



Econsultancy

REPORT

Best Practice Guide

Customer Journey Mapping

This guide offers an overview of customer journey mapping, exploring the origins, rules and types of customer journey maps that can benefit businesses.

Customer Journey Mapping

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1. Introduction

The purpose of this guide is to provide an overview of customer journey mapping. It provides a simple starting point for anyone yet to map out their customer journeys. It is also a reference for those for whom the process is underway.

This guide draws insights from those who have developed complex journeys with multiple stakeholders in many countries, including those who have started with a blank page. Contributors to the guide also include agencies and technology partners who provide guidance and support to their clients.

1.1 Executive summary

- Customer experience is a competitive differentiator in many sectors.
- Customer journey mapping is a granular part of customer experience mapping and includes mapping a customer's digital and physical experiences with a brand, business or organisation.
- Customer journey mapping provides evidence of where customer pain points exist and where customer experience improvements can be made to drive business value.
- Its roots are from the late 1980s, 1990s and 2000s when the concepts of 'Moments of Truth' 'Experience Blueprints' and 'Moment Mapping' were born.
- Recent growth has stemmed from organisations' requirement to articulate the relationship that it has with its customers in an increasingly complex multi-channel and multi-platform world.
- There are other mapping models that can be used in conjunction with customer journey mapping, including process maps, value proposition canvases, cognitive maps and empathy maps.
- Business cases for customer journey mapping projects include:
 - Identifying new revenue opportunities
 - Minimising waste and process inefficiencies
 - Maximising customer lifetime value
 - Improving customer service and customer experience
 - Improving customer satisfaction (CSAT)
 - Decreasing customer churn and improving customer retention
 - Improving employee empathy and motivation
 - Shaping company culture to become more customer centric
 - Aligning teams and departments
 - Aligning metrics and KPIs.
- Organisations should not aim to try and map every customer journey but prioritise key journeys that will have the greatest impact on business growth or efficiency.
- As multiple teams and departments should be involved, senior stewardship and the right organisational culture are essential conditions for success.
- Stakeholders and experts for the project should be drawn from many areas of the organisation, but especially those who experience the customer face to face.
- Qualitative and quantitative data from multiple sources should be used to inform elements of customer journey mapping projects before, during and after the project.
- There is no absolute best practice template or type of map but rules for a successful customer journey mapping approach include:
 - Having organisational ownership at a senior level

- Nurturing a culture that supports and delivers customer experience improvements
 - Establishing a mapping project that supports identifiable business goals
 - Having a shared vision about what the map is (and is not) and what it helps to deliver for the organisation
 - Involving the right stakeholders
 - Developing the map using the right blend of qualitative and quantitative data and information
 - Using realistic project timeframes.
- Maps have many layers but the most common include steps, stages or phases, customer goals, expectations, behaviours, experiences, processes, problems/opportunities and channels.
 - While most maps are time and goal-bound, some maps are cyclical in nature, representing the repeated relationship a customer has with a business or organisation (e.g. a renewal customer).
 - Workshops and reviews are a critical part of customer journey map projects.
 - The maps created can be lo-fi physical versions or complex digital versions – the manifestation of the map will be determined by project complexity, project goals, budgets etc.
 - Customer-centric organisations suggest that the mapping process is never finished, as customers' expectations increase and channels and touchpoints evolve.
 - Customer journey maps provide a living and breathing reminder to constantly improve customer experience but also a useful way to report and measure the value of those improvements.

1.2 Methodology

The methodology involved two main phases:

Phase 1: Extensive desk and qualitative research to identify relevant uses, issues, approaches, examples and models for customer journey mapping.

Phase 2: A series of in-depth interviews with a range of senior client-side, vendor and agency-side practitioners, consultants, strategists and experts. These interviewees came from a wide range of different sectors.

Econsultancy and the author would like to thank the following people for their contributions to this report:

- **Kelly Autenrieth**, VP of Global Customer Experience, Brandwatch
- **Chris Donnelly**, Founder and CEO, Verb Brands
- **Jake Hird**, VP Strategy, Asia Pacific, Merkle
- **Karl Brown**, Head of Customer Experience, Direct Line Group
- **Evi Malisianou**, Head of User Experience Research, Brandwatch
- **Dr Janne Ohtonen**, Group Director of Customer Experience Technology, TUI
- **Aliza Pollack**, brand strategy and user research consultant
- **Adam Powers**, Chief Experience Officer, Tribal Worldwide
- **Yana Sanko**, CX Lead Consultant, UXPressia
- **Lucy Walker**, Audience Director, eight&four
- **Matthew Webster**, Senior Customer Experience Manager, Virgin Atlantic

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- **Jerry Daykin**, EMEA Media Director, GSK
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- **Louise Kristensen**, EMEA Digital Commerce Lead, GSK

1.3 About Econsultancy

Econsultancy's mission is to help its customers achieve excellence in digital business, marketing and ecommerce through research, training and events.

Founded in 1999, Econsultancy has offices in New York, London and Singapore.

Econsultancy is used by over 600,000 professionals every month. Subscribers get access to research, market data, best practice guides, case studies and elearning – all focused on helping individuals and enterprises get better at digital.

The subscription is supported by digital transformation services including digital capability programmes, training courses, skills assessments and audits. We train and develop thousands of professionals each year as well as running events and networking that bring the Econsultancy community together around the world.

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Contact help@econsultancy.com to find out more.

1.4 About the author

The lead author for this guide is Michelle Goodall. Michelle is an experienced consultant. She has more than 20 years' B2C and B2B experience client and agency side, providing digital transformation, marketing, communications and social media strategy advice and support.

She has worked with a wide range of clients, including the Victoria and Albert Museum, London 2012, BBC, Direct Line Group, Multiple Sclerosis Society, Barclays, The Coca-Cola Company, Unilever, the UK Government, US Embassy and many others.



2. The Development and Rise of Customer Journey Maps

The exact origin of customer journey mapping and customer journey maps is a little unclear, but the concept of a business or organisation mapping business processes is not a new one.

2.1 The origins of customer journey mapping

In 1921, engineer Frank Bunker Gilbreth Sr introduced the flow process chart to the American Society of Mechanical Engineers. By the early 1930s, another engineer, Allan H Mogensen, was using Gilbreth's tools to illustrate, simplify and make processes more efficient.¹

Today, identifying and looking at customer 'touchpoints' is not revolutionary, but it was certainly talked about in a different way in the early 1980s by the then CEO of Scandinavian Airlines System (SAS), Jan Gösta Carlzon.

Carlzon advocated a view of the airline's customer experience that focused on 'moments of truth'. These determined whether the airline succeeded or failed its customers. In his book *Moments of Truth*, published in 1987, Carlzon said:

*"Last year, each of our 10 million customers came in contact with approximately five SAS employees, and this contact lasted an average of 15 seconds each time. Thus, SAS is 'created' 50 million times a year, 15 seconds at a time. These 50 million 'moments of truth' are the moments that ultimately determine whether SAS will succeed or fail as a company. They are the moments when we must prove to our customers that SAS is their best alternative."*²

In his book and speeches, Carlzon never explicitly talked about creating a map of the customer journey, and was seemingly focused on people as touchpoints. This is some way from the multiple physical and digital channels, platforms and experiences that are built into customer journey mapping today.

The developing fields of customer experience management and customer value management in the mid-1990s started to focus on quality, pricing, communication and other aspects of the customer experience that drive customer value before and after purchase or conversion.

In an article appearing in *Marketing Management* in 1994, authors mention an "experience blueprint",³ which they define as "a pictorial representation of the experience clues to be engineered, along with specification that describes them and their individual functions".

In 2002, Colin Shaw, founder and CEO of Beyond Philosophy, one of the first organisations dedicated to customer experience, drew upon Carlzon's moments of truth and created a diagram called Moment Mapping™. This was a visual diagram that looked much like an archery arrow highlighting important elements and sub-elements at each stage of the customer experience.

The process was designed to help define customer expectations and to map what an organisation was doing at each point, from a physical and emotional perspective, that might affect the customer experience.

¹ <https://www.lucidchart.com/pages/business-process-mapping>

² Carlzon, J.G. (1987) *Moments of Truth*. Ballinger Publishing Company

³ https://www.oreilly.com/library/view/mapping-experiences/9781491923528/maex_ch10.xhtml

In 2005, Dr Janne Ohtonen, now Director of Customer Experience Technology at the world's biggest integrated travel company, TUI, was asked to develop a customer experience strategy for a car manufacturer in Finland. At the time, the term 'customer journey maps' was not used, but he recognised that he needed to reconfigure the organisation from the outside in and map out traditional business processes from an external customer perspective.

Ohtonen added KPIs and mapped the Six Sigma quality principles and techniques to these customer-focused maps to identify issues along the customer journey. The improvements made to the car factory and its processes, in a country where it is expensive to manufacture, allowed the company to expand the value chain. The factory still makes cars today.

Dr Ohtonen, who has since written the book *The 5-Star Customer Experience*,⁴ explains: “We did things in a very different way – aligning the customer perspective to business processes and operations. It wasn't called customer journey mapping at the time – there was probably someone in the US using this terminology – but not in Finland.”

2.2 Customer journey mapping is a key driver of business success

Today, many organisations are focusing on 'customer centricity'; customer experience as a point of brand differentiation and a driver of customer value and loyalty.

Research suggests that good customer experience can improve the bottom line for businesses.

The 2019 report [Walking in their Footsteps – The Business Case for Customer Journey Mapping](https://econsultancy.com/reports/walking-in-their-footsteps-the-business-case-for-customer-journey-mapping/) by Econsultancy in association with Salesforce highlighted that “companies who embed mapping in their culture are twice as likely to exceed their top business goal than their competitors”.⁵

A 2018 Forrester/Adobe study also highlighted that customer experience-driven businesses reported “driving faster top-line growth, with an average revenue growth rate of 15%, compared to an average of 11% amongst other companies”.⁶

The Econsultancy/Adobe report, [Experience Index: 2020 Digital Trends](https://econsultancy.com/reports/experience-index-2020-digital-trends/) found that in 2019, companies leading the way in customer experience are three times as likely to have significantly exceeded their top-up business goal than mainstream companies (*Figure 1*).⁷

Each of these studies show that experience-driven companies reported superior business performance across the customer lifecycle, including greater brand awareness, return on ad spend, average order values, customer satisfaction, retention and lifetime value than their counterparts.

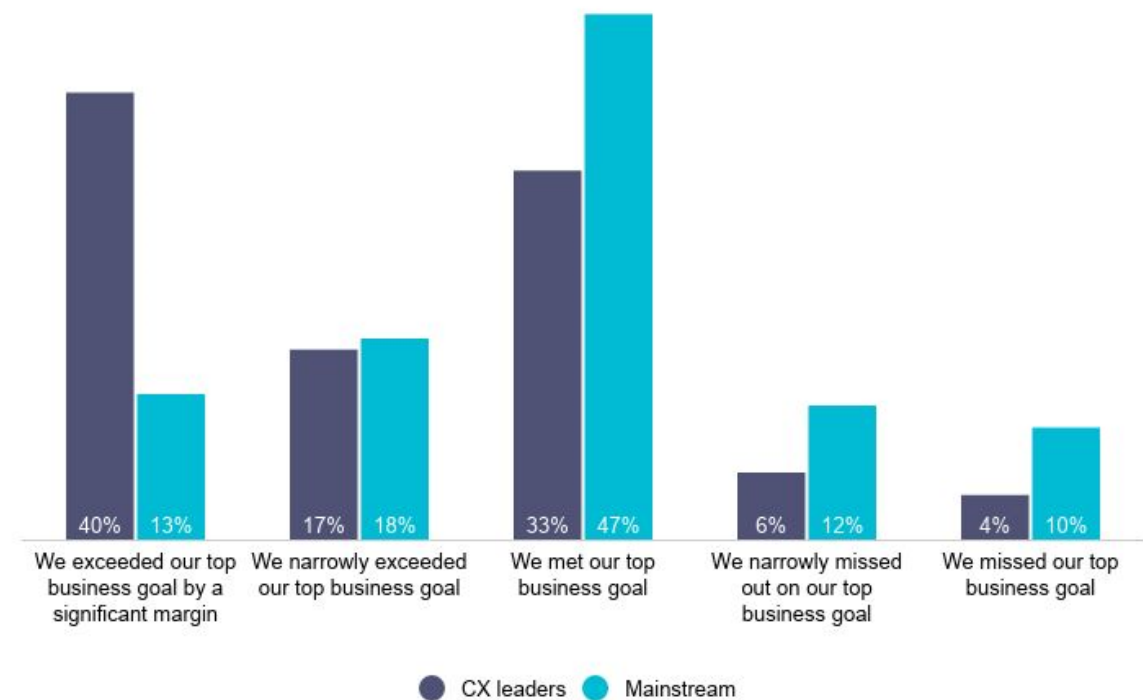
⁴ <https://www.threecustomersecrets.com/>

⁵ <https://econsultancy.com/reports/walking-in-their-footsteps-the-business-case-for-customer-journey-mapping/>

⁶ <https://www.wimages2.adobe.com/content/dam/acom/en/experience-cloud/research/roi/pdfs/business-impact-of-cx.pdf>

⁷ <https://econsultancy.com/reports/experience-index-2020-digital-trends/>

Figure 1: Thinking about the past year's performance (i.e. 2019), which statement best describes how your department performed against its top business goal?



Respondents: 5,315



Source: Experience Index: 2020 Digital Trends⁸

The need to break down the silos that can lead to poor customer experiences and reduced customer value has made it necessary for most organisations to look at the entire customer journey – from its catalyst all the way through to its conclusion – if they want to improve the customer experience.

Customer journey maps are one effective part of a broader toolkit for developing an understanding of the customer journey, identifying blind spots and improving and developing all customer touchpoints. Adam Powers, Chief Experience Officer at Tribal Worldwide, describes why many more organisations are using more maps today than ever before: *“It’s because of the increasingly complex landscape, and the increasingly complex relationship that brands have with their customers.”*

“There is a need to understand those customers more acutely and business is trying hard to articulate what they understand about their customers in ways that can be acted upon and be meaningful to the rest of the business.”

