CUSTOMER EXPERIENCE MAPS

Despite best intentions and mountains of data, many organizations continue to offer lacklustre experiences for their customers.

Many organizations function with an internal focus, and that becomes apparent when customers interact with their various products, services and employees. Every interaction a customer has with an organization has an effect on satisfaction, loyalty, and the bottom line. Plotting out a customer's emotional landscape by way of a Customer Experience Map, or Experience Map, along their path sheds light on key opportunities for deepening those relationships.

What is a Customer Experience Map?

A Customer Experience map is a visual or graphic interpretation of the overall **story from an individual's perspective** of their relationship with an organization, service, product or brand, over time and across channels. Occasionally, a more narrative, text-based approach is needed to describe nuances and details associated with a customer experience. The story is told from the customer's perspective, but also emphasizes the important intersections between user expectations and business requirements.

Inspired by user research, no two experience maps are alike, and regardless of format they allow organizations to consider interactions from their customers' points of view, instead of taking an inside-out approach. They are one tool that can help organizations evolve from a transactional approach to one that focuses on long term relationships with customers built on respect, consistency and trust.

All organizations have business goals but leveraging customer experiences as a supporting component of an experience strategy keeps customers (or members, patients, employees, students, donors etc.) at the forefront when making design decisions. They can be used in both current state review and future state visioning to examine the present, highlight pain points and uncover the most significant opportunities for building a better experience for customers.

How Do We Use Them?

Customer engagement is not simply a series of interactions, or getting people to visit a website, "Like" something on Facebook, or download a mobile app. Genuine engagement centres on compatibility, and identifying how and where individuals and organizations can exist harmoniously together. Giving thought to how your organization/product/service/brand fits into customers' lives is crucial.

I also use experience maps to gain internal consensus on how customers should be treated across distinct channels. Holding collaborative workshops with cross-disciplinary teams

mixing people who otherwise never communicate with each other can be extremely valuable in large organizations in particular.

Illustrating or describing how the customer experience could be brought to life across channels allows all stakeholders from all areas of the business to better understand the essence of the whole experience from the customer's perspective. How do they want to be spoken to, what are they thinking, feeling, seeing, hearing, and doing? Experience maps help us explore answers to the "what ifs" that arise during research and conceptual design.

What Components Does a Experience Map Include?

Must-haves

- **Personas**: the main characters that illustrate the needs, goals, thoughts, feelings, opinions, expectations, and pain points of the user;
- **Timeline**: a finite amount of time (e.g. 1 week or 1 year) or variable phases (e.g. awareness, decision-making, purchase, renewal);
- **Emotion:** peaks and valleys illustrating frustration, anxiety, happiness etc.;
- **Touchpoints**: customer actions and interactions with the organization. This is the WHAT the customer is doing; and
- **Channels**: where interaction takes place and the context of use (e.g. website, native app, call centre, in-store). This is the WHERE they are interacting.

Nice-to-haves

- **Moments of truth**: A positive interaction that leaves a lasting impression, often planned for a touchpoint known to generate anxiety or frustration; and
- **Supporting characters:** peripheral individuals (caregivers, friends, colleagues) who may contribute to the experience.

The Process

1. Review Goals

Consider organizational goals for the product or service at large, and specific goals for a customer experience mapping initiative.

2. Gather Research

Review all relevant user research, which includes both qualitative and quantitative findings to provide insights into the customer experience. If more research is needed, get those research activities in the books. Some of my favourite research methods include customer interviews, ethnography & contextual inquiry, customer surveys, customer support/complaint logs, web analytics, social media listening, and competitive intelligence.

3. Touchpoint and Channel brainstorms

As a team, generate a list of the customer touchpoints and the channels on which those touchpoints occur today. Then brainstorm additional touchpoints and/or channels that can be incorporated in the future experiences you will be mapping. For example, the touchpoint could be "pay a bill", and the channels associated with that touchpoint could be "pay online", "pay via mail" or "pay in person".

4. Empathy map

Empathy maps are a depiction of the various facets of a persona and his or her experiences in a given scenario. This exercise helps me organize my observations, build a deeper understanding of customers' experiences, and draw out surprising insights into what customers need. Empathy maps also provide a foundation of material to fuel experience mapping. The goal is to get a well-rounded sense of how it feels to be that persona in this experience, specifically focusing on what they're thinking, feeling, seeing, hearing, saying and doing.

