DESIGNING THE CUSTOMER EXPERIENCE

HOW TO PLAN AND RUN CUSTOMER JOURNEY MAPPING WORKSHOPS

MACQUARIUM

Introduction

Stephen Perry, CCXP
Director, Experience Strategy and Design at Macquarium

Dear reader,

Since you have downloaded this eBook, you must be keenly interested in customer journey mapping. You want to harness the power of this technique for your organization, and want practical advice on how to do so. I have created this guide for people like you, and have put as much detail as possible in a "short read" instructional guide so that you can benefit from the lessons I have learned over many years of creating customer journey maps with clients.

First, a little background on me. I'm a researcher, strategist, and designer. I've spent most of my life as a design practitioner in the User Experience (UX) and Customer Experience (CX) consulting industry, leading research projects, guiding experience strategies, and designing customer and end-user experiences of all kinds, from digital products to in-store services, and their intersection. I've long been aware of the need for things to work better, for moments to be enjoyable, and for efforts to provide value.

Over the years I've learned the value of bringing diverse teams together who can create organizational change for the better, and have run numerous types of workshops in order to achieve this objective. One of my favorite techniques in creating such positive change is customer journey mapping workshops. I'm happy to see that customer journey maps are catching on as businesses begin to understand how valuable they can be in fostering greater customer empathy. So for those of you out there who want to learn how to run these kind of workshops, I've created this step-by-step guide for planning and running customer journey mapping workshops of your own.

Checking-out at the grocery: Numerous channels combine to create a touch point interaction, and numerous interactions combine to create a customer experience

Second, a few reading notes and key definitions. If you're not familiar with some of the the terms, we CX nerds talk about "omni-channel" customer experiences, and the various "touch points" customers have with your company. A channel can be closely equated to a device, like a mobile phone, interactive kiosk, or laptop. A touch point is often a combination of many channels, people, and objects, and also takes into account the context of physical space and time. Examples include a customer service phone call while you use your laptop to login to your website account during the call, or purchasing a movie at a kiosk in the grocery store and paying with your smart watch. The point is that all of these interactions accumulate to equal an overall omni-channel customer journey that defines how people feel about doing business with you, which elevates or diminishes your brand.

Customer journey maps scrutinize all of the little details that create customer experiences, to ferret out problems and break-downs, as well as to find unmet needs and opportunities to delight. Journey maps help to fix bad experiences, and make good experiences great. These can be user experiences as well. I use the term "customer" loosely in my language to cover everyone from end-users of websites and apps, to consumers, to employees, to business partners, and even entire companies. Since customer journey maps can apply to almost anything, some practitioners and agencies have renamed them "experience maps," but most know the term "customer journey maps," so we'll stick with that.

I also have a couple of example projects from both the B2B and B2C worlds of doing business that I will be referring to in the hope that real-world examples will help you to relate to these instructions, based on your type of company and your point of view. I will also share some expert advice on facilitation that I've learned from my experience as a workshop planner and facilitator.

I hope you enjoy reading this guide, and it helps you to use customer journey mapping techniques for your own benefit.

CHAPTER 1
CUSTOMER JOURNEY MAPS

The Value of Customer Journey Maps

Companies spend a lot of time and money trying to create experiences that provide a differentiated and highly valued product or service. But they often approach the subject with an internal point-of-view and create experiences that they think customers will like instead of what customers might actually need. They also often operate with a channel- or department-oriented model for how they organize and manage their customer experiences. Forrester refers to this as an "inside-out" viewpoint, and reminds us the we are not our customers.

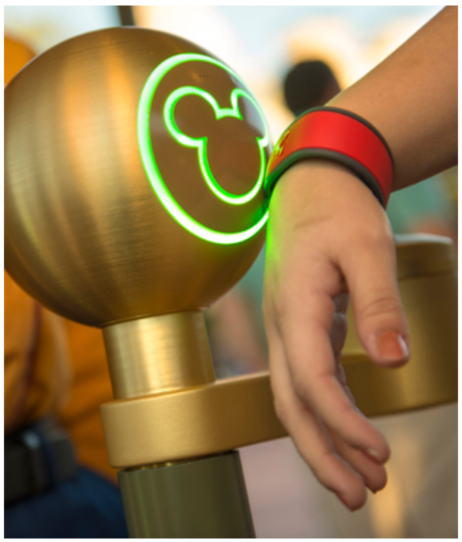
Numerous studies show that consumers will pay more for good customer experiences, and will leave for a compeitor over bad customer experiences

Unfortunately, doing business this way can result in a fragmented series of experiences that leave customers frustrated. In the new omni-channel world of empowered consumers and cross-channel interactions, a negative experience in one channel or across channels can be disastrous to customer loyalty. We've all suffered through painful customer experiences where doing business with a certain company became a struggle and felt more like dealing with five disconnected companies, not a single organization. When experiences are not coordinated or synchronized across departments and teams, it leads to a terrible customer experiences.

But when companies take an outside-in point-of-view and use techniques like customer journey mapping, they can achieve much more unified experiences across channels and touch points. Customer journey maps are highly detailed visualizations that graphically display a real customer's journey as they perform activities related to achieving a goal. Journey maps document every touch point and step that occurs and every channel in play during each customer interaction to tell a complete story. This can be a buyer's path from consideration to purchase to installation, or a customer's service path from problem to resolution. Because they visually simplify complex human interactions into easily understood diagrams, they are a very powerful tool for grasping the reality of customers' experiences and sharing this understanding across organizations.

Another great thing about customer journey maps is how effectively they can be used to improve so many important business operations. Journey maps can help to:

- Create more successful marketing campaigns by learning how to effectively speak to and engage prospects and customers
- Enable more pleasant customer service scenarios by understanding where and why they fail
- Design better products by realizing what features customers actually want
- Fix particular pain-points customers have by identifying their root-cause
- Uncover new product and service opportunities that can enhance the buyer and customer experience
- Organize better internal processes by improving internal operations



Disney's ground-breaking Magic Band creates an unfragmented and highly valued customer journey

There is almost nothing that can't be improved by the use of customer journey mapping, which is why so many industries are now adopting the practice. It is simply a great way to think like your customer, view your company through their eyes, and learn how to better market to them and serve them. More and more, consumers and companies demand great experiences in order for you to earn their business and retain their loyalty. If you fail to provide great experiences, they are easily capable of turning to a competitor who offers better experiences. As a result, company leaders are realizing that they must change their ways and learn to compete on customer experience as the key brand differentiator.

A recent article by McKinsey shows the impact that intentionally designing the customer journey can have. In the article, McKinsey describes a new customer experience designed and created by California solar panel maker and installer, Sungevity. Sungevity crafted such a highly personalized customer journey that it has completely reinvented their path-to-purchase. The new journey is so successful that it has doubled their sales in one year to over $65M. They accomplished this by mapping their current customer journey, and then intentionally designing a more personalized one. The new journey facilitates the customer experience every step along the way, knowing where they are in the journey, anticipating their needs, and providing the right content experience to nudge them willingly along. This integrated purchase and service journey is so personalized and effortless that most prospects become customers and advocates. (Inlcuding the McKinsey article's author.)

The importance of intentionally designed customer experiences cannot be overstated. Great customer experiences don't just happen organically. They require rigor and effort, and often organizational change. But the benefits of these efforts far outweigh the costs of completing them. A recent study by the Temkin Group shows that even a modest improvement in customer experience for the average $1B company can increase revenues by up to $893M over three years. Studies by Gartner, Forrester and others also show the value of this investment and the monetary returns.

FORRESTER DATA FORRESTER.COM

Industries with high revenue impact and ok-to-poor scores on our CX Index™ leave the most money on the table. Here's the revenue opportunity associated with improving your score by just one point:

RESULTS OF A ONE-POINT IMPROVEMENT IN CX INDEX SCORE

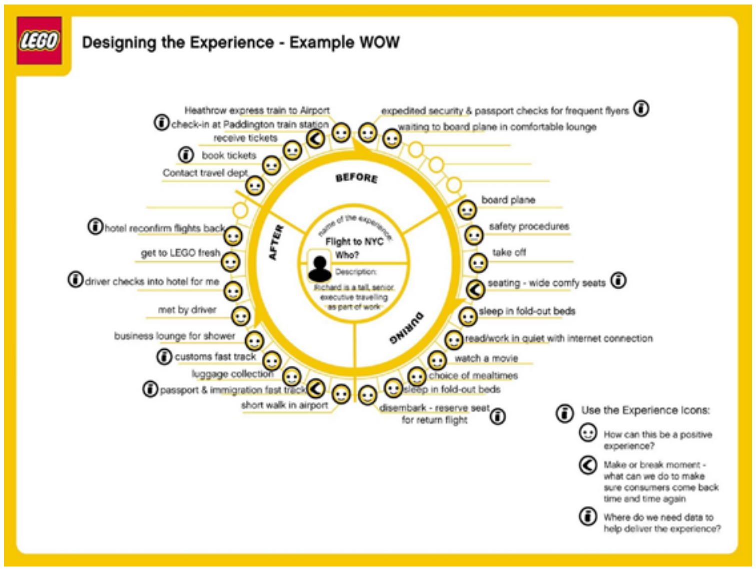
	Annual incremental revenue per customer*	x	Average number of customers per company†	=	Annual impact per company
Wireless providers	$2.13	x	82 million	=	$175 million
Luxury auto	$337.10	x	350,000	=	$118 million
Upscale hotels	$6.52	x	10 million	=	$65 million
TV providers	$3.56	x	17 million	=	$61 million
Retail banks	$3.92	x	15 million	=	$59 million
Insurance firms (home and auto)	$3.25	x	15 million	=	$49 million
Internet providers	$3.09	x	16 million	=	$49 million
PCs manufacturers‡ (excluding Apple)	$2.07	x	10 million	=	$21 million
Credit cards	$0.25	x	61 million	=	$15 million

Forrester's CX Index

I'm always surprised when clients balk at spending $100-200K for customer research and journey mapping projects that can net millions in ROI. But as company leaders seem to gain further understanding of the true value of these efforts, it seems like the tide may be turning. If you can spend $100K to A/B test the language in a banner ad, you can at least consider similar spending towards mapping and designing the journey that ad plays a part in.