He went on to explain how his agency works with clients as early as possible to look at customer experience mapping more broadly: *“Customer experience mapping is the ‘opening of the aperture’ and having a much more holistic view of the end-to-end customer experience, which we find a lot of organisations don’t really have, and that becomes a good starting point.”*

“Then that might evolve into customer journey mapping, which is much more specific and more granular. Increasingly, an organisation needs to look at its total experience. Customer journey mapping enables organisations to do that in an actionable and strategic way.”

⁸ <https://econsultancy.com/reports/experience-index-2020-digital-trends/>

2.3 The impact of digital and new technologies on the customer journey

Every new digital technology and channel creates new customer touchpoints. With new touchpoints come new expectations and customer behaviours.

Digital and internet technologies such as apps, search engines, customer review sites, price comparison engines, marketplaces, live chats and social media have revolutionised the customer journey. Disruptive technologies such as drone delivery, augmented reality and AI must also be considered alongside classic and physical touchpoints such as direct marketing, signage, retail space, sales and customer service staff and delivery notes.

One of our contributors spoke about working on a customer journey mapping project where the team identified more than 300 digital and physical customer touchpoints that they needed to map. Another contributor spoke of using wearable technologies and smartphone geolocation data as possible sources for building profiles of their customers in customer journey mapping projects.

New technologies are also facilitating the creation of the maps themselves. Tools such as UXPressia and Miro can help teams in different locations co-create and edit maps digitally.

The strategic building blocks of customer journey mapping will stay the same but customer touchpoints, data sources and the tools used will inevitably change. There are a number of Econsultancy guides that can help you consider the bigger picture and to understand digital customer touchpoints better, which include the following:

- [Developing Future Strategy: Long-Term Thinking for Marketers](#)
- [SEO Best Practice Guide](#)
- [Paid Search Best Practice Guide](#)
- [Social Media Strategy Best Practice Guide](#)
- [Getting to Grips with Voice Search](#)
- [User Experience and Interaction Design for Mobile and Web](#)
- [Marketing Automation Best Practice Guide](#)

Readers may also wish to review Econsultancy and Salesforce's specific report on customer journey mapping, [Walking in their Footsteps – The Business Case for Customer Journey Mapping](#).

2.3.1 CRM, customer loyalty, marketing automation and the customer journey

CRMs and loyalty specialists have long mapped out customer journeys, processes and customer lifecycles. These two disciplines tend to focus on an inside out view of the customer, rather than on elements of the customer journey *before* and *after* the conversion. A rise in investment in enterprise level marketing automation highlights the importance of thinking and planning 'in the customers' shoes' at all stages of the customer lifecycle, from acquisition to advocacy.

Marketing automation solutions offer the ability to tailor customer interactions such as email, personalised web content, social, dynamic and programmatic ads, SMS and push notifications and more to create a logical and seamless customer journey using data. Visual elements of the tools enable organisations to map out clear customer journeys.

Many smaller organisations that do not have the budget for marketing automation solutions are now adopting principles of audience segmentation and using simplified customer journey mapping in their digital marketing planning.

To find out how to implement a marketing automation strategy, download [Econsultancy's Marketing Automation Best Practice Guide](#).

3. Types of Customer Journey Maps

How important is it to get the map terminology right and is there a set of standard maps that businesses and customer experience specialists use?

Interviews with our experts highlighted the breadth of the different types of maps that have been developed and used in wider customer experience projects, and how they precede as well as connect to customer journey mapping.

Should there be more standardisation around the naming of maps used in customer experience?

“Some of the terms can be used interchangeably. It’s the responsibility of whoever is picking up these projects to get to the specifics very quickly.”

— Adam Powers, Chief Customer Experience Officer, Tribal Worldwide

“The terminology applied to the types of maps is fairly universal. If there’s any confusion around developing maps, it probably stems from not understanding what the objective – and therefore the outcome – needs to be.”

— Jake Hird, VP Strategy, Asia Pacific, Merkle

“Many marketers have done some form of journey maps across their long careers and yet, they don’t always know if they are doing a journey map. Perhaps codifying the name and the process to some extent will encourage more people to engage in it with confidence.”

— Adam Powers, Chief Customer Experience Officer, Tribal Worldwide

“It can be a ‘wild west’ in organisations when it comes to mapping. Are there too many maps in organisations? Yes... but only if you’re not using them. Process maps and customer journey maps are completely different things.

“Process or architecture maps often have standards behind them. They describe stages in absolute detail and show every step. Customer journey maps are almost the opposite. Customer journey maps are very high level and the whole customer lifecycle is typically reduced to five to eight steps. You need to understand whether they are granular enough for the business objective that you are trying to solve.

— Dr Janne Ohtonen, Group Director of Customer Experience Technology, TUI

“Our customer is the retailer; therefore we create shopper or consumer journey maps.”

— Global Marketing Manager, FMCG

3.1 Defining customer journey maps

A customer journey map is a granular visualisation of the processes and stages that a specific audience persona (or 'actor') goes through in order to accomplish a specific goal that has value to an organisation. Within this map, the actor's motivations, behaviours and emotions are also usually mapped.

The objective for many organisations when customer journey mapping is to understand and optimise the path to purchase, sale or conversion, but there are many other business goals that can be mapped. For example, an insurance company may wish to map out customer journeys for the path to purchase of insurance products, but they may also wish to map the customer claims journey to ensure it is as frictionless and efficient as possible.

In its most basic form, customer journey mapping starts by compiling a series of user steps or actions into a timeline. This timeline generally travels from left to right and forms the horizontal stages of the map.

Figure 2: An illustration of a timeline for part of a customer journey



Source: Michelle Goodall

Some customer journeys can be short in terms of stages and timelines, such as an impulse sale purchase in a retailer's physical store. However, other maps can have end points on their journeys that can take years to reach. An example of this would be a large global organisation's decision maker's journey as they relocate a European office or manufacturing base.

Depending on the objective for the map, elements can be added to help form a narrative, such as:

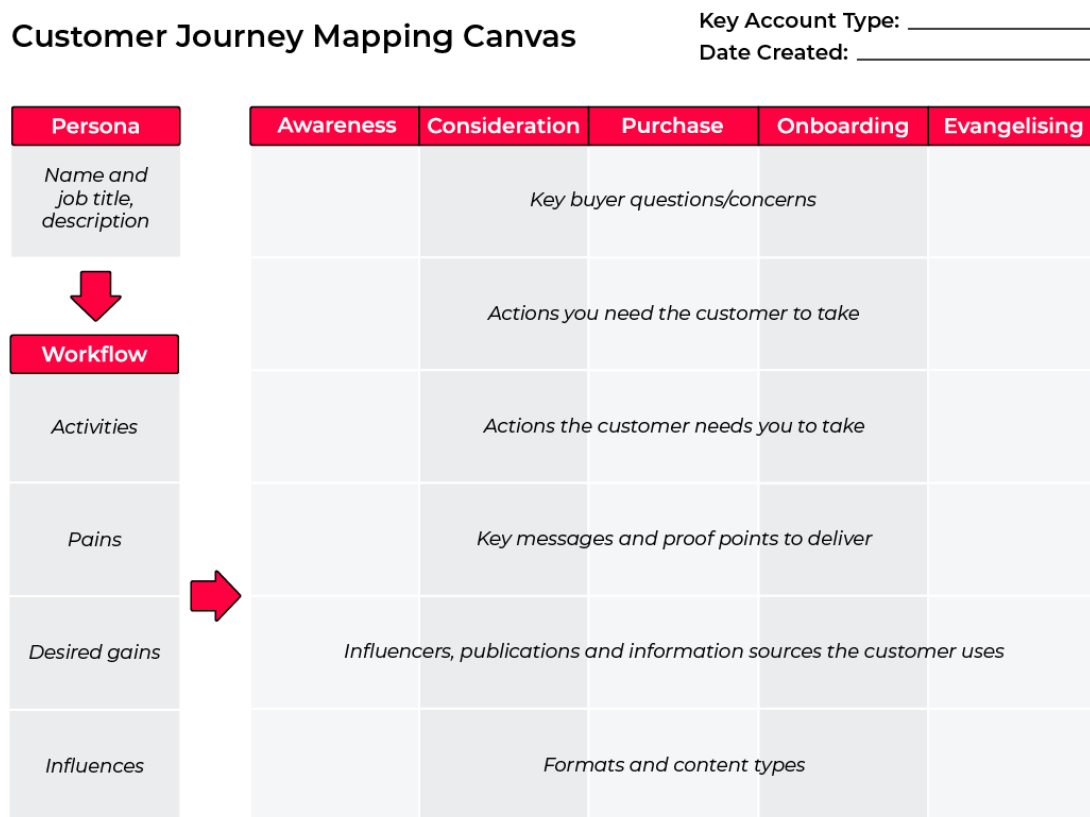
- A summary of the customer persona – who they are, their needs, wants etc.
- Activities, actions or processes at different stages of the journey (that the customer may make and/or you need or wish them to take)
- The customer's goals or problems at different stages of the journey
- The customer's emotions, feelings, expectations and thoughts
- Key pain points, concerns or friction points within the customer journey
- Touchpoints, including digital and physical channels and platforms such as 'Search Engine', 'Email', 'Member Hub' or 'Store Checkout', 'Changing Rooms' or 'Telephone Helpline'
- Key messages or brand/product/service proof points that you wish to deliver at each stage
- Storyboards, screenshots or mock-ups to illustrate the segment of the journey
- Business goals
- Marketing, sales or servicing KPIs.

This narrative is then condensed and polished, ultimately leading to a visualisation.

The example blank canvas below (*Figure 3*) is a simplified example of a customer journey mapping framework. Using and expanding upon a template like this, marketers can consider what activities their customers undertake, the pains they may be experiencing and what they are looking to gain from a product or service, as well as key questions or concerns.

This helps marketers to understand what actions they need to take to help customers progress in the customer journey and what key messages they should be looking to deliver, as well as the formats and content types best suited to achieve this.

Figure 3: An example customer journey mapping canvas



Source: Econsultancy⁹

3.2 Current state and future state customer journey maps

While customer journey maps can go through many iterations during their lifetime and usefulness, there are two main modes of customer journey mapping.

Current state maps are a reality check and are used in diagnostic phases to identify customer pain points or problems and moments of truth. These represent the points in a customer's journey with a brand or organisation when a key event occurs at any stage and an opinion about that brand or organisation is formed. For example, take Innocent Drinks. There can be moments of truth in different stages of the customer journey through to purchase and beyond.

A moment of truth could be the entertainment derived from discovering and using one of the brand's gif stickers on an Instagram Story at the awareness stage, from the tone of the copywriting on the bottle itself or the charity knitted hats at the consideration and purchase stages. The quality of the drink itself could be a moment of truth at the post-purchase or enjoyment stage.

⁹ <https://econsultancy.com/reports/overcoming-b2b-digital-marketing-challenges-best-practice-guide/>

Figure 4: Examples of Innocent's moments of truth



Source: Innocent Drinks website¹⁰ and Instagram¹¹

Future state (also known as 'clean sheet') maps create a vision of the organisational design changes that should be made by working back through the current state map.

The future state map uses the pain points and moments of truth highlighted in the current state map to identify people, process and technology changes that need to be prioritised. It visualises and shows the ideal experience and journey, free from the limitations of departmental silos, people or technology problems.

3.3 Maps frequently used in conjunction with customer journey maps

Here are some of the most common maps that can be used in conjunction with customer journey maps:

3.3.1 Process maps

A process map is a planning and management tool that visually describes the flow and series of events that produce an end result for an organisation, such as the manufacturing process in a car factory.

It can be used in many areas of business to communicate and to help streamline processes. Process maps can be used to help:

- Enable business process redesign or improvement
- Enable quality or business process efficiency improvements
- Plan crisis and issues management processes
- Design business processes to comply with standards or industry regulations.

A process map shows who and what is involved in each of the steps in the process, organisational interdependencies in a process and can reveal areas where a process (or collaboration) should be improved. Unlike customer journey maps, process maps are unlikely to include customer or user emotions and feelings.

¹⁰ <https://www.innocentdrinks.co.uk/bored/our-packaging>

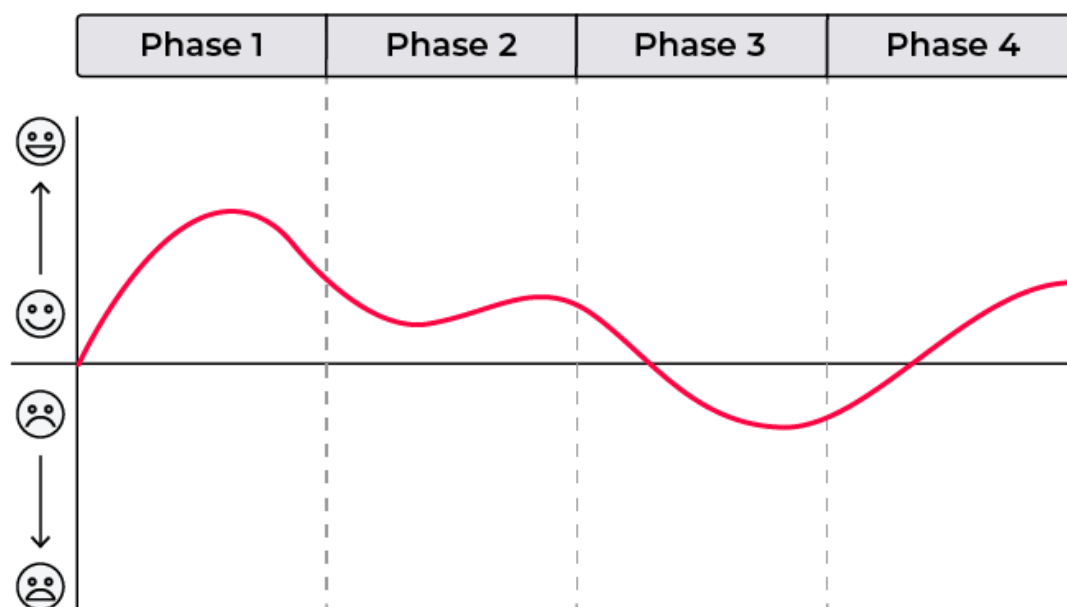
¹¹ <https://www.instagram.com/innocent/>

3.3.2 Experience maps

An experience map should ideally come before a customer journey map.

