

# What Is Customer Journey Mapping and How to Start?

Customer journey mapping has become a favourite tool for visualising the customer's experience. But what exactly are they, how do you create them and what is the best way to use them?

There is nothing magical about the process, and it is something that can be done by anybody. This guide aims to talk you through the process of mapping the customer journey from beginning to end. I even give you a customer journey mapping template to use.

## What Is Customer Journey Mapping?

The reason people feel intimidated by customer journey mapping is they have the wrong view of it. They think it has to be an accurate representation, something that is representative of every nuance of the customer's experience. But that is impossible.

A better way to think of it is like a persona. It is representative of a typical experience. In fact, customer journey maps are much like personas. The difference being is that they focus more on tasks and questions. They also express the customer's experience over time, rather than as a snapshot. That means the two work well together. A persona focuses on the person, while a customer journey map focuses on their experience.

Of course, this means that a customer journey takes more effort to create. As a result, you will produce fewer of them. Often people only create a journey for each of the primary audiences. They also focus on an overview of the entire journey, rather than digging into too much detail.

That said, over time you can flesh out the journeys. You can look at segments in more detail or even address secondary audiences.

Another way to think of a customer journey map is that it is a story designed to provide insights into the customer's journey. It is an archetype that represents the underlying complexity of the real journey. But in a more digestible form. In other words, a customer journey map is not going to be 100% accurate.

That might leave you wondering what the point is. Why bother with a map that is not entirely representative of the experience?

## Why Customer Journey Mapping Is Essential

A customer journey map is a powerful tool.

**If you are a designer**, it will help you to understand the context of users. You will gain a clear picture of where the user has come from and what they are trying to achieve.

If you write copy, it will help you to understand what questions users have and how they are feeling.

It gives managers an overview of the customer's experience. They will see how customers move through the sales funnel. That will help them to identify opportunities to enhance the experience. The map will show how enhanced customer service can differentiate the organisation's digital experience.

For the user experience designer, a customer journey map helps to identify gaps, points in the customer experience that are disjointed or painful. These might be:

- Gaps between devices, when a user moves from one device to another;
- Gaps between departments, where the user might get frustrated.
- Gaps between channels (for example, where the experience of going from social media to the website could be better).

Most of all, a customer journey map puts the user front and centre in the organisation's thinking. That is in contrast to their tendency to look at *their* priorities. It is so easy to get caught up in what you want a project to achieve that you forget to consider how it will benefit users.

It is also an ongoing reminder throughout the project to consider the user's context. The user's questions, feelings and goals will change throughout their journey. We need to be aware of that.

A customer journey map also provides context for the project as a whole. A journey map helps define where in the customer's experience the project sits.

Take for example a typical website. The website might only act as a marketing tool. It creates the desire in the user for the product and answers fundamental questions. But the action of buying might happen offline. However, the same website might enable the user to place an order and even get after sales support. If you know how much of the journey the project covers it will help define the scope.



When I created a customer journey map for the Samaritans it clearly showed where digital could help improve the experience.

Finally, customer journey mapping can be a helpful tool in broader digital transformation, because, at its heart, digital transformation is about adapting to changing consumer expectations.

Customer journey mapping helps to expose these changes in customer behaviour. It ensures organisations are not planning based on out-of-date assumptions. The problem is that senior management sees digital as nothing more than an add-on to their existing offering. They fail to realise just how much digital has changed things. By mapping the customer journey, you help to highlight that change.

Customer journey mapping also helps management teams look beyond their current obsession. For example, management has a habit of focusing on things like mobile, social media or SEO. Instead, they need to see these things in context. A customer journey map helps give that context.

Providing this context helps to highlight gaps or shortcomings. That shows management where the business is failing to meet the needs and expectations of customers. It also helps them to focus on the customer, rather than on their products, services and organisation. This customer service mentality is lacking, especially within larger organisations.

How then do you create a customer journey map? The process of creating a customer journey map has to begin with getting to know users.

### How to Research Your Customer Journey Map

Many organisations already have some information about users. In fact, you might meet resistance from those who feel that repeating this exercise would be a waste of time. That is why gathering existing research is a good start. Often, this research will be out of date or buried in a drawer somewhere.

By gathering existing research, you will see what the organisation knows and how relevant that information is. That will appease those who are resistant, while potentially saving you some research effort.