Fundamentals of Customer Journey Maps

Experience designers and service designers are constantly experimenting with new types of journey maps and their visual styles and layouts in order to make them more useful and informative. There is really no one set way to visualize and format a journey map, but there are some proven best practices for their creation, as well as some key components that all journey maps share:



Lego's circular customer journey map

Customer Context. All customer journey maps capture and display what customers are thinking, feeling, and doing during the course of each interaction or group of interactions with your company. They focus deeply on the rich context of each situation as the building blocks of the overall experience, including: Time, Place, Devices, Channels, Touch Points, Relationships, Psychology, and Emotions. Journey maps illustrate all of these attributes at moments in time across a series of collective interactions that add up to equal an overall experience.

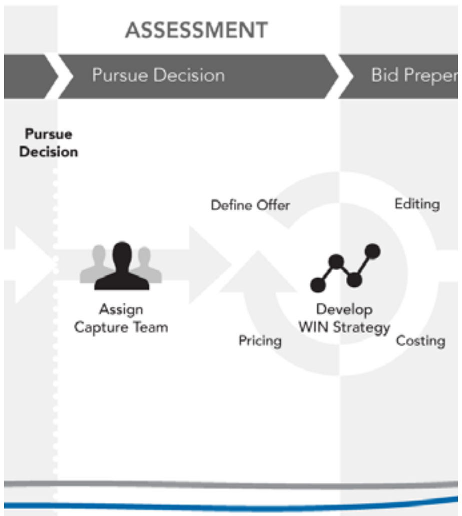
Common Empathy. All customer journey maps share the intent to create a common organizational understanding and empathy for what your customers are experiencing psychologically, emotionally, and physically during the interactions that your company requires in order to do business with you. Whether these interactions are intentionally designed or arise organically, this set of interactions that you have created completely defines your company's brand in the minds of your customers. This is why cross-functional teaming on journey map creation and design is ideal. It fosters empathy with your customers' experiences across the organization, and creates a sense of common empathy and ownership of the customer experience.

Storytelling. All customer journey maps tell a complete personal story, either as a snapshot of reality (current state maps) or as an intended and possible next state of being (future state maps) for the customer. This story visualizes and conveys the subtleties and details of the psychological, emotional, and physical attributes of customer experiences (thinking, feeling, and doing). The purpose of any customer journey map you create may be different, but the story should be true, accurate, personal, and complete.

Outside-In. All customer journey maps tell the story from the customer's point of view. They illustrate the factual aspects of doing business with your company from the outside-in, rather than projecting the company's point-of-view outwardly. Many organizations spend a lot of time and money mapping out internal processes with the expectation that customers will behave as business processes dictate. This is a fallacy. Customers don't care what it takes for you to provide the product or service that they need. And they certainly don't want to have to learn your internal processes in order to get what they want.

Truth and Transparency. All customer journey maps are based on customer research and illustrate true customer stories with complete transparency. Factual transparency into why customer behaviors occur are key to making customer journey maps useful and valuable. Do not be seduced into thinking that your process diagram is a customer journey map. Customer journey maps are based on real customer sentiments and behavioral data that provide true customer insights. Insights are a deep understanding of a person or thing, as yet unknown. These latent insights can be found using quantitative research data, as provided by VoC surveys and analytics. Better still, they can also be found by performing qualitative research using in-the-field ethnographic and observational studies. Both types of data are recommended to get a complete, truthful, and transparent (unvarnished) catalog of customer attitudes, emotions, and behaviors along their journey.

Informative and Transformative. In their simplest form and intent customer journey maps will tell you what is really happening with your customers in your current state of customer experiences. In their most informed form and intent they will also tell you precisely why things are happening and why customers behave the way they do in your current customer experiences. In their most advanced form and intent customer journey maps will help you to create a completely new customer experience that transforms your way of doing business by mapping out an intentionally designed future state customer journey.



Smippet from an internal process future state journey map showing a team's journey during sales efforts

Types of Customer Journey Maps

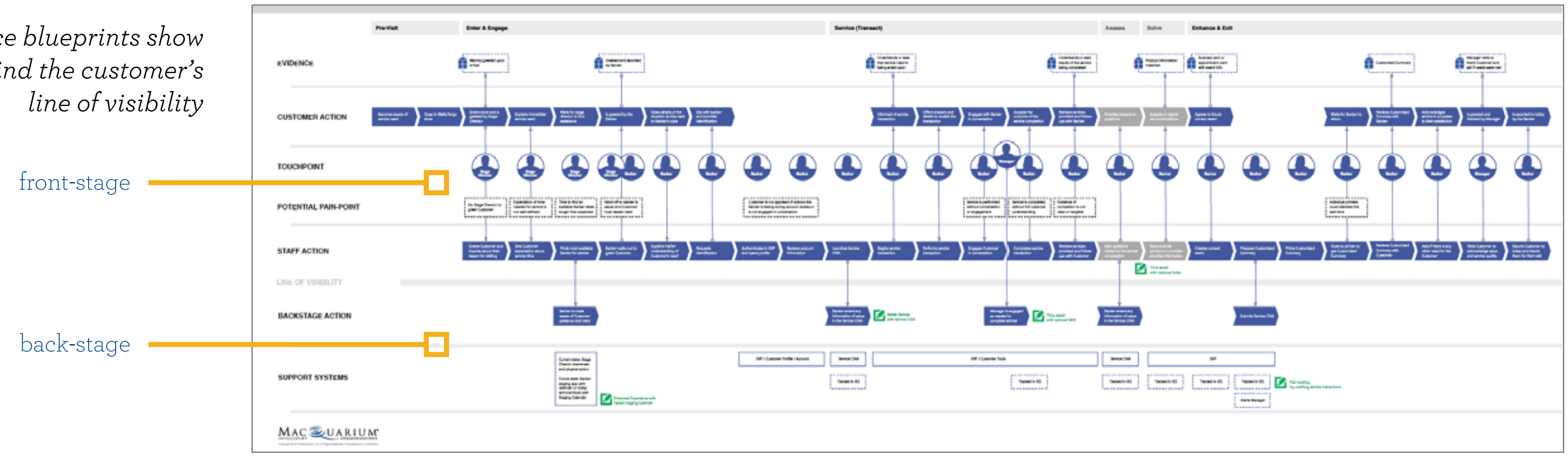
Now that you know the basics about customer journey maps, let's examine the form and intent of a few common types of customer journey maps, and what purposes they can best be used for. There are several commonly used types of customer journey maps, each with a specific purpose that you can use to meet your organization's needs.

The Current State. A current state customer journey map illustrates the reality of the customer journey as it stands now –warts and all– as customers interact with your company, product, or service. Current state customer journey maps tend to represent smaller slices of time surrounding a particular activity, like on-boarding, setting up a new device, ordering a product, or a customer service interaction. Because they identify successes, pain-points, and friction in a customer experience they are especially suited for driving incremental improvements in a particular area of focus.