Experience maps are very broad. They map general human behaviour, rather than specific customer, user or audience behaviours, in relation to a specific product or system. By contrast, customer journey maps are specific and focused on a particular business, service or product and a specific 'actor' or customer persona.

Figure 5: An experience map exploring customer behaviour and satisfaction



Source: Econsultancy

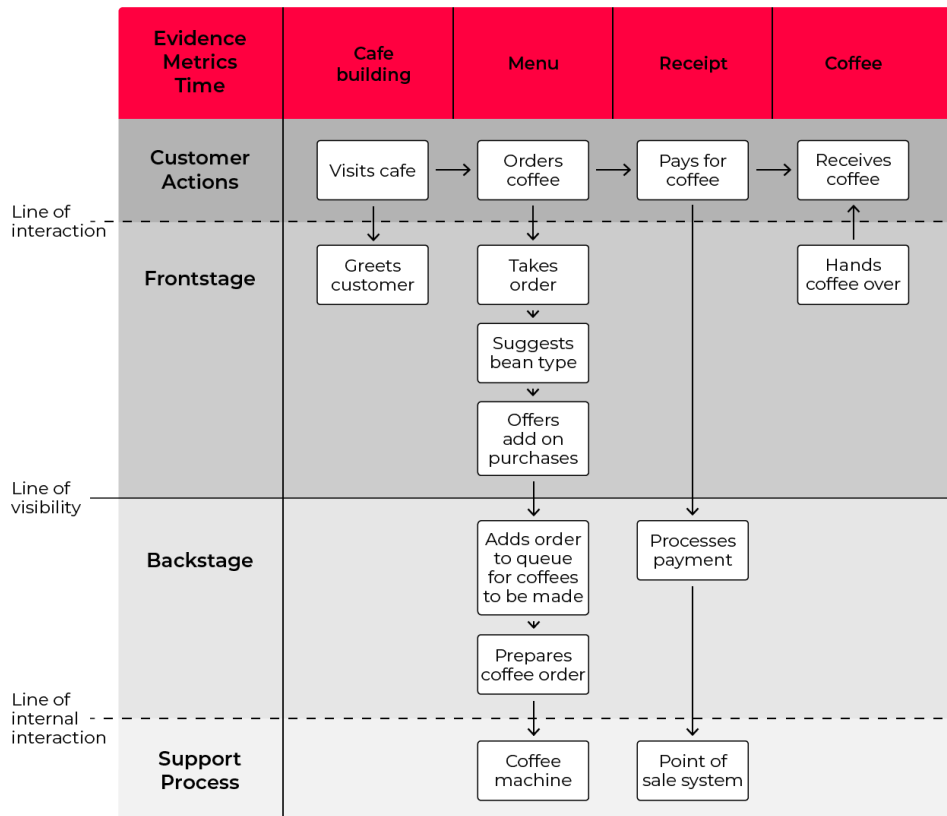
For example, if a company were developing a contactless payment system, it would create an experience map of how a person tends to pay for goods or services. An experience map would include paying by cheque, paying by credit or debit card, drawing out cash from an ATM, borrowing money from someone, using meal vouchers, requesting an invoice etc. The experience map could highlight pain points such as forgetting a card or wallet, finding out of date vouchers, making a mistake writing a cheque etc.

Using the pain points, a future journey map for a specific product or service could be created (e.g. how a user can pay with their mobile/cell phone).

3.3.3 Service blueprints

A service blueprint is a diagram that visualises the internal steps, processes and relationships between service components (people, channels and processes) that need to be in place to deliver service to the customer in each of the touchpoints where the customer meets the organisation. They help organisations see the detail of how their service is designed and implemented by the organisation and how its customers use it.

Figure 6: Example of a service blueprint



Source: Econsultancy

Service blueprints are designed to improve service and save money for the organisation, and are often companions to customer journey maps.

3.3.4 Cognitive maps

Cognitive maps are powerful visual map types frequently used in user experience and interaction design. Cognitive maps visualise a user's 'mental model' of a system, for example, a website, an app, a product or a process. They are key in the development of products or systems, user instructions, demos and any form of user assistance.

A mental model is what a user believes or feels about a system (website, app, product, etc.) and these are unique to individuals, based on their experiences. For example, personal mental models may be set by what type of phone, operating system or browser people use as well as expectations about usability set by the websites and apps that they frequently use.

Cognitive maps can also be used for visualising fuzzy or random theoretical connections between objects or concepts. Political scientists have used this mapping process to represent connections between huge concepts, such as 'social instability' with 'fundamentalism', 'radicalism', 'imperialism' or 'government instability'.¹²

These maps can also be used in organisational theory by, for example, illustrating an employee's everyday tasks are connected to stakeholders; such as clients, colleagues and the public; required job deliverables; the research that they conduct and their exposure to or attendance of meetings, conferences and events. Such an example is shown on the Nielsen Norman Group website.¹³

¹² http://leszeksykulski.pl/wp-content/uploads/2018/10/Kosko_FCM_Fuzzy_Cognitive_Maps.pdf

¹³ <https://www.nngroup.com/articles/cognitive-mind-concept/>

Cognitive maps can be used in conjunction with customer journey maps, for example, to help illustrate the mental models of specific customer personas in relation to a service or product, or to illustrate the connected societal, economic or political landscape.

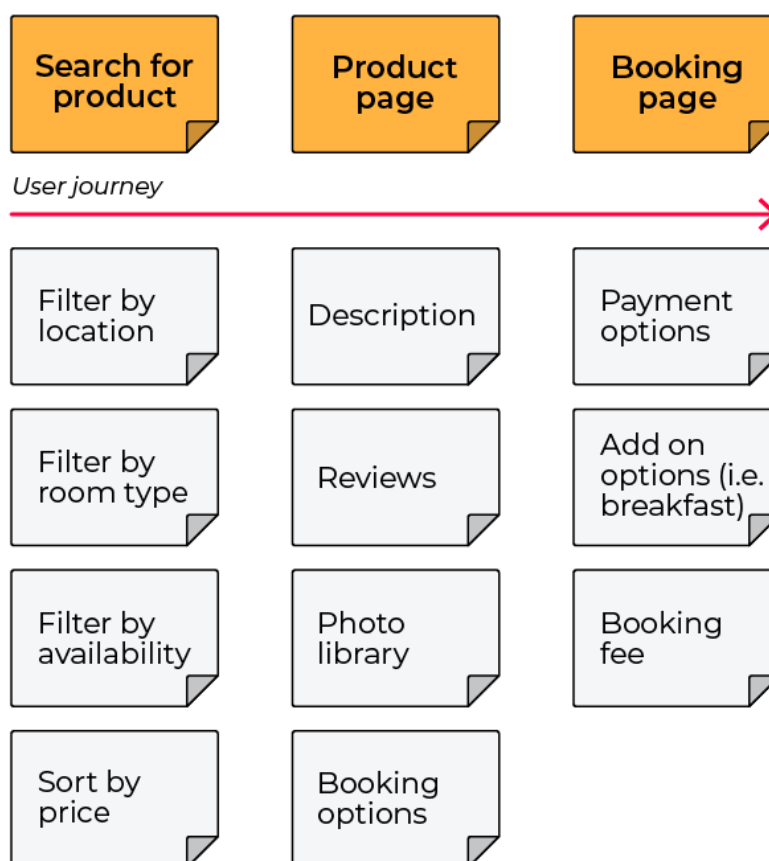
For example, a political party, charity or not-for-profit organisation could use cognitive mapping to help illustrate very broad concepts that affect voter intent, such as 'social mobility', 'equality', 'urban vs. rural opportunity mismatch' and 'proportional representation'. Used in conjunction with customer journey mapping, the political party could identify where they might need to focus engagement with specific personas, and which policies in their political manifesto could work the hardest for each audience.

3.3.5 User story maps

Customer journey maps are meant for big picture, high-level discovery and understanding of the specific pain and passion points of audiences or customers. User story maps are visual versions of specific user stories for planning and implementation of smaller projects.

For example, pain points for a parent in applying for a passport online could be getting a suitable photo of a baby or toddler and getting suitable witnesses to sign the passport photo and complete the forms. A user story map would break these steps into smaller pieces, so that solutions could be found in improving physical and digital channels and systems.

Figure 7: An example of a user story map



Source: Econsultancy

3.3.6 Empathy map

Some organisations have yet to segment their audiences fully and have not created customer personas. Others have fully segmented audiences and wish to layer emotions, beliefs and behavioural drivers to their personas.

For smaller organisations with limited budgets, an empathy map can provide a quick start, allowing them to put themselves into their customers' shoes. It can also be helpful for those who need to develop a quick customer journey for one important customer or user.

Typically, an empathy map will place the customer in the centre of four quadrants, representing what they say, do, think and feel in a particular situation, such as buying a TV (Figure 8).

Figure 8: Example of a simple empathy map for a TV buyer



Source: Michelle Goodall

Empathy maps can be used with customer journey maps to distil and simplify key customer research data such as customer satisfaction research or chatbot or live chat data. They are particularly useful as easy-to-reference summaries of customer 'truths' during customer journey mapping projects and can stop bias creeping into the process.

Brand strategy and user research consultant Aliza Pollock explains the typical role for empathy maps, compared with user experience maps: *"There are differences between user experience maps and empathy maps, the former being about the user's behaviour and attitudes and the latter being more about emotions, and a way to better flesh out and humanise personas."*

3.3.7 User, consumer, shopper, employee, claimant maps

Customer journey maps are often called user journey maps when they refer to groups and individuals that are not 'customers', or where there are no financial transactions. For instance, in the public sector, a customer could be a patient or specific type of tax payer.

Organisations tend to use different terms for specific audiences or stakeholders and it is not unusual to see 'customer' swapped out for other terms such as shopper, employee or consumer. As one of our expert contributors, Dr Janne Ohtonen, Group Director of Customer Experience Technology for TUI, reflects when discussing types of maps and terminology: *"It doesn't really matter what it's called. As long as the map and its outcomes meet the business challenge that you are trying to solve, naming standards matter very little."*

4. The Business Case for Customer Journey Maps

Econsultancy's [Walking in their Footsteps – The Business Case for Customer Journey Mapping](#) is a useful companion guide to this report and recommended reading. Based on a survey of more than 1,200 marketers, it explores the state of customer journey mapping, its impact and success factors, as well as highlighting the payoff of embedding customer mapping into organisational culture.

Although the report states that customer journey mapping is a “*cheat code for a better customer experience*”, it also finds that only 25% of marketers surveyed have reached a proficiency in it. Only half of the survey respondents said that they were actively engaged in customer journey mapping.

Retail and travel sectors appear to be further along the adoption curve, alongside organisations that have embraced customer experience as a key differentiator in more commoditised markets, such as those in the insurance industry. The UK's Direct Line Group consistently wins awards for customer experience and customer service, including the 2019 UK Customer Experience Awards 'Customer Centric Culture – Financial Services' award.¹⁴

Karl Brown, Head of Customer Experience at Direct Line Group, explains that organisations that are genuinely customer centric find it easier to invest the time and effort required to focus on customer experience. But, as he explains, it can be difficult to make a business case and 'gut feel' from customer champions is often enough to drive change.

“We find that some of the best ideas we have to improve things for customers are difficult to build a tangible commercial business case for and this can be a barrier to making changes if you allow it to be,” he says.

“But doing the right thing for customers normally delivers long-term value for the organisation even if it can be difficult to forecast. It's an extremely powerful message to our people when we make change and signpost as 'just being the right thing to do'. Really proving being customer centric isn't just lip service and something the business believe in.”

Brown continues: *“We now have a number of live initiatives in our business that have delivered great customer outcomes, making dealing with our products much easier and seamless, while at the same time removing inefficiencies and/or delivering incremental income as customers find it easier to buy more or remain with our brands. We use these initiatives as case studies to reinforce the value of doing the right things for customers.”*

4.1 Typical business benefits of customer journey mapping

Our contributors spoke about the many benefits of using current state and future state customer journey mapping as a part of a broader customer experience strategy.

¹⁴ <https://cxa.co.uk/winners-and-finalists-2019>

What follows is a summary of the business benefits of customer journey mapping:

1. Identifying key business drivers

Viewing a business from the customer's perspective frequently highlights business drivers that may require more focus and improvement.

For example, one of this report's contributors used journey mapping to identify the likely investment of a marketing and communications plan. The business objective was to drive new category product awareness to conversion and sales for two distinct target audiences. The mapping process quickly highlighted which audience was most likely to convert. This helped the business develop its product, marketing and communications strategy.

2. Identifying new revenue opportunities, reversing loss of revenue

Collaborative, cross-function projects that focus on addressing customer pain points and passions can not only reverse loss of revenue but can identify new ways of driving sales and create efficiencies.

3. Minimising waste and process inefficiencies

The visual mapping of current state customer journeys frequently highlights stages or business processes that are wasteful, costly or inefficient. Many organisations develop a more holistic value chain by improving customer journeys.

Dr Janne Ohtonen remarked that a project he worked on as a consultant in Finland helped a telecommunication provider to make savings of \$70,000 per month, as inefficient processes were identified and eliminated.

4. Maximising customer lifetime value

Aligning business processes to customer journeys can highlight which elements of the journey are under- or over-served. Often the process highlights a lack of focus on post-purchase, loyalty and advocacy stages. For further detail about customer lifetime value, read the Econsultancy report [Understanding Customer Lifetime Value](#).

5. Improving customer service and customer experience

It is impossible to avoid some of the uncomfortable truths that the process of customer research and analysis of customer pain points reveal. Articulating common problems and where the solution sits within the organisation will create action.

