself in marketing, as many of us do, then you really have to work across the organization to represent - and that's actually true wherever you sit. We've all read the research or heard, read the blogs about CX being a lonely profession, but when I actually have a program called the Fellowship where eight more advanced CX leaders are part of it. And none of them feel lonely because they spend all their time working across the organization.

Brian Sander leads Triple A, who was on the board with me at CXPA. And I told him I heard you spend about 70% of your time with other executives, with stakeholders. So that's a lie. It's got to be closer to 80%. Sandra from Autodesk, Sandra Fornasier, she says it's closer to 90% for her. Wherever you are, you need to be working with executives across the organization or you're going to be a hopeful and you're going to be at risk.

SS And it certainly has to be one of the most significant barriers to success. Go back to the very first question I asked you about, one of the biggest barriers is the siloed nature of companies and the fiefdoms. And it's hard to work across the aisle, to use a U.S. expression. One final question and, you again, you know, you the organizing principle of the book is around these change makers and as they say, they were fascinating to read. Of all the ones you cite in the book though, which comes the closest in your mind to getting it right? I have a feeling it's Dow. For one thing, the forward of the book is written by someone from Dow, but, and if it is, what lessons do they have to offer that are really relevant to everyone else listening to this podcast?

JT Well, we used to offer a conference "Do B2B Better". And I had Ricardo from Dow speak at it. He overwhelmed everybody right out of the get go. He was the first speaker after me. He had a challenging question from a president of a division saying what's the role of inventory in my business and what does CX have to say about it? I doubt many of the people on your podcast want to hear that question or would have any idea how to go about answering it. Ricardo did. Ricardo did a great job of talking about how he turned inventory, which is just a pile of stuff, into a customer metric. Availability to promise.

He showed that's that comes back to the third key which is connecting the data to the journey, third action changemaker. He then talked about how confidence and enjoyability actually, when ATP dropped, confidence dropped and enjoyability dropped, two of their emotions they measure. The second action change maker and showed how those drop. When those dropped, he showed that order velocity also dropped. Again, it's not linear, it's through a threshold, going back to the third actual change maker, bringing in the data and then there's easy math there to show how that impacted revenue and therefore EBIT. The first action of a change maker, connecting financials.

So I love, I just was in Denver and spent a couple of days with Ricardo learning more about his program. It's an incredible program. There were a lot of great change makers. Spent a lot of time talking with me. I'm actually pleased that Roxie Strohmenger from the book now works for Heart of the Customer. Very excited about that. That was a big win for us. We found some great people. Nancy there, other group, Bill Stakos, Nancy Flowers, who spent a lot of time with me sharing the work they did. And so there are a lot of great change makers in the industry, and I highly recommend spending time with them and learning from them because they do things differently and we can all learn from that.

SS Yeah, and there's, as I said, there's so much learning in your book. It's quite compacted and an easy read too, I have to say. It's not a tome. So it's, uh, as I say, one of the best CX books that I've run across. My bookshelf behind me is filled with them. So congratulations on that and thank you for the time today. This has been really educational for me. And as I said about marketing, marketing has a role to play here…

JT 100%

SS …for sure. And you made a very valid point about its historical inability to prove ROI against it's own expenditures, never mind something more significant, as in, let's put customers first in the end.

JT Thank you, Steve. Yeah, I really enjoyed the people who opened up their experiences with me. I mean, again, the book is really research based on what the great companies are doing. So thanks to all those who contributed because I learned a ton.

Podcast

That concludes my interview with Jim Tincher. As we learned, doing B2B better means taking a more systematic and holistic approach to customer experience management. Piecemeal improvements are never enough to build and sustain transformational change. But that level of effort requires unequivocal executive buy-in and support – so the business case needs to show a clear connection between CX performance and the health of the company. NPS only matters if there is an indisputable link to net dollar retention. Culture is also a factor. Everyone needs to enthusiastically embrace change. The CX team have to see themselves as "changemakers", with the fortitude to stick with it, even in the face of "business as usual" pushback. They will need to craft an inspirational CX Vision and Strategy that will win over even the most diehard resistors. And they will need to help the organization see the experience through the eyes of the customer, using customer journey mapping to find and fix the pain points, gain alignment around the transformational priorities, while envisioning an ideal experience that will gain the trust and loyalty of customers.

1. The XM Institute is a resource center for Experience Management (XM) professionals operated by the survey platform Qualtric.
2. Watermark is a leading customer experience consultancy led by Jon Picoult which produces an annual Customer Experience (CX) ROI Study.
3. Riccardo Porta is the Global director for CX at Dow Chemical Company.

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