

From Mapping to Managing: A Practical Guide for Customer Journey Management

Introduction

Customer Experience has long ceased to be a 'nice-to-have'—it determines loyalty, efficiency, and growth. Yet, while many companies have been mapping Customer Journeys for years, the real breakthrough often fails to materialise. Maps hang on walls, insights are known—but processes don't change, silos persist, and the economic benefit remains unclear.

This book addresses exactly this point. It shows why it is no longer enough to merely describe Customer Journeys—but why we must begin to manage them. Journey Management is the next evolutionary step: from static mapping to an operational steering model with clear responsibilities, KPIs, and measurable ROI.

This e-book guides you step-by-step through this transformation—from defining a Journey Framework, governance, and research methods, all the way to key metrics and ROI validation. It is aimed at everyone who no longer sees Customer Experience as a project, but as a management discipline.

The central question is: Where does your company stand today—at the **mapping** stage or have you evolved to **management**?



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1. Why Journey Management is Now Indispensable

1.1 Initial Situation: From Fragmented Experiences to Orchestration

Over the past two decades, the perspective on customer interactions has changed several times. Initially, the focus was on individual touchpoints: companies optimised website usability, hotline waiting times, or the branch experience in isolation. Later, Customer Journeys moved to the centre—as a sequence of experiences a customer goes through before reaching a goal. But practice shows: mapping alone is not enough to bring about real change. While Journey Maps create transparency, they often do not lead to sustainable changes in processes, systems, and corporate culture.



The central challenge is to move from one-time depiction to continuous steering. This is precisely where Journey Management comes in: It transforms static representations into an operational improvement, orientation framework for **measurable prioritisation**, and **ROI**.

In this context, we also want to address two terms again:

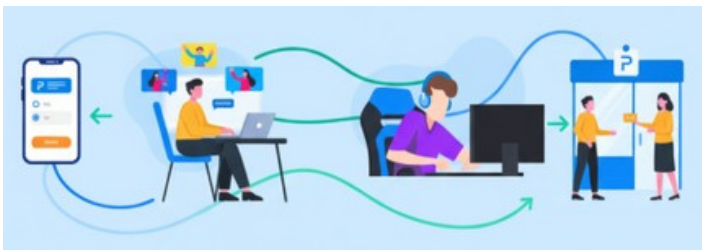
Journey Management: Steering system for the continuous optimization of Customer Journeys—with clear responsibilities, key figures, and processes. **Journey Framework:** Structural model that systematically depicts the entirety of all Journeys and serves as the methodological basis for Journey Management.

1.2 The Dynamics of Markets and Customer Expectations

Several developments make the transition from pure mapping to true Journey Management absolutely essential. Customers have long been comparing experiences across all industries. Those who experience seamless service with Amazon or Netflix expect the same from banks, insurers, or energy providers. This cross-industry expectation continuously raises the bar. In addition, there is the growing focus on

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omnichannel complexity. Customers naturally move between digital and physical channels—from the app to the call center to the point of sale. Where these channels are not orchestrated, breaks occur that jeopardize trust and loyalty.



The data situation also intensifies the challenge. Never before have so much information been available to companies—yet it often remains trapped in silos. Without the overarching journey perspective, it is hard to recognize patterns or systematically address pain points.

In parallel, cost and efficiency pressure is growing. Executive boards expect investments in Customer Experience to demonstrably create added value. Simple satisfaction measurements are no longer sufficient; what is needed are key figures that directly contribute to business results.

1.3 From Mapping to Management: The Decisive Shift

Journey Management goes beyond classic process optimization. It creates a permanent steering system that focuses on three central

dimensions: structure, governance, and measurability.

The first dimension is **structure**. It is created through the development of a hierarchical Journey Atlas, which distinguishes between Overall Journeys, Sub-Journeys, and Micro Journeys. Uniform definitions of phases, touchpoints, and metrics ensure that all stakeholders speak the same language.

The second dimension is **governance**. Clear responsibilities and ownership prevent journeys from stagnating in theory. Cross-departmental collaboration and the link to corporate goals ensure that improvements are not random but targeted.

The third dimension is **measurability**. Only through the integration of Voice-of-Customer data, Operational Data, and financial KPIs does the impact of improvements become visible. Initiatives can be prioritized according to their cost-benefit ratio and their ROI can be proven.

In this combination, Journey Management becomes a bridge between strategy and operational implementation—an instrument that provides orientation and makes change measurable.

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1.4 What Happens When Journey Management is Missing

Companies that stop at mapping run the risk of failing to overcome central deficiencies. Journey Maps are often static documents that quickly become outdated. Without clear responsibilities and KPIs, valuable insights dissipate without ever having an impact.