6. Improving customer satisfaction (CSAT) metrics such as Net Promoter or Customer Effort scores

There is a correlation between high CSAT scores and business performance. This report's contributors all spoke of the positive impact of customer mapping projects on CSAT measures.

7. Decreasing customer churn and improving customer retention

Removing customer frictions, pain points, barriers and identifying and addressing areas where the customer feels undervalued can have a positive impact on customer loyalty.

8. Improving employee empathy and motivation

Teams that may not be customer facing, but who participate in customer journey mapping and use a 'customer lens', are able to frequently re-evaluate the significance of their work and their individual and departmental impact on business reputation and success.

9. Shaping company culture to become more customer centric

Many customer experience projects kick-start a cascade of successful internal customer culture programmes that change attitudes and behaviours.

10. Aligning teams and departments

Using the customer as a common denominator for the business can help teams empathise, find common purpose, understand interdependencies and use a common language. The face-to-face and collaborative nature of most mapping projects help teams align and perform more effectively.

11. Aligning metrics and KPIs

Aligning metrics and KPIs to customer journeys can bring them to life and make them more relevant. Attribution modelling on top of this can highlight the most impactful elements of the journey and help with planning and budgeting.

The travel industry, an early adopter of customer journey mapping, continues to innovate

“For industries such as travel, the user journey is highly complex, competitive and long, [so] there are many challenges that need to be considered. As consumers are always in a state of desire to travel (as noted in the customer journey map), brands need to consider the impact of external threats that will change the way consumers book their travel.

“Consumers have instant access to a high volume of information that is leading to choice paralysis, which we now see is resulting in a behaviour change: the customer is going back to booking through a travel booking specialist who will provide them with the ultimate experience.

“Experience is priority for our consumers. When they travel they want to go off the beaten path and have an experience that is unique to them. It all leads to [the need to access] accurate data that can be analysed from multiple lenses to build a holistic CJM [customer journey map]. This can be time consuming but ultimately provides a competitive advantage.”

— Lucy Walker, Audience Director, eight&four

5. Rules for a Successful Customer Journey Mapping Approach

Contributors to this report, who have decades' worth of combined experience, were asked to highlight the criteria for a successful mapping project. Without exception, all stated the same basic rules, regardless of the complexities or simplicity of the project. These are summarised in the following sections.

5.1 Get organisational ownership at a senior level

While the project will have owners that may come from marketing or customer experience, unquestionably, without organisational ownership at a senior level, the journey map can become a digital file or a poster that collects dust, rather than a living story that can inspire teams to improve multiple elements of the customer experience.

If championed from the top down, the story that customer journey maps tell can unify teams, reduce operational silos, create efficiencies and deliver value to the business.

Matthew Webster, Senior Customer Experience Manager at Virgin Atlantic, explained that a new CEO not only encouraged a renewed approach to customer journey mapping in the organisation, but also changed the operational structure to put it at the heart of business change.

"We have mapped customer journeys in the past, but they were never living, breathing documents. Our 'magic touches' have been great but didn't always fix the problems that our customers cared most about," Webster says.

"Our new CEO is passionate that we use journey mapping as a back-to-basics tool to focus on our 'as is journey' to identify customer pain points and then fix them. They see this as a solid base for a longer term plan to map our 'to be journey' where we then focus on how we enhance these journeys."

He continues: *"Our customer experience department is being renamed as the 'customer journey department'. We are going into CJMs [customer journey maps] wholeheartedly, completely end-to-end from inspiration through to all the physical points in the journey through to loyalty and advocacy at the end.*

"In the past we have looked at the journey in parts, which can lead to silos. The CJM leads will look at both digital and physical parts of the journey, end-to-end. They will prioritise, budget for and finance improvements across the journeys so that the customer leads make changes that impact the customer and manage the funding behind this.

"It's a laser focus on parts of the journey that our customers are telling us to fix and parts of the journey that we feel will have the biggest impact in our customer satisfaction scores."

Kelly Autenrieth, VP of Global Customer Experience for Brandwatch, suggested that while data informs much of customer journey mapping, there can be elements of subjectivity. The clarity and vision that leaders provide to those who are knee-deep in granular mapping projects can be helpful, she says: *"Opinions should also be supported by business/leadership strategies to ensure that the journey is reflecting core company values or practices.*

"We have a dedicated user experience research team – not many organisations have that. What's more, the main stakeholders report into chief role, so it's being driven from the top."

5.2 Have an organisational culture that supports and delivers

Senior stewardship should ensure that the outcomes from a customer journey mapping project not only live within the organisation, but also inspire and disrupt ways of thinking and doing.

While many organisations may not take such decisive restructuring action to put the customer at the heart of the business as Virgin Atlantic, all respondents stated that senior presence and alignment to business and leadership strategies were a deciding factor in successful projects. There has to be a culture of collective seeking and deriving value from analysing and continually improving customer experience.

5.3 Support identifiable business goals

Customer journey mapping can be both a time and resource sapping process. As with any successful project, customer journey maps must be mapped back to easily understood, identifiable business objectives and outcomes.

Typical business benefits of customer journey maps were covered in *Section 4.1*, but every business will have its own reasons for mapping, such as improving CSAT scores, improving product usage or even channel engagement.

Mapping customer journey maps to valuable business outcomes is critical. However, expert contributor Jake Hird, VP Strategy, Asia Pacific for Merkle, warned that marketers should avoid the current fashion of using customer journey maps tactically: *“Stop using journey maps as tactical assets, instead of strategic ones. Journeys are important, but they should typically be treated as a playbook, not a plan.”*

Customer journey maps are rarely something that exists in isolation, outside of a broader strategic focus on improving customer experience through many organisational touchpoints.

While customer journey mapping can be an ongoing process, especially for those focusing on constant optimisation of the customer experience, it is important to establish the outcome, not just the business goal or goals that are supported.

5.4 Be clear what your map is... and what it isn't

A quick way to lose faith in customer journey mapping is to be far too broad and ambitious with the first project. Many organisations are tempted to embark on a mapping project that is exhaustive and covers every audience segment, every possible journey and every possible customer experience. Other common pitfalls can include:

- **Failing to create a shared vision for the map** that all internal stakeholders understand and can relate back to – agreeing ‘terms of reference’ for the project is one way to avoid this situation
- **Having unrealistic expectations** that the customer mapping process can fix everything that requires fixing within an organisation
- **Having maps that are far too detailed and complex** to understand and act upon – organisations with mapping experience tend to increase the complexity of their maps from high-level to detailed after completing and actioning a few successful mapping projects.

5.5 Involve the right stakeholders

It is critical to get the right stakeholders on board at the earliest stage to create agreement and alignment around the purpose of the project. ‘Stakeholders’ refers to individuals or teams who:

- Are domain experts and can provide information and expertise to help build a customer journey map hypothesis

- Contain information or data about customers and their experience or interactions with any business, organisational or brand touchpoints, whether they are digital or physical
- Have it within their power to improve or negatively affect a customer's experience or perception of the business, organisation or brand
- Will be affected by any decisions to improve or change the business, organisational or brand touchpoints at any stage of the customer journey.

Who is involved will be defined by the scope of the project (e.g. whether it is product-, brand- or service-led) and the type of journeys being mapped.

The company's organisational structure will also be a factor as to who is involved. Some organisations do not have insight teams, for example. In smaller organisations, marketing managers may have an insights role so this entire team or department does not exist. However, in sectors such as media, finance, travel and retail, insight teams are responsible for gathering and analysing data from many teams and sources, and are therefore critical stakeholders in the project.

Contributors to this report suggested that any customer journey mapping project, for any size of organisation, should ideally include the following stakeholders:

- **Any teams that represent the 'voice of the customer':** For example, customer service, member services, claims teams (e.g. in the insurance sector), shop floor teams and front of house (e.g. concierges in hospitality, store managers or supervisors in retail). The insights and knowledge that these teams hold is invaluable. They are central to any customer mapping project.
- **Marketing:** By definition, marketing is *"the management process responsible for identifying, anticipating and satisfying customer requirements profitably"*.¹⁵ Marketing is a key generator and user of customer research, insights and data. It plays an important role in terms of ensuring brand codes, key messaging and positioning are consistent and repeated through brand architecture and customer touchpoints.
- **Digital:** Generally speaking, digital teams are responsible for digital strategy and digital products in the organisation. They are critical stakeholders in most projects.
- **Sales/business development:** Sales teams are a front line gold mine of qualitative research and feedback, even if they do not speak to the customer or end user directly. They acutely feel the impact when other departments do not share their urgency in fixing customer experience. They can be essential stakeholders when it comes to prioritising improvements that have genuine impact on revenue and sales.
- **User experience (UX):** Customer journey mapping in the traditional sense of the term came from this discipline and many UX teams continue to lead customer journey mapping projects. UX teams bring objectivity and a smart use of data to customer journey projects.
- **Product owners:** Product owners are used to process maps. Their products are important customer touchpoints. Customer journey mapping exposes product owners to connected areas of the business and ensures that they are aware of the role that product and user experience and the importance of a feedback loop between marketing, customer experience and product.
- **Technical leads:** Technical leads can bring solutions (and a reality check) to improving customer journey mapping. In many organisations, customer journey mapping can be an important step in bridging potential gaps between developers, product owners, digital, marketing and customer experience.
- **Loyalty:** In some sectors, loyalty teams have their own complex customer journey maps. They can often get forgotten when it comes to projects that look at broader customer journeys but can bring invaluable insights and data around specific customer engagements and behaviours with a brand or product.

¹⁵ <https://www.cim.co.uk/>

- **Insights:** Insights teams gather data from many sources and are required by teams and departments to create actionable hypothesis and reports. In some organisations, insights teams can lead customer journey mapping.
- **Senior leaders and executives:** Senior leaders and executives are critical champions of customer-focused projects to derive business value. Their main role is providing senior stewardship and focus.

Many customer journey mapping projects are managed by a central cross-departmental team of experts from operational, marketing and sales, that can process and think instinctively like a consumer. Aliza Pollack, brand strategy and user consultant, said: *“The rule of thumb is that if their [the stakeholder’s] part of the business touches the customer/user, they have a valuable role to play in defining the customer/user, taking the journey map to their team, redefining who they see as the customer/user and refining their plans for them.”*

The contributors also talked about how important customers were in terms of gathering data and validating the maps (which will be discussed further in *Section 6*), but they are also an important stakeholder in many projects. Global organisations tend to develop the first tranche of customer journey maps centrally and then roll them out to regional teams who will refine them with their distinct perspectives and explore similarities and differences in customer expectations and behaviours.

GSK’s EMEA Digital Commerce Lead Louise Kristensen and EMEA Media Director Jerry Daykin discussed their approach to mapping customer journeys at the 2019 Festival of Marketing.

Standardising GSK’s consumer experience journey mapping

Louise Kristensen, EMEA Digital Commerce Lead, and Jerry Daykin, EMEA Media Director at GSK, presented at the Festival of Marketing in 2019. In their session titled ‘How data and personalisation is fuelling growth at GSK’, they explored what it takes to unlock the value of data, when is the right time to personalise and how to create the best consumer experience.

They spoke about the ‘consumer experience journey’, how they map this idea across their many ‘customers’ for their consumer healthcare products and how the programme was rolled out across their markets.

“Last year [2018], when we wanted to drive alternate consumer experience journeys, we completely revamped the way we do marketing internally. We worked right from our category teams that sit at brand global level, our local markets, our brand teams, our marketers and our sales teams. It’s important that we don’t forget the sales element of this. We don’t do marketing and selling,” Kristensen said.

“We did a lot of capability work around ‘how do you map the consumer experience journey’ and ‘what do we expect to be mapped from that’. And therefore, how do we work with our insights and analytics teams so that we get the right insights points? We made sure that we standardised that so that every single brand didn’t have a different view of the datasets that they were using – we standardised these consumer journeys. We put some pressure on ourselves to get that work done.”

Daykin added: *“It was a real cross-functional effort between marketing, sales and the insights from our data and analytics teams to build out those maps. We did it in a big programme that we ran out across our global and local markets. Senior stakeholders such as the CMO were driving that agenda. It’s easier if you have the wind of your senior stakeholders pushing you in that direction.”*



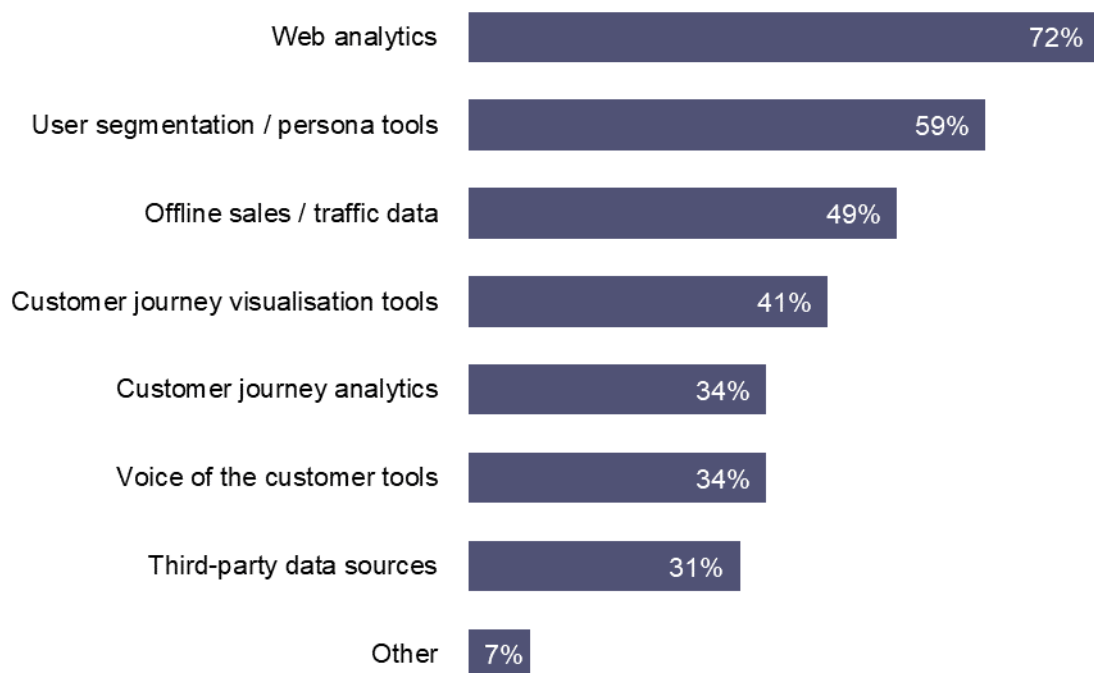
5.6 Get the right data

What data should be used in customer journey mapping?