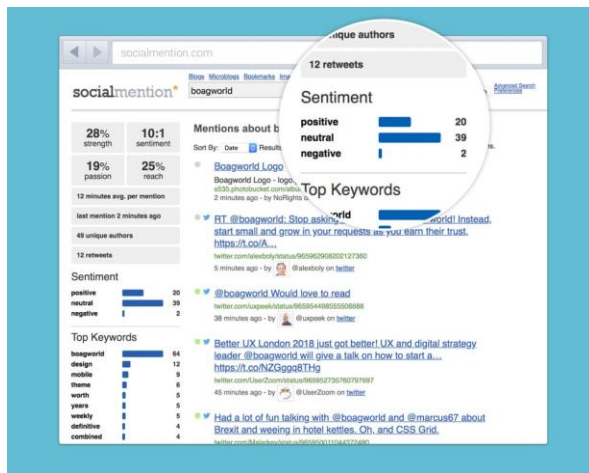
There are two types of research: analytical and anecdotal.

### **Analytical Research**

You can turn to many sources for data about users. The most obvious is website analytics, which provides a lot of information on where users have come from, and what they are trying to achieve. It will also help you to identify points in the process where they have given up.

But be careful. Misinterpreting analytics is easy. For example, don't presume that a lot of clicks or long dwell times are a sign of a happy user. They could indicate that they are lost or confused.

Social media are also a useful source of data. Tools such as SocialMention tracks mentions of a brand and whether those mentions are positive or negative.



SocialMention can be used to gather user feedback helpful in informing a customer journey map.

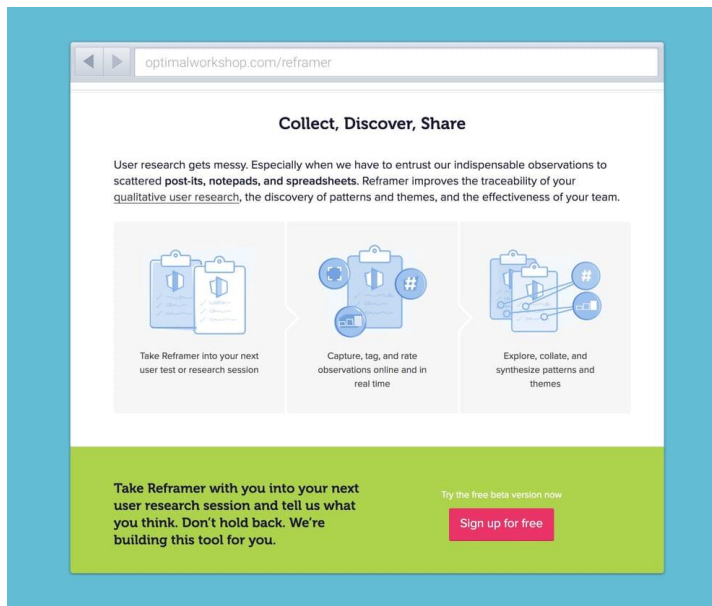
Search data also provides valuable insights into what users are looking for, revealing whether your existing website is providing the right information.

Finally, consider running a survey. That will help you build a more detailed picture of users' questions, feelings and motivations.

## Anecdotal Research

Although data can build a compelling case, it does not tell a story by itself. For that, you need anecdotes of user experiences.

One challenge is getting access to customers. It can be hard finding customers willing to sit down and talk with you (even over the phone). But it is worth persevering.



A tool like Reframer makes organising your anecdotal feedback straightforward.

If all else fails, you can interview people who talk to customers often. Salespeople or customer support staff are two examples. Depending on your company there are often many more. But remember, these people won't see the entire customer journey. You will need to piece together the various parts by talking to different staff.

Time and budget will constrain the depth of your research. If your organisation has many different user groups, then creating detailed customer journeys for each might be hard. Therefore, focus on your primary audiences.

You can make educated guesses about the customer journeys for secondary audiences. Do this by workshoping solutions with front-line staff and other internal stakeholders. Although this "*quick and dirty*" approach will not be as accurate, it is still better than nothing, presuming everybody is aware of its limitations.

Be careful to make clear what has research behind it and what does not. Making many decisions based on assumptions is dangerous. Once management sees the benefits of research, they will be willing to spend more time on it.

Whether you have detailed research or not, often the best way to kick off the process of creating a customer journey map is to run a workshop.

### How Do You Do Customer Journey Mapping?

One of the most common mistakes I see people making when creating a customer journey map is to produce it in isolation. They feel that they have consulted widely and gathered research, so they are ready to design the journey themselves. But that is a wasted opportunity.

Running a customer journey workshop is often a convenient way of engaging with many stakeholders. It is also great for getting key influencers to start thinking about the user's experience. But how do you run a workshop like this?

The first thing is to know what you want from the workshop.

Do you need help with journey mapping? Want somebody to facilitate your mapping workshop?

