

A Guide to Customer Journey Mapping



About This Guide

What's Inside...

- ▶ Getting Started with Customer Journey Mapping
- ▶ Map Framework Options & Steps to Building a Customer Journey Map
- ▶ Mapping Considerations
- ▶ Using Your Map to Design Incredible Customer Experiences

An Introduction...

Today, customer experience is at the forefront of company strategy across industries worldwide. Customer journey mapping is universally seen as an ideal starting point to understand your business from your customer's perspective, collect voice of the customer & other evidence & put it all in one place.

It gets stakeholders on the "same page" and helps you prioritize decisions on how and where to invest your company resources to differentiate your brand through an insanely great customer experience framework.

At Touchpoint Dashboard, our goal is to take the guesswork out of journey mapping & put you on the road to success with designing & creating great customer experiences.

We know you have questions & we're here to help. That's why we've created this guide & offer a variety of [journey mapping resources](#) on our website.

About This Guide

There are many ways to map...

- Some maps are more visual (like a storyboard)
- Others are more data-driven for the purpose of touchpoints analysis
- Some maps are more high level, while others are very granular

The bottom line is...

There is no right or wrong way to map – we are all learning together. But—depending on how you plan to use and share your map and its findings—some methods work better for you than others.

We will discuss some of the approaches in this guide.



Mapping Musts

Checklist of Things to Include in Your Journey Map

- ✓ **Customers Segments (Personas)** – define & segment them to identify whose journey you want to map
- ✓ **A Touchpoint Inventory & Customer Journey** – The steps customers take & all the touchpoints they encounter as they progress through your lifecycle stages & channels
- ✓ **Quantitative Data & Qualitative Customer & Employee Feedback**

Map Ingredients

Regardless of the design you use, all maps should include (at a minimum) the elements listed on the checklist to the left. This will provide a solid framework for building a robust customer journey map packed with priceless insights about your customers, your processes & your overall operations.

A Point to Ponder...

A map in & of itself is just a pretty picture illustrating how your customers interact with your business. It's what you put into your map that will ultimately determine how valuable it will be & help you truly drive change for your organization.

For more info on map ingredients, check out our ["Cooking Up a Winning Customer Journey Map"](#) series on our blog.

Journey Mapping Should...

- ✓ **Be Approached as an Ongoing Discipline, NOT a One-and-Done Project!**
- ✓ **Be Collaborative.** A cross-functional team from all areas of your organization should be involved in the mapping process & have ongoing access to the map to use it, make updates, & monitor performance & progress.
- ✓ **Be Customer-Focused.** A map must be developed from the customer's perspective, not the organization's. It should contain both quantitative & qualitative research.
 - ✓ **Quantitative:** Dig into your existing data—scour web analytics, surveys & other data sources that reveal how customers interact with your organization
 - ✓ **Qualitative:** Observe & talk to customers & front line employees. Allow them to tell a story of their experience. Document their actions, thoughts & feelings & match them up with touchpoints, channels & lifecycle phases

Journey Mapping Should...

- ✓ **Be Multi-Faceted.** A good map provides an eagle-eye view of the holistic customer journey and...
 - ✓ Helps you identify your most important touchpoints
 - ✓ Provides a way for you to attach customer research and data to touchpoints
 - ✓ Makes edits & updates easy
 - ✓ Allows you to pull out specific sections of the customer journey that require the most attention and create “micro-journeys” of individual scenarios. These “micro-journeys” can all be rolled up into the master map that encompasses the customer experience from start to end
- ✓ **Be Easy to Understand, Share & Update.**