The level and depth of data required will be determined by the business objective and outcomes that the business is looking to deliver.

According to Econsultancy's 2019 report published in association with Salesforce, [Walking in their Footsteps – The Business Case for Customer Journey Mapping](#), marketers are turning to a range of tools and data sources to help develop personas and visualise the customer journey. Among the companies surveyed for that research, web analytics was the most frequently used tool for building up a picture of the customer, with nearly three-quarters (72%) of respondents using it. More than half (59%) are using user segmentation or persona tools (*Figure 9*).

Figure 9: What data sources and/or tools do you use to deliver customer journey mapping? (company respondents)



Respondents: 237

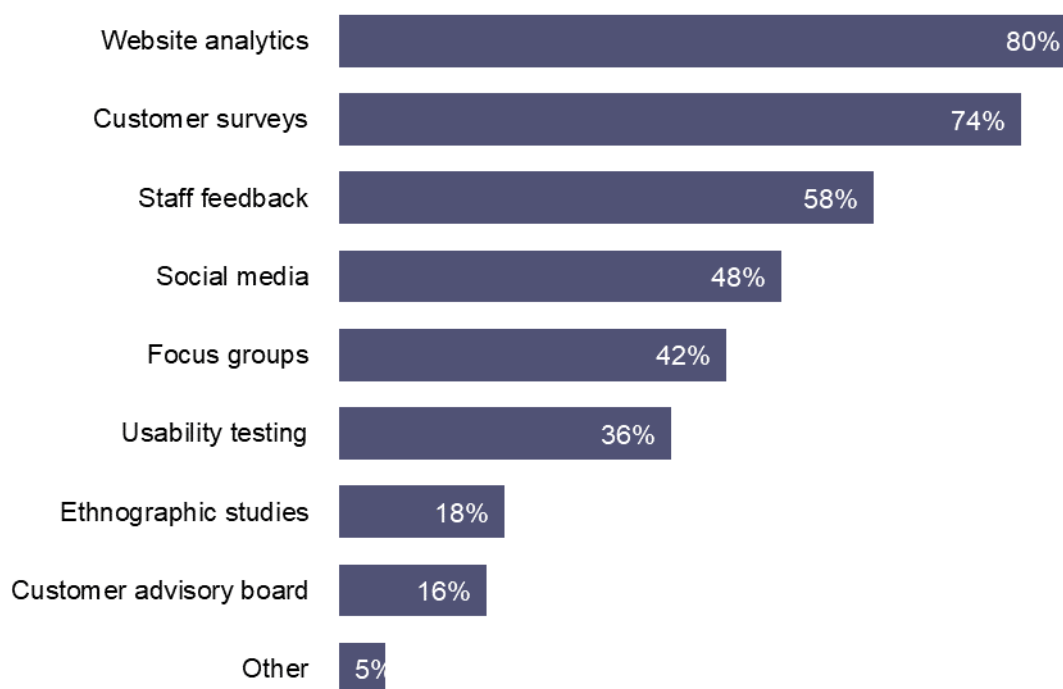
Source: Econsultancy¹⁶

A far smaller proportion of companies, however, are using customer journey visualisation tools (41%), customer journey analytics (34%) or voice of the customer tools (34%), suggesting that businesses who start to invest in these tools now are still in a position to gain an edge over competitors who only have web analytics capabilities.

The same research found that the vast majority of companies (80%) also tend to rely on web analytics when collecting insights to inform the customer journey. This was closely followed by customer surveys (cited by 74%) (*Figure 10*).

¹⁶ <https://econsultancy.com/reports/walking-in-their-footsteps-the-business-case-for-customer-journey-mapping/>

Figure 10: From which of the following, if any, do you collect insights to inform the customer journey? (company respondents)



Respondents: 225

Source: Econsultancy¹⁷

Less often cited were the qualitative methods of research, such as focus groups (42%), usability testing (36%) and ethnographic testing (18%), suggesting that many companies are missing a trick when it comes to building a richer understanding of their customers' feelings, behaviours and motivations, information that could be crucial when it comes to building a customer journey map.

Although quantitative data offers a wealth of insight, allowing companies to track performance in real time, qualitative research can help marketers get to the 'why' of the quantitative data, and even reveal insights that were previously unthought of.

The different data categories that are typically used in customer journey mapping projects are described below (*Table 1*). The following table is not a comprehensive list of data required for customer journey mapping, but is intended to help anyone responsible for customer journey mapping projects understand how data is categorised and possible sources of relevant information and data.

¹⁷ <https://econsultancy.com/reports/walking-in-their-footsteps-the-business-case-for-customer-journey-mapping/>

Table 1: Data definitions and example data types used in customer journey mapping

	Quantitative data	Qualitative data
Type of data	Data that is statistical and typically structured in nature, solid and defined.	Data that is non-statistical, typically unstructured or semi-structured.
How it is measured	This type of data is measured using numbers and values.	It is not typically measured using hard numbers, but categorised and analysed based on properties, attributes, labels, and other identifiers.
Pros	<ul style="list-style-type: none"> • Larger sample size available • Fast – some tools offer real-time insights • Standardised metrics make it possible to make comparisons over time 	<ul style="list-style-type: none"> • Provides depth of understanding around a customer's thoughts, feelings, behaviours and motivations • Opportunity to probe previous questions or ask questions on the fly • May be more authentic
Cons	<ul style="list-style-type: none"> • Lacking detail • Limited – e.g. many survey questions have pre-set answers, which may not reflect respondents' true thoughts • No opportunity to follow up if survey respondents are anonymised 	<ul style="list-style-type: none"> • Smaller sample size • Costly and time-consuming – this research takes longer to conduct and requires specialists • Findings may not apply across an entire cohort of customers
Example types of data collected and analysed during customer journey mapping projects	<ul style="list-style-type: none"> • The total number of potential customer touchpoints • Number of complaints (increase/decrease) • Number of feedback forms completed • Number of social media mentions (negative and positive) from social analytics tools • Average customer complaint resolution time • A raft of app and website analytics quantitative data, e.g. Number of checkout / registration form abandons, click through rates, popular content, downloads, Goal Flow data etc. • Marketing data – ad campaign data, channel performance data (e.g. CRM, search, email, social etc.), campaign attribution data etc. • Sales data • Renewal data • Customer lifetime value data • Loyalty programme data • Quantitative behavioural data – e.g. size of audiences generated from retargeting cookies • Net Promoter Scores (number of promoters, passives and detractors) and CSAT customer survey data • Any other data from relevant surveys based on robust samples 	<ul style="list-style-type: none"> • Business operational data analysis – i.e. how each department is involved with each customer interaction and how this then impacts customer perception, experience and revenue generated (e.g. stock levels, fulfilment, impact of ad campaigns on number and type of customer enquiries and impact on Service Level Agreements etc.) • How a brand, product or service feature is described by users (social listening and keyword searches) • Categories of top user frustrations or complaints from customer or member surveys/complaints • Mystery shopper feedback • Ethnography • Customer diaries • User experience testing data • Live chat and call centre transcripts • Support tickets • Product feedback • Review site category of customer complaint and praise • Observations and feedback from business development, sales teams, shop floor and other customer facing teams etc. • Partner, VAR, influencer, advocate feedback/ observations

Source: Michelle Goodall

It is important that the right types of data are collected at the start of the project, based on the customer journey mapping project objectives. The 'right type of data' for any mapping project is that which is:

1. **Statistically relevant** – quantitative data must be based on a robust sample and must statistically indicate a trend, change, problem or opportunity, as opposed to anecdotal data.
2. **Relevant to your project, your personas and the stages of the journey you are mapping** – for example, if a business is mapping the onboarding journey of a new customer to an app, then app subscription renewal data and physical store sales data are unlikely to be relevant.
3. **Clean** – inaccurate or corrupted data can have an impact on results. Ensure that data is correct, consistent and useable by identifying any errors in it, correcting, deleting or manually processing them as needed.
4. **Interpretable** – data must be interpretable to create meaningful KPIs through the journey and tell a story, show success, create learnings etc. The role of customer journey mapping is to help understand and provide a blueprint for improving customer experience. Most customer journey mapping projects map current state and highlight areas for improvement. therefore, data at each stage of the journey should allow for benchmarking the current state in relevant stages to highlight the business problem or opportunity.

Revisiting the maps and adding data after any changes have been made to the customer experience can visibly highlight the business impact. For example, the business might add the observation *“total audience segment customer churn at renewal stage decreased by 11%”*.

Do not underestimate the time and effort that it takes to agree upon, collect, collate and do any meaningful analysis of quantitative and qualitative data, from multiple sources, the first time that any mapping project starts (see *Section 5.7*).

Creative thinking can build useful data

Anything that can help build a real picture of customers can be useful if it is statistically viable. The ‘right type of data’ may not exist, or perhaps exists but has not been brought to life for some stakeholders in a customer journey mapping project.

At the Festival of Marketing 2019, Jo Jackson, CCO at MADE.com, explained how she and her team walked in their customers’ shoes and were able to gather more qualitative data about their customers through observation: *“The best tip I can give to people yet to map out their customer journeys is to be a real customer. We can be marketers or we can be a real customer and walk in and just think... ‘how do I want to walk into this space?’”*

She explained how MADE.com had its office in its showroom, with just a glass wall separating the meeting room and its customers on the shop floor. *“I was having meetings with people and watching people in our showroom,”* she says. *“Just go into your space, map out who your users are – ours are predominantly millennial but we do have an older generation coming in with their tape measure – be a real customer and take off your marketing hat!”*

When should data be used in a customer journey mapping project?

Pre-project: Data should be used at the start of the project to show the scale of the business challenge, to create a business case and to set shared project goals and objectives for mapping journeys for analysis and improvement. Data should also be used to put a value/size behind the audience segments and prioritise those that should be mapped. One of this report’s contributors spoke of their four distinct audiences for priority mapping based on the modelled financial impact of getting customer experience right or wrong.

During the project: Data should be used to create a journey hypothesis or 'heuristic maps'. These are first passes at the current state journey of a customer persona. Using a blend of quantitative and qualitative data, the customer journey mapping team can create maps that may have some gaps, but that can be developed further with a wider group of stakeholders in a workshop or number of workshops.

Post-project: Data should be used to benchmark the impact and business return on investment of any changes made as a result of the mapping project. Again, this could be the actual financial return of the changes or even the value of a perception change among important customers and stakeholders. For example, unprompted perception statements or feedback from key audiences might become more closely aligned to a brands' desired positioning and proposition (this might manifest in more existing or in-market customers describing a bank's digital platforms and branches as 'simple to use').

5.7 Do not underestimate the time it takes

The end-to-end physical and digital mapping approach does not work for all organisations. Marketers who take this as their starting point may find things overwhelming and fail rapidly.

For many organisations, it is important to get some quick wins under their belt before further time, resource and money are committed to more detailed mapping projects. How much time a project takes will be determined by many factors, such as size of the business challenge/problem, the type and complexity of maps, the number and types of stakeholders, the number of customers and journeys being mapped, whether the project is global or local and whether it involves one product/brand or many.

While writing this report, the author was involved in a project to create basic heuristic maps for a small B2B company with a mostly digital set of customer touchpoints to be workshopped by key stakeholders. Compared to a travel, insurance or arts and culture client, it was a relatively simple exercise.

However, finding the time and space to gather and analyse the data from different sources and stakeholders, agreeing the start and end points and layers of the map, developing the primary customer personas, getting the right stakeholders in a room, workshopping the current state map and creating a workable visual digital map to help prioritise improvements, still took more than a month.

Jake Hird, VP Strategy, Asia Pacific at Merkle, also warns of underestimating the time it takes for teams to workshop the maps. He advises against trying to do too much in a short space of time.

He also acknowledges how hard it is to get the right stakeholders in a room together: *"Cramming everything into a few hours can be overwhelming and there's no time to really digest and process the information that's being thrown around."*

"Many of our projects require teams to work together but also to sit back and review the workshopped maps, feed back and help us iterate them over an agreed time period."

6. Developing the Customer Journey Map

There are a number of key stages that equally apply to ‘quick and dirty’ and more detailed and complex customer journey mapping projects. Our contributors all spoke of the following key development stages:

- Agree project scope, goals, objectives and deliverables
- Agree team and responsibilities
- Agree and develop personas
- Agree data and informational needs
- Agree customer journey map layers
- Develop customer journey workshops.

6.1 Agree project scope, goals, objectives and deliverables

This was covered in previous sections, but it bears repeating that a simple statement of the terms of reference for the project that can be agreed by senior leaders and all project stakeholders is critical.

A simple example terms of reference statement might be:

“A UK-only project to map ‘current state’ customer journeys for four of our most valuable customer personas through both physical and digital touchpoints. We will develop a collective understanding of how to join up brand experience through customer journeys, and identify, prioritise then phase improvements and measure the impact of those improvements.”

Brands working with agencies must provide a brief with clear goals, objectives, budgets and timelines.

A schedule of work (SOW) is typically an agency's response to a client brief, ensuring that project scope, objectives and deliverables are commonly understood and agreed, as well as providing an initial estimate of the degree of work involved in delivering the project. Agencies will deliver a high-level budget estimate and milestone plan that should be documented in the SOW. Once approved by the client, the SOW acts as the catalyst for the agency to begin defining the project requirements and solution in more detail.

