Customer Journey Mapping

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WHAT IS IT?

A customer journey map is a visual representation of the path to achieve a goal, from an individual's perspective. Journey mapping combines storytelling with visualisation, a powerful duo that can help stakeholders better understand the problems users face when trying to accomplish a goal. Most importantly the map allows product teams to consider interactions from a customer's perspective rather than the traditional inside-out approach.

The journey mapped is based on user research; consequently, no two journeys are the same. Each map will present user expectations, how they feel at various stages in the journey, the issues contributing to the emotional response, and importantly for product owners, these insights can inform where there are opportunities to improve the experience.

WHY DO YOU NEED IT?

- To evolve product development thinking from an inside-out to an outside-in approach. Rather than being driven by internal processes, the mapping reveals real experiences that product owners and stakeholders may know very little about.
- Sharing is caring – for all. Journey mapping creates a vision of the end-to-end customer journey. To successfully improve the journey, teams that may ordinarily be isolated now have a common ground and understanding of where they impact on the customer experience.
- To identify areas of neglect. A major failing in the experience could be due to the fact that no one in the organisation is managing or responding at a particular stage/touchpoint.
- Potentially for the interpretation of quantitative data, what in the customer journey is leading to lost sales or non-use of a feature?

WHEN DO YOU NEED IT?

- Customer journey mapping can be used in two ways: mapping the current situation or for presenting a future vision. In both cases, as is common with discovery research; the process should take place ahead of any design.
- When you have established what the business goal is and who will be experiencing the journey, you are ready to embark on the mapping.

HOW DO YOU DO IT?

- Each customer journey map requires the following:
  - **Persona** – the user type you are attempting to understand the needs and goals for, and based on which you can also convey how they feel, what they are thinking, where they experience frustration.
  - **Scenario and Goals** – combined with the persona, this provides the 'lens' for the journey.
  - **Touchpoints and Channels** – the user interactions and the services engaged.
  - **Thoughts** and **Feelings** – what are the user's expectations and how do they feel about a particular point in the journey.
  - **Issues** – what are some of the problems faced during the journey?

- **Opportunities** – by fleshing out the inputs at each stage in the journey and some of the underlying issues to any frustration experienced, this last section seeks to look for opportunities that your product or service can address to improve the overall customer experience.

- It is common to initially collaborate on the journey mapping with different functions within the product team (including owners, marketing, sales, support and technical), basing the journey inputs on observed and analytical evidence as well as assumptions or existing research. This is okay as a starting point, but must be validated through research with real users.
- The research can come in multiple forms, typically customer interviews provide the rich qualitative data you seek to validate and fill in any gaps in the journey. Additionally, surveys, customer support logs and web analytics can also help inform the journey detail.
- Typically, in a workshop setting the journey is mapped collaboratively using sticky notes.
    1. First map the journey as a step-by-step experience.
    2. Add in the main touchpoints per step.
    3. Based on the step and the touchpoint, add in thoughts and feelings, highlighting any frustration issues.
    4. The mapping is rounded off with a 'brainstorming' section of what opportunities could the product capitalise on to improve the customer experience.
- It's important to keep the journey mapping a collaborative experience, simply creating and presenting the map as a 'done-deal' is unlikely to garner serious engagement from stakeholders. Be sure to bring it up in meetings, to keep it at the front of team member's minds, pin it to the wall, reference it in the same way you'd talk about personas.

EXAMPLE

Persona **Compliance Officer**
Activity **Screening a client for Adverse Media**

PHASE	NEW CLIENT	SCREEN	EVALUATE	DECIDE
GOALS	**Add client details to the system**	**Screen client for any adverse media**	**Determine whether client has any associated adverse media**	**Decide if based on screening we can ondoard the client**
TOUCHPOINTS	Receive request by email, spreadsheet or verbal	Log into the system Input client details	Review results Filter results Search within results	Save result to a case Print / share the results Add a note to the results
THOUGHTS (Needs)	Is this client already in the system? Do we have enough detail?	How broad or narrow does my screen need to be? Is this a big or small client? Is there a quicker way of doing this - rather than multiple searches to cover all risk themes?	So many results - I can't go through all of these What's the best way to reduce the results Can I trust that no matches means nothing found? What do I do about the non-English results? I'll spend half my time sifting through duplicates! Are the top results the most relevant results? How are the results ordered? Have I read this article before?	There are no hits here - all false, I need to record that I've done the check I'm satisfied that I have identified a positive/possible match
FEELINGS				
ISSUES	Information may not be detailed enough for a good screening	May not be sure how broad/narrow to screen Are keyword terms truncated? Only focus on risk areas that I care about Only want to screen for the last x years Choose a date range when a periodic screening	Too many results Unclear why results are returned Is there enough information to click in for more detail? Don't want to see certain sources or certain types of articles	Want to keep a record of my decision - with appropriate text - the link may disappear Need to have all the evidence in one place
OPPORTUNITIES	Standard minimum information form/policy *(not in our control)*	Indicator of how big the client is - anticipation on number of results Different settings for small vs. large entity types	Good matching engine Preset filters Ensure it's clear why results returned Indicate read articles Provide key snippet of article	Report generator Screen grabber Function to add notes to the case report and/or the media article Ability to share findings

REFERENCES

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