Furthermore, approach often reinforces silo thinking. Each department optimises its own contact points without regard for the overall experience. This creates an inconsistent picture for customers, leading to frustration. The lack of a management

Finally, there is the threat of losing the economic argument. If CX initiatives are perceived as 'soft factors,' they fall behind amidst budget pressure. Without proof of a clear ROI, their strategic relevance significantly decreases.

1.5 Maturity Model: The Path to Steering

Experience from numerous projects shows that organisations go through different stages of maturity in dealing with Customer Journeys. At the beginning, there is often **Ad-hoc Mapping**: Individual teams create isolated Journey Maps, usually without strategic embedding. The next step is a phase of coordinated **transparency**,

where journeys are documented, but rarely systematically maintained.

The next stage of development is integrated monitoring. Here, journeys are linked to Voice-of-Customer data and operational key figures. KPIs become visible, and progress is measurable. Only at the highest level does one speak of Journey Management in the true sense: journeys serve as the operational steering unit, responsibilities are clearly regulated, and the ROI of measures is systematically calculated.



This maturity model offers companies a reliable point of orientation for self-assessment and simultaneously shows the path toward professional steering.

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1.6 Conclusion

The time of isolated Journey Maps is over. In a world of rising expectations, growing complexity, and increasing efficiency pressure, companies need a tool that systematically and sustainably

Journey manages Management is the necessary next step in evolution.

Organisations competitive advantages on three levels: They strengthen customer loyalty through consistent and efficiency by purposefully directing investments toward the most impactful levers. And they promote growth by aligning CX initiatives with ROI and thereby proving their strategic value.

The following chapters show how this paradigm shift can be implemented in practice—from analysis and design to operational anchoring.

2. Building a Journey Framework

A significant deficiency in many Customer Experience initiatives lies in the lack of structure for the Customer Journeys that have been recorded. Often, individual Journey Maps are created in workshops, which, while creating transparency in the short term, remain isolated and overlap or contradict each other over time. To manage Customer Journeys sustainably, a systematic approach is required: the Journey

Framework. This ensures that all journeys are documented and maintained. It is thus the methodological foundation upon which operational Journey Management can be built.

2.1 Goal and Function

What is it? The Journey Framework has the task of creating a uniform reference structure for all customer interactions within the company. It serves not merely for documentation but is the basis for governance, reporting, and steering. Journeys are thus no longer understood as one-time visualisations but as firmly anchored control units in the corporate context. By systematically assigning responsibilities, key figures, and data sources, it becomes possible to clearly classify the relevance of individual journeys and make their development measurable.

Why is it important? Without a framework, comparability between the individual journeys is lacking. Each department works according to its own definitions and priorities, which creates an inconsistent overall picture. A structured framework creates transparency and consistency throughout the entire company. It enables the aggregation of findings, the recognition of synergies between journeys, and the targeted steering of measures. As a result, Journey Management transforms from an operational tool into an enterprise-wide steering instrument.

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2.2 The Journey Atlas as the Central Model

What is it? The core component of the framework is the so-called **Journey Atlas**. It describes the entirety of all an organisation's journeys in a hierarchical structure. At the top level are the **Overall Journeys**, which map a customer's essential life cycles, such as acquisition, retention, or win-back. Below these follow the **Sub-Journeys**, which capture individual process sections such as onboarding, contract renewal, or complaint management.

At the most detailed level are the **Micro-Journeys**, which represent individual interactions at the touchpoint level, such as resetting a password or tracking a delivery.

This hierarchy fulfills a dual function: on the one hand, it allows for clear aggregation – improvements in Micro-Journeys have a measurable effect on Sub-Journeys and ultimately influence the Overall Journey. On the other hand, it allows for differentiated steering by enabling measures to be applied where they will have the greatest effect.



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Why is it important? The Journey Atlas ensures that all journeys are interconnected and not viewed in isolation. It makes it possible to track the influence of individual measures from the micro to the macro level. Improvements at a touchpoint can thus be traced back to their contribution to overall satisfaction and business success. At the same time, the Atlas allows for clear assignment of responsibilities and transparent setting of priorities. It is thus the backbone of professional Journey Management.

2.3 Governance and Responsibilities

What is it? Governance in Journey Management describes the organisational anchoring and steering of all activities related to the defined journeys. It determines who is responsible for which journey, how decisions are made, and according to which rules data, KPIs, and measures are managed. Typical roles are the Journey Owner, the CX Steering Committee, and Data Governance officers.

For the framework to be used effectively, clear governance rules are needed. Every **Sub-Journey** should be assigned to a **Journey Owner**, who is for its maintenance, further

sets priorities, and ensures the connection to the corporate strategy. Additionally, a structured Data Governance is required, which guarantees consistent measurements, valid data sources, and organisational uniform KPIs. Only through this theoretical steering anchoring does a model become an operational instrument.