Elements of Journey Mapping

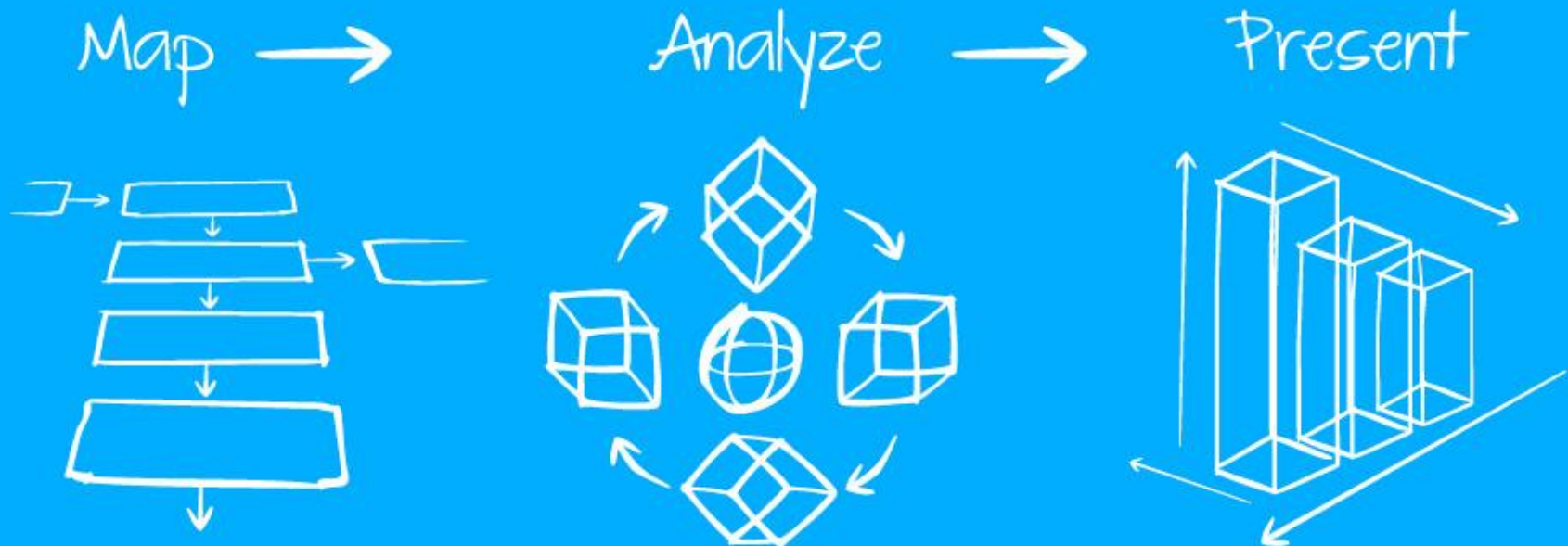


Customer experience is complex. Journey mapping can help bring your customer experience to life. As you prepare to start mapping, use this image along with the checklist on page 4, to guide your research & discovery activities & collect & organize all the necessary map elements

Mapping Framework

Map/Analyze/Present...

Just as there are multiple ways to design a map, there are a variety of ways to approach the mapping process. However, for the most part, all approaches seem to follow some variation of our MAP framework, which we've outlined in detail on the following pages.



Mapping Framework: MAP



- ✓ **Identify your mapping method, team & ingredients.**
- ✓ **Involve key stakeholders:** Remember, mapping should always be collaborative. Get everyone on the same page from the very beginning. Here are a few ways to involve key stakeholders:
 - ✓ Host formal journey mapping workshops & involve everyone in the actual data gathering, analyzing & map building process.
 - ✓ Organize an informal meeting or call to discuss the project's scope, objectives, goals and timelines, & assign roles and responsibilities.
 - ✓ Interview stakeholders on key capabilities – this will surface touchpoints, key interactions (moments of truth) & pain points.
- ✓ **Start building your map.** Bring the customer journey to life by adding your touchpoints and related business & customer data.

A Mapping Method to Ponder...

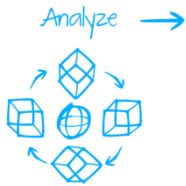
Should we skip the post-it notes & input our data directly into Touchpoint Dashboard?