The goal of the customer journey workshop is not just to map the customer journey. In fact, it is unlikely you will be able to create a detailed customer journey map in a day. Instead, expect to walk away with a draft of a single journey for one type of user. If you are lucky, you might cover two, but don't expect that.

Remember, the aim of customer journey mapping isn't to map every nuance of the user's experience. You are trying to tell a story. A story you can circulate within the company to engage people with the idea of customer service. Something to get them thinking.

The workshop helps in that regard. It will focus critical influencers from across the organisation on the importance of user experience. It educates them so that they better understand how to serve their customers and carry out further research.

The process of creating a customer journey map also helps identify weak points in the customer journey. Places where the organisation is letting customers down and procedures need to change.

Keeping these goals in mind is essential. **It is easy to get sucked into endless discussions over different paths the user might follow.** Pick a journey and tell that story.

With these goals clear in your mind, the next decision is who to invite to the workshop.

### **Who Should Attend a Customer Journey Mapping Workshop?**

There are two types of people that you should invite to a customer journey mapping workshop. There are those who understand the customer journey and those who do not but are influencers in the organisation.

It is often **senior management** who fall into the latter category. The more senior you are the less you have to do with customers. Yet the more your decisions impact their experience.

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That is why these people need to attend a customer journey workshop. It helps focus them on customer needs and shows them the consequences of some of their decisions. That only works if you also have people who understand the customer journey in the meeting too.

You may think that the people who understand the journey most are the customers themselves, but that isn't necessarily the case. They will know their journey, but that might not be representative of the whole. For that, you are better off talking to **customer service staff**. They engage with a large number of users on a daily basis. They will have invaluable anecdotes of failures in user experience. Stories you can incorporate into a customer journey map.

That said, you should always seek to **have customers in the room** too, if for no other reason than to let senior managers meet them. However, if you are unable to make that happen, it is not the end of the world. If you have customer-facing staff there and you have done your research, you will still be okay.

There are other people with a contribution to make too. **Marketers** often have insights into user behaviour based on market research they have carried out. **Digital teams** also have a lot to offer. Contributions based on usability testing and analysis of web analytics.

Make sure that when these people attend the meeting, they bring any research or data they have on users. The more material you have to work with, the better the session will be and the less reliant it will be on personal opinion.

## How to Run a Customer Journey Mapping Workshop

Running a customer journey workshop is not as hard as you might think. Different people run these workshops in different ways. But the approach I have settled on is straightforward, and you could run it without trouble.

### Decide on your scope

One of the hardest parts of running a customer journey mapping workshop is deciding what to map. In particular, you have to decide what level of detail you want to focus on.

Imagine you wanted to map the customer experience for taking out a loan for a house.

At one extreme you could map the entire customer experience from deciding to buy a house all the way through to the user finishing paying the loan off years later.

At the other extreme, you could focus on that crucial moment when a user submits a loan application.

There is no hard and fast rule here. It depends on why you are producing the customer journey map.

If you are producing the customer journey map to visualise general user research then a zoomed out view is often better. But if your goal is to communicate an idea or a problem, it can be useful to concentrate on a key part that tells you a lot about the needs of the customer and how your idea meets them.

However, it will dictate the amount of detail. The more 'zoomed in' the experience, the more detail you can add. So if you are mapping the experience over the repayment of a house loan, don't expect much detail.

### Identify the key stages of user interaction

Once you have established scope, identify the principal stages a customer passes through in their interaction with your company. That often involves steps such as:

- Discovery.
- Research.
- Purchase.
- Delivery.
- After-sales.

It is important to note this will vary depending on the nature of your product or service. There is no right or wrong way to organise your stages so feel free to decide on a model together in the workshop.

Some customer journey maps even branch into slightly different journeys or double back on themselves at times. However, as a rule of thumb, I try to avoid this kind of complexity. Once again a customer journey map is telling a story, it does not need to be 100% accurate. Adding in that level of detail just makes it hard to read, and that undermines its value.

### Identify the information you want to map

The second decision the group needs to make is what information you want to map about the user. What do you need to know at each of these key stages in their interaction? Again, this is up to you. But some common areas are:

- **Tasks.** What is the user trying to achieve at this stage?
- **Questions.** What does the user want to know at this stage?
- **Touchpoints.** How does the user interact with the organisation at this point?
- **Emotions.** What is the user feeling at this stage in the process?
- **Weaknesses.** How does the organisation let the user down at this stage?
- **Influences.** Who or what is helping to shape the user's decision-making process at this stage?

### Create your customer journey grid

With those two decisions made you can now create a grid with stages on one axis and information to gather on the other.