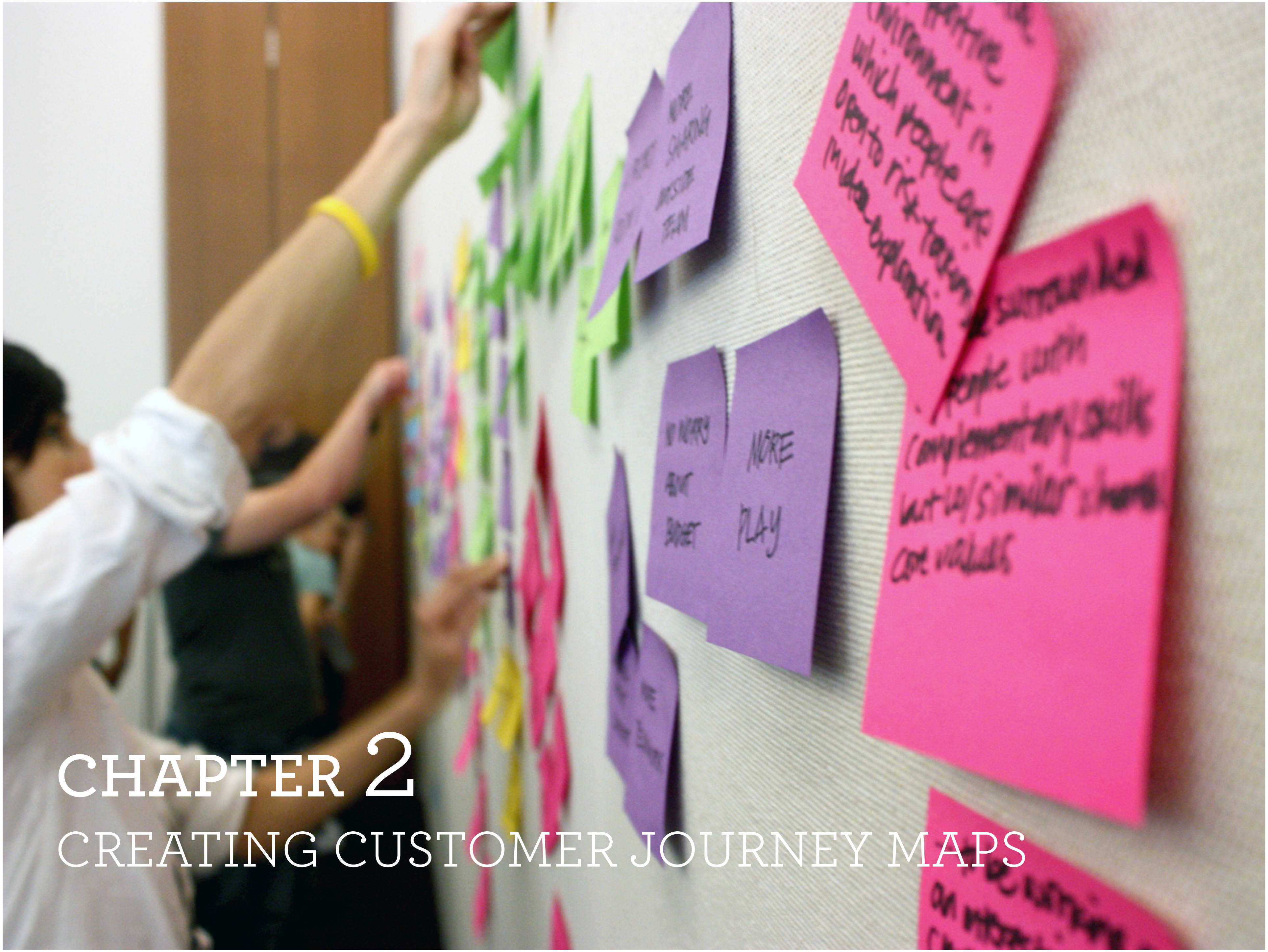
The Future State. A future state customer journey map illustrates an idealized experience for the customer that could be achieved in the future. They are the one of the best ways to conceive of and map out entirely new customer experiences, products, product features, and customer services. They work especially well when designed by the cross-functional company teams who can actually make new experiences happen, and are made even better when customers help inform and design the new journey.

The Blueprint. Usually referred to as a Service Blueprint, this type of customer journey map adds additional layers of "front-stage" service evidence items (like receipts), as well as "back-stage"company activities to show how internal operations create and support the customer journey. Because the blueprint identifies the activities, systems, processes, people, and policies that are required to create a great experience it is most often used for future state journey mapping. But it can also be used as a current state map to help find root causes of current state pain points in back-office activities as an analysis tool.

Service blueprints show what's behind the customer's line of visibility



A Day in the Life. These extensive customer journey maps take a bigger picture look at all of the activity in a customer's day, even when not interacting with your company. Because it considers these other activities, it is more suited to helping identify new innovations, products, and services that your company could provide in your customer's daily life.



CHAPTER 2
CREATING CUSTOMER JOURNEY MAPS

Creating Customer Journey Maps

Customer Journey Maps are intended to be a tool for creating a common understanding of customer empathy across the organization. For this reason it is best when they are created by cross-functional teams from all of the business units that impact the customer experience. Most journey maps are created during workshops where teams come together to collaborate and co-create the maps. Workshops are a great way to create both current and future state journey maps. However, sometimes journey maps are created by smaller teams and then shared with the larger audience. But lets look at how a customer journey mapping workshop is planned and run.

A large workshop group

Creating a Current State Customer Journey Map

Step 1: Define Your Scope

Your understanding of the context of your customer journey map will impact how you plan and design your working sessions. You need a high-level understanding of the problems that you're trying to solve, and a sense of how complex they are. Get as much information up front as possible about the situation and focus on what you need to map.

For example, one client in B2B manufacturing knew from NPS and VoC studies that they had very negative feedback from customers with their product ordering and delivery, and ease of doing business metrics. But surveys couldn't tell them what the root causes were or why there was so much irritation and churn. In this case we needed to focus on mapping the "Delivery" customer journey from Manufacturing, Ordering, Distribution, Picking, Packing, Shipping, to Delivery –all the way through the supply chain. We knew it would be a fairly lengthy journey with numerous customer touch-points, business types, employee activities, systems, and channels to understand in order to get the root cause of their issues. This was obviously a fairly large effort from the outset with many customers, employees, and stakeholders involved.

But don't be misled by the size of the interaction, which may not fully reveal the size of the problem to be solved. Sometimes a seemingly small journey has far-reaching impact. For example, another client in B2C retail banking needed to know how to improve a very important customer service interaction between bankers and customers. In this case the interaction involves a financial needs assessment that is presented in the form of a rather long questionnaire. Bankers use this internal online system to attempt to ask these questions and capture answers during any face-to-face customer service interaction, whenever customers visit the branch for their individual customer service needs. While this seems like a much smaller journey to map at first glance, the information resulting from this one customer-facing interaction serves the needs of almost every business unit across the organization, and can take several customer visits to fully complete. So this was actually a much larger endeavor than it might seem at first, and had a very large number of stakeholders at the company with interest in the outcomes. The resulting future-state customer journey mapping workshop had almost 50 active participants.

Understanding the nature of the problem to be solved, the number of stakeholders who own the customer journey, and the number of customer touch points will help you to assess and plan for the scope of your effort. It will also help to estimate the size of your workshops and identify the people you will want as participants from across the organization.

You should also be prepared to adapt to changes in scope as you uncover the truth. In the first B2B manufacturing example above, it became clear during discovery and research activities that the single customer journey our client had thought was happening was in fact three entirely different journeys for three unique customer segments, based on each business type they served. In this case one customer journey map was not enough, and we had to adapt our scope along the way.

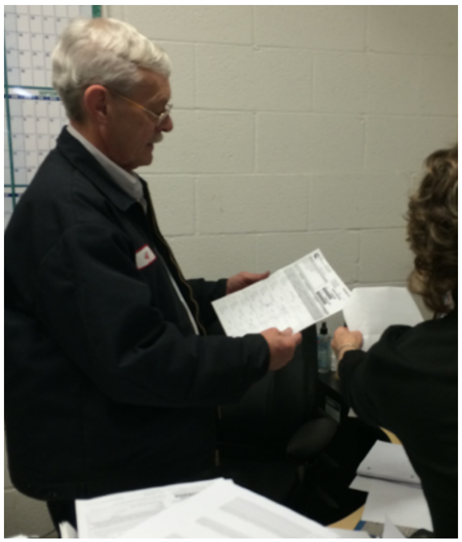
Step 2: Uncover Customer Insights

Affinity groupings of research themes from multiple sources before mapping

Quantitative Research. Most companies already have access to many great data sources for finding insights on the customer journey. Web and mobile app analytics, search logs, call center logs, surveys, and CRM apps can all be harvested for customers' patterns of behavior and sentiment. If you have open write-ins as part of your surveys you can perform text analytics and gain even more insight. It takes time, but digging into multiple data sources will give you a good sense for which parts of the journey customers encounter problems with or are enjoying. If you have the time you can also run a survey specifically targeting your area of concern.

As you go through the data, pull out any patterns you see occurring and account for them in a short note or story. Gather all of these notes as building blocks for participants to use in the workshop. We advise all of our clients to use data and analytics as part of understanding customer needs. For some companies you may also find reluctance to rely solely on qualitative research, and having organizational data in support of your customer journey map can create greater buy-in to the process and the results.

Qualitative Research. Of course nothing gives you the full picture of what customers are thinking, feeling, and doing like getting into their world with them through interviews and observation. Qualitative research of this kind can uncover things you simply cannot find out any other way. We highly recommend performing this type of research, in addition to using quantitative data, to have the most complete picture of the customer. Qualitative research often reveals the "why" of a customer issue or behavior. The best insights come from actually observing customers and employees in their own environment.



Visiting with customers in their work environment to observe and feel their experiences with them

When performing qualitative research be sure to target people who fall under the category of one of your personas or customer segments. This will ensure the insights you get can be mapped back to existing documentation. If you don't have them yet, use your research findings to create personas that participants can use in your workshop. Or use your findings to get any older personas as fresh and as up to date as possible. Customer behaviors change over time, so we recommend performing qualitative research every year or two.