Why is it important? Without governance, Journey Management remains a theoretical concept. Only clear responsibilities ensure that journeys are actively maintained, updated, and evaluated. The CX Steering Committee also creates cross-departmental coordination and prevents isolation from occurring in departmental optimisations. Through uniform data governance rules, it is ensured that KPIs are consistently collected and interpreted. This creates a resilient system that continuously derives measurable improvements from insights.

2.4 Application in Different Business Contexts

The characteristics of a Journey Framework vary depending on the business environment. In B2C markets, journeys are typically more standardised and characterised by high volumes. Here, the focus is on efficiency, automation, and cross-channel consistency. In B2B contexts, however, journeys are more complex, take longer, and involve a multitude of stakeholders on

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the customer side. Here, topics such as governance, role clarification, and individual process design come more to the fore. The framework must be designed in a way that it can flexibly map both scenarios without losing clarity.

2.5 Benefits and Impact

A consistent Journey Framework creates several effects: It prevents redundant or contradictory representations, increases the comparability between journeys, and enables a clear prioritisation of optimisation measures.

Furthermore, it ensures that Customer Journeys do not remain isolated within specialist departments but are integrated into the steering and management processes. Thus, the framework forms the prerequisite for making the contribution of Customer Experience to corporate goals measurable.

2.6 Conclusion

Without a structured framework, Customer Journeys remain a sporadic instrument without sustainable impact. With a Journey Framework, however, a consistent, binding, and controllable model is created that serves as the foundation for every form of Journey Management. It connects strategic goals with operational implementation and ensures that improvements in the customer experience are not only locally noticeable but systematically contribute to business success.

3. Step-by-Step Procedure in Customer Journey Management

The introduction of Journey Management changes how organisations steer customer experiences—both strategically and operationally. To be successful, a clear and structured procedure is required that provides orientation while simultaneously allowing the flexibility to address company-specific circumstances. A proven approach is a five-step procedure:

1. Goal Definition and Expectation Management

Before a single journey is mapped, it must be clear why the organisation is embarking on this path. Is it about measurably improving customer experiences, increasing the efficiency of processes, or anchoring a consistent CX strategy throughout the entire company? This clarity of goals protects against the typical mistake of falling into mere activism and creating maps without a strategic framework.

2. Building a Journey Framework

The framework forms the structure that all activities are oriented around. It defines the hierarchy (Overall Journey, Sub-Journey, Micro Journey), the terminology used, the responsibilities, and the central KPIs.

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Without this common basis, parallel worlds quickly emerge where every department uses its own definitions—a sure way back to old silo structures

3. Prioritisation by Impact and Effort

Not every journey deserves immediate attention. To use resources sensibly, the 'Impact vs. Effort' matrix is suitable. Journeys with high customer benefit and low implementation effort should be tackled first to achieve visible quick wins. These initial successes are crucial to maintaining trust and motivation within the company.



4. Implementation and Integration into Processes

The biggest challenge lies not in the creation of the maps, but in the sustainable anchoring of the results.

This requires integration into operational procedures, for example by adapting CRM systems, process manuals, or service guidelines. Only in this way does Journey Management transition from a strategic concept to a lived component of the organisation.

5. Measurement, Review, and Continuous Improvement

Static Journey Mapping is worthless. Only with continuous review based on defined key figures—e.g., CSAT, CES, NPS, Churn Rate, Conversion Rate, or complaint volume—can a company see whether the initiatives are taking effect. Supplemented by regular reviews and feedback



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loops, can you create a dynamic cycle that further develops Journey Management. This procedure is deliberately formulated because it is adaptable for both B2C and B2B organisations. Crucial is the consistency. Companies that skip the third or fourth step after a short time risk Journey Management degenerating into a purely cosmetic measure.

4. Research Methods in Journey Management

Customer Journey is not based on assumptions, but on data. Without well-founded insights into the behaviour, expectations, and emotions of customers, Journey Management quickly degenerates into a theoretical model. Therefore, the selection and combination of suitable research methods is a central success factor.

Qualitative methods such as in-depth interviews, diary studies, or focus groups provide valuable insights into the emotions and motivations along the journey. They answer the question of why customers make certain decisions or at which points they feel frustration.

Quantitative methods such as surveys or panel studies, on the other hand, allow for the validation of hypotheses and the recognition of patterns on a broad basis.

The particularly effective combination of both approaches is: qualitative research identifies relevant hypotheses, which are then verified using quantitative methods. Modern technologies significantly expand this spectrum. Digital Experience Communities provide continuous feedback, while text and sentiment analysis make unstructured data from emails, chat histories, or social media usable for evaluation.

