

Measure Journeys To Drive Emotional Engagement

How To Measure A Journey's Baseline, Curve, And Punch

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Summary

To know what good looks like — and to benchmark customer journeys — we need to understand how to measure emotion. Emotions are information. They carry distinct and diverse messages. To make sense of those messages, we need to see them in context and we need to understand behaviors, events, and end-to-end journeys. This report outlines how to measure the emotional makeup of journeys — the baseline, curve, and punch — to maintain a contextually appropriate balance of positive and negative emotions that shape memory.

Emotions Are Information, Yet Many Companies Get Emotion Wrong

Rather than designing experiences built on a broad spectrum of emotions, too many firms equate emotion with delight. Emotions:

- **Carry distinct and diverse messages.** Anger sets your boundaries; its basic message is one of protection. Confusion tries to protect you by halting your actions. Sadness helps you slow down. Happiness holds our sense of wonder and anticipation of good things, and it looks forward to the future. Each of our emotions has its own individual message and purpose. Emotions help us navigate our way through life.
- **Are a boxed set.** Real joy and happiness can only exist in relation to all the emotions — they are a “boxed set.” We can’t just pick and choose our emotions. Anger isn’t joy, just as joy isn’t contentment, just as accepted is not respected. When we equate emotion with delight, we miss out on other emotions that lead to retention and long-term loyalty. For instance, feeling valued, appreciated, and confident top the list of loyalty-eliciting emotions — above making people happy. A great experience is not the absence of negative emotions, and your customers are going to experience a range of emotions.
- **Drive business results.** Emotion is the primary driver of customer [loyalty](#). It accounts for nearly half of a brand’s energy; brand energy gets charged by emotion, salience, and fit — and, overwhelmingly, emotion forms the most important pillar. Emotions in the workplace influence everything from leadership effectiveness to building and maintaining complex relationships, from innovation to employee and customer interactions.
- **Require context.** Our emotions are shaped by events, and events are shaped by our emotions. All emotions are, in essence, impulses to act. Combining journeys and emotion is powerful because it helps us see emotions paired with the context — the sets of interactions and events — that triggered and shaped them.

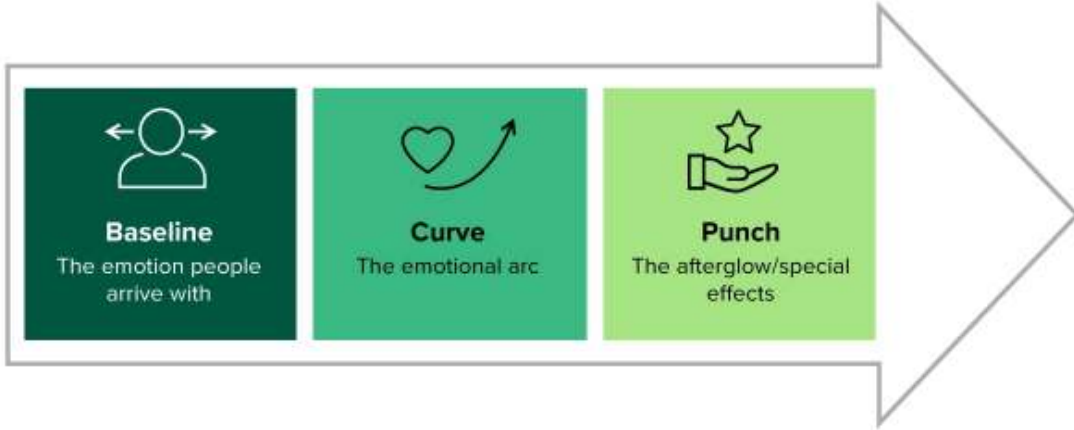
Measure Emotion To Maintain A Contextually Appropriate Balance

A great experience maintains a contextually appropriate balance of positive to negative emotions that shape memory. Experiences of sadness, anger, guilt, or fear can help us form arguments, improve memory, or encourage generosity, and they make us less

