Experience Mapping Toolkit

Run a successful Experience Mapping workshop with your team!

Capital One

Service Design at Scale

Toolkit Contents

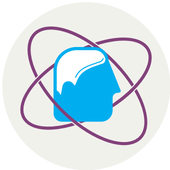
OVERVIEW

Service Design & Experience Mapping

Service Design is a human-centered strategic design discipline that optimizes how customers and business interact so that each can achieve their desired outcomes. The tools and methods of service design orchestrate how people, processes, and technology come together to deliver unparalleled customer experiences.

Experience Maps are an important tool of service design. They depict an experience over time from a human point of view, giving teams insight into the subjective qualities of an experience, as well as the connected systems that make it up. They bring tangibility and clarity to the customer journey, allowing teams to arrive at a shared understanding of what's going on and where to focus their resources.

Core Principles of Service Design



Human Centered

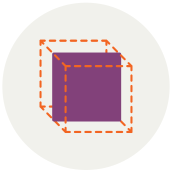
Focuses on the people for whom we are designing and extends beyond the customer to include the experience of staff and the business.

Co-creative

Includes stakeholders and customers in the design and delivery of service experiences.

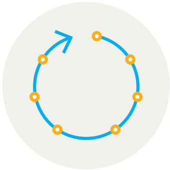
Orchestrated

Considers how the various elements and processes of a service organization should be aligned for optimal service delivery.



Tangible

Reveals the value and interactions of an intangible service through physical and digital touchpoints that can be seen and experienced.



Holistic

Looks toward the end-to-end experience, not just a single moment, service encounter, or experience stage.

Design Phases: Tools & Methods

Download our Tools & Methods Overview Poster
bit.ly/SXD-OverviewPoster

Alignment & Problem Framing

- HYPOTHESIS JOURNEY MAP
- STAKEHOLDER INTERVIEWS
- ALIGNMENT WORKSHOP
- STAKEHOLDER MAP
- CURRENT-STATE BLUEPRINT
- ECOSYSTEM MAP

Discovery & Mapping

- QUALITATIVE RESEARCH
- RESEARCH INSIGHTS
- EXPERIENCE MAP
- EXPERIENCE PRINCIPLES
- ARCHETYPES

Ideation & Envisioning

- IDEATION
- PRIORITIZATION FRAMEWORK
- STORYBOARDING
- SERVICE STORMING
- VISION STORIES

Evolution Planning & Piloting

- FUTURE-STATE BLUEPRINT
- PROJECT/ FEATURE CARDS
- EVOLUTION MAP (OR ROADMAP)
- PILOTS

An Introduction to Experience Mapping

AN EXPERIENCE (OR JOURNEY) MAP
is a tool that visualizes a human experience (like buying a home or being treated for an illness) over time, capturing the facets we need in order to understand not only what is happening, but also the broader human context beyond the specific experience—the "before" and "after" as well as the "why," "how did it feel," and "who else?"

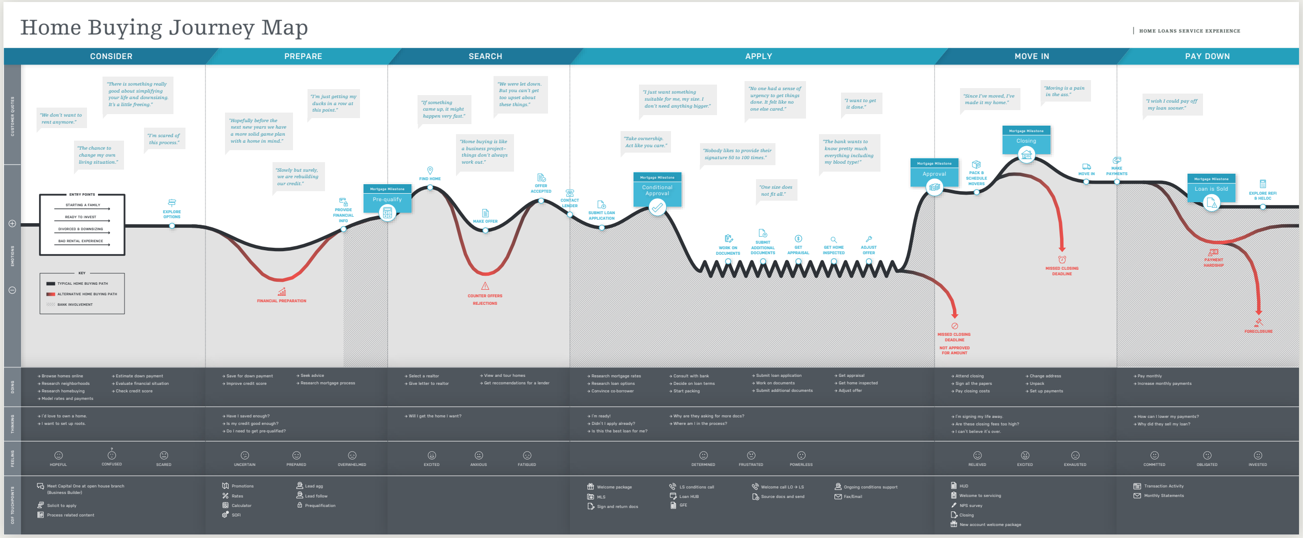
On one end of the detail spectrum, it can be a highly synthesized, rigorous research deliverable, capturing both qualitative and quantitative insights. This type of map is typically an output at the end of a research and synthesis phase and is used as a tool for ideation, prioritization, and alignment.