An underestimated aspect is the integration of internal data sources. CRM systems, transaction data, or complaint analyses reflect actual behaviour and can be combined with 'Voice of the Customer' insights in the journey mapping. The result is a holistic picture that considers not only the customers' perception but also their measurable interactions.

The challenge lies less in accessing data than in the ability to integrate it consistently. Companies that use research methods in isolation risk fragmented results. Only the linkage of different sources creates the necessary depth to not only visualise journeys but also to steer them effectively.

5. The Three-Stage Journey Atlas

A central instrument of Journey Management is the Journey Atlas.

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It ensures clarity and structure by mapping journeys in a graduated hierarchy: Overall Journeys, Sub-Journeys, and Micro Journeys.

The Overall Journey describes the major life cycles of a customer relationship—for example, from the first contact to the termination or renewal of a contract. This perspective is particularly suitable for top management, as it makes the major levers visible.

The Sub-Journeys portray individual phases in more detail, such as onboarding, contract conclusion, or the complaint process. They are the level at which operational optimisation measures are usually defined.

The Micro Journeys go one step further. They describe specific interactions, such as the process of a password reset request or the purchase process in the online shop. This level



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of detail is particularly relevant when point-of-contact frustration occur. The value of the Journey Atlas lies in its ability to link these levels together.

Only then is a consistent picture created that can be used simultaneously for strategic, operational, and tactical purposes. Companies that analyse only Micro Journeys quickly lose sight of the bigger picture. Conversely, a pure focus on the Overall level remains too abstract to derive concrete improvements. frictions with high potential for

In practice, the introduction of a Journey Atlas has been shown not only to create clarity but also to break down silos. When sales, marketing, and service look at the same atlas, a common reference framework emerges that objectifies discussions and makes priorities transparent.

6. Journey Design – From Mapping to Shaping

While mapping describes the current state, the actual value creation process begins with design. Journey Design means developing concrete target scenarios from the insights gained from mapping and research, which improve customer experiences and support business goals.

The core of Journey Design lies in the question: How should the experience feel for our customers—and how do we achieve this goal? It's important here not just to optimise existing processes but to bravely design new interaction

models. Often, it is not the small process corrections, but radical redesigns that make a difference.

A practical example is the digital onboarding of banks. While the classical procedure still involved paper-based steps, branch visits, and long waiting times, Journey Design has established fully digital end-to-end processes in recent years. The results are significantly shorter processing times and higher satisfaction.

Journey Design is always a balancing act between feasibility and the ideal scenario. Design Thinking methods have proven particularly effective: customers are involved early in development, ideas are iteratively tested, and prototypes are quickly discarded or further developed. This reduces the risk of investing resources in solutions that later miss the mark.

The goal of successful Journey Design is not only the elimination of pain points but the deliberate creation of positive, memorable moments. Companies that succeed here turn satisfied customers into loyal advocates.

7. Metrics and Key Figures – Making Success Measurable

Journey Management doesn't work without reliable key figures. Only through clear metrics is

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it visible whether investments show results. It is not enough to view individual CX metrics in isolation—the crucial factor is linking journey-specific key figures with hard business goals.

At the highest level, metrics such as Net Promoter Score (NPS), Customer Satisfaction (CSAT), or Customer Effort Score (CES) can provide valuable indicators of satisfaction and loyalty. But only their assignment to specific journeys makes them actionable. For example, a low NPS in the onboarding process can have completely different causes than in the complaint management area.



In addition, operational key figures are indispensable. Processing times, drop-out rates in the purchase process, conversion rates, or First Contact Resolution Rates give a concrete

picture of process quality. By combining perception data ('Voice of and performance data), a complete picture of the journey performance is created.

A progressive approach is the introduction of Journey Health Scores. These aggregate multiple indicators into an overall score that represents the state of a journey at a glance. Such a score can, for example, weigh NPS, process duration, and churn rate and serve as an early warning system when thresholds are exceeded.

The challenge lies in not drowning in a flood of key figures. Less is often more: The crucial factor is the selection of a few, yet meaningful KPIs that are clearly linked to strategic goals. Companies that establish this connection can clearly prove the contribution of Journey Management to value creation.

8. Jobs to be Done, OKRs, Pains, and Gains

Modern Journey Management goes beyond the pure process view. It sees customers as people with goals, needs, and obstacles. This is where the Jobs to be Done (JTBD) approach comes in. It asks not what product customers want to buy, but what progress they want to achieve in their lives.