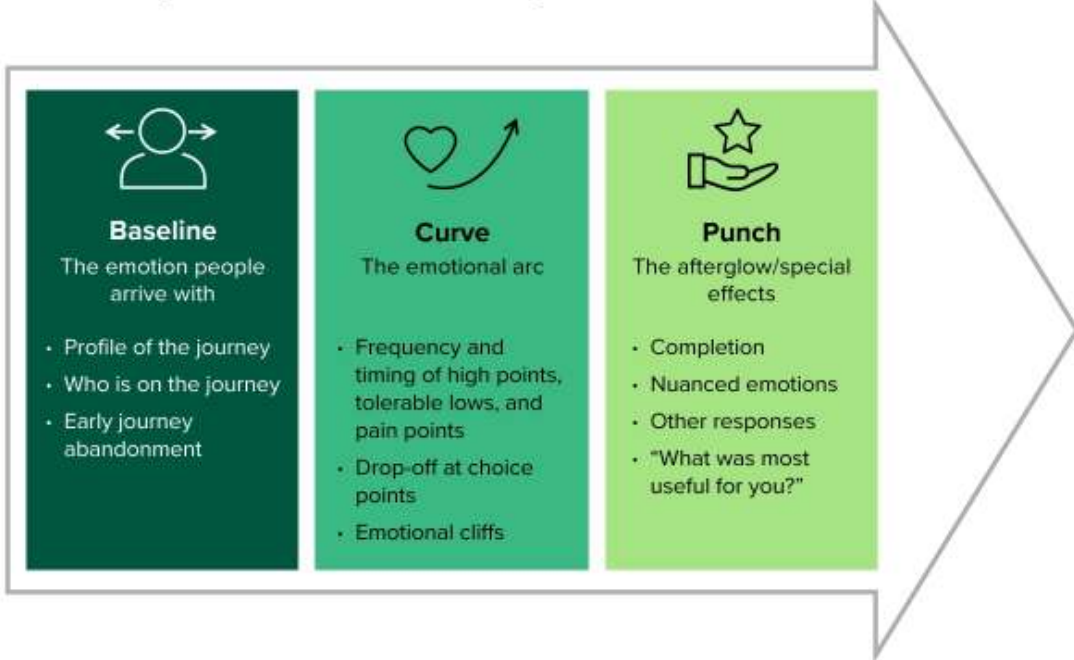
prone to confirmation bias. But emotions that are out of control impede the intellect. Measuring emotion is not a binary operation; you can't just do it after the fact with a satisfaction survey. You need to include multiple measures at three critical stages of your customers' experiences: the [baseline](#), the [curve](#), and the [punch](#) (see Figure 1).

Figure 1
Measure The Emotional Makeup Of Journeys Using Multiple Measures

All journeys have a baseline, curve, and punch



Include multiple measures when measuring emotions



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The Baseline Depends On Who Is On The Journey

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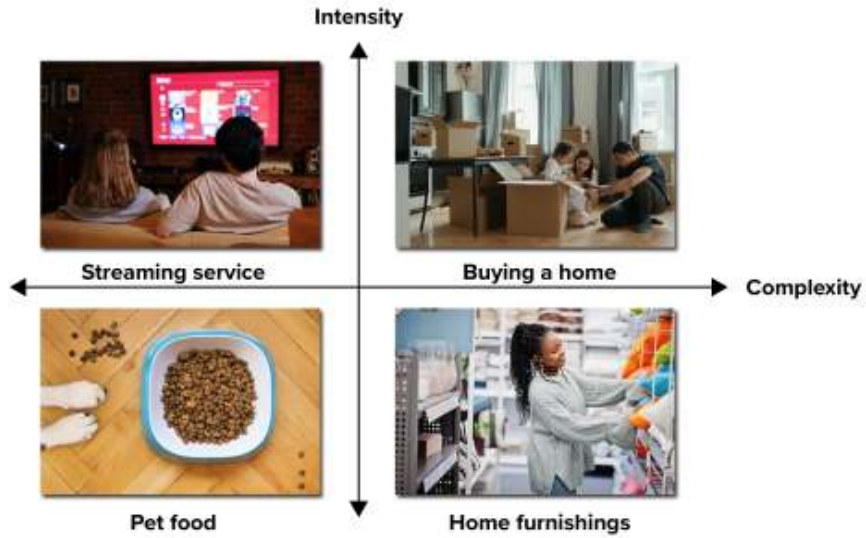
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Emotions don't appear from thin air; they are fueled by preexisting emotional affect, catalysts, and triggers — and shaped by individual traits, emotional history, and external events like COVID-19. The baseline is how customers arrive. To measure it:

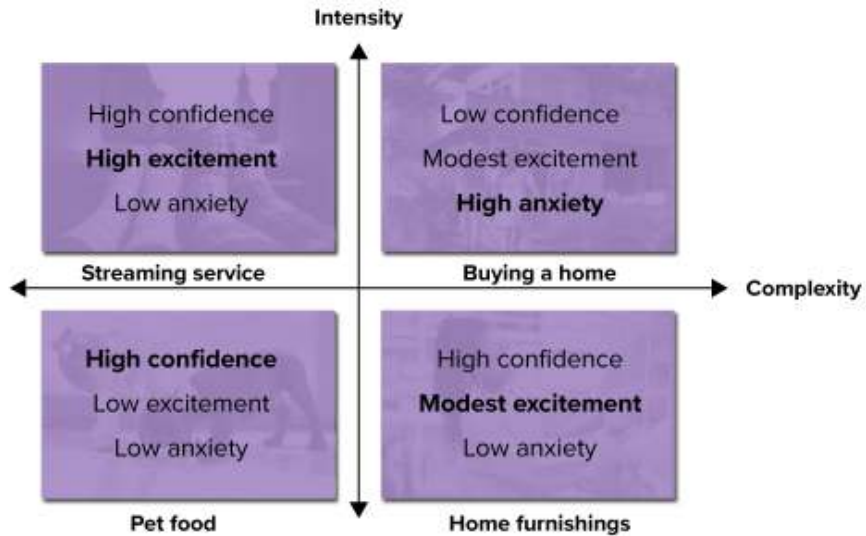
- **Start by segmenting journeys by complexity and intensity.** Think of complexity in terms of the number of steps and channels used; the intensity based on the “fear of missing out” (FOMO) and the “fear of better options” (FOBO); the level of commitment required (permanence); and reach (the potential impact of the purchase on others). When we look at the overarching emotions that customers report, high-complexity, high-intensity journeys (like buying a home) tend to evoke high anxiety, modest excitement, and low confidence. In contrast, low-complexity and low-intensity journeys like buying pet food conjure high confidence, low excitement, and low anxiety (see Figure 2). Use a “complexity versus intensity” two-by-two framework to build an initial hypothesis about the baseline, and then put your industry lens on it (see Figure 3).
- **Calibrate for external events that could impact the baseline.** [External events](#) can impact the baseline of every journey. The pandemic has driven an explosion in online activities that will change how consumers communicate and interact with brands forever. Customers are reassessing what they value, actively saving money if they can, and engaging in proximity buying. They are also demanding better efficiency, speed, and information. Facing the COVID-19 pandemic, customers are battling uncertainty from all corners, needing confidence more than ever. Designing journeys for [confidence](#) — that customers have made the right choice or come to the right place — has become more important than ever during the pandemic.
- **Evolve to zoom in on the individual customer on the journey.** Ultimately, the baseline depends on who is on the journey. The baseline is fluid and individual. Typically, we look at journeys at the segment or persona level, but we need to get to the individual customer level over time to manage emotions. Customers have different price sensitivities, needs for convenience, perceptions, values, and willingness to experiment. Other journeys, experiences, and life events also have an impact on your customers' baseline (see Figure 4).