5. Brainstorm with lenses

The goal of lensed brainstorming is to generate as many ideas as possible in a short period of time. To gain focus as I generate ideas I use "lenses"—words representing key concepts, brand attributes or mindsets that help us look at a problem or scenario in a different way. For this exercise I recommend that the team agree on 3-5 lens words (for example: accessible, social, comforting), then set the clock for 2 minutes per lens word. Each person individually writes down as many ideas as they can think of in that time. After 2 minutes' switch to the next lens word until all lens words have been used as idea inspiration. This ensures that every voice on the team is heard and generates a huge inventory of ideas.

6. Affinity diagram

This is a method to visually organize ideas and find cohesion in the team's concepts. Affinity diagramming helps us shift from casting a wide net in exploring many possibilities, to gaining focus on the right solutions for this audience. All team members should put their ideas generated in the lensed brainstorming activity up on the wall. Have someone sort the ideas into categories and label them. As a group, begin to consider where you might combine, refine, and remove ideas to form a cohesive vision of the future customer experience.

7. Sketch the experience

Drumroll, please. This is the part you've been waiting for! It's now time to put together all the pieces: timeline, touchpoints, channels, emotional highs and lows, and all the wonderful new ideas the team generated for how to improve the future customer experience. Get creative with how you lay it out—it doesn't have to be a standard left to right timeline. It

could be circular or helical. It could be one large map or it could be an interactive, clickable piece with embedded video. There are no templates, and there are infinite possibilities.

8. Refine and digitize

Experiences don't always become a sophisticated deliverable—sometimes they begin and end as sticky notes on a wall or sketches on a whiteboard. But most of the time, when you go through the activities to arrive at a solid customer experience map, you want to polish it, leverage it in your work and share it with colleagues across the organization. If visual design isn't your strong suit, consider collaborating closely with a visual designer who can transform the experience map sketch into an impressive artefact.

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FRANK
43, Call Center Manager, Family Man
Recently diagnosed with high cholesterol

GADGETS: Pedometer, Wireless Scale in Office, Smartphone
GOALS: 100% Med Adherence, Lose Weight, Reduce Cholesterol

MAR — Frank attends a lunch & learn at work and learns about Healthrageous. He was diagnosed with high cholesterol 3 months ago and has had trouble remembering to take his medication and adjusting his lifestyle. He signs up on a team with some of his coworkers to compete for a bonus vacation day.

APR — While Frank's team doesn't win the competition, he's glad they participated. Not only has he gotten a handle on his meds and lost 5lbs, but healthy eating and activity have become common topics of discussion in the office.

MAY — Frank decides he'd like to lose 5 more before his vacation in August. He's not reliant on the app to remember his meds now so sometimes forgets to log in for a few days at a time.

JUN — Frank gets his cholesterol checked. It's better but still not where it should be. He realizes he's been slacking on his diet and decides to pair up with a friend on H! for support.

JUL — After leveling up, Frank can partner with multiple friends to complete weekly tasks. They start a heart-healthy potluck lunch club on Fridays based on a suggestion from H! Coach Rhonda.

AUG — Frank's buddies are in and out of H! as they go on vacation. He's dropped from 3 weekly actions to 2, but the game keeps him engaged with some healthy summer BBQ recipes and fun outdoor activities.

SEP — Frank takes time off from H! while on vacation for 2 weeks. He's a little slow to get back in the game since he's been cheating his diet. Coach Rhonda lures him back in with time-pressure challenges.

OCT — The company holds another team competition, this time for charity. Instead of a total steps goal, there is a series of challenges for the teams to complete over the 12 weeks up to Christmas.

NOV — Frank has built up a repitoire of healthy eating habits and is determined to ace his cholesterol test next month. He's tracking his food and exercise closely to ensure he's sticking to the plan.

DEC — Frank's cholesterol is much better, though with Christmas coming up he knows he'll end up cheating his diet. He keeps tracking his food to stay aware of just how much he's eating to see how it affects him. He's intrigued to see how much data has accumulated over the past 9 months.

JAN — Frank and a few coworkers decide to join a gym to get back in shape after the holidays. He gained 5lbs back over the holidays, and aims to lose 10 and then build up some muscle.