For example, a customer doesn't 'rent' a drill, but the progress of getting a hole in the wall. Transferred to journeys, this means: Every phase

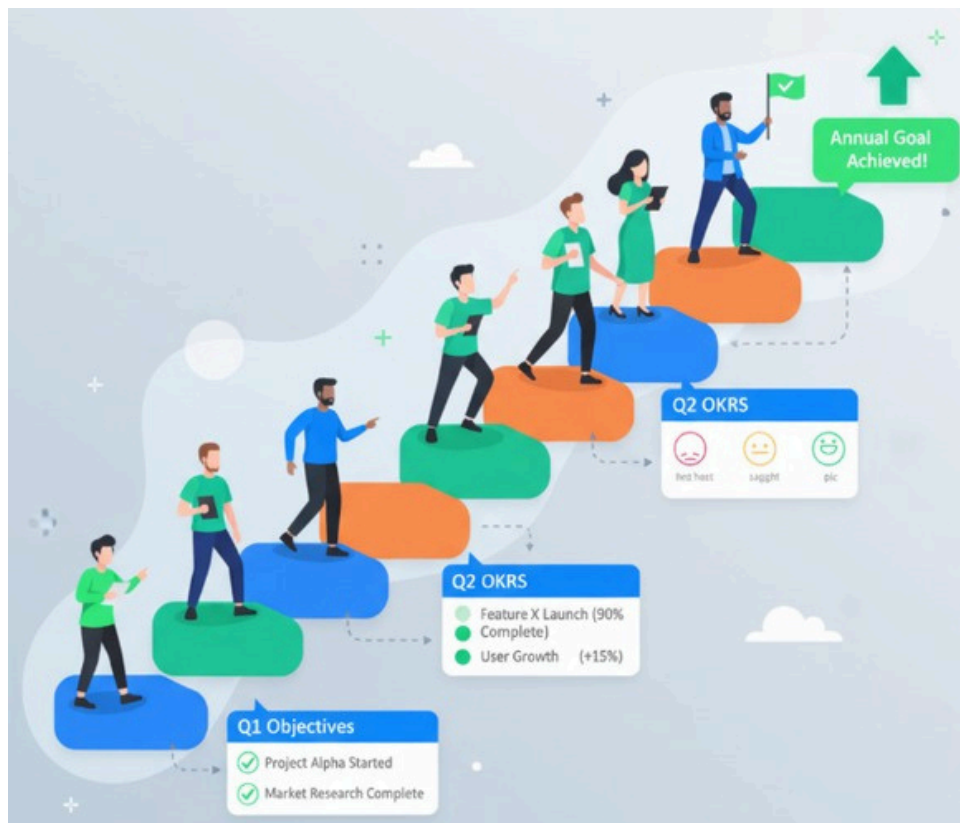
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must be linked to the underlying job. Only then will it become clear whether a process actually enables relevant progress or merely follows internal logics.

To effectively anchor this perspective within organisations, **Objectives and Key Results (OKRs)** are suitable. They connect strategic goals with measurable outcomes. An Objective could be: 'Onboarding becomes a seamless and motivating experience.' The corresponding Key Results could define that 80% of customers successfully complete the process within 24 hours and the NPS in onboarding increases by 10 points.

Simultaneously, it is necessary to systematically track Pains and Gains to be systematically captured. Pains are obstacles that slow down the customer's progress—such as long waiting times or non-transparent fees. Gains are positive effects that go beyond mere functional fulfillment—for example, particularly friendly service or an unexpected added benefit.

The integration of JTBD, OKRs, Pains, and Gains creates a closed impact framework. Journeys are thus not only designed from the customer's perspective but also consistently aligned with corporate goals. The result is Journey Management that offers genuine added value to customers while also achieving strategic impact.



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9. ROI Validation for Journey Management

Investment in Journey Management is only sustainably secured if its added value can be quantified. Especially in times of tight budgets and a high focus on results, executives demand verifiable proof that journey initiatives do not just incur costs but measurably contribute to business success.

The ROI can be demonstrated in two ways: through **cost reduction** and through **revenue increase**. Cost reduction arises, for example, when an optimised complaint journey reduces the number of repeated contacts and thus lowers service costs. Revenue increase results when an improved renewal journey leads to higher renewal rates or an optimised onboarding reduces the churn rate in the first year.

Practice shows that the biggest effects occur where emotional factors and hard business figures meet. A better customer experience not only increases satisfaction but also loyalty—and thus the probability that customers stay longer and spend more.

To make the ROI transparent, a model that contrasts the effort (costs) and the expected impact is recommended. The previously mentioned Impact-vs.-Effort framework is suitable for this. It allows initiatives to be

prioritise and clearly communicate their contribution. Additionally, concrete case studies should be documented that show how journey improvements were translated into measurable business results.



Ultimately, the ability to validate ROI decides whether Journey Management is recognised as a central steering instrument—or as a short-lived fad. Companies that provide convincing proof here not only secure budgets but also the strategic relevance of Customer Experience at the executive level.