Figure 2
Use The Complexity-Versus-Intensity Framework To Segment Journeys

Use a complexity-versus-intensity two-by-two framework to segment journeys



Build a hypothesis of what the baseline emotion is for the journey

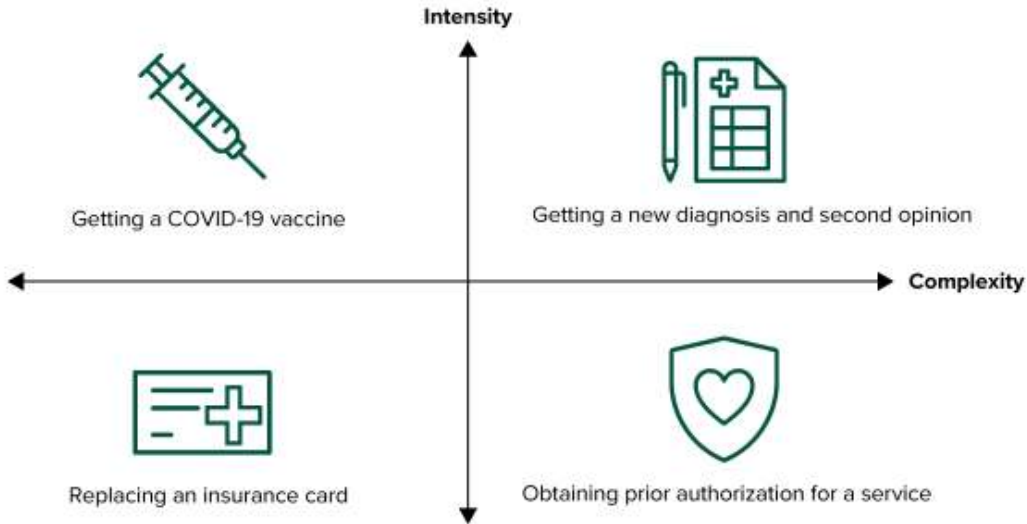


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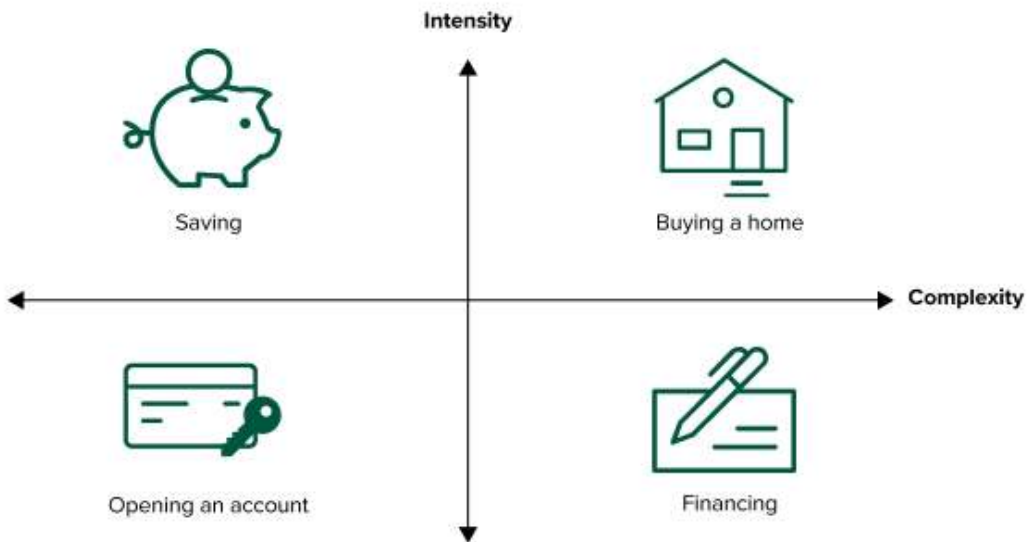
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Figure 3
The Complexity-Versus-Intensity Framework Applied to Two Industries