Econsultancy has a helpful [SOW template file](#) that can be adapted for businesses wishing to brief an agency or consultant helping with their customer journey mapping project. It is also helpful for in-house projects developed by in-house teams.

This unifying vision or concept should be agreed and repeated frequently in all discussions and correspondence with experts and stakeholders.

6.2 Agree team and responsibilities

Section 5.5 covered the typical people and departments who might be involved in customer journey mapping. It is important to define who is responsible for tasks and milestones in any project.

Our contributors included agencies, consultants and client-side marketers and strategists. Many agreed that using a matrix such as the RACI (responsible, accountable, consulted, informed) framework helps to keep complex projects on track when there are multiple project stakeholders, individuals and teams involved.

The RACI matrix clarifies responsibilities and ensures that everything the project needs done is assigned someone to do it. The roles that stakeholders might play in a customer journey mapping project using RACI are examined below:

Responsible: Individuals, teams or stakeholders who do the work, whether that is completing a task or making a decision. Several people can be jointly responsible in a customer journey mapping project, for example, agencies or consultants may be responsible for gathering and collating data at all stages of the project, creating heuristic maps and running workshops. Key sales, marketing, customer service and digital teams may be responsible for providing data, participating in the workshop, refining the maps, testing the maps and making the changes that are prioritised from the process.

Accountable: Individuals, teams or stakeholders who are the 'owners' of the project. They ensure responsibilities are assigned in the matrix for all related activities. They steer the project, and sign off milestones, tasks, objectives and decisions when completed.

Consulted: Individuals, teams or stakeholders who are required to give input before, during and after the project. These people are kept in the loop, and may have different levels of active participation in the project.

Informed: Individuals, teams or stakeholders who are updated on progress or decisions, but do not need to be formally consulted. They rarely contribute directly to project tasks or decisions.

6.3 Develop, agree and communicate personas

Personas are fundamental to customer journey mapping. Personas are meaningful archetypes to help marketers understand a typical member of an audience group, their characteristics and commonalities.

The Interaction Design Foundation describes personas as: *"Fictional characters, which you create based upon your research in order to represent the different user types that might use your service, product, site, or brand in a similar way."*¹⁸

The business may already have a strong idea of which customers it needs to map. For many organisations starting out with customer journey mapping, these personas usually reflect their most important audience segments, usually in terms of business opportunity and impact. These organisations will have developed personas to represent these audience segments for either web or product design, marketing or marketing automation projects.

There are some golden rules when it comes to developing or creating personas:

1. Create personas that are informed by data

Econsultancy's [Segmentations and Personas Best Practice Guide](#) provides more detail about this – specifically about basing personas on the insights derived from market segmentations – but note that personas should not be invented or made up. They should be based on robust data.

2. Avoid going 'persona-crazy', developing and mapping multiple personas

The best personas are created to be used across the organisation, at the very least as a core blueprint of an audience group's common behaviours, goals, needs and motivations.

3. Avoid creating personas in a silo without involving other teams and departments

It is not uncommon for teams to reject personas developed by other teams if they feel that they have been imposed upon them. There are many examples of UX teams or marketing teams imposing their personas on customer journey mapping projects. If these personas do not accurately reflect, for example, the customer service or sales team's understanding of who they are *actually* speaking to, then disconnects can occur.

¹⁸ <https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them>

4. Communicate the value of creating personas to broader teams and departments

Many organisations who have created UX personas for website or product development have had a burst of activity and then forgot to explain their use and potential usefulness to others in the organisation. Do not let all that hard work and research go to waste. See whether these are representative of key audience segments and whether they can be used or adapted by talking to different teams and departments in the business.

There are many articles that explain the many different types and layers of personas that can be mapped. This report keeps it as simple as possible for those yet to develop them. Again, it must be stressed that personas are a particularly important part of the project to get right to ensure all project stakeholders are invested in the project and *believe* in the personas that they will be mapping.

There are two persona types that our contributors mentioned as useful when categorising audiences for successful customer journey mapping projects:

1. Targeted user experience personas

These are granular personas that will have a specific goal – and very specific needs – that they want to fulfil, such as a visually impaired art lover who wishes to purchase membership at a museum. These personas are often developed in user experience teams.

Kelly Autenrieth, VP of Global Customer Experience for Brandwatch, explains how her team successfully uses these types of personas: *“I’ve found that the most successful CJMs [customer journey maps] are ones that are very targeted on a specific persona and a specific part of their journey. [They] allow you to home in on edge cases/problem areas without sacrificing details or data.”*

“While you’re trying to be as specific as you can be, you will still provide a general expectation of events and experiences because there will always be outliers.”

2. Broad marketing personas

These tend to be much broader personas that are usually created in marketing. For example, an airline might create personas for its different flyer types, for example, individual holidaymaker, family holidaymaker, economy business traveller, business traveller, upper class traveller etc. Sub-personas may be created within each of these categories to add another categorisation or level, for example, loyalty levels. Whichever type of persona the brand chooses to develop, it should try to answer these questions:

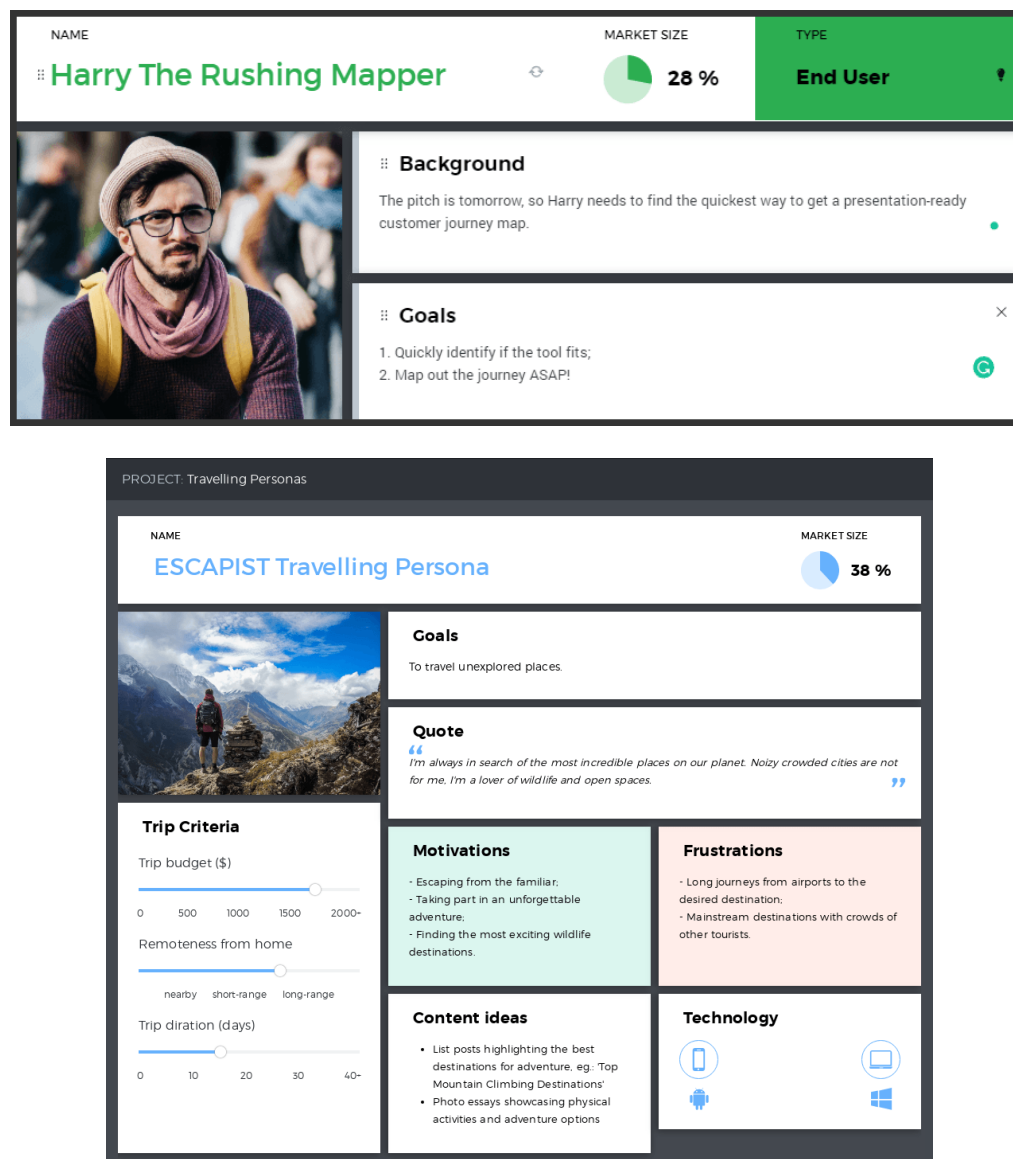
- Which methods and data types are best suited to build personas? According to Econsultancy’s [Segmentations and Personas Best Practice Guide](#), personas should be based on quantitative or qualitative insights. Are there surveys, physical studies, digital channel and platform data, unstructured customer service call transcripts, feedback from specific teams etc. that can be used?
- How many personas are needed? How many is ‘too many’? How few is ‘too few’? (As noted in Econsultancy’s [Segmentations and Personas Best Practice Guide](#), segmentations are a good place to start when creating personas; personas should reflect segments. One interviewee for that report advised against creating more than about seven segments, as it can become difficult for the business to digest and act upon that number. N.B. When data is significantly different, it indicates that there should be more segments and therefore more personas.)
- Do customer personas that can be used or developed out further with some more research already exist in the organisation? If there are multiple personas found in different silos, are there persona commonalities that can be used?
- How will the personas be used for the project and in the future? Are the personas going to be used internally across multiple teams? Will they be shared externally with agencies or consultants?
- Are personas being created to represent new target audiences? Or is the business using what it knows about existing customers?
- What does the organisation specifically need to know about the customers and who must it speak to in order to obtain the data and information that it needs?

- Does the organisation understand what these customers want from it, how they feel and what their behaviours are?

Many smaller organisations may not have the time or budget to create perfect personas. But every organisation should be able to develop some high-level persona characteristics of its most important customers. Even basic information from the brand's website, digital channels, sales and customer facing teams can help in the creation of personas and non-abstract journeys.

Consider personas that represent specific age groups, roles and budget ranges, then consider their specific goals, for example, 'book a holiday', 'subscribe', 'donate' or 'sign up to trial app'.

Figure 11: Example high level and broad marketing customer personas



Source: UXPressia^{19,20}

6.4 Agree data and informational needs

Section 5.7 stated that the level and depth of data required for a project will be determined by the business objective and outcomes the business is looking to deliver. It also highlighted the different data categories that are typically used in customer journey mapping projects.

¹⁹ <https://uxpressia.com/blog/journey-maps-without-personas>

²⁰ <https://uxpressia.com/blog/use-customer-personas>

One of the key themes running through the interviews with this report's contributors was the requirement of both quantitative and qualitative data and the importance of identifying not only what data is required at which stage of the project, but also who in the organisation holds that data. The data gathering stage should be a part of early stakeholder and expert meetings to help build a hypothesis of not only *who* the customer is but also *how* the organisation is quantifying their behaviours.

Brand strategy and user consultant Aliza Pollack spoke of this as a very early unifying element of a successful customer journey mapping project: *"If everyone cooperates, it's a victory for the team because it is as armed as possible with an idea, a hypothesis of the process **before** embarking on consumer work, and there is something to work against."*

The collection of voice of the customer data, stakeholder information and expertise should allow the project teams to create a journey hypothesis.

6.4.1 Conduct stakeholder and expert interviews for gathering data and more information

One of the most important stages of the project is to ensure the project lead has arranged interviews and information gathering sessions with key stakeholders and experts at the *earliest* stage of the project.

Customer journey mapping usually involves change to the 'current state'. As a result, some teams, departments and individuals may have to commit to doing something differently. They will need to invest time, and possibly budget, to improve the customer experience.

By engaging stakeholders across the organisation at the earliest stage, the organisation is not only improving the chances of the success of the project, but also creating the right conditions for collaboration and change. Every project and organisation is different, but usually the key stakeholders will be represented in some way in the mapping workshops themselves. They will also be part of a 'data triangulation' to help draw the current state journey.

Evi Malisianou, Head of User Experience at Brandwatch, suggests that this is the key to defining the current reality of experience that customers have: *"I've found that combining multiple methodologies, from both qualitative and quantitative models, where each methodology aims to answer a different set of research questions, will cover all angles of the experience."*

What should be discussed in the early stakeholder and expert meetings?

Most customer journey mapping projects will require more than one initial meeting with key stakeholders and experts, including post-workshop map analysis, testing and ongoing reviews. As a minimum, the following initial stakeholder meetings should take place, ensuring information requirement from each stakeholder, team or relevant department is understood:

1. To discuss the desired outcomes of the project and the stakeholder/their teams' hypothesis
2. To discuss the role that they will play at different stages of the project and requirements from them
3. To discuss their role in actioning agreed changes to the customer experience
4. To discuss how to quantify the impact of the changes and the timelines required to show business value
5. To identify all customer touchpoints and sources of touchpoint data
6. To discuss an early hypothesis of the customer journey map and its high-level stages (i.e. moments in the customer journey such as Aware, Search, Buy, Use etc.)
7. Either share and discuss the personas that will be mapped, or gather information or help agree customer segments and personas that will be mapped

8. Identify whether they are aware of or are using any customer journey maps, user experience maps or other process maps that can be used in the project
9. To gather any relevant quantitative and qualitative data (see *Table 1*)
10. To gather any specific documents and processes that are helpful to the project
11. Depending on the complexity of the project, it may be possible to co-develop a 'heuristic' or 'first-pass' draft map to test ahead of any workshops to develop the maps with a team of people.

6.5 Agree customer journey map layers

There are many differences between organisations, industries and sectors, their products, services and customers. As a result, customer journey maps will have unique sets of layers. These layers are usually the vertical and horizontal elements of a map.