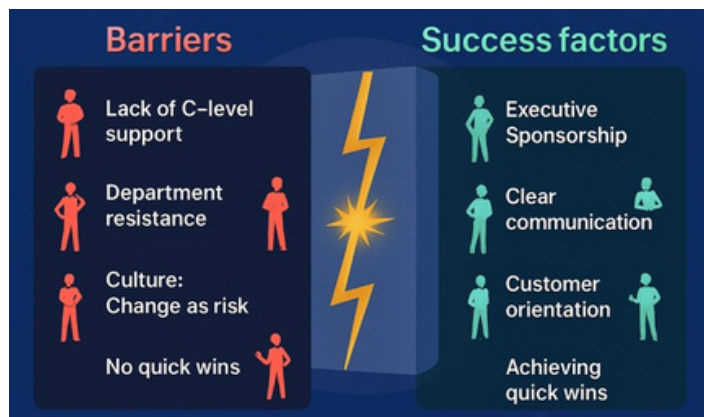
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10. Change Management – From Methodology to Lived Practice

10.1 Why Journey Management So Often Fails

The most frequent reason for the failure of journey management initiatives lies not in the methodology, but in the organisation itself. Resistance from specialist departments, a lack of support at the management level, and a corporate culture that views change more as a risk than an opportunity represent the main obstacles.

Journey management is not a project that is set up once and then completed. Rather, it is a continuous transformation of how companies think about their customers and make decisions. This paradigm shift requires active change management – and begins long before the first workshop.



10.2 The Role of Executive Sponsorship

Without visible support at the C-level

Journey management often remains a topic for middle management. This is insufficient for sustainable implementation. Executive management and the board of directors should actively integrate journey management into their agenda – as a strategic management tool, not as an operational optimisation project.

In management practice, this means that company clearly communicates the importance of customer experience. Journey metrics are incorporated into management reports and regular steering committee meetings.

Furthermore, it is ensured that journey owners play a corresponding role in cross-departmental decisions.

| Without executive sponsorship, there is a high risk that journey initiatives will be postponed in early budget discussions.

10.3 Internal Communication and Mobilisation

Change management in the context of the journey requires a target group-specific communication strategy. For top management, ROI and strategic differentiation are paramount.

For operational teams, it is particularly relevant that journey management makes concrete problems visible while simultaneously offering solutions.

proven approach is the targeted implementation of quick wins. First visible results

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Improvements – such as reduced processing times or simplified processes – increase acceptance and promote the willingness to actively participate throughout the company.

10.4 Cultural prerequisites

Journey management is particularly effective in organisations that are willing to consistently think from their customers' perspective. This requires a corporate culture that understands feedback as a learning opportunity, not as criticism. Building such a culture is a long-term process. Initial steps can include regularly incorporating customer feedback into decision-making processes, actively involving managers in journey reviews, and making decisions explicitly with reference to the customer journey. In the long term, journey management will thus transform from an external initiative into an integral part of daily work.

11. Management Technology and Tooling in Journey

11.1 From data chaos to an integrated journey view

Many companies already have a variety of relevant systems in place – from CRM and feedback tools to web analytics and contact centre solutions. The central

The challenge, however, rarely lies in a lack of data, but rather in its lack of integration. Without a comprehensive journey perspective, individual systems only provide isolated snapshots. Only the merging of this data enables a holistic understanding of the customer journey.

Technology in journey management fulfils two key tasks: It combines data from different sources into a consistent view and makes it available in a way that allows it to be used for operational decisions.

11.2 The technological architecture

An effective journey management setup typically includes several system components:

- **VoC platforms** for collecting and analysing customer feedback
- **CRM and transaction systems** for mapping actual customer behavior
- **Journey mapping tools** for structured documentation and management
- **Analytics and BI solutions** for aggregating and visualising key performance indicators (KPIs).
- **AI-powered analysis tools** for pattern recognition and forecasting

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11.3 Integration strategy

The crucial question is not which individual tool is used, but how existing systems can be meaningfully integrated. In practice, a step-by-step approach has proven effective: First, central data sources are identified and integrated. Then, specific journey management functionalities are added.

11.4 Integrated Platform Approaches

Modern platforms increasingly combine several of these functions into a single solution. This reduces integration effort and makes the relationships between feedback, behavior, and key performance indicators (KPIs) directly visible. This, in particular, facilitates the derivation of concrete measures.

12. Personas and Segmentation in Journey Management

12.1 Why a journey doesn't describe all customers

A common assumption in journey projects is that a single journey represents all customers equally. In practice, however, expectations, behaviours, and needs differ significantly between different customer segments. A differentiated approach makes it possible to better understand specific requirements and to address them more effectively.