At the other end, it can be sketched out as a quick hypothesis based on what an individual or team already knows. This type of map helps groups share knowledge, frame problems, and identify areas for further discovery.

In between are a number of variations and processes. This toolkit focuses primarily on a few workshop-based variations—but do experiment and adapt these methods to suit your needs.

While human insights derived from qualitative research are a key input for experience mapping and a human centered design process, this toolkit does not cover design research methods. Please see the Resources section for more information.

The Value of Mapping Experiences



AN EXPERIENCE MAP...

» Communicates insights from research

» Visually depicts a human experience over time

» Clearly shows key experience moments, whether highlights or pain points

» Shows other important facets of the experience, such as people, touchpoints, and actions

» Serves as an input to both ideation (future work) and prioritization (aligning in-flight work to key experience areas)

A PICTURE IS WORTH A THOUSAND WORDS

In a world of finite resources and time, how do we decide what to work on? How do we uncover and prioritize opportunities to make the biggest impact, whether through evolutionary improvements or innovative new products and services?

Human-centered designers (of course) specialize in gathering human insights to help answer questions, inform decisions, and inspire new ideas. Experience mapping is a method that helps us gather, synthesize, and communicate those human insights; it helps us better understand our present so that we can design our future.

THE VALUE OF THE ARTIFACT

In a single visual, you can capture many key facets of an experience: the emotional highs and lows (this is what differentiates an experience map from a process map), the phases of the experience, touchpoints, actors, and opportunity areas, to name a few.

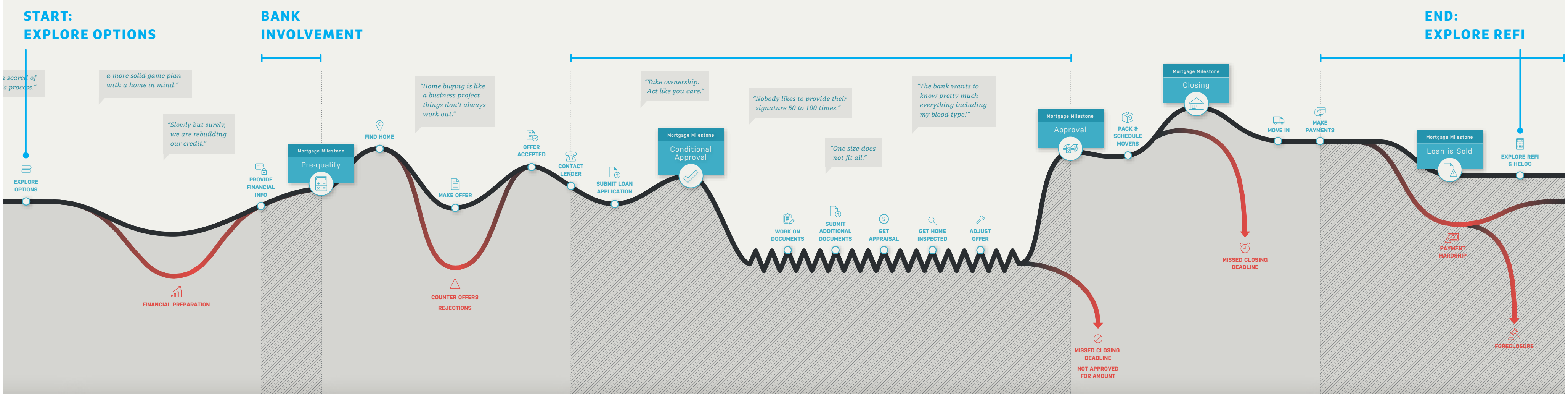
Quantitative data can be synthesized into the main map—e.g., the emotional highs and lows can reflect CSAT data where available—or accompany experience moments—e.g., conversion metrics, usage stats, phone calls, etc. While it's not possible to capture all the nuances of qualitative research insights in this single visual, you can still tell a compelling story about key aspects of the experience in a way that's incredibly quick and easy to understand.

THE VALUE OF THE PROCESS

Our colleague, Chris Risdon, says: "Make sure to take everyone with you." An inclusive, cross-functional process is arguably more valuable than the artifact itself. Ideally, you will involve collaborators and stakeholders from each part of the organization responsible for creating the overall experience, throughout the process. This creates a shared understanding of the customer experience and a solid foundation for tackling problems and opportunities.

Determining Scope & Level of Zoom

Where does the experience that you are mapping begin and end? How much detail should you include? That depends on what you are trying to accomplish. For this home loans map, the team was trying to see the broader customer experience through buying a home, rather than just getting a mortgage.



Horizon 3

CREATING A STRATEGIC VISION

If your goal is to develop either new capabilities and services or develop new markets, it's a good time to zoom out and go wide.