Example of two-by-two framework in the healthcare industry



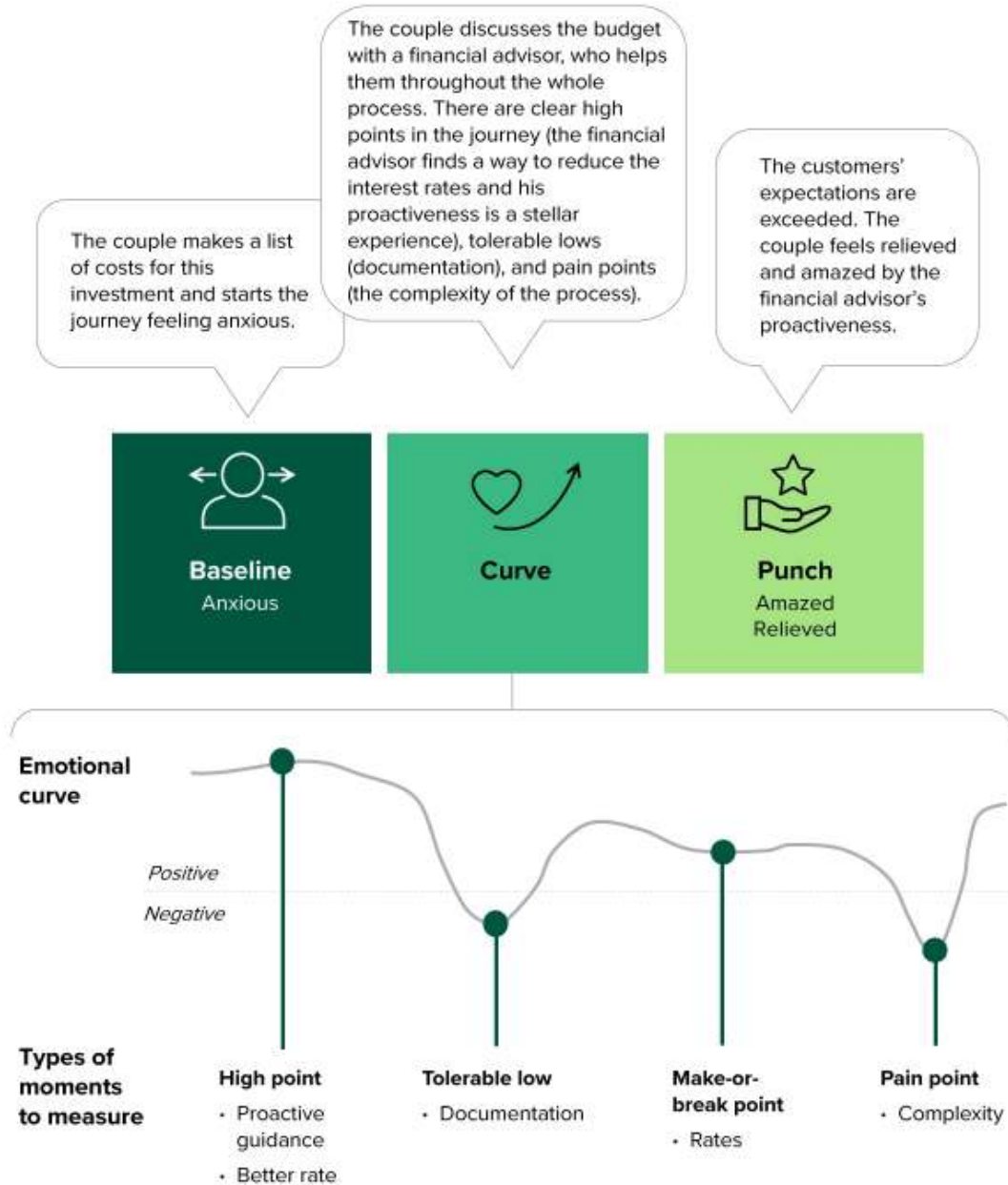
Example of two-by-two framework in the financial services industry