12.2 From Persona to Operational Journey

Effective personas are based on real behaviour and actual needs. They are derived from qualitative and quantitative data and form the basis for segmented journeys. The Journey Atlas allows for the definition of separate sub-journeys for relevant personas. This enables differentiated management, allowing measures to be prioritised specifically for individual segments.

12.3 B2B specifics: Buying Center and Stakeholder Journeys

In B2B contexts, decisions are often made by multiple stakeholders. Different roles – such as decision-makers, users, or purchasing departments – each go through their own journeys, which influence each other. A systematic stakeholder mapping therefore forms the basis for effective

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Journey Management in the B2B sector. | In the B2B context, the Journey Atlas makes visible the points at which different stakeholder journeys meet.

13. Research Methods in Detail

13.1 In-depth interviews along the journey

In-depth interviews are among the most effective methods for understanding customer journeys beyond the surface level. They provide information not only about what customers experience, but above all, why certain situations are perceived as positive or negative. A narrative structure has proven effective for use in journey management. Customers are asked to describe specific experiences along a particular journey, step by step. This results in coherent experience reports instead of isolated statements.

The added value lies in the depth of the insights: Emotional reactions, uncertainties or implicit expectations become visible – aspects that often remain hidden in standardised surveys.

13.2 Diary studies

Diary studies are particularly suitable for journeys that extend over a longer period or include multiple interactions. Participants document their experiences in a diary.

regularly share their experiences, thoughts, and impressions. Unlike retrospective surveys, this data collection takes place close to the actual event. This reduces biases and captures even small but relevant details that are often lost in retrospect.

This method is particularly valuable for understanding dynamics within a journey – for example, how expectations change over time or at which points uncertainty arises.

13.3 Minimum Viable Research

Not every company has the resources for comprehensive research projects. At the same time, a solid data foundation is a key prerequisite for effective journey management.

In practice, however, it turns out that even a limited number of qualitative interviews – supplemented by existing data sources such as complaint analyses or CRM data – are sufficient to identify the central pain points of a journey.

What is crucial is not so much the completeness of the data, but the ability to derive concrete hypotheses from existing knowledge and to test them iteratively. The most common bottleneck in journey management is not a lack of data, but the delay in decisions due to excessive analysis.

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14. Maturity Model – Determining the current situation and deriving next steps

14.1 Overview of the four maturity levels The maturity model serves not only to classify the current status, but above all as a basis for concrete next steps. Each level is associated with typical challenges and requires specific measures.

Stage 1 – Ad-hoc Mapping: Customer journeys are created sporadically and often in isolation, usually within the context of individual workshops. Uniform definitions, clear responsibilities, and a systematic link to key performance indicators (KPIs) are lacking. **Derivation:** Introduction of initial governance structures, naming of journey owners, and definition of basic KPIs.

Stage 2 – Coordinated Transparency: Journeys are documented and discussed across departments. However, a consistent framework is lacking, and maintenance is often irregular. **Derivation:** Development of a central journey atlas, establishment of uniform terms and introduction of regular review cycles.

Prioritisation model (e.g. Impact vs. Effort), development of an ROI model and implementation of early warning systems.

Stage 4 – Journey Management: Journeys are firmly integrated into corporate management.

Responsibilities, KPIs, and decision-making processes are clearly defined, and measures are systematically evaluated. **Derivation:** Scaling to further journeys and segments as well as integration into strategic planning and budgeting processes.

The transition between maturity levels rarely occurs linearly, but rather in iterative development steps.



15. Journey Design – Specific Methods and Procedures

15.1 From the current state to the target scenario

While mapping describes the current state, journey design defines the desired target state. The key difference lies in the fact that it not only addresses existing problems but also...

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not analysed, but specifically designed to create new experiences. It is crucial to focus on the moments that have the greatest impact on perception and loyalty. Not every interaction is equally relevant – a few key touchpoints disproportionately shape the overall perception.

15.2 Service Blueprinting as a supplement

The customer journey shows the customer's perspective. The service blueprint complements this view by including the internal processes, systems, and roles that enable the experience.

This connection is crucial because many problems don't arise on the surface but are rooted in internal processes. Sustainable improvement therefore always requires an adjustment of the underlying processes.

15.3 Design principles for effective journeys

Successful journey design follows recurring principles:

- **Reducing complexity:** Minimising unnecessary steps and points of friction
- **Creating transparency:** Clear communication of next steps and expectations.
- **Targeted differentiation:** Consciously creating positive, memorable moments
- **Designing the ending:** The conclusion of a journey influences the

Overall perception disproportionately

15.4 Iterative testing instead of comprehensive concepts

Instead of comprehensive, long-term concepts, an iterative approach has proven effective. Ideas are tested, adapted, or discarded early on, before larger investments are made. | The success of journey design depends less on the creativity of individual ideas than on consistent validation in implementation.

