Prepare: Client Empathy Mapping

Have you ever wondered, "What can I do in less than half a day that, more than almost anything else, will transform my firm's way of thinking, create awareness, build value, and focus my team on improving our clients' experience?"

If you're looking for a quick way to jump start a client-centric culture, or you need to align everyone's approach before a big pursuit, consider starting with a simple and powerful exercise called **Client Empathy Mapping (CEM)**. A client empathy map allows you to quickly, clearly, and simply build a better picture of the underlying drivers of your clients, and then pro-actively respond to those needs.

What are the Benefits of a Client Empathy Map?

Client Empathy Maps are useful for several purposes. At their core, they give your team a deeper understanding of the client (internal or external). This allows you to design an experience for your clients with greater confidence that it will meet their needs and address any underlying concerns they may have. If you haven't been through the process yet, set aside some time with key stakeholders in your firm to build one map, and experience firsthand the value. Every time we have led a group through the exercise, 100% of the participants say the time was well spent. Key reasons you might decide to host a CEM session:

- Kickstarting a Client Experience Program
- Pursuing a Major Project / Opportunity
- Entering a New Market
- Desire to Increase Share of Wallet with a Key Client
- Onboarding a New Client
- Hiring new Client-facing Staff / Leaders
- Seeking to understand Why Internal Initiatives are not Getting Buy-in
- Seeking to Understand Why Internal Initiatives are not Getting Buy-in
- Increasing Concern of Competition / Client Attrition

What is a Client Empathy Map?

A CEM is more a process than a document. You and your colleagues collaborate to anticipate the questions, needs, and behaviors of the client you are seeking to better understand at every step in their journey (See Figure 1). By capturing these rational and emotional states throughout the journey, you will see clear opportunities to guide the client towards positive outcomes, head off negative events, and create happier and more loyal clients.

Client Empathy Maps are a simple way to visualize the totality of a client's experience. Different than a Journey Map or an Ecosystem Map (both of which can be difficult to create for long & complex journeys), the Empathy Map focuses on *client understanding*, rather than the full mechanics of the processes and touch points. The output of an Empathy Map may reveal sub-sections of the client journey that can be further improved with a more detailed approach like a Journey Map or Ecosystem Map.

Who Needs to Be Involved

Client Empathy Mapping is a dynamic, fun exercise generally improved by having many voices and perspectives in the room. Time is costly – especially in professional services firms – but the diverse perspectives from many players build better maps. Front-line employees (e.g., project managers), their support staff, leaders, executives, and administrative staff (e.g., finance

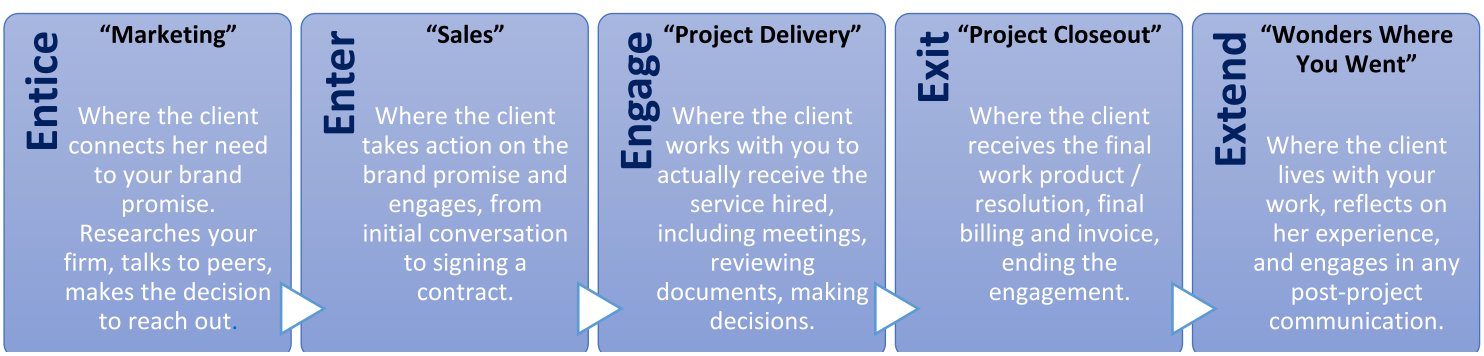

Figure 1: Client Empathy Map Journey Steps

/ accounting / IT) all impact the clients' journey and may have ideas for how to improve that journey. That said, with as few as three or four colleagues, you can create a wealth of insight and ideas for creating excellence.