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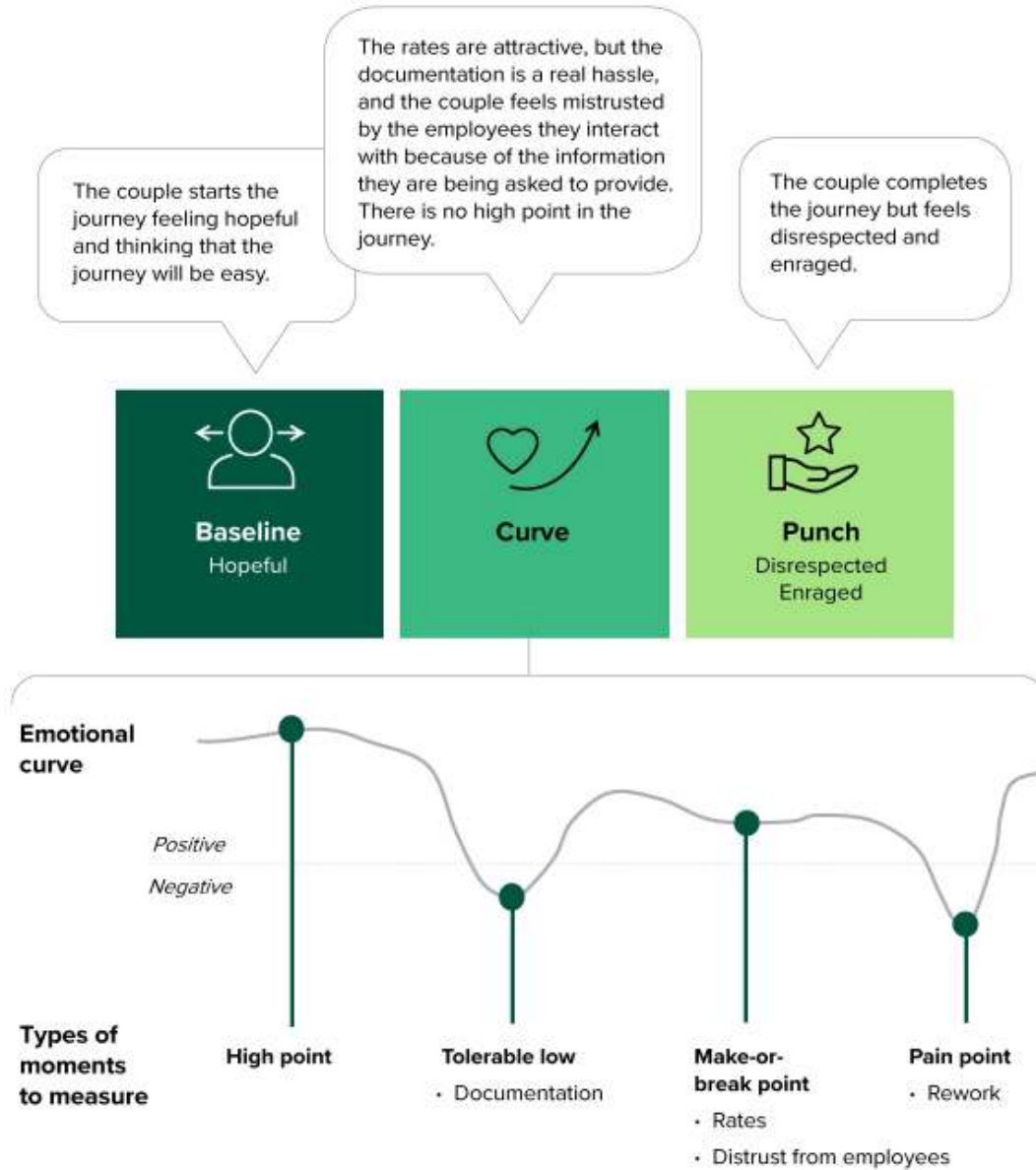
Figure 4
The Baseline, Curve, And Punch Of Two Home-Buying Journey Scenarios

Scenario 1: a couple's home-buying journey ends on a high note.



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Scenario 2: a couple's home-buying journey ends on a low note.



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The Curve Starts With Qualitative Research To Prioritize Memory-Making Moments

Memory-making moments spark emotion throughout the journey. We need to understand the emotions that customers express, but we're also interested in what the customer was doing that triggered a strong, memory-making emotion. These memory-making emotions together form the journey's emotional curve. Our job is to fine-tune

the moments that customers will be most likely to remember. To do this:

- **Start with qualitative research to identify memory-making moments that spark emotion.** The first and most significant change you should make is to flip where you're investing in your analysis of customer emotion. Start with ethnographic work, contextual interviews, focus groups, and the qualitative comments in customer feedback and then turn to the results of quantitative surveys. A qualitative approach will save you time in the long run. It helps you map the emotional curve and prioritize memory-making moments that spark emotion: high points, tolerable low points, make-or-break moments, and pain points.
- **Pay special attention to value-destroying emotional cliffs.** Understand which problems are the most damaging. Avoid the temptation to blindly focus on the most frequent service failures. Don't get distracted by the squeaky wheel. Your most common sources of friction aren't necessarily the ones that need immediate attention. One retailer found that the three most destructive issues pre-pandemic had to do with finding and purchasing items efficiently. During the pandemic, the most destructive issues were having to pay for return shipping, needing an original receipt to make a return, and experiencing problems navigating the website. While failures such as stock-outs are annoying, they aren't particularly destructive because they don't violate a contract. But asking members to pay for return shipping and provide an original receipt signals that the company doesn't know who they are, doesn't trust them, and doesn't care about making it easy for them to do business.