We use an open-ended, but guided interview and observation process that allows customers to drive the conversation but keeps focus on our area of concern. Don't make it an interrogation. When people feel comfortable and trust you are listening they will open up. When interviewing or observing be sure to take lots of pictures, videos, and notes. Audio and video are especially handy for capturing quotes later. Also be mindful to grab any artifacts you can get your hands on that may help show why customers are behaving the way they do. For example, with our B2B client, having an actual copy of the disorderly packing slip that was annoying so many of their customers made it crystal clear to stakeholders that this was a pain point they could very easily fix. Qualitative research always reveals low-hanging fruit like this.

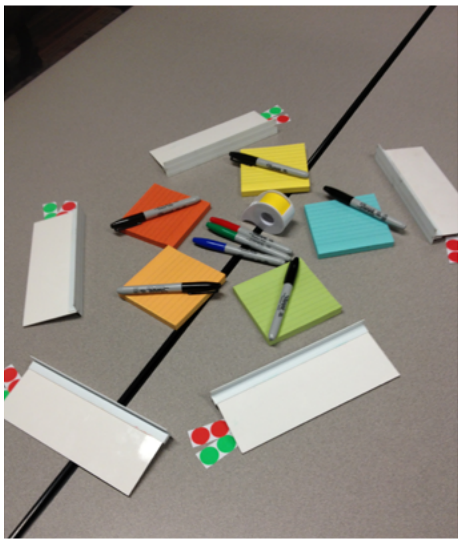
Drawing the journey with customers can also be very helpful. If research allows time for it, sit down with customers as you interview and observe them and visualize their journey together in a simple sketch. It's a great way to show what customers think their journey is.

Remember to always capture their emotional states along the way, as well as their expectations. What did they expect to happen? What actually happened? How did it make them feel? People often do things out of fear, frustration, or even anger so be sure to capture customer feelings about what they are doing and why. Social listening and customer online reviews can be very useful for gaining these emotional sentiments if you can't get out into the field to observe and talk to customers.

As you prepare your findings either from quantitative or qualitative research, look for the recurring patters and insights. A good insight will be something the company really doesn't know about customers yet, so be mindful to capture and document those in detail. These will feed those a-ha moments in your workshop as participants build empathy for customers. In another example from our previous B2B client, we discovered that differences in product labeling coming from various factories was leading some customers to believe that their purchased products might be cheap knock-offs and not the real thing. This was definitely an a-ha moment for the customer support team. In another a-ha moment example, this time for our retail banking client, bankers felt very anxious about the amount of time it takes to ask customers a long list of questionnaire questions. But we discovered that most customers actually really like the personal attention, and didn't think it took very long at all. Regardless of where you find insights, be sure to capture them in detail for your workshop inputs.

Step 3: Gather Participants and Prep Your Workspace

Recruiting Participants. Your research will help you understand who needs to be in your workshop. You need the right mix of people who own the customer journey as workshop participants. Be sure to focus on finding people from across the organization who have ownership or influence on the customer journey that you are mapping. You also want to recruit enough participants to be able to break them up into small teams of 4-6 people, but still have a good mix for each group. Recruiting and scheduling people for attending the workshop can take time to get right so start planning this and the workshop date right after your discovery work.



Typical workshop supplies

The Room. You will need a large workspace like a training room with work tables and chairs. Place tables together so they are big enough but tight enough to accommodate the size of your work groups. Arrange your table settings fairly close to the walls where the craft paper working surfaces are up, so they can be used to build, view, and present work group journey maps. As activities progress you'll find people using both the walls and the tabletops for drawing, mapping and sketching. If you have a smaller single group, a large conference room will do.

The Supplies. You'll need enough supplies for everyone, so know how big your overall group is before buying supplies. But any office supply store will have most of what you need. You may need to source Art Supply stores for supplies like craft paper.

- Craft paper rolls. For the mapping work surface. Get the kind that has plastic backing so markers don't bleed though onto table and walls.
- Transparent gift-wrapping tape. For securing paper products together. (See "Tips for Workshop Facilitators" for an important use of this supply.)
- Painters tape. For safely taping craft paper to walls. However, be aware that this "low-tack" tape can fall off certain wall surfaces easily.
- Sticky notes. For capturing journey details. You will need 5-8 colors. Do not get the "accordion-style" sticky notes.
- Colored Graphic Tape. For category labels like top-level journey stages that are too small for sticky notes. Half-inch is a good width.
- Black Sharpies. For writing and drawing. Lots of them. You may want to get both the regular and super-sized tips.

- **A camera or good phone camera.** For taking pictures as you go. Encourage other facilitators to do so as well.
- **A projector and screen.** This is optional, but we very often present research findings and ground rules using a workshop presentation.
- **Sticky dots.** For dot-voting on priority. You will need 3 colors.

Setting up. Be sure to set your room up in advance of the workshop. Staging the room well help set the tone for your session. Upon entering the room participants should know that this will be a dynamic, collaborative, and creative working session.

Prepare your craft paper mapping surfaces using the transparent gift-wrapping tape, and adhere them to the walls using painters tape. Typically craft paper comes in rolls that are only about 3-4 feet in height. You will need to create paper surfaces at least 6 feet in height and 7-10 feet long. Roll out two 10-foot long strips from the craft paper roll, and use the wrapping tape to adhere them together on the front and the back, so you can easily roll them up later for transport. Adhere them to the wall using the painters tape and you have a solid working surface for your sticky notes and mapping activities. This takes 2-3 people to do usually.

Arrange your tables and chairs in order to create intimate settings for your work groups. Place print-outs of instructions and research notes at each seat. If you have your seating assignments worked out have name cards at each seat. If you have an ice-breaker activity, have what's needed for that at each seat as well. Ensure you have any reference materials pre-printed and present for each participant at each seat. Tables should be situated in close proximity to walls where craft paper working spaces have been created.

Place your multi-color sticky notes, sticky dots, wrapping tape, and marker pens in the center of each table. These are shared items and should be placed within common reach.

Example table and room setup

Step 4: Facilitate Your Workshop

Break into work groups. If you've recruited well you should be able to break up into small groups of 4-6 people, while maintaining a rich cross-departmental mix in each work group. This is why recruiting planning is so important. You want each of your smaller work groups to bring together diverse cross-functional skills and experience. We carefully plan participant recruiting, and like to have the room setup with name cards and assigned seating at the outset in order to ensure this mix.

Set the tone. At the start of the workshop before any map construction begins, familiarize your group with your research findings. In addition, you also need to set the ground rules for participation. We try to enforce no phones and laptops outside of break-times, and also what is behaviorally expected of participants. I also like to have an ice-breaker before mapping activity begins. One technique that has worked well for us is to print up the titles of several jobs that have nothing to do with the people in the room or the business, and randomly hand them out to each person. Extreme and funny titles work great. Like photo-journalist, safety manager, or even space alien. Then you show the group an extremely evocative photo, and have each participant describe the feelings it causes for the person with the job title they received. The rest of the group has to guess each person's job title based on the thoughts and emotions expressed. That's just one way, but it's fun and helps set the tone for collaboration and empathy, and thinking outside one's own experience.

Example of a highly evocative photo to use for the ice-breaker role-playing game

If you're presenting research or ice-breakers with a projector, make sure everyone can see the screen, and hear you and each other. In some cases you may get lucky enough to have a double-layout, where people can gather together on one side of the room and have breakout tables on the other side. But it takes a very large space for that.

Deconstruct the research findings. Pick a color-coding setup for your activities, thoughts and emotions, touch points, and pain-points. Then have each team pull points out of the research notes that will become the building blocks of the map using the appropriately-colored sticky notes. Remind them that they need to go after what customers are thinking, feeling, and doing at any moment. Also ask them to think about what customers may do in-between moments of interaction with your company that may influence the overall journey, like going to look for social media comments or reviews from other customers, etc. One person from the team should be collecting and moving sticky notes to the map paper, keeping them grouped together if related (like an action + result + emotion combination). Have them ensure things don't get mixed up as they move from table to wall.

Try and arrange for enough time, depending on the amount of research you have and the size of your journey. As the work progresses be sure to check on the progress of teams and how they are working together. Help anyone getting stuck and ensure everyone is participating, not just a few.