FEB — Upon reaching Level 5, Frank is excited to challenge some folks who recently signed up for H!

MEDS
WEIGHT
CHOLESTEROL

Email initiates web onboarding process

LEVEL 1!
LEVEL 2!
Med management goal achieved!
LEVEL 3!
5lbs lost goal achieved!
1st Goal Achieved Badge!
Buddy Badge! Partnered with 3 different people
5lbs lost goal achieved!
Over Achiever Badge! Early goal completion
Lightning challenge draws Frank back in with some bonus kudos that help him level up
LEVEL 4!
Reduce cholesterol goal achieved!
Streak bonus for 2 weeks at the gym
LEVEL 5!

Halfway checkpoint for all three 2-month goals. Doing well on meds and weight, but diet is hit or miss.

Halfway checkpoint for weight loss goal. Frank's a little behind schedule, so coach adjusts his plan accordingly.

Halfway checkpoint for cholesterol management.

Uses Journal intensely to track diet and activity beyond weekly action plan

Reviews data when Coach points out interesting correlations

SMS Text notification reminds Frank to enter data when he forgets for 3 days.

Coach suggests heart-healthy potluck club

Coach adds tasty BBQ recipes to action plan

GAME HIGHLIGHTS

🔄 SCHEDULED NOTIFICATIONS | DAILY 📱 Mobile medication reminders & logging | FRIDAY ✉ End-of-week checkpoint | SUNDAY ✉ Summary of past week | MONTHLY ✉ Goal progress & maintenance report

SAMPLE ACTION PLANS & KUDO SCORES

WEEK 1 [MAR]	WEEK 8 [APR]	WEEK 18 [JUL]	WEEK 22 [AUG]	WEEK 27 [SEP]	WEEK 36 [NOV]	WEEK 47 [FEB]
✓ Take medication when reminded by H! mobile app	✓ Take medication without being reminded by H! mobile app	✗ Cook 3 healthy meals this week	✓ Healthy BBQ with family	✓ Make a healthy fruit dessert [do it tonight for bonus kudos!]	✓ Track meals in journal	✓ Go to the gym 4x
✗ Walk 2500 steps per day [for team competition]	✓ Walk 4500 steps per day [for team competition]	✓ Go for a 5-mile bike ride	✗ Swim for 5 hours	✓ Walk 5000 steps per day	✓ Eat 15 servings of veggies [for team competition]	✓ Pack a new lunch food for you and the kids
✓ Buy olive oil to use instead of butter	✓ Play frisbee with the kids	✓ Healthy potluck lunch [with Jim, Sally, Mark]				✓ Walk more than a Level 1 group [versus Erik, Yang, Cory]
2 1 per action	**18** 1 per action + x2 completion bonus + x2 competition kudos for 3rd place	**19** 1 per action + 8 co-op bonus + 10 goal completion bonus	**5** 1 per action - 1 sponsor penalty + 5 goal checkpoint evaluation	**14** 1 per action + 5 lightning bonus + x2 completion bonus	**4** 1 per action + 2x completion bonus	**26** 1 per action + 8 streak bonus + 4 challenge win + x2 completion bonus

While experience maps are usually a tangible deliverable, like the one above, the process of experience mapping is what's most important – it pushes us to think deeply about how we can use experience design to have a positive impact on our customers.

9. Share and use

It can be beneficial to maintain experience maps over time. For example, you could set a time each quarter or year to evaluate how your current customer experience matches your documented vision experiences. If your organization tracks quantitative KPIs, you can integrate these into a experience benchmarking process. Socializing experiences among stakeholders is critical in moving your organization toward action.

In addition to prioritization, the output of a experience map can serve as a backbone for strategic recommendations and more tactical initiatives.

For example, if you're a mortgage company and you identify the closing process as a key area of frustration, anxiety and opportunity for engaging with the customer and designing for the "moment of truth", then mark this as a high priority and get that on your strategic roadmap.

Tips

Schedule enough time to properly go through the recommended process. I've found that you can document a current state experience in about 3 hours, and a future state experience in about 5 hours. This makes for a full day to do both for one persona.

Make sure a good mix of people are involved in the experience map creation. It's helpful to have stakeholder participants from many areas of the organization, as well as people of varying levels of seniority.

Once the experience maps are created, share them with zeal. Shout them from the rooftops and display them prominently in common areas.