	Discover	Research	Purchase	Delivery	Post-Sales
Task					
Questions					
Touchpoints					
Emotions					
Influences					
Weaknesses					

A

basic customer journey map template should look something like this.

It is important to stress that the final customer journey map doesn't need to look like this. But this provides a framework you can work within.

I recommend getting a large roll of paper and covering an entire wall with this grid. As big as you can.

### Start by working together

Now as a group work through the first column. For each row start writing information on post-it notes and add it to the grid. For example what tasks is the user trying to complete in the discovery phase? Write each task on a separate post-it note and add it to the appropriate cell on the grid.

The reason to write them on post-it notes is that as the day goes by you may well restructure the grid. You may also decide that a task happens later in the process.

Where possible use the data and information people brought along to inform what goes on your post-it notes. But if in doubt, guess. You can always confirm your guess after the workshop. It is better to maintain momentum than get stuck on the part of the grid.

### Work in small groups

By the time you reach the bottom of the first column people will have got the idea. At this point, I tend to split attendees into pairs (or small groups depending on numbers). I then give each pair a column to work through by themselves. That speeds up the process and also stops the day getting too monotonous.

Once the pairs have finished their columns, we come back together to discuss. That ensures everybody agrees even if they didn't produce that column themselves.

That is it. But what happens after the workshop is just as important.

Also, see my complete guide for ensuring user experience is a priority in your company.

## How to Use a Customer Journey Map Effectively

There are two dangers of a customer journey workshop.

The first is that **the journey may be inaccurate**. It is never going to be perfect, but it should at least be representative of reality. That is why you should spend some time after the workshop validating the results. You don't need to make this complicated. It just means showing it to some customers and getting their feedback.

The second danger is that **the customer journey map just ends up in a drawer** somewhere, unused and forgotten. To prevent this, it needs converting into an engaging format that everybody in the company can see.



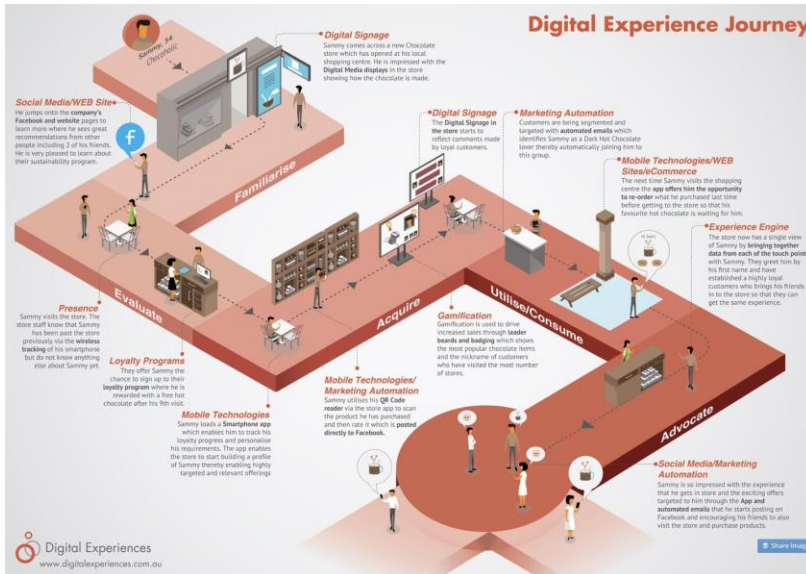
A customer journey map needs to be easy to grasp and engaging.

The goal is to ensure that the user's story remains front and centre in people's minds. Get a designer to produce the graphic to ensure it is as understandable as possible and grabs people's attention.

Whatever its form, the map should contain both statistical and anecdotal evidence. It should highlight users' needs, questions and feelings throughout their interaction with the organisation.

## Examples of Customer Journey Maps

As mentioned, there is no right or wrong way to produce a customer journey map. Typically, it will be some form of an infographic with a timeline of the user's experience. But it could be a storyboard or even a video.



Typically customer journey maps appear as infographics, but they could be a storyboard or even a video.

Don't make it too complicated. It is easy to get caught up in the multiple routes a user might take. That will just muddy the story.