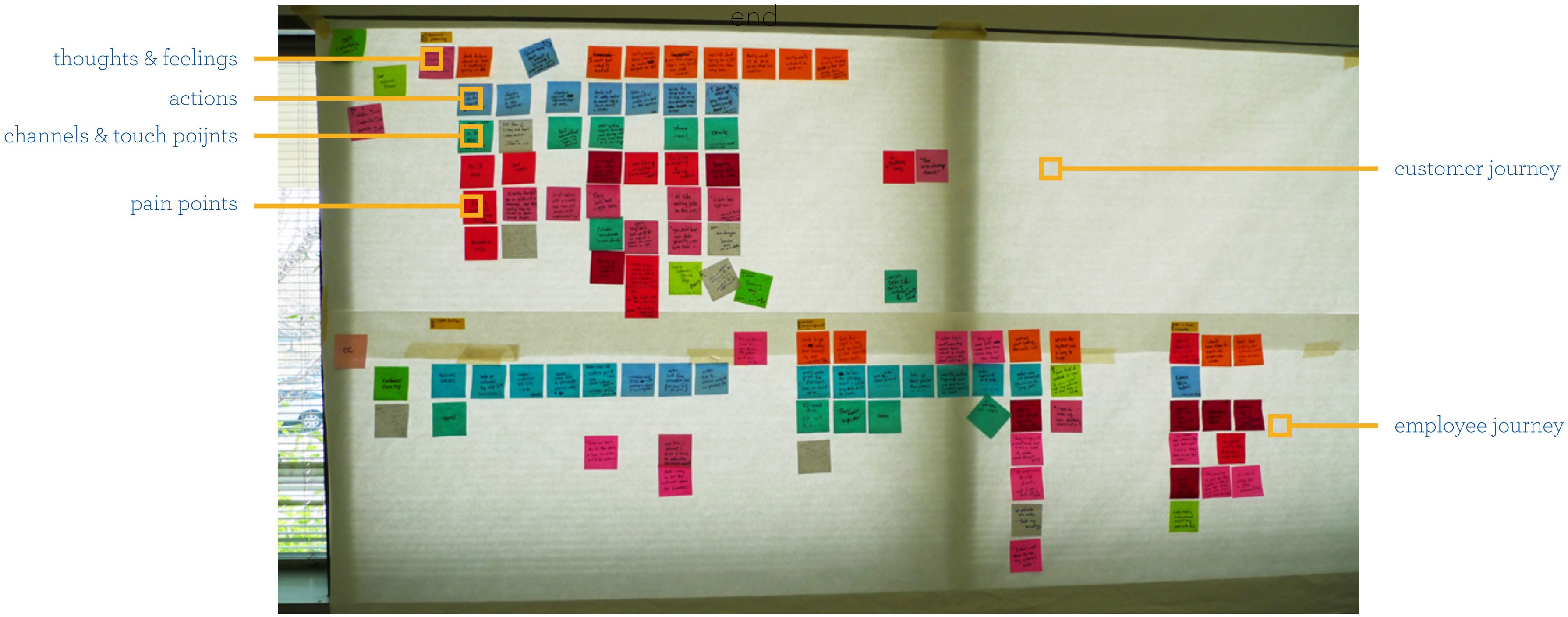
Create a common understanding. Share information across work groups and ensure that people discuss what they have uncovered for a common understanding of the customer. We find it can be valuable to have a short time in the agenda after gathering stickies to let the team openly discuss patterns and insights they see shaping up, and any surprising moments that customers are experiencing.

Columns of sticky notes represent each step in the journey

Build the paper map. Identify the larger categories of steps (stages) in your customer journey as your top-level columns. They should be fairly obvious like, product research, ordering, shipping, delivery, setup, and so on. Place a piece of colored graphic tape as a written label at the top of the paper to identify these larger categories. Use the sticky notes you have collected for other elements. And don't be afraid to draw or write on the paper. Organize your sticky notes and align all the actions, touch points, channels, emotions, pain points, and quotes so they line up under one another. If you find you have duplications coming from different data sources that's great. Just organize them together or unify them in to a single item. If you are trying to track patterns that are coming from various data sources, then collect and keep them all but group them closely together.

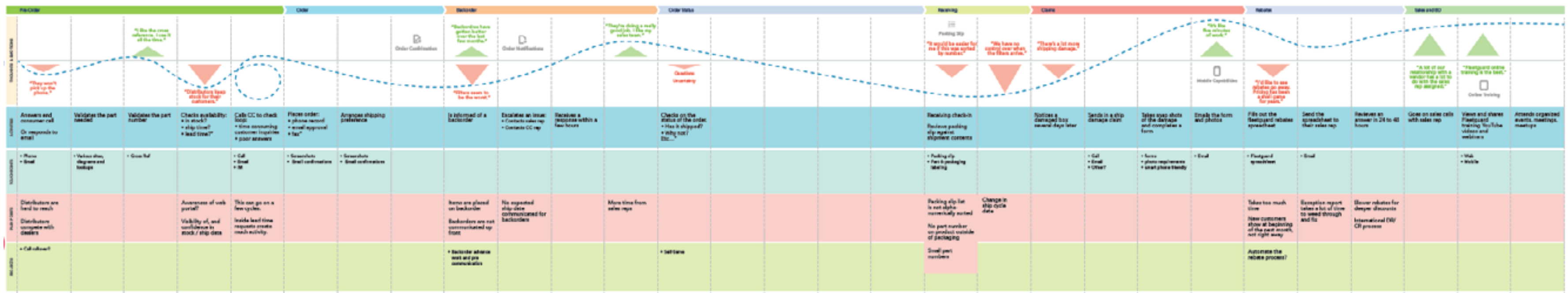
Keep arranging and moving and adding to your map until you have a complete story visualized. If there gaps in understanding use another color of sticky note to identify the missing bits and move on. You can always go back to the research later. Don't get too bogged down right away unless a major missing piece shows. Then you may want to have one team member investigate the research notes again. Some things will certainly be things you already know, but you should also be coming up with insights that are enriching your understanding of the customer journey. You may also wish to have a sticky note color that represents ideas and solutions that come to mind as you are building the map and discussing touch points. But don't focus too much on solutions just yet. That really comes later in using the journey map.

In the end you should have a clearly itemized storyline on a large paper journey map that looks something like this:



Step 5: Visualize the Map Story

The next step is to formalize your paper map into an infographic that turns the data points into a flowing path of emotional ups and downs. Any way you choose to represent it, be sure anyone can visibly see the spikes in happiness or frustration. Some journey maps even use emoji to convey the emotion of a moment. Think about what moments are most important to show, based on your original intent and area of focus, as well as on the audience you will be addressing in order to craft the most impactful visuals. Ultimately you want your customer journey map to richly convey the reality of customer interactions, primarily to identify areas for improvement. What message will your map convey at just a glance? What messages will it convey if a person looks deeper in to the details? What do you want it to convey and to whom?

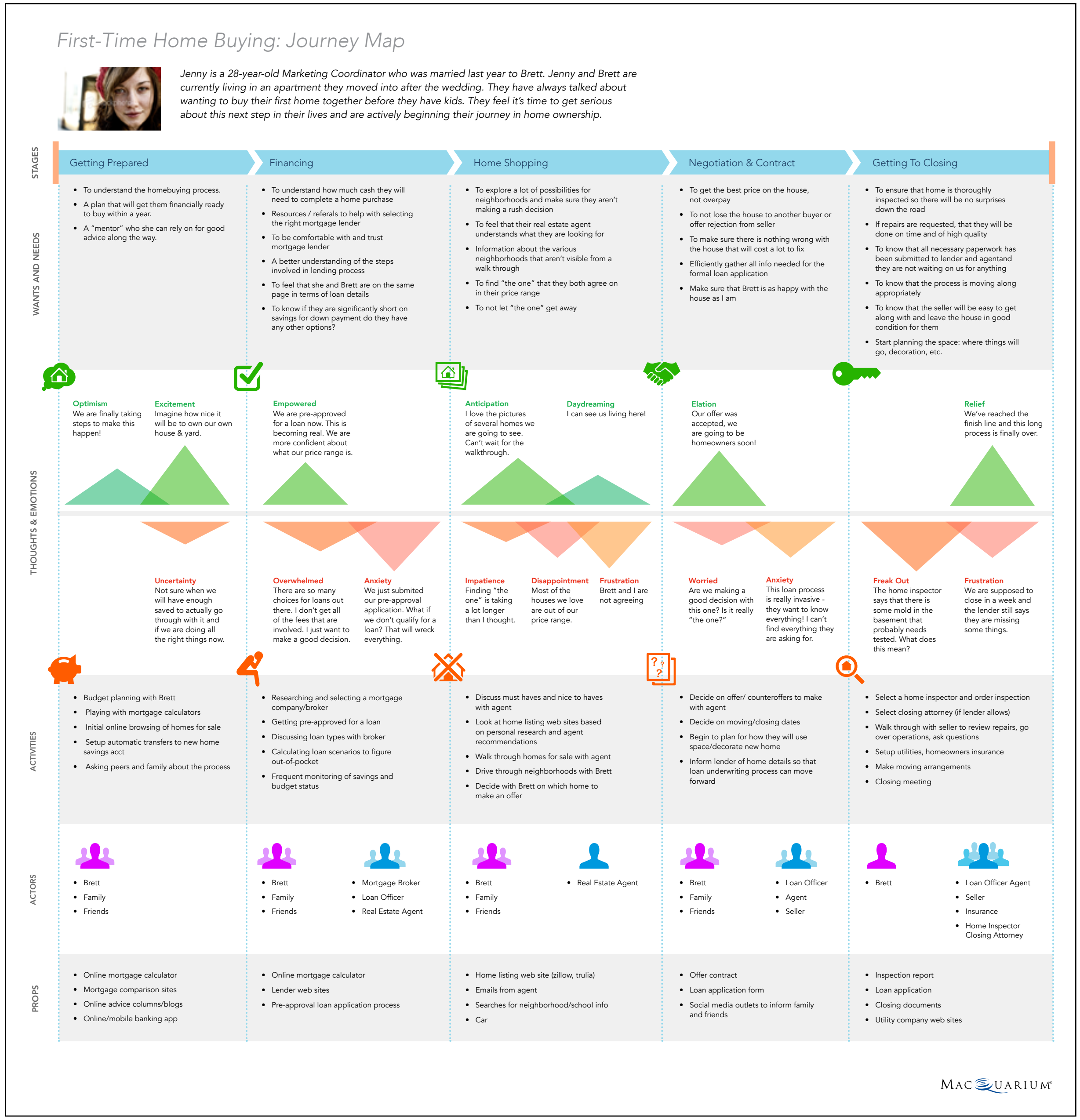


This visualization of the emotional ups and downs of a buyer's journey shows many areas for improvement