Something to consider, due to the workshop nature of the exercise, larger groups typically create maps much faster. Where a few people may require four or more hours to build a good map (without experience), groups of ten or more can do the work in half the time. The most time-efficient version uses five groups working together, so multiples of five work well. If you can get 10, 15, or 20 together you'll maximize the insights and opportunities. Don't be afraid to start small, just recognize each contributor will need more time to get through the process.

How do I Use an Empathy Map?

In the process of creating a map, you'll accomplish two primary objectives. First, you'll create excitement for client experience (CX) thinking. Second, you'll generate a prioritized list of potential actions your team can take to improve the clients' experience. Many "low hanging fruit" items will surface, along with other more strategic and complex opportunities, each of which will help retain clients, win new clients, and improve business outcomes.

I'm Ready. How Do I Get Started?

The tools are simple: Post-It Notes and Sharpies, and about 15 feet of wall space (See Figure 2). While not required, the process works best using seven or eight different colors of Post-It Notes for visual clarity. You'll find a ready-made shopping cart of high-contrast colors on this Amazon list (http://a.co/11yDzlJ).

Round up a group of your co-workers and set aside several hours. Practiced teams can do a complete map in 60-90 minutes. If you're just getting started, you owe it to your team to double that time allotment. Three hours is a great target. The last step (identifying and prioritizing potential actions) provides the most lasting value – running out of time limits the potential of the whole exercise!

Before the workshop, develop a "Client Persona" for the client's journey you will map. There's no "right" client to pick, though a high-value, strategic client is a good place to

Figure 2: Sample Client Empathy Map

start. Or, pick a common, representative client that has many similar peers (so a larger portion of your client base can benefit from the exercise). You may also choose to do an empathy map for a major project pursuit, in which case building a persona around the lead decision maker will assure your map is targeted for securing a win.

The persona could be very detailed, or extremely lightweight. The more familiar the client is to the empathy team, the less detail you'll need. Also, be sure to select a PERSON, not a company, for your persona. People have emotions (with which you can empathize), companies don't.

You can find many resources online regarding persona development, but in short, make the person a real client, preferably one your mapping team knows. Capture the demographic details of the person (age, title, etc.). Create a list of 10 – 20 adjectives describing that person – use adjectives that have clear opposites, for example: is the client sophisticated or simple, wordy or concise, engaged or detached? List a few personal motivators for that client: WHY are they doing what they do, both at work and at home? Where does the client want to be in five years? Where does the client go now to buy services like yours? Where do they shop for other business and personal goods & services? A complete but simple persona should fill a single page. Don't get caught up in the details – you're simply creating a starting-point for the empathy team.

Share the persona with the team before the workshop. Have them read it and offer any other insights. Distribute a final draft ready for your empathy workshop.

Building Your Empathy Map:

To see where to start, consider the result you are looking to achieve. Your empathy map may look something like Figure 2 when complete.

The Empathy Map tracks the *five phases of the client journey*, beginning to the left, and moving to the right. The five key phases are Entice, Enter, Engage, Exit, and Extend, as shown in Figure 1 (found on page 1).

Every client passes through each of the five journey phases – and hopefully cycles back to the beginning to work with you time and time again!

As you build your Empathy Map, you'll see each phase constitutes one COLUMN on the map.

Each of the rows on the map represents a different "empathy tool" to anticipate and communicate something about the client. These tools are: Questions, Needs, Thinking, Feeling, Saying, and Doing. The final row is not an empathy tool, but the place where you decide what you're going to do in response to your empathy insights. The different tools are described in Figure 3.