We recognize the value that could exist by initially using sticky notes on a wall during a workshop. The decision on whether to bypass this step (and enter content directly into Touchpoint Dashboard) comes down to a few considerations:

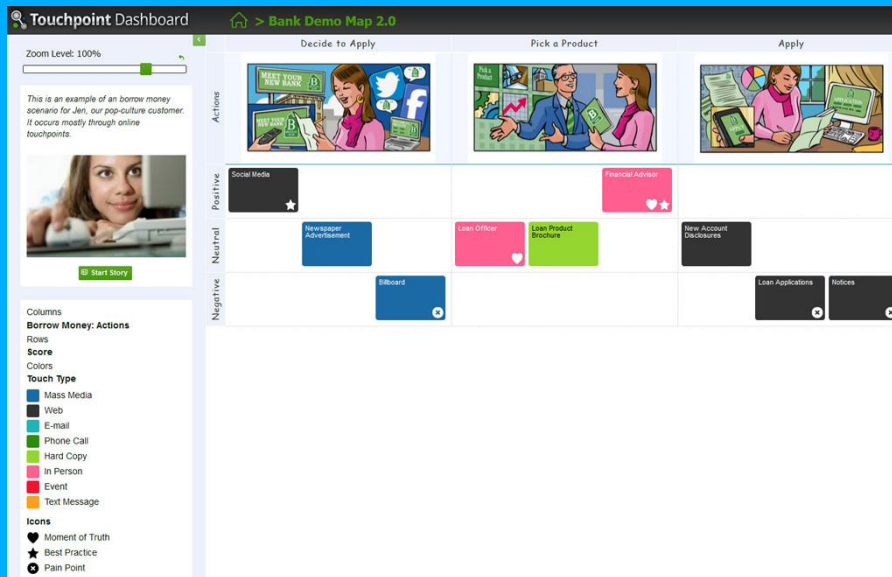
1. Familiarity with using Touchpoint Dashboard
2. Speed at which touchpoints are being surfaced (thus dictating time window for entering content)
3. Is there a person dedicated to entering the content?
4. Do the logistics allow for participants to easily see the screen (e.g. quality of computer and projector equipment)



Mapping Framework: ANALYZE



Draw Actionable Insights Out of Your Map



Use Touchpoint Dashboard's Built-in Business Intelligence System to:

- ✓ Identify what's most important to your customers and business & what creates or detracts from value and drives loyalty.
- ✓ Create different views of data.
- ✓ Use charts to help visualize & understand customer experiences.
- ✓ Score your touchpoints & develop and prioritize action plans. (i.e. if a touchpoint's value is high but isn't effective, you'll know it requires immediate attention.)
- ✓ Build a compelling case for change.