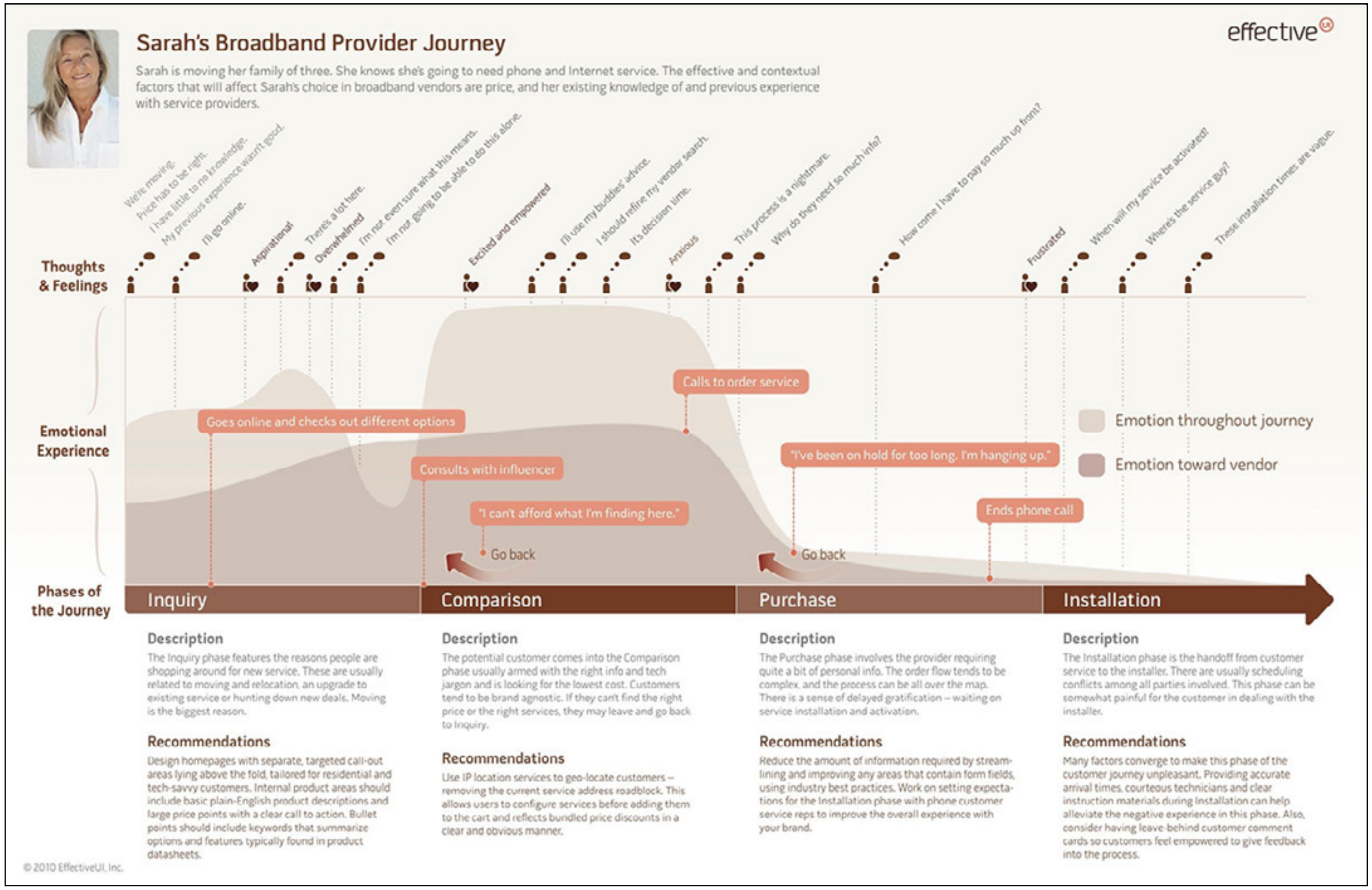
After thinking about what elements are going to be included in your customer journey map, it is smart to sketch out the journey and iterate on it until it tells the story you need it to tell.

If you have design skills put them to use. If you need help with the creation of the visuals bring a graphic designer on board and let them polish up your map into a good-looking visual. The complete image should be as powerful as the information it conveys in order to be most effective. The overall image should contain the details of the customer interactions, and make the story of the customer journey highly visible and illustrative of customer activities. There really is no fixed way to do this, so do what works for you and especially for your company audience. Use graphic treatments, colors or icons that your company will easily understand.

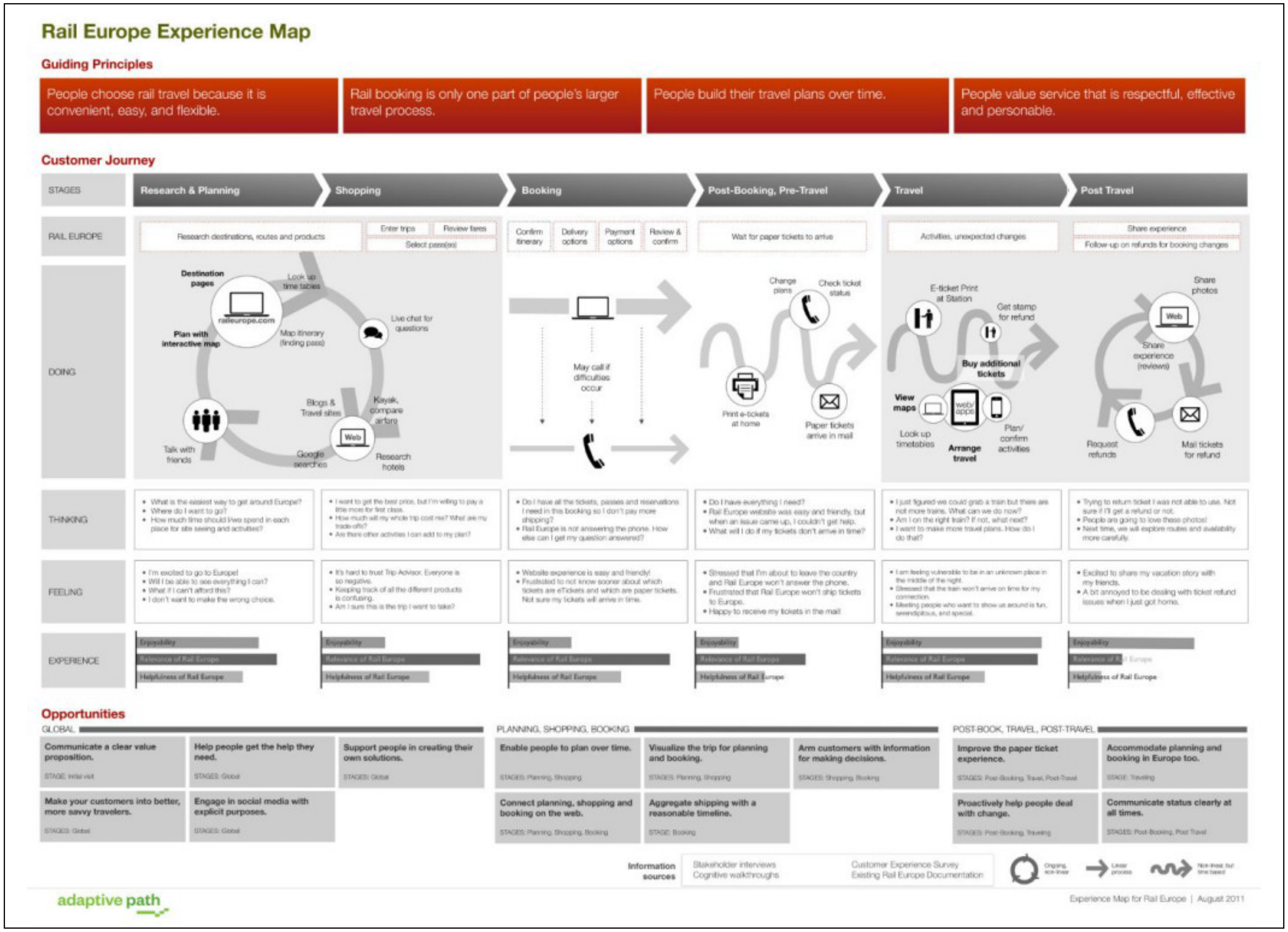
Here are a few more examples of journey map visual styles on the following pages that show the variety and flexibility of these visualizations:



Home Buyer Journey by Macquarium



Broadband Provider Customer Journey by Effective UI



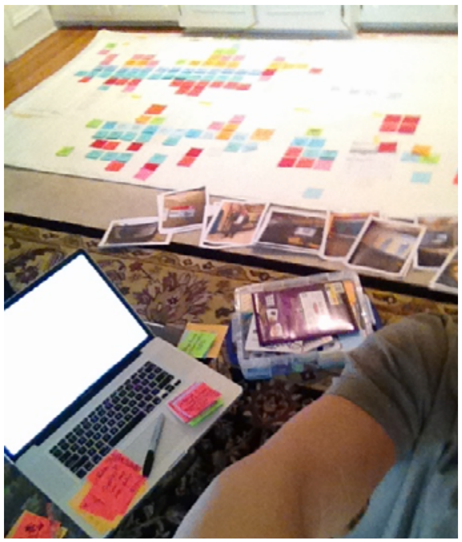
Rail Europe Buyer Journey by Adaptive Path

CHAPTER 3

USING CUSTOMER JOURNEY MAPS

Creating a Future State Customer Journey Map

Many of our clients are already doing current state journey mapping, but have trouble figuring out what to do with the research and the maps once they have them. Moving from an old state to a new state is always challenging. Again, customer journey mapping can help facilitate and guide this process. Some of my favorite projects have been ones where I've been asked to research and map the current customer journey, and then facilitate a future state journey mapping workshop to design a new customer experience.



Prtepping for a future state workshop: deconstructing research data and mapping out the current journey

Planning Your Workshop

Most of the same rules for creating current state workshops still apply, but there are some major differences in future state workshops. Future state workshops are less about representing the "now," and are more about collobratively and intentionally designing the "next." Let's look at how this kind of workshop is structured:

Step 1: Define Your Scope

Just as in a current state workshop you need to figure out your scope and have some clear goals going in. But here you can use the current state map and previous research to know what problems you are trying to solve. You can take a slice of the overall customer experience from the current state or redesign the whole thing from scratch to create an intentionally designed and optimized customer experience.

Step 2: Recruit Your Participants

If your team is the same team that built the current state map that is excellent. And it may save you some upfront time in recruiting participants and creating a common understanding of the customer experience. If not, the same rules apply for planning ahead and getting the right mix of people.

Future state workshops are generally fairly large (30-40 participants) in order to involve as many of the people who own the customer journey as possible. It is also especially important to ensure a mix of leaders, font-line staff, and even customers. Unlike a current state map which can be created by a small team and shared with a larger audience, a future state map requires people who can truly create change. You need participants who know what can easily be done versus what can only be done after overcoming challenges inside the organization. They should have the knowledge to create a realistic future state that is grounded in reality. They will be the people who will eventually make it happen by defining and owning the projects, systems, and actions that are generated by the intent of the future state map.

It is recommended that you have more than one facilitator to keep an eye on things when groups are this large.

Step 3: Setup Your Workspace

The setup and activities are very similar to a current state workshop, but in a future state workshop participants use the research and current state maps as a reference to collaboratively design a realistic new journey. The room setup is usually a bit little different. You may already have a nicely designed current state map you can put on the walls or you may just have a paper current state map, but they should be viewable. If you have enough room to create a blank canvas next to the current state then do so. If not you can often use the walls for the current state maps, and table tops for the blank canvas.

Step 4: Facilitate Your Workshop

Facilitating a work group as they co-design an improved journey

The primary difference here is that you will not have the step of extracting data points from the research. When facilitating future state workshops it is more important to get people thinking, writing, designing, and drawing their ideas out. You can also add a couple of helpful steps after the map is created. The general flow of the workshop is:

Break into work groups. Same as current state workshops. Small work groups of 4-6.

Set the tone. Same as current state. Set the ground rules and expectations. Use an ice-breaker before mapping activity starts.

Create a common understanding. If the team is not familiar with the current state map and research, plan for time in your agenda to present the current state map and any high-priority findings from previous sessions and research. You want the new team to have the same shared understanding of customer issues and needs. There is almost always a moment when a participant latches onto a piece of low-hanging fruit that is an a-ha moment for them, and jumps onto the phone or into email to start solving the problem. Be prepared to let it happen, but try to keep their attention focused on the big picture.

Build the paper future state map. Just as in the current state map you will want participants to identify key stages as column headers, and use sticky notes to show each step in the new journey. But you will find some people who want to draw it. Let them draw their ideas before mapping them with stickies. Others will feel very uncomfortable drawing and may have a list of ideas already. Help them get these out onto sticky notes in an itemized fashion. Work with your teams to help them share and co-design their new journeys openly with each other. Things tend to start slowly and require lots of facilitation up front, but as discussion and collaboration grow, you'll find things speed up and ideas start flowing. Keep asking questions, and spurring discussion and action as you check on your work groups.

Have work groups present. At the end of the mapping activities have each group present their new journey to the entire group. If they worked on tables, tape the new maps up on the walls where everyone can see. After the journey is presented, let the group discuss the merits or challenges of creating the new journey. Be prepared for naysayers who will say it can't be done for one reason or another, but don't allow them to pull too much focus away from the group presenting. Put objections in the parking lot and move on.

Work groups present their new customer journeys

Prioritize ideas. Using the sticky dots, have the group prioritize ideas on all of the new maps. This will help to understand what they think is important as a team, and what aspects of the new journeys are seen as most valuable to the organization. To prioritize, have 3 colors of sticky dots that represent 1) the importance of the idea to the business, 2) the importance to the customer, and 3) how easily it can be accomplished by the organization. Give each participant an unlimited number of votes, and watch as they stack up dots around certain elements. You can limit the number of dots, but offering an unlimited amount lets them put more emotion into it. I recall one company leader placing red "important to the business" dots all over a key new concept in his future state journey map. It was actually just as important to the customer to make this change, but placing many red dots around it emphasized that he felt very strongly about the company's need for this change. Similarly, everyone placed blue "easy to do" dots on one new idea, prioritizing it as low-hanging fruit to immediately act on.

A company executive stuffs the ballot box during dot voting

Identify Ideas as Projects. This is optional but can be very important later for teams in gaining executive buy-in for projects that will be necessary to create the new customer journey. Using the maps and the prioritization information, work with your team to create a list of projects in their company language. Give each project a charter and description tied to customer experience strategy and business strategy. Identify what the next steps and roles needed are for each project. It can also be helpful to identify in-flight projects and tie them to your new journey and project charters. In some cases there may already be projects running that could be steered towards your new journey.

Step 5: Visualize the Map Story.

Just as with a current state journey, visualize the future state customer journey with customers' emotional highs and lows. Be realistic and identify those "moments of truth" where you know you will still have possible negatives (like returning a product), but your new journey should look much smoother, with fewer valleys and spikes. If you are not identifying specific projects in your workshop, you may wish to create a service blueprint. If you plan to do so, make sure you capture all of the back-office activities, systems, and tools on sticky notes as part of your map building. The service map should show all of the behind-the-scenes activities by employees, and all of the tools and systems needed by both customers and employees.

Facilitating a large future-state customer journey mapping workshop

Pro Tips for Workshop Facilitation

Facilitating customer journey mapping workshops can be hard work, but it is also fun and very gratifying. Getting people who have often never worked together before to gain a common understanding of a problem and co-create new solutions is challenging. Keeping workshop teams functioning and thinking creatively is challenging. But watching them collaborate, innovate, and completely re-imagine the way they do business is rewarding. If you learn how to do it well, you can make a huge impact on your organization.

If you are planning to take on the challenge of customer journey mapping at your organization, here are a few tips about facilitating workshops that come from many years of experience in planning and facilitating customer journey mapping workshops:

Provide recruiting guidelines. Whether you have executives, employees, and customers in the session, you want to have the right people in the room. Find the people who have either deep context and ownership of the problems to be solved, or a significant role in eventually creating, operating, and supporting the area of concern. Provide anyone who is helping you to recruit workshop participants with a list of attributes you desire for an effective mix of people and teams, especially if you want your work groups to be balanced across business units in each group.

big sticky notes

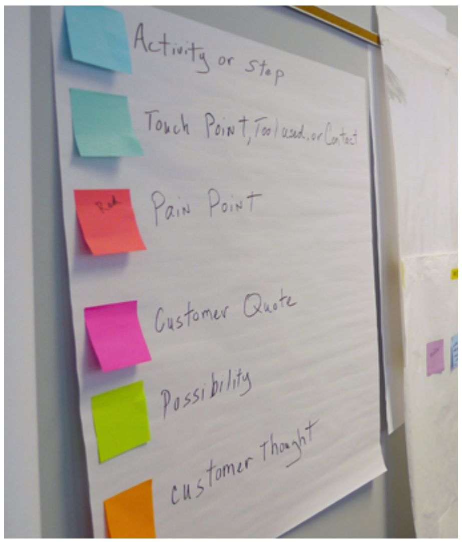
Rescued by large sticky notes on the wall underneath the maps

Create a pitch deck. Since you are going to be recruiting participants who are very busy, you should provide a brief but thorough explanation of workshop activities, their purpose, and their value. You'll get much better attendance if people understand why you are asking them to participate, and what they will be doing.