Filling In the Blanks

The intersection of each row and column is a field where your team brainstorms the empathy elements. For example, you may start with the column Entice and the row Questions. *What questions does your client have during the entice phase?*

After generating several questions, you can choose to move along the row (get all the questions figured out across the journey) or move down the column (figure out everything about the Entice phase). Both approaches work well, though many find working out all the questions first, then moving to needs, etc. is easier to process. What we've seen is that jumping between phases is less of a mental leap than jumping between themes.

Depending upon the size of the team you have working on this, you can divide and conquer. With five or more people, break into five teams. Each team can work on QUESTIONS for one phase of the journey. Team 1 works on Entice, Team 2 on Enter, etc.

To assure everyone can engage, and to get different perspectives in each phase, rotate phases as you move down the map. For example, Team 1 may brainstorm Entice / Questions the first round, then move over and down to Enter / Needs, followed by Engage / Thinking, Exit / Feeling, Extend / Saying, and wrapping up back with Entice / Doing. This allows everyone to touch every phase and every empathy tool. This method allows larger teams to move faster than a small team of 2 or 3 who must cover each box, one at a time.

Questions	What questions does the client have at this point in the journey? Questions may be about your service, or about her situation.
Needs	What does the client need at this step? Often the need answers a question. Also consider needs from the client's perspective, not limited to what your firm currently provides.
Thinking	What is the client thinking? These aren't questions – you covered those. Instead, these are the rational reactions the client has to the processes, experiences, roadblocks, and environments encountered. **Include Positive / Negative & Because**
Feeling	What is the client feeling? These are the emotional responses to processes, experiences, roadblocks, and the environment encountered. **Include Positive / Negative & Because**
Saying	What might the client say? Often what's said relates to the thoughts and emotions, but "saying" is an act with intent to communicate, and may reveal what is "really meant" based on unsaid thoughts/feelings from above. **Include Positive / Negative & Because**
Doing	What things is the client doing in this phase? Think about all the actions the client takes not just interacting with your business, but also include the related actions the client takes in other areas of her journey. **Include Positive / Negative & Because**
Actions	Different than above, this is the list of things YOUR FIRM might do to alleviate a pain or create a better experience from any of the questions / needs / thoughts/ feelings / sayings / doings above. Anticipate the questions / needs, and design answers to them proactively.

Figure 3: CEM Empathy Tools

If you take a team approach, have everyone brainstorm QUESTIONS for 3-5 minutes; each team should put between 3-6 questions on the board, one question per Post-It Note (refer back to Figure 2). After all teams have added their notes to the map, start with Entice, have each team read their notes, and quickly (1-2 minutes) share their thinking. DON'T TRY TO SOLVE PROBLEMS OR ANSWER THE QUESTIONS – no big discussions yet. You'll never finish if you stop to figure out every opportunity to improve. That's what the ACTIONS row is for. Anyone who has an idea for something *your team* can do in response to that round of Post-Its can write their idea for action on a Post-It Note and put it on the bottom row. The bottom row is open for additions any time during the workshop. However, I encourage you to leave it closed for discussion until the very end unless you want to turn this into a 10-hour exercise.

After reviewing the QUESTIONS row, move down to NEEDS and repeat the process. Each team gets about three minutes to brainstorm possible needs the client has, write each on a Post-It, and add it to the wall. Start the review again at Entice and add actions as they come up.

Repeat for each of the next four rows, Thinking, Feeling, Saying, and Doing. These Post-It notes need a bit more information: *sentiment* and *cause*. For example: "I'm feeling anxious about approving this invoice BECAUSE I don't know the actual percent complete of the project. (NEGATIVE)." This is a negative sentiment (anxious) and shares the root cause of the anxiety. Every note should therefore include the word "because." You may not be able to remove "anxiety" but you can probably address the root cause (for example, by providing evidence of work completion that matches the invoiced fee). Rather than write the word positive / negative on the note, simply put a + or – in the top-left corner of the Post-It.