6.5.1 Horizontal and vertical layers

The horizontal stages are reflective of the steps or phases that have a natural phasing or steps over time.

Figure 12: Steps or stages in a simplified house buying customer journey



Source: Econsultancy

Some organisations have a cyclical relationship with their customers, such as government departments responsible for annual payments of tax or renewals of licences or passports. They may use a circle to illustrate the repeated interaction phases. This can be used instead of the more common landscape maps. There is no absolute best practice approach to which journey map layers must be included.

The vertical layers or elements of a customer journey map tend to guide the questions that need to be asked about customer experience at each stage of the customer journey, for example, 'user goals' or 'pain points'. Experts also refer to these vertical layers as 'swim lanes' (*Figure 13*).

Figure 13: Example vertical layers or ‘swim lanes’ in a customer journey map

	AWARE	SEARCH	DOWNLOAD	INSTALL	SET UP	USE	SUPPORT	FEEDBACK	DELETE
User goals									
User expectations									
Touchpoints									
Process									
Process and channels									
Interface screenshots									
Experience									
Problems									
Ideas/ Opportunities									
Pain points									

Source: Adapted from UXPressia²¹ by Econsultancy

6.5.2 What are the most common map layers?

UXPressia has researched customers’ use of its customer journey mapping tool since 2015, and has identified the most common layers (*Figure 14*). Unsurprisingly, since these maps put the organisation firmly in the shoes of the customer and how the organisation can meet their customer’s needs, ‘user or customer goals’ is the most common layer.

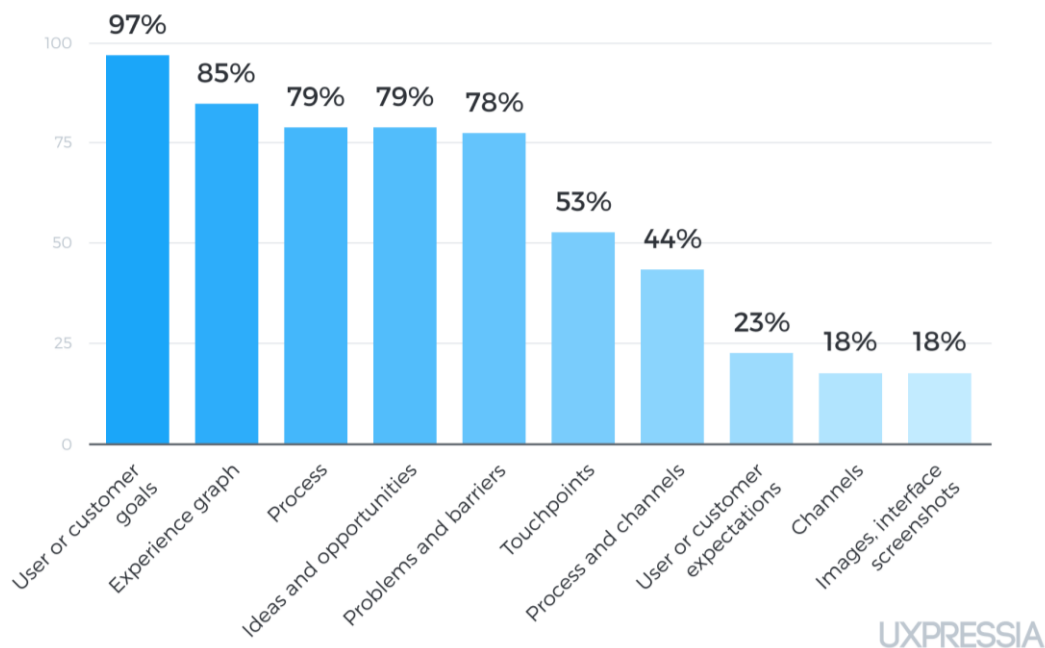
Yana Sanko, CX Lead Consultant at UXPressia, explains: “There are various layers or lenses through which we can look at the journey. And these layers are very context-dependent. When developing our customer journey mapping tool, we’ve identified more than 30 different types of layers that professionals use. Their number and combination vary greatly depending on the industry, type of project, its scope, and purpose.”

There are other layers that could be introduced to the map. For example, there could be a data layer introduced to highlight the KPIs that are measured at each stage.

To illustrate this, a software-as-a-service organisation mapping its current state customer journey might include a quantitative and qualitative data layer showing a number of customer queries and key pain point topics at the consideration, onboarding and renewal stages of the journey.

²¹ <https://uxpressia.com/templates/cjm-for-software>

Figure 14: The most common customer journey map layers



Source: UXPressia²²

All contributors suggested that simplicity is key for organisations new to customer journey mapping. Creating maps with layers that do more than offer a high-level view of a customer's experience, and their journey, could be a recipe for disaster. The contributors suggest instead starting small and building out the complexity of the maps over time.

6.5.3 Stage and phase layers – 'start and end' steps and elements

The stage or phase layers of a customer journey map should represent high-level steps or stages of a sequential journey.

For many marketers, early customer journey mapping may simply follow a typical marketing or sales funnel (e.g. awareness, interest, consideration, intent, evaluation and convert/purchase). The challenge with this approach is that the journey is rarely completed, and opportunities to continue to delight and derive customer value beyond a sale or conversion or encourage loyalty and advocacy is missed.

More cross-functional mapping projects tend to include extensions to these stages and steps and include 'during' and 'after' stages of a customer journey (e.g. on-board, use, renew/repeat purchase, complain, recommend). It is strongly recommended that mapping projects do not solely focus on the typical marketing 'before' stages, but also map out the 'during' and 'after' stages.

Travel organisations have long mapped out their complex customer journey stages. Lucy Walker, Audience Director at eight&four, talked about the sheer number of potential customer touchpoints at the decision-making stage of booking a holiday, including digital channels search, social media and influencers, review sites, travel and weather websites and fare aggregators, as well as traditional, non-digital channels such as print media, broadcast and word of mouth.

The complexity of the travel customer journey, even at the decision-making stage, has been highlighted by research by the travel technology company Expedia Group. Its data shows that American and British

²² <https://uxpressia.com/blog/top-customer-journey-layers-statistics>

travellers make 140 and 121 visits respectively to travel sites in the 45 days leading up to booking their holiday.²³

Anyone who has booked a holiday or flight over the past few years will understand very well that even after booking a holiday or flights, the travel operator, booking agent or airline will continue to provide information, trying to create a seamless customer experience via many touchpoints. The travel sector maps and constantly improves typical elements of the journey that create anticipation and value leading up to the holiday, the journey and holiday experience itself. Travel businesses send and personalise messaging through many touchpoints post-holiday.

Matthew Webster, Senior Customer Experience Manager for Virgin Atlantic, says that the teams in his organisation are currently mapping 27 different high-level stages of the journey for one of their business areas and its key customer personas. Highlighting the importance of the mapping process to travel brands, he says *“there is the potential for over 200 customer pain points on each customer journey”*.

While the following table is not comprehensive, and the horizontal stages should be fully dependent on the nature of the brand’s mapping project, sector and customer, it provides some example horizontal stages that could be considered.

Table 2: Example stage or phase layers

Before	During	After
Need or Desire	Deliver / Install / Acquire	Leave / Churn / Expire
Research / Seek information	Arrive / Welcome / Check in	Feedback
Awareness	First Contact (second, third contact etc.)	Delete / Close
Interest	On-board / Set up / Activate	
Consider / Choose / Compare	Test / Explore / Evaluate / Trial / Start to use	
Decide / Convert / Register / Join / Sign up	Support / Maintenance / Repair / Upgrade / Service	
Register / Join / Sign up	Cross-sell / Upsell	
Book delivery / Book on-boarding	Share feedback / Request service	
Wait / Anticipate	Complain / Claim	
Enquire / Request service	Renew / Repeat purchase / Retain	
Travel	Loyalty	
	Advocacy / Recommend / Refer	

Source: Michelle Goodall

²³ <https://info.advertising.expedia.com/travel-consumers-path-to-purchase-research-for-marketers>

Figure 15: A software ‘buyer’ customer journey map template

	AWARE	SEARCH	DOWNLOAD	INSTALL	SET UP	USE	SUPPORT	FEEDBACK	DELETE
User goals									
User expectations									
Touchpoints									
Process									
Process and channels									
Interface screenshots									
Experience									
Problems									
Ideas/ Opportunities									
Pain points									

Source: Adapted from UXPressia²⁴ by Econsultancy

Figure 15 illustrates a template map for a software buyer and their customer journey. The stages or phases are: Aware > Search > Download > Install > Set Up > Use > Support > Feedback > Delete.

Journey sub-stages

Consider the travel sector again. Note that there may be sub-stages to the high-level stages of the customer journey that apply only to very specific customer personas. They may need to explore very specific stages in more detail.

For example, in the ‘before’ and ‘during’ stage of the map, ‘passenger with connecting flights’ is important, but would only apply to those who need to change planes or check in. As another example, an airline may have very specific stages for people who require different levels of accessibility and support during their customer journey. Will they have access to the right information at every step of their journey (travelling to the airport, checking in, accessing the plane, collecting baggage)? Is the website, booking form and app fully accessible to screen readers?

The advice again from the experts is: do not go too deep too quickly. Focus on high-level stages that will apply across the organisation’s chosen customer personas and then build out as required for different audience or customer segments.

²⁴ <https://uxpressia.com/templates/cjm-for-software>

6.6 Developing customer journey workshops

Customer journey workshops help stakeholders to review, refine, enhance and explore gaps to create a 'working journey'. Projects usually begin with a current state journey map to identify pain points for prioritising and fixing.

There may be a number of workshops required. Not all of the follow up workshops will require a cross-functional team. It is common that the initial workshop includes many stakeholders, and then the workshop output is taken to different teams, departments and experts to refine and build the maps, with a final workshop to present the final map.

Some customer journey mapping projects are simple enough to complete with one or two rounds of stakeholder and expert interviews, agreed customer personas, development of agreed layers and a creation of a customer journey hypotheses (which can also be referred to as a 'heuristic map') for workshoping, reviews and completion. Other mapping projects may need multiple rounds of stakeholder reviews, workshops and iterations before it is time to book that big room and get the Post-it Notes and pens out.

For the purpose of this report, imagine that the team has got to the stage where:

- Terms of reference for the project are agreed – all teams and individuals are moving collectively and have a shared vision of success and project outcomes
- The right expert stakeholders have been involved at the information and data gathering stage
- The map types have been agreed (e.g. current state to future state)
- The right data and information has been accessed, analysed and used
- The personas have been agreed
- The map layers have been agreed
- The team has developed hypothesis maps that need to be fully populated in the workshop
- The team has broadly agreed to the number of workshops or iterations of the maps that can fit within the project timeline (e.g. 1x group cross-functional workshop session followed by 1x more detailed map review and minor iteration by experts)

6.6.1 Pre-workshop

To get to the stage above, the team will have almost certainly decided who will need to attend the workshop to act as a source of information around specific customer touchpoints and possibly any projects or changes that have been planned that will impact the customer journey and their experience.

Customer journey workshops are an amazing way to bring teams together around the unifying and energising concept of *"are we doing everything that we can to anticipate, meet and beat our customers' expectations?"* It may sound obvious, but there are some specific things to consider ahead of time to ensure the success of the workshop(s):

Agree who attends

Section 5.5 looked at which teams and departments could be involved in customer journey mapping projects, whether as sponsors, data and information providers, active developers of the journeys or teams that will make the subsequent required changes. These were categorised as:

- Any teams that represent the 'voice of the customer'
- Marketing
- Digital
- Sales/business development
- User experience (UX)

- Product owners
- Technical leads
- Loyalty
- Insights
- Senior leaders and executives

Other teams or specialists may be included as the project dictates, such as manufacturing, warehousing, logistics, compliance, human resources or finance.

Chris Donnelly, Founder and CEO of Verb Brands, a digital agency working with luxury fashion, hospitality and lifestyle brands, said that some of the brand's best customer insight sits within the company: *"The Mount Street boutique manager or the hotel concierge will have the best understanding of who the customer is and what they want. Brands should integrate these people within their strategy."*

He continues: *"It's very challenging in the luxury sector, as the actual time that you have with high net worth individuals and customers is limited."*

Karl Brown, Head of Customer Experience at Direct Line Group, talked about how his business successfully involves departments that may not be thought of as consumer facing: *"When looking to deliver significant change it is important to involve all areas in ideation sessions to ensure all elements of the experience are considered, including back office functions who are often forgotten."*

"Mapping journeys in a highly visual way ensures all members of the project team have one version of the truth and allows customer flow, pain points and moments of truth to be collectively understood and actions to improve aligned."

When it comes to workshops, attendees do not necessarily have to be the most senior stakeholders from a team or department, but the attendees must:

- Be senior enough to have a broad view of the touchpoints and any ongoing projects or plans that could impact the customer experience
- Have the sufficient power to make any quick key decisions or agree immediate actions to rectify things that cause significant customer pains, e.g. changes to a specific web form
- Be prepared to work collaboratively.

Contributors to this report also talked about the critical role of customers. There are many situations in which including customers in initial mapping workshops would not be suitable, and of course, there may be sensitivities around data added to the layers.

However, some contributors said that they have worked on projects where the voice of the customer is represented in the room by an individual or a small group, and the customer has actively participated in the mapping project.

Identify a suitable place and space for the workshop(s)

The majority of customer journey mapping workshops still use physical maps upon which attendees can stick, place, draw or highlight their inputs. Some maps are small and simple enough that a large sheet of paper on a boardroom table is suitable for the teams to work on. Other maps can be large and complex, needing long walls, more space and more time for teams to develop the maps in sprints.

Virgin Atlantic is developing large enough dedicated space for its customer journey mapping, and will invite consumers in to provide feedback and to help validate the maps. This means that physical maps can exist, live and 'breathe' in a room, and not be moved around the organisation, or quickly digitised and shrunk in size. Most maps usually have to vacate the space that they were created in fairly quickly.