Know your workspace. Sometimes we get surprises that have to be worked around in the workspace. For example, one client booked us a large training room, but neglected to mention that they had strict policies about not putting tape on the walls, which of course is all but a must for a journey mapping session. We worked around the issue with some clever use of large sticky notepads, as an underlayment, which seemed to pass the watchful eye of the Physical Plant Manager, who also insisted on re-arranging things himself so we didn't damage his tables and chairs. You also want to be sure there are nice large work tables as well. Don't try to do this in an auditorium or theater-style room. It's also really great to have lots of whiteboards and large paper pads, especially the large sticky note pads.

Don't be afraid to rearrange. If the workspace you have setup isn't working out well during your sessions, pause and redo the layout with the whole team. Remember to try and keep table configurations as small and as square as possible. Never use the big open square or a long line of tables. You want people up-close and personal. If you do have to rearrange, make it a fun activity. Working together in physical activities also creates a sense of teaming, so don't be afraid to change setups when you need to.

Create a legend. Show a reference for the color scheme of sticky notes that represents attributes of the map for participants. It's easy to create one with a large sticky note pad and some regaular sticky notes. Just place the stickies on a sheet of the large sticky note, and write in what each color stands for large enough to be seen from a distance. Create as many as needed and place them on the walls or easels for participants to view easily.



Legend for sticky note color-coding

Form small work groups. If you have a large amount of participants in attendance it is best to break them up into smaller work groups of 4-6 participants. Smaller groups work best together, and also tend to require less coaching and facilitation. I have also had success with larger work groups of 10-12 people on each team. But in this arrangement you need a dedicated facilitator for each team, plus a lead facilitator to float between teams and keep the temperature of the whole group. Don't try to facilitate alone if you have more than 10 participants overall.

Allow for a team change. You will likely have "no-show" participants who can create an unbalanced mix across your carefully planned work groups. Before mapping activities begin, ask your participants if they feel that their work group is well-suited to the task. Let your participants self-select and join other work groups if they feel it is important to the outcome of the workshop. You want to create a team feeling in both the work groups and the larger group. Let them help create that.

Allow for a scope change. During a workshop, you may also run into a moment where the overall team wants to focus on a larger or smaller aspect of the customer journey. If this happens it is obviously a deep concern they have as a team, and as a facilitator you should be prepared to accomodate. The steps in your process will largely be the same, so let the larger team define their most-needed scope along the way. Ask them as work groups and as the entire group where they want to focus.

Apply a lens. If you have a particular area of focus you may want to give your teams a lens to view their mapping activity by, for example mobile app usage or in-store mobile. You can have all your work groups view through the same lens or you can assign separate lenses to each work group if you are looking for a wider spread of ideas.

A work group discussing ideas through the lens of mobile phones

Use a safe word and a parking lot. Some people will go down a total rabbit hole that has nothing to do with making progress on the journey map. By choosing a word that's the signal to let the matter go for now, you empower everyone in the group to self-moderate. You'll be amazed how many times you hear your groups yelling the safe word at each other. Everyone has their pet subject, and sometimes hidden agendas to influence others on a completely different topic. Use the safe word and have a large note pad to write down any of these sidebar topics that may be causing distraction so they are captured for later consideration. This way people who are misdirecting focus can at least feel heard, but understand that they need to drop it for now.

Ask a lot of questions. Avoid the temptation to steer too much when people seem to get stuck. Quiet space is not necessarily bad for participants. It means they are thinking. To spur action, ask participants questions that may help them empathize with the situations illustrated in the customer journey they are mapping. Referring to customer personas and their emotional context can be very helpful here.

Watch for personality extremes. Some people are naturally introverted and won't speak up even though you need them to. Be sure to engage and involve them, and directly ask them questions to get them to open up. If needed, allow them the space to sketch or write their ideas down on their own, and then help them present to their work group for consideration and inclusion. On the other hand, some people can be overbearing and stifle the contributions of others in their work group. When you see that happening, and causing others to disengage, be sure to diffuse it. One way is to inject your self into the conversation and slowly take attention away from the overbearing person, while opening up discussion with others. Be especially watchful for these behaviors in future state journey mapping workshops, where inclusion of all ideas is cirtical to success.

It ain't pretty at first. Don't worry about how pretty your first paper map is. I used to hope for and attempt perfect, large-format printouts of current state customer journey maps when leading up to working sessions for future state customer journey mapping workshops. But don't worry about that kind of formality until the very end. If you need to, you can even cut out a piece of the map and tape it onto another piece in order to get the details right. It doesn't matter how "Frankenstein" the stitches of tape and markers might look to you along the way. What matters is getting all the details correct in the rough paper mapping. You can clean all of that up later, when designing and digitizing your map.

This Frankenstein traveled many miles, continually changing and growing along with research findings.

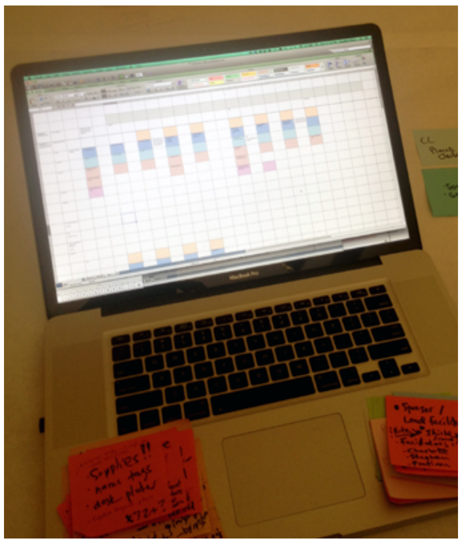
Tape before you roll. A great thing about paper journey mapping is you can roll it up and take it away, and continue to update it in multiple locations as your insights grow. I've spent many projects rolling up paper maps and transporting them across the country for collaboration and building. But before you roll up a big paper map, take the time to place small pieces of transparent tape at the top of each and every sticky note so they are solidly anchored to the craft paper. I learned this lesson the hard way years ago, when I unrolled my perfect journey map only to find the sticky notes had become completely unstuck and fell like leaves off of the craft paper. Talk about an a-ha moment. Fortunately, I had taken photos of them. Keep transparent tape in your kit, and ensure your sticky notes are firmly secured before rolling up your paper maps for transpsort.

A set of journey maps taped and ready to roll

CHAPTER 4
CLOSING THOUGHTS

Workshop Your Way to Customer Success

I hope you have learned all you need to start journey mapping yourself. When applied well, they can be a critical step in your own journey of creating great customer and user experiences. Keep experimenting and trying new techniques in workshop and follow-up activities. Don't forget to keep your maps up-to-date as things change. Journey maps can become living documents that help guide the entire organization in successful transformation in both digital and physical experiences. Once created, they can be used to guide everything from strategy workshops to campaign and content creation.



Digitizing journey maps for sharing and updating as the journey changes

You May Have Similar Activity Already Going On

You may already be doing things very similar to customer journey mapping, you just need to apply them from the customer's point of view. After one future state session, where we had Six Sigma leaders observing, one of them came to speak with me afterwards. He was quite excited to find out that journey mapping is actually fairly similar to the Six Sigma activities the company ordinarily performs, except that we had made the whole effort about customer empathy. And he was exactly right. It was great to learn that they could easily adopt customer journey mapping as a technique, and were excited about it once they experienced it.

Digitize and Operationalize

After creating a customer journey map, digitize it for sharing across the organization, and updating the journey as it evolves. There are many new tools available for making your journey maps more institutionalized, and easier to update. Some apps allow you to attach photos, videos, and audio clips to further reinforce the actions and emotions occurring at each step. You can't attach video and audio to a paper map. While most of these apps are fairly new and have certain limitations, they are growing in capabilities and adoption, and make it easier to keep your customer journey maps living documents over time.

Journey Maps Are a Tool, Not a Panacea

It's important to remember that journey mapping is an activity and a tool that can help get you closer to a great customer experience. but it will not be the only kind of tool or activity you will need. We often use many other forms of communication along with customer journey maps. Customer personas are of course an important starting point, and personas should be the foundation of your map building. We also tend to use storyboards for storytelling the customer journeys old and new. Storyboards are great for visualizing new concepts that may be hard for people to understand. And don't stop there if you need to get organizational buy-in. Animations, infographics, and videos can be very powerful for influencing opinion and establishing business cases. All of these kinds of tools are useful for sharing across the organization and continuing to build towards a customer-centric culture.

When you do get the chance to enable improvements in your organization, be sure to measure impact so you can communicate the ROI of the effort. Share your successes across the organization and continually evangelize the value of customer-centricity.

Thank You!

If you enjoyed this publication, let us know. We value your feedback.

For more publications check out the Macquarium blog.

To learn more about us, please visit our website or contact us at info@macquarium.com

Sincerely,
Stephen Perry

MACQUARIUM

The Macquarium Building
1800 Peachtree Street, NW
Atlanta GA, 30309

404-554-1000