16. ROI Verification – From Theory to Example Calculation

16.1 Why proof is crucial

The strategic relevance of journey management depends significantly on whether its contribution to business success can be quantified. Without reliable figures, there is a risk that initiatives will be classified as not being a priority.

16.2 Two Paths to ROI

The economic benefits can typically be represented by two levers:

- **Cost reduction:** Reduction of contact volume, processing times or error rates
- **Increased sales:** Increased loyalty, repeat purchases and recommendations

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16.3 Example calculation

A company with a high volume of complaints reduces the number of necessary contacts per issue through targeted optimisations. This leads to direct savings in the service area.

At the same time, customer satisfaction improves, which is reflected in a lower churn rate. The combination of cost efficiency and increased customer loyalty leads to a significant overall economic effect. In total, this results in an annual effect of approximately €1.04 million. With estimated project costs of €150,000, this corresponds to a return on investment of approximately 590%.



Even simplified calculations make an important contribution to making the impact of journey management comprehensible internally.

17. AI in Journey Management

17.1 How AI is changing journey management

Artificial intelligence expands the

The possibilities of journey management are significantly improved, especially when dealing with large and unstructured data sets. Tasks that previously involved a high degree of manual effort – such as the evaluation of extensive feedback data – can now, in many cases, be automated and performed much faster.

17.2 Key Application Areas

Typical areas of application include:

- **Automated analysis** of customer feedback to identify patterns and trends
- **Personalisation of interactions** based on individual behavioral data
- **Predictive models** for the early detection of relocation risks
- **Continuous monitoring** of journey metrics

17.3 Limits and Risks

Despite the efficiency gains, targeted control of deployment remains crucial. Particularly during critical moments in the customer journey, purely automated interaction can lead to negative experiences. A balanced relationship between automation and human interaction is therefore crucial for sustainable success.

AI increases speed and scalability – but does not replace the strategic foundations of journey management.

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18. Employee Journey – The Mirror Image of the Customer Journey

18.1 The relationship between EX and CX

The quality of the customer experience is closely linked to the employee experience. Employees who have the necessary information, systems, and decision-making authority are able to create better customer experiences.



18.2 Integration in den Journey-Atlas

An integrated view of customer and employee journeys makes it possible to visualise connections. Problems in the customer journey can often be traced back to internal challenges in processes or systems. By presenting both perspectives in parallel, a holistic understanding of the underlying causes emerges.

18.3 Operational Consequences

Improving Customer Journeys

This often requires adjustments on the part of employees – for example through better system support, clearer processes or expanded scope of action.

| Sustainable improvements to the customer experience often require a simultaneous optimisation of the employee experience.

19. Journey Management in Practice – Industry Examples

19.1 Financial Services: Onboarding

Optimised onboarding processes lead to significantly shorter processing times and simultaneously reduce dropout rates. The key is not so much the digitisation of individual steps, but rather a consistent redesign from the customer's perspective.

19.2 Insurance: Claim notification

The primary focus of the damage report is reducing uncertainty. Proactive communication and transparent status updates significantly contribute to improving the customer experience.

19.3 Energy: Switching providers

In regulated markets, customer experience is gaining importance as a differentiating factor. Clear and early communication reduces uncertainty and

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and increases the completion rate.

19.4 Telecommunications: Complaint Management

Efficient complaint processes contribute to both cost reduction and increased customer loyalty. In particular, a high first-call resolution rate has a direct impact on satisfaction and loyalty.

▮ The practical examples illustrate that journey management can achieve measurable effects on efficiency and customer loyalty in various industries.

10. Take-away

Journey Management is the logical next step in the evolution of CX initiatives: moving away from sporadic optimisations toward a holistic steering approach. It unites the customer's perspective with the company's goals, overcomes silos, and ensures that measurable value is created from insights. In times of rising expectations and growing complexity, Journey Management is no longer an option—but a necessity for sustained success.

The decisive question is:

Where does your company stand today—at the mapping stage or already in management?

About QuestionPro

As one of the world's leading Insights and Experience Platforms, QuestionPro unites all building blocks of modern decision-making: Research, Customer Experience (CX), Journey Management (JM), Employee Experience (EX), and Communities.

We help you transform feedback into impact—to understand faster what moves people and use that to create experiences that inspire.

With more than 5 million customers in over 100 countries, QuestionPro's main focus areas are Customer Experience, Employee Experience, and Market Research.

With QuestionPro, we bundle all four Experience pillars into one platform:

- Market Research
- Customer Experience & Journey Management
- Employee Experience
- Online & Insights Community

Furthermore, we have a fantastic team of experts to support you from vision to implementation.



Let's get in touch!

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