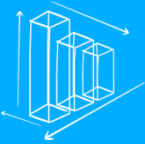




Mapping Framework: ANALYZE

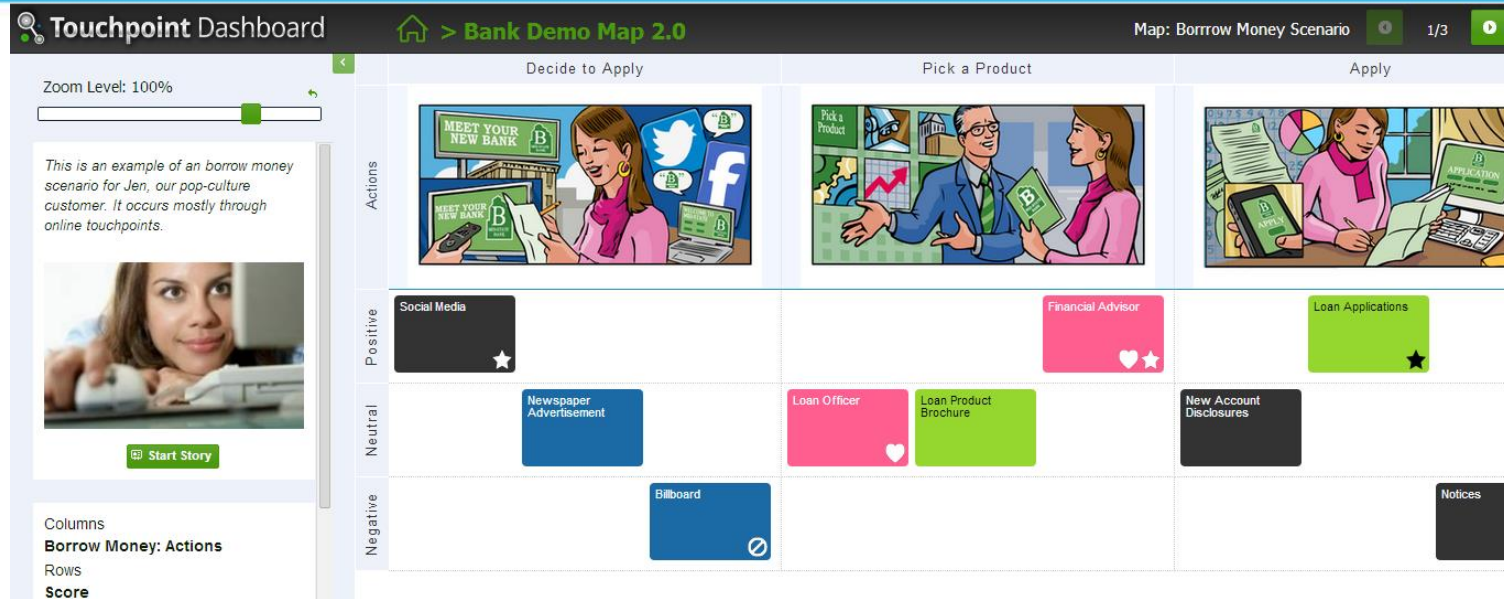
The mapping method you choose will greatly impact your ability to efficiently and thoroughly analyze your map & data and share your findings. Touchpoint Dashboard makes analysis easy because your data & your map are synched together – there's no flipping back and forth between your map and separate documents or databases.





Mapping Framework: PRESENT

Readout phase. This is where you share your map & findings with stakeholders.



Try Using Touchpoint Dashboard's...

- ✓ Presentation layer to create compelling stories to share.
- ✓ Sharing options to share the whole map or custom-tailor specific map views & reports and share only what's most relevant to your audience.
- ✓ Notes capability to socialize the map with stakeholders .

A Point to Ponder...

Traditional mapping methods (like the wall of post-it notes or diagrams made on a white board or conventional software) limit your ability to create and share multi-faceted maps. Touchpoint Dashboard breaks free of these limitations.

Steps to Building a Journey Map

If you're looking for a step-by-step guide to journey map building, you may find this image helpful. We also recommend reading our white paper, "[Cooking up a Winning Customer Journey Map](#)," which provides a detailed walk-through a map building process.

Planning

- Identify your map's scope & scale and your mapping method & team
- Create/obtain necessary mapping resources & materials

Data Gathering

- Schedule & conduct any new customer research/interviews
- Gather, organize & review all map ingredients

Map Creation

- Create a framework (define map rows & columns, create a key)
- Add touchpoints & plot the customer journey; refine & validate
- Synch metrics, customer data & collateral with touchpoints

Identify & Analyze Key Findings & Actionable Insights

- Collaborate with the mapping team & analyze map
- Score, rank & prioritize opportunities & identify "deep drill" needs

Investigate Issues & Opportunities

- Conduct deep drills & analyze results

Present Your Findings & Plan for Continuous Improvement

- Develop recommendations & create roadmap for change
- Share findings & establish a plan to monitor & manage progress

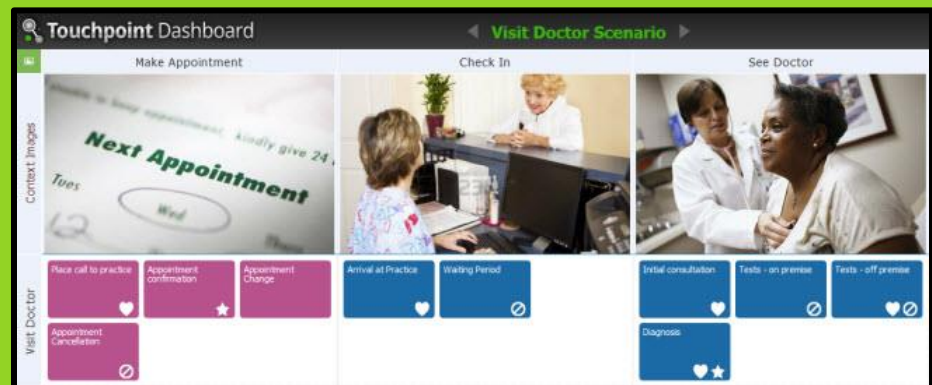
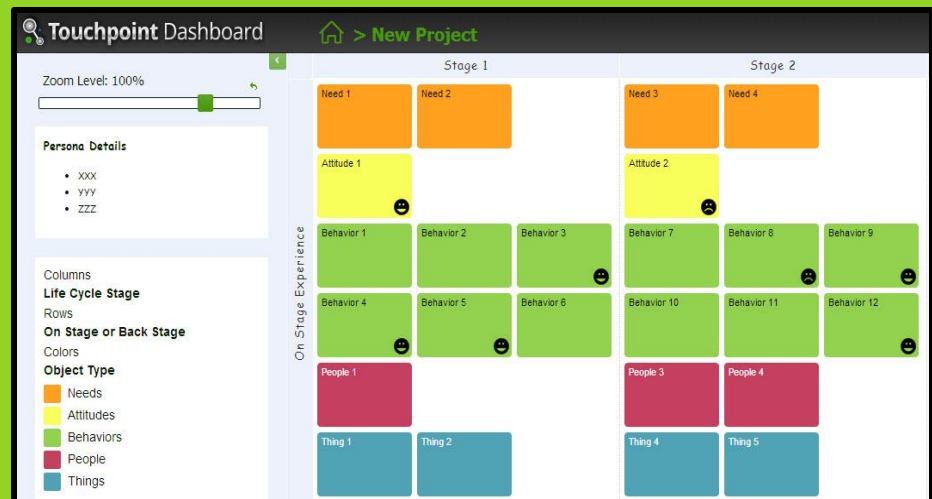
Mapping Considerations

When approaching a Journey Mapping project, there are several considerations that need to be addressed:

Types of maps

Maps can be touchpoint-specific, or you can map an ecosystem (where you outline how data, technology, people & processes work together in the phases of the customer journey).

We'll provide examples of these map types designed in Touchpoint Dashboard on page 16 & 17.



Map Examples

Touchpoint-Specific Map Example: Columns represent lifecycle stages, rows represent department (owner), and colors represent channel:

Touchpoint Dashboard

Home > Healthcare Demo

Zoom Level: 100%



Columns
Lifecycle Stage

Rows
Department

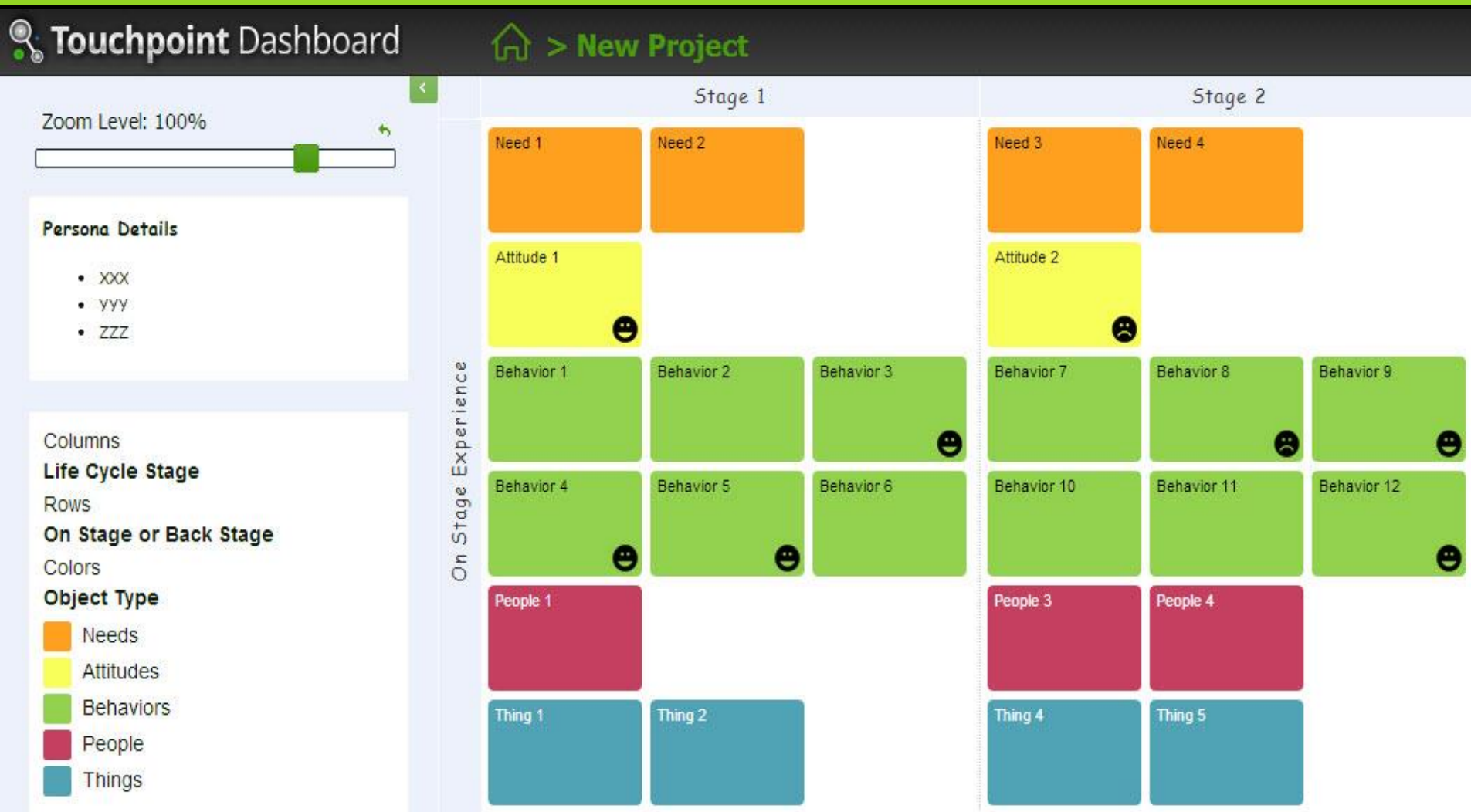
Colors
Touch Type

- Phone
- Mail
- In Person
- Chat



Map Examples

Ecosystem Map Example: Rows represent objects “on stage” or “back stage”, and colors represent things like Needs, Attitudes, Behaviors (Actions), People, & Things:



More Mapping Considerations

How Do I Define a Touchpoint?

How granular should I get in defining the touchpoint? For example, is each direct mail piece its own touchpoint, or is it sufficient to just have one touchpoint called "direct mail"? There is no right or wrong answer here either, but you should gain consensus before starting the mapping activities.

Which Touchpoint Attributes Should I Capture?

At a bare minimum...

- ✓ Customer Lifecycle Stages
- ✓ Channels
- ✓ Key moments of truth
- ✓ Some method of evaluating or scoring the touchpoints, such as...
 - ✓ Emotion, Score, Frequency, Pain Point, etc.

More Mapping Considerations

Add Depth &
Insight to Your
Touchpoints by
Capturing these
Additional
Attributes:

- ✓ **Customer or stakeholder comments**
- ✓ **Department/Owner**
- ✓ **Products and Processes supported**
- ✓ **Back office systems and IT assets supporting touchpoints**
- ✓ **Scenarios where touchpoint is used (based upon customer goal/need)**
- ✓ **Importance**
- ✓ **Cost, time, and/or impact if pain points are resolved**
- ✓ **Root cause of pain point**
- ✓ **Do's and Don'ts (your golden touchpoint standards)**

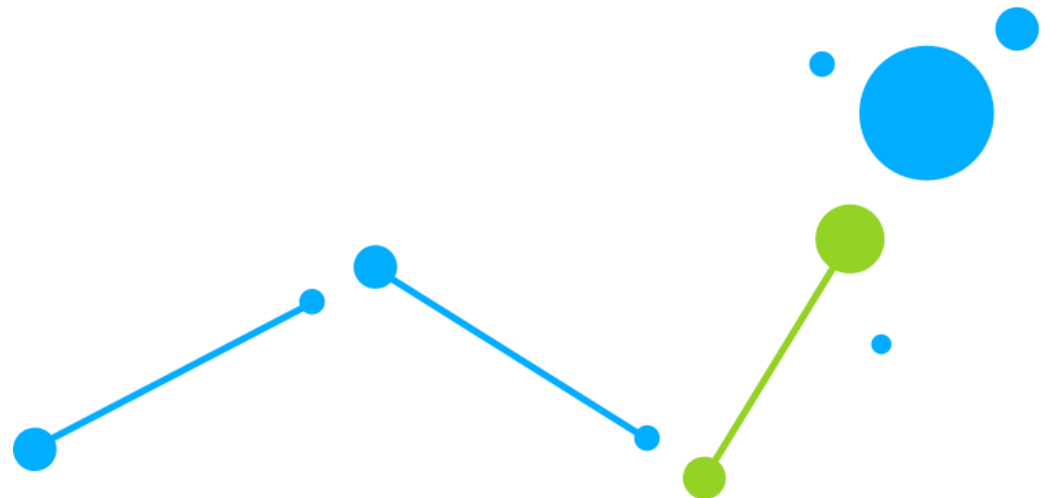
Common Questions & Mapping Tips

Q

Should I try to map the entire customer journey up front, or is it better to start with a specific scenario/objective (e.g. applying for loan, filing a claim, activating my phone, visiting the doctor)?

A

We suggest you start out small...



Mapping Tips

1. Start Small

Consider picking a specific scenario (application, enrollment, onboarding, etc.) to get started.

- ✓ When doing so, it's a common practice to create a separate view that uses the columns as the steps in the scenario and the emotions/score for the rows
- ✓ Place the touchpoints in a certain order in order to represent a hypothetical journey/path a customer would likely take for this scenario
- ✓ Don't get hung up on the sequence/order of touchpoints! With Touchpoint Dashboard, you can easily rework the order and create different view of data.

2. Map the Current State First:

- ✓ Then, validate the current state map with customer feedback.
- ✓ Later you can map the future state.

More Mapping Resources:

- [Your Touchpoint Path May Be Slippery – Proceed with Caution](#)
- [Goldilocks & The Customer Journey Map – Finding a Map View That's Just Right For You](#)

Using Your Map to Design Incredible Customer Experiences

Now That I've Built My Map, How Do I Use it to Drive Change in My Organization?

Prevent your journey map from becoming a dust collector!

- ✓ Have a long-term plan in mind.
- ✓ Appoint map “owners” who are committed to keeping projects on track.
- ✓ Remember, mapping is not a “One & Done” project. Businesses are always evolving & maps should too to reflect the current state of the customer experience.
- ✓ As you complete your initial assignment, we challenge you to think beyond the “project.”

A Point to Ponder...

Here are a few ways you can expand the use of your map to keep your customer experience initiatives moving forward:

- Measure touchpoint performance and add additional detail
- Use your map for employee training
- Map upcoming product launches or your desired future state

Get More Mileage from Your Map



Think beyond your initial project!

There are many ways you can expand the use of your map once it's created.

For some ideas, check out our post:

- [How to Get the Most Mileage out of Your Touchpoint Map](#) - One of the action items is to measure touchpoints. For details on approaches for doing so, please review the following posts:
 - [Touchpoint Measurement 101 Part I: Everyone's Talking About It. Why's It So Important?](#)
 - [Touchpoint Measurement 101 Part II: Effective Methods for Measuring Touchpoints](#)
 - [Touchpoint Measurement 101: Part III: Measurement Challenges & Solutions](#)

READY

SET

**START
MAPPING!**

We hope you & your teams find this guide useful as you embark on your journey mapping endeavors.

We'd love to hear your success stories. Send us a tweet at [@TPDashboard.com](https://twitter.com/TPDashboard.com) or email photos & stories to info@touchpointdashboard.com