A good Post-It Note for the Thinking, Feeling, Saying, Doing rows looks like Figure 4, below:

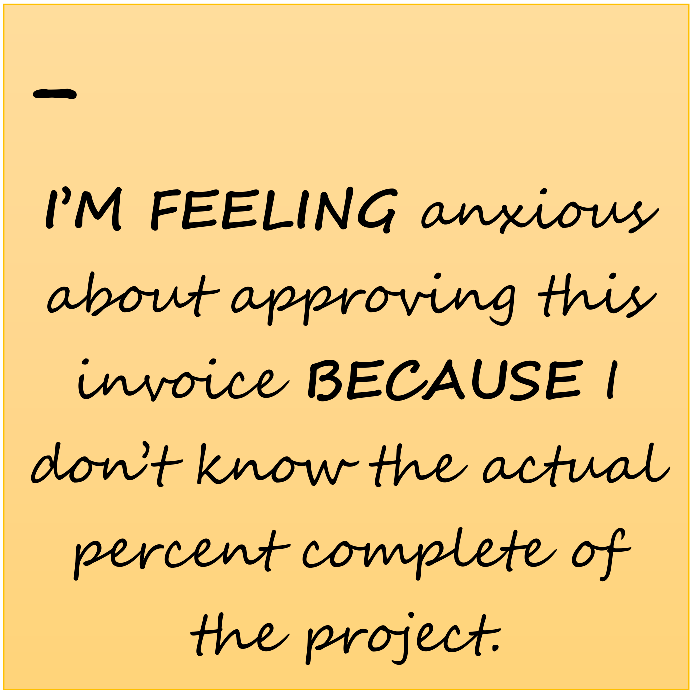

Figure 4: Example of Post-It Note for Rows 3 - 6

When you are generating actions, you might look at the positive sentiments and identify ways to *design* for that outcome. When looking at negative sentiments, you may want to identify ways to avoid that outcome. Avoiding problems is critical but pursuing moments that delight your clients is just as powerful, and often instrumental in differentiating your firm from others. Frequent doses of delight also build in a buffer against the inevitable negative moments your clients will face. Consider "delighters" to be contingency in the relationship against friction. The more great moments you deliver, the more understanding your clients will be when mistakes happen.

After all the rows and columns have been filled, consider looking at each column in whole, to get the bigger picture. Then generate one more round of potential actions. Perhaps start at the end of the journey, and for each action generated, consider whether that action can be implemented earlier in the journey to be more proactive. In this way, review each column, working Extend, Exit, Engage, Enter, Entice.

Now that the entire map has been created – all the questions, needs, behaviors and actions – take one more step to prioritize the identified actions. Have each person take ONE Post-It note and rip it into three flags. Independently, each person reviews the actions, and flags the three they think are the best ideas to implement first (see Figure 2). After everyone is done, you'll have a clear picture of which ideas have the most organizational support, and therefore are most likely to be successfully implemented. Develop a brief plan for how to plan each initiative, assign responsibilities, and wrap for the day.

Each stakeholder responsible for a highly prioritized action may desire to push their thinking further, looking at the Post-It note(s) that generated their action, and employ the "Five Why" method to really go deep in understanding the client's perspective. "I'm feeling anxious about approving this invoice BECAUSE I don't know the actual percent complete of the project. (NEGATIVE)" was the example from above. WHY does that lack of knowledge create anxiety? Why does the answer to that question matter? Keep asking why until you understand. You'll likely find deep and powerful emotional drivers behind his sentiment and behavior!

Congratulations! You've built your Client Empathy Map.

On the following pages you'll find a few additional resources to help you conduct your first Client Empathy Map session successfully:

- [ ] A step-by-step distilled checklist to time and run your session (Page 6)
- [ ] A preparation guide to share with your workshop attendees before they show up (Page 7)
- [ ] A sample "deliverable" you might create after your workshop, which captures all the insights gained, and builds a plan for executing on the action items.