For example, let's say you are in home loans—this is a good time to do qualitative research on the end-to-end home buying experience, well beyond the bounds of your current service.

In-depth qualitative research (empathy) interviews will inform both a broad and deep understanding of the needs, contexts, and relationships of home buyers, which will inform ideas for entirely new service offerings.

The Horizons model is simply a way to divide up and plan for the near-, medium-, and long-term future. Different organizations may have slightly different definitions, but in general, Horizon 1 is 0–12 months, Horizon 2 is 12–36 months, and Horizon 3 is 36–72 months.

Horizons 1 & 2

EXPERIENCE EVOLUTION; ALIGNING & PRIORITIZING WORK

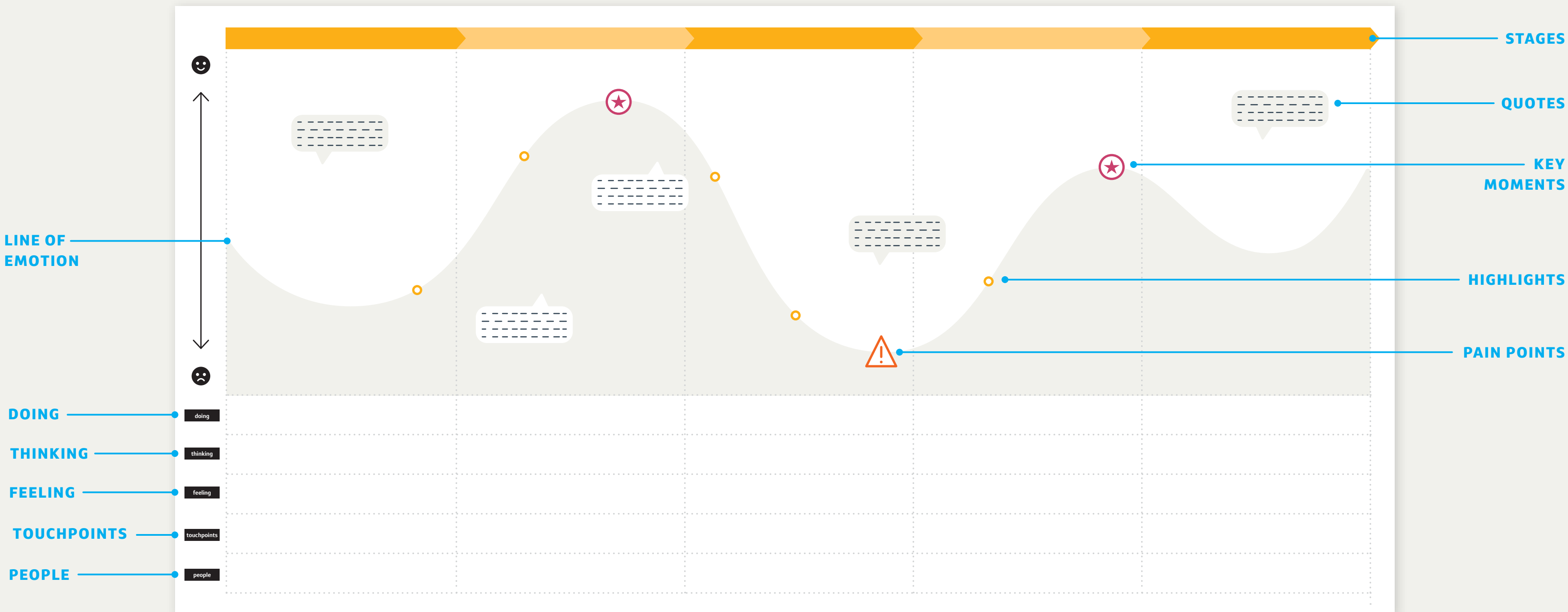
If your goal is to enhance the experience and increase operational efficiency of an existing service, you may wish to focus your discovery only on the customer experience with your service.

Your research should therefore zoom in more, and may include a mix of empathy interviews, user testing, surveys, and quantitative behavioral metrics.

Empathy interviews are still important to discover motivations, relationships, and needs that happen out of the business view. These contexts markedly affect the service experience and can't be learned any other way.

Don't pass up the opportunity to conduct research with both customer-facing and “backstage” staff, who will have valuable insights into the current-state customer experience and how to improve it.

Anatomy of an Experience Map



Doing: These should always be the actions of the main actor, a.k.a. your customer or user. It's easiest to first lay out the actions step by step, then fill out the rest of the information.

Thinking: Thoughts are expressions of mindsets, beliefs, and expectations. Direct quotes from research may reveal these, but in places, you will probably have to make inferences from the information you have.

Try expressing thoughts as first-person statements—"I think my credit is good enough to qualify me for this card." This will help differentiate thoughts from feelings.

Feeling: Ideally a single word or very short phrase that expresses emotion, such as "Embarrassed," "Suspicious," "Afraid," "Indignant," "Hopeful," "Joyful."

Touchpoints: A touchpoint is a place where the person and the service come together. Touchpoints are designed, e.g., "login screen" or "credit card bill." They should