The Punch Looks Beyond Journey Completion To Uncover Nuanced Emotions

This is the afterglow: the ultimate impact of the experience that shapes the next experience and the next. Think of it as the special effects that give enormous power to the scripts we write to make sense of the experience. It's the payoff for the customer. To measure the punch:

- **Don't let journey completion blindsides you.** Measuring journey completion isn't enough. One customer in our focus groups completed their mortgage journey yet said: "We have to stick with it because of the notary costs; otherwise, we feel enough rage to take our mortgage elsewhere. As soon as we can, we're out of here, even if the rates are higher!" Overreliance on journey completion can cause firms to lose customers without knowing why.

- **Look beyond end-of-journey survey scores to customer comments.** Customers often score firms highly in surveys even when they experience significant problems with their products or services. End-of-journey surveys at times fail to tell companies what customers really think and feel and can mask serious problems. For example, one customer gave 10 out of 10 as a CSAT score but offered the following comment: “The only thing that we were a bit disappointed with is to do with repairs. It seems that every time they come out, it’s over \$1,000 in service. The fitters seem to be struggling with diagnosing the issue, and it always seems to be more expensive.”
- **Honor emotions, build trust, and make amends when you breach it.** Smart firms engage in a conversation about emotions and expectations with customers, employees, and partners. They build emotional skills that drive empathy and help employees express and coregulate emotions. They continuously and deliberately scrutinize disconnects between emotion and context (interactions and events). When an expectation isn’t met, they apologize and enable employees to make things right. If you breach emotional trust — the make-or-break moments when you let customers down — you need to accept responsibility, apologize, and make a gesture that is emotionally attuned. If possible, reset the punch. [Delta Airlines](#) sends an apology email with a 500-point SkyMiles credit to its best customers if they get stuck sitting in a middle seat on certain flights. Called “Middle Seat Mondays,” the program tries to ensure an otherwise uncomfortable trip ends on a more positive note.

Start With The Punch To Kick-Start Measuring Emotional Engagement

Ask customers about the stories they tell family and friends about the journey. Look for evidence of more nuanced emotions in open text comments. This is your opportunity to kick-start your understanding of the full scope of the role of emotions in building enduring relationships with customers. To kick-start measurement for emotional engagement:

- **Start with the punch to understand the stories customers take away from the experience.** Measuring completion is important but not enough. Check the punch to see if customers remember the highs or if they only recall the valleys. If you have an end-of-journey survey, check the timing is right. Are you asking about more nuanced emotions in the survey? Are you looking for correlations to cognitive responses (e.g., compliments, complaints, and suggestions) at other touchpoints? At the end of the journey, ask customers what they liked most about the experience. Honor their emotions and look for opportunities to reset the punch, starting with your

high-value customers.

- **Segment your journeys and measure early drop-off next.** Create your own industry-specific complexity versus intensity two-by-two framework. Understand who is on the journey — personas, segments, and, over time, individual customers. Measure early drop-offs in the journey due to out-of-control emotions. One customer we interviewed abandoned his mortgage refinancing journey because the bank's website asked for too much personally identifiable information too soon, jumping the gun with a call to action before building trust.
- **Measure and fine-tune memory-making moments with a focus on emotional cliffs.** You don't need to measure everything in the journey; remember, we are after the memory-making moments that make up the emotional curve. Do the qualitative research to make sure you know what the memory-making moments are. Measure drop-off at memory-making moments. For each journey, ask whether the emotions, the frequency of the emotions, and where the emotions occur in the journey fit the profile of the journey and the individual on the journey. Pay special attention to value-destroying emotional cliffs.



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