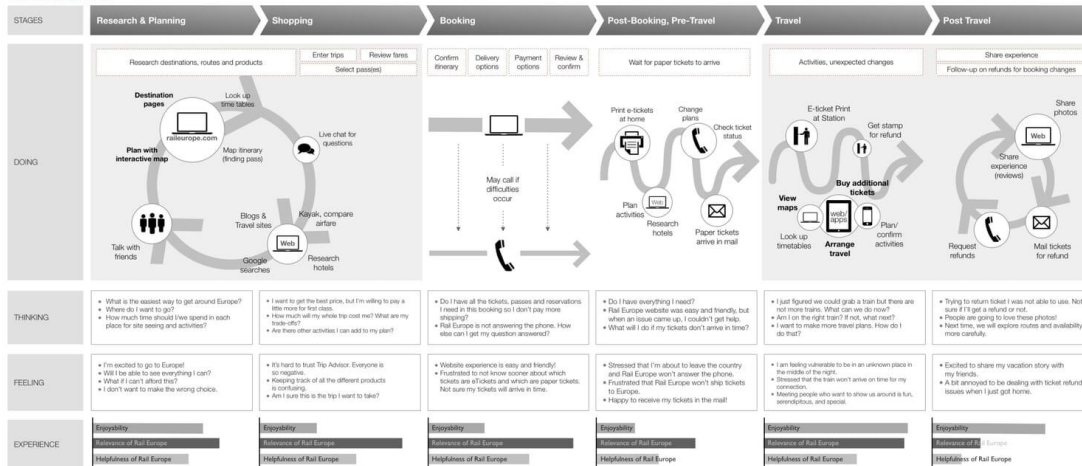
The graphic is not meant to map every aspect of the customer's experience. Instead, it should tell a simple story to focus people's attention on the customer's needs.

### Rail Europe Experience Map

#### Guiding Principles

- People choose rail travel because it is convenient, easy, and flexible.
- Rail booking is only one part of people's larger travel process.
- People build their travel plans over time.
- People value service that is respectful, effective and personable.

#### Customer Journey



#### Opportunities

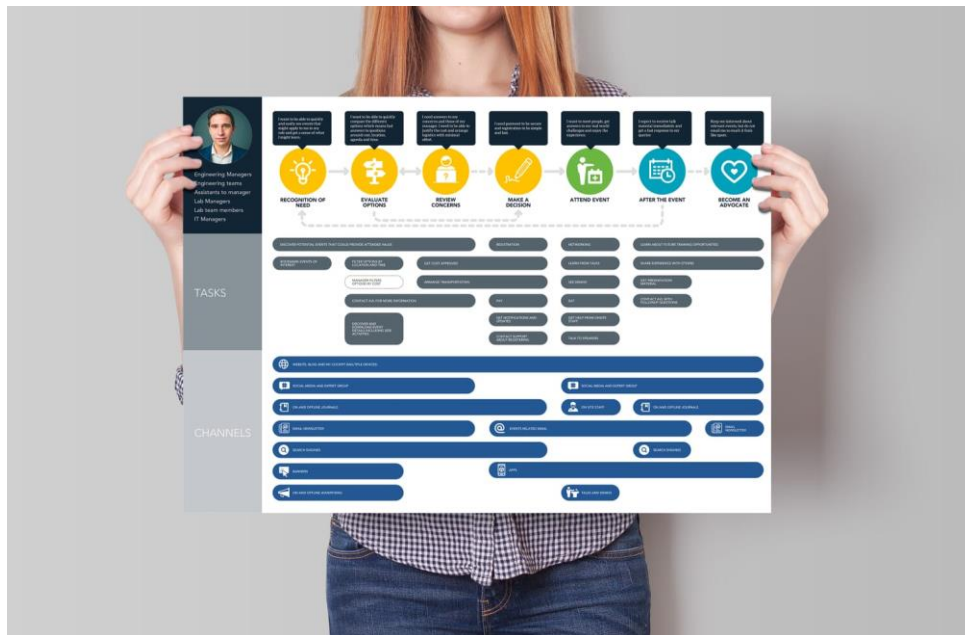
Opportunities	PLANNING, SHOPPING, BOOKING	POST-BOOK, TRAVEL, POST-TRAVEL
Communicate a clear value proposition.	Enable people to plan over time.	Improve the paper ticket experience.
Help people get the help they need.	Visualize the trip for planning and booking.	Accommodate planning and booking in Europe too.
Support people in creating their own solutions.	Arm customers with information for making decisions.	Proactively help people deal with change.
Engage in social media with explicit purposes.	Aggregate shipping with a reasonable timeline.	Communicate status clearly at all times.
Make your customers into better, more savvy travelers.		

Information sources: Stakeholder interviews, Cognitive walkthroughs, Customer Experience Survey, Existing Rail Europe Documentation



Although this is a well-known example of a customer journey map, it is not a particularly good one because it is overly complex.

Think of the customer journey map as a poster pinned to the office wall. At a glance, people should be able to see the critical touchpoints that a user encounters. It should remind them that the customer's needs must always be at the forefront of their thinking.



Try to make the customer journey maps simple enough to be viewed as a poster.