If you have any questions or would like help, please reach out to answers@clientsavvy.com or call us at 866-433-7322.

Empathy Map Step-By-Step Checklist:

- ☐ **PREPARE:** Identify your Team, Schedule, and Invite
- ☐ **PREPARE:** Develop Your Persona and Share
- ☐ **PREPARE:** Acquire Post It Notes and Sharpies
- ☐ **5 MIN:** Discuss the Persona clarifying questions
- ☐ **5 MIN:** Present overview of the map process
- ☐ **5 MIN:** Define each column
- ☐ **5 MIN:** If working in teams, assign each team to a column/phase (See Figure 1)
- ☐ **2 MIN:** Define "Questions" for the team (See Fig. 2)
- ☐ **5 MIN:** Create "Question" Post-Its for each phase
- ☐ **7 MIN:** Have each team present their questions; limit presentation / discussion to 1-2 minutes
- ☐ **2 MIN:** Generate action Post-It Notes and put on the map during the presentation / discussion
- ☐ **2 MIN:** Define "Needs" for the team (See Figure 2)
- ☐ **5 MIN:** Create "Needs" Post-It Notes for each phase.
- ☐ **7 MIN:** Have each team present their needs; limit presentation / discussion to 1-2 minutes each
- ☐ **2 MIN:** Generate action Post-It Notes and put on the map during the presentation / discussion
- ☐ **2 MIN:** Define "Thinking" for the team (See Figure 2)
- ☐ **5 MIN:** Create "Thinking" Post-It Notes for each phase. Reminder: Include word "Because"
- ☐ **7 MIN:** Have each team present their thinking; limit presentation / discussion to 1-2 minutes
- ☐ **2 MIN:** Generate action Post-It Notes and put on the map during the presentation / discussion
- ☐ **2 MIN:** Define "Feeling" for the team (See Figure 2)
- ☐ **5 MIN:** Create "Feeling" Post-It Notes for each phase. Reminder: Include word "Because"
- ☐ **7 MIN:** Have each team present their feeling; limit presentation / discussion to 1-2 minutes
- ☐ **2 MIN:** Generate action Post-It Notes and put on the map during the presentation / discussion
- ☐ **2 MIN:** Define "Saying" for the team (See Figure 2)
- ☐ **5 MIN:** Create "Saying" Post-It Notes for each phase. Reminder: Include word "Because"
- ☐ **7 MIN:** Have each team present their saying; limit presentation / discussion to 1-2 minutes each.
- ☐ **2 MIN:** Generate action Post-It Notes and put on the map during the presentation / discussion
- ☐ **2 MIN:** Define "Doing" for the team (See Figure 2)
- ☐ **5 MIN:** Create "Doing" Post-It Notes for each phase. Reminder: Include word "Because"
- ☐ **7 MIN:** Have each team present their doing; limit presentation / discussion to 1-2 minutes each.
- ☐ **2 MIN:** Generate action Post-It Notes and put on the map during the presentation / discussion
- ☐ **3 MIN:** As a group, briefly review Extend, generate any additional actions
- ☐ **3 MIN:** Review Exit, generate additional actions
- ☐ **3 MIN:** Review Engage, generate additional actions
- ☐ **3 MIN:** Review Enter, generate additional actions
- ☐ **3 MIN:** Review Entice, generate additional actions
- ☐ **1 MIN:** Have each person tear a Post-It into three
- ☐ **5 MIN:** Everyone adheres strips to the three actions they think the firm should accomplish first
- ☐ **5 MIN:** Confirm as a team which actions your will take action on immediately
- ☐ **5 MIN:** Assign stakeholders to each planned action, and set goals to implement
- ☐ **AFTER:** Take pictures of the map, document decisions, and share with your team/firm

	Entice	Enter	Engage	Exit	Extend
Questions					
Needs					
Thinking					
Feeling					
Saying					
Doing					
Action					