Send invitations and instructions

A well-communicated project will mean that all stakeholders have a good idea of when and where the workshops will take place, who is attending, who is facilitating, what the desired project outcomes are and what the timelines are. An email invitation, or an update on collaboration platforms such as Slack, Microsoft Teams or lighter touch business messaging apps such as Guild, with those details plus any specific requirements – e.g. *“please bring latest CSAT data”* – should suffice.

Agree who moderates and facilitates the workshop

The client-side report contributors all talked about the value of external support for their early stage mapping projects. Enterprise companies tend to have their own dedicated customer experience teams and so have the capabilities and capacity to run customer journey mapping projects.

Working with consultants and specialists can speed up a project, but also provides an external, unbiased critical but diplomatic friend who can ensure that no single team or individual dominates. They can also capture important exchanges and conversations during the workshops that might not be reflected in the maps.

In large groups, it may be necessary to work with more than one moderator and facilitator, such as if more than one customer persona and more than one goal or journey is being reviewed and worked on.

Create an agenda

An agenda should broadly contain:

- Introductions – specifically if there are teams and individuals who do not know each other or work together
- Brief statement of terms of reference of the project and broad desired outcomes
- Statement of desired outcomes from the workshop(s)
- Overview of timings and phasing of the workshop(s)
- If the team have not worked on previous mapping sessions, it is helpful to state desired behaviours and what should be avoided as well as places to park any ideas or issues that should be reviewed, but outside of the workshop
- Presentation of the personas and maps
- A run through of workshop phases and tasks for attendees – for example:
 - Each will take one persona and add high level information to the current state customer hypothesis map (e.g. emotions, pain points)
 - Each team will present back to the wider group
 - Wider group will build and develop map
 - Wider group agrees priority high value quick wins and fixable pain points for immediate action
 - Post-workshop – identify teams and experts who will review digital versions of maps and priority actions and provide feedback
- Summary of next steps and follow ups.

Visualise your workshop space and kit

Consider what needs to be taken into the room, and what might need to be taken out of the room, to allow enough space for mapping. Ask the following helpful questions:

- Is there enough wall space?
- How big will the maps be and how much space will teams need to develop the layers and fill in the gaps?

- How will they add (or take away) their builds? Should Post-it Notes or other methods be used?
- What additional kit might be needed? (For example, emotion stickers, specific coloured pens or stickers that allow teams to 'vote' or prioritise things that need to be addressed or fixed.)
- Will any food and refreshments be needed?
- Will the agenda be printed or be left up on an AV screen?
- Does the screen allow the moderator to bring in other prompts, data etc.? (For example, a customer persona journey story.)
- Will longer forms and copies of data or information that have been collected and possibly summarised in the map need to be brought in?
- Will consumer artefacts, which help build a story of who the customer is, need to be brought in?

Develop and print or pin up your personas and hypothesis/heuristic maps

Again, there are many different possible approaches here. Even large organisations will use the classic approach of using masking tape, long rolls of paper, a ruler and Sharpies to draft the agreed layers of the heuristic or customer journey hypothesis maps. Printing handouts of the organisation's personas is also helpful so that teams can constantly refer back to the customer and information about them. This lo-fi approach does not mean have to mean low quality.

Mapping software

Most of the interviewees for this report use visual designers and digital tools to help with the mapping process. There are a number of tools that can help marketers create personas from templates and also template customer journey maps. Some are free and low cost. Others are enterprise level tools with additional features such as workflow management and reporting. Here are some tools that were mentioned by our interviewees:

- **UXPressia** – low-cost web-based persona and customer journey mapping tool
- **Smaply** – low-cost web-based persona and customer journey mapping tool
- **Whimsical** – low-cost web-based flowchart, wireframe and mind mapping tool
- **Canvanizer** – low-cost, simple web-based mapping tool
- **CFN Insight** – enterprise-level mapping and customer experience workflow software that includes reporting.

Consider which layers should appear in the map and how many people will need to collaborate on the document physically and digitally before choosing the software and tools required. This software is useful ahead of the workshop, when considering which layers and information to add to the hypothesis maps and to create large printed maps to work on in the workshops. It is also useful to help capture the outputs during the session, on top of any video or photography that might be used to record outputs.

6.6.2 During the workshop

Most workshops are energising and highly successful sessions. Usually, attendees arrive with a positive mindset and understand what is required of them. Contributors to this report spoke about occasional understandable disagreements between some individuals and teams, but not one spoke negatively of any projects they had been involved in.

Successful facilitation

It is important that workshops are run well by facilitators with the ability to channel energy and input from attendees. Successful workshop facilitators need to:

- Be seen to have gravitas by senior stakeholders and give space to others in the room to speak and contribute

- Be able to keep the workshop(s) on track
- Direct teams to park specific issues or pain points that could dominate the discussion
- Resolve disagreements or lengthy discussions that could lead to conflict and project derailment
- Get teams to openly address issues that they may be reluctant to discuss
- Get teams to balance their opinions with facts/data
- Draw quick wins from the workshop
- Reflect the progress being made to keep momentum and energy levels up
- Recognise blockers and when to move the session on.

Bring the customer in and ‘be the customer’

This does not have to be literal. There is no need to grab an actual customer out of the store, off the street or beam them in via a video link.

Example personas and journeys could be introduced not just by highlighting the persona and map, but perhaps playing a video of a real customer’s journey. Other ways to bring the customer into the session is to bring in real artefacts, such as phones or devices they use, receipts or invoices, photos and even printed transcripts from them.

Consultant Aliza Pollack has had success with this approach. She says using video provides *“an unforgettable story of a person which resonates with busy, marketing clients and product designers who are often stuck in their own respective discipline weeds”*.

She continues: *“In talking with consumers, I like to have them bring any artefacts that can ground their experiences in some reality in order to manage gaps in recall and biases.”*

Another approach is to assign individual stakeholders or have small stakeholder teams act as representatives of the consumer (through transcripts or video), having those stakeholders own that persona representation. They must **be** that person in the workshop and think like them, consider their motivations and their emotions.

This approach can encourage ownership and empathy. When someone has to **be** someone else, they have to think hard and laterally about motivations and why people do what they do, and often behave in different ways to ourselves.

This approach does not completely eliminate personal biases and opinions, but it does set up important context around behaviours that is great fuel for any product or communications development.

Figure 16: A mapping workshop at Tribal Worldwide London



Source: Tribal Worldwide London²⁵

Collective, small team or individual work

The interviewees for this report mentioned that, in most cases, their workshop sessions include sprints of activity where everyone or small teams work on all or some parts of the journey. After these sprints, there are sessions of collective reflection and iteration, with individuals or teams providing further context, information or data.

Finally, there is usually a summary session to prioritise actions, usually by quick fixes or identifying those that are high priority/value that may need further investigation post-workshop.

The role of teams and individuals in the workshop will be entirely dictated by the project goals and its complexity, as well as by the number of people available, and their roles. Some projects have a scribe – someone who does not participate but takes notes and even starts to digitise the physical map during the session using journey mapping software.

Digital or physical mapping

Most interviewees talked about the relatively lo-fi nature of the actual mapping process, which tends to prevail if a number of people are required to work on the maps together.

In some cases, if it is not possible to convene the right people in one place for face-to-face workshoping, a small number of teams can collaborate using digitising software. By using these tools, teams who in some cases may be in different countries, can work on the maps together in a digital environment and a multi-licence mapping collaboration tool. In these sessions, video conferencing and/or professional chat software can be used as a channel for collaboration.

However, interviewees agreed that nothing beats face-to-face collaboration and the use of agile methodologies, validating and iterating as you go.

Capture the wider conversation

As well as asking attendees to build and iterate the maps and add their individual and collected views to them, it can be useful to record sessions. Marketing elements of the customer journey can be subjective

²⁵ <https://www.tribalworldwide.co.uk/>

and there may be additional value that comes from the sessions that could help shape messaging and campaigns in the future, but has no bearing on the map itself.

One of the occasional outcomes of the workshop is the recognition that more information or data might be needed. Brandwatch's Head of User Experience Research Evi Malisianou explains that some assumptions from the workshop may also need to be validated: *"If there are different opinions, that is a clear indication of lack of information, in which case we need to dig deeper and do more research."*

"Our processes and methodologies are user-centred so when we identify opinions that are based on assumptions, we will aim to put these in front of our users. Product decisions should not be based on unvalidated assumptions."

6.6.3 Post-workshop

When asked when customer journey maps are 'finished', Matthew Webster, Senior Customer Experience Manager for Virgin Atlantic, laughed and said that truly customer-centric organisations use maps to *constantly* refine and improve the journey.

While phases of the project may be completed, the maps are living and breathing visualisations of the work that still has to be done to help customers reach a nirvana-like state where there is zero pain or friction.

UXPressia's CX Lead Consultant Yana Sanko backed up this theory: *"The last thing you want is for your customer journey map to become a wallpaper. It should be evolving together with your company and its customers. Generally, it's a good rule of thumb to plan for revision and update time as soon as you are done mapping and prioritising ideas."*

The amount of post-workshop activity required will be determined by the complexity and scope of the project. In most cases, a workshopped map will be produced for one or several rounds of feedback from experts to refine key areas and to help prioritise actions further. These workshopped maps are most frequently digitised by using journey mapping software, but in some cases can be designed to sit in a place where the wider organisation can see and provide further feedback and challenge to the journey.

Chris Donnelly, Founder and CEO of Verb Brands, spoke of a customer journey map, painted creatively on a blackboard in the staff break out area of the brand's office. It was purposefully placed where employees made drinks and meals to allow them to linger and reflect on the customer journey.

They could also consider how their day-to-day activity affected the customer. All employees were invited to add their thoughts and feedback with chalk provided next to the map.

"It really worked, according to the brand," Donnelly says. *"It helped those who weren't involved in the mapping workshops to feel that their feedback mattered and that they were involved, but it also provided really useful further insight and information."*

Taking this into consideration, the post-workshop map should have a point where the project team feels that it is well developed enough to be able to inform and drive change, but also should be reviewed either on an ongoing basis or at agreed check in points.

Each customer journey mapping project has its lifecycle, whether that is a few weeks or a few months, but it is important to create the projects with the understanding that external and internal factors can all impact the customer experience.

A 'living document' does not imply that there is no record or measurement of success. It is essential to keep records of different version of maps to compare with past and future journeys, as well as measure the impact of any changes.

This important cyclical relationship between past and future projects is summed up by Malisianou: *"Customer journeys should be informed every time a research study is complete and has gained insights that can inform a current state journey."*

7. Conclusion

The purpose of this guide is to provide an overview of customer journey mapping and a simple starting point for anyone yet to map out their customer journeys. The research and companion guides linked from this report should provide further information and help around the topic.

A list of key takeaways for those yet to start the process are listed below:

- **Start small and keep it manageable**

Prioritise key journeys that will have the greatest impact on business growth or efficiency but do not aim to try and map every customer journey. If the business needs to, start with a small pilot project, which can help develop an approach methodology. Global organisations should start with a core region, then refine with regional teams with their distinct perspectives, customer expectations and behaviours.

- **Ensure that your customer journey mapping project addresses a business need**

Businesses should not see customer journey mapping as a tactical asset, but a strategic one. Make a business case rather than using 'gut feel' to steer the project. The potential business cases for customer journey mapping projects are varied, but can include many that will keep most CFOs and senior teams happy, such as identifying new revenue opportunities, minimising wasteful processes and maximising customer lifetime value.

- **Agree project scope, goals, objectives and deliverables**

Whether the project is in-house or delivered by an agency, a simple statement of the terms of reference for the project that can be agreed by senior leaders and all project stakeholders is critical. This unifying vision or concept should be supported with a schedule of work and deliverables. A mapping project rarely is a simple day of sticking Post-it Notes on a wall and agreeing actions!

- **Align and support other departments**

It is critical that mapping does not just stay in the marketing department. Customer journey mapping projects flourish when project leads align effectively with other teams and departments (including country or regional teams). Teams and departments that are customer facing not only hold the right data, but can also act as customer champions and are key project stakeholders.

- **Data is key – but it has to be the right type of data**

Qualitative and quantitative data from multiple sources should be used to inform elements of customer journey mapping projects before, during and after the project. But do not go 'data crazy'. Ensure that the brand's data is statistically relevant and clean. Data should also be relevant to the project, the brand's personas and the stages of the journey being mapped. It should also be interpretable to the extent that it allows for the creation of meaningful KPIs throughout the journey, making it possible to measure success.

- **Simplify the journey stages and layers that best capture the journey and your needs**

Customer journey maps will have unique sets of layers that map the journey and its elements. Simplicity is key for organisations new to customer journey mapping. Create maps with layers that offer a high-level view of a customer's experience, and their journey. Sub-journeys can be created at a later date or as required.

- **There are many low-cost tools that can help to create a template or 'hypothesis' customer journey**

While mapping can use very lo-fi tools such as a wall, masking tape, sticky notes and pens, there are low-cost design software tools that can be used specifically for journey or process mapping. It is worth using these to help with template design and to simplify collaboration on digital versions of the maps.

- **Workshops bring the journey to life and align teams**

Workshops help stakeholders to review, refine, enhance and explore gaps to create a 'working journey', and also offer a great opportunity for cross-team alignment and empathy. However simple or complex the project, a well-planned, well-run workshop will provide a pay-off that is much greater than the creation of a beautiful map.

- **Get started!**

As long as there are some basics in place, such as agreed audience segments and personas, clarity about goals, a business case behind the project, the ability to access data that can inform the mapping project and the right people involved, it is possible to get started. Customer journey mapping is a rewarding part of customer experience, marketing and business strategy that many enjoy participating in.

8. Further Reading

8.1 Reports

[Walking in their Footsteps – The Business Case for Customer Journey Mapping](#)

[Experience Index: 2020 Digital Trends](#)

[A Guide to Customer Experience Management](#)

[Segmentations and Personas Best Practice Guide](#)

[Marketing Automation Best Practice Guide](#)

8.2 Articles

[CX and UX trends in 2020: What do the experts predict?](#)

[How brands can remove friction from the customer journey](#)

[The fintech revolution and its effect on customer experience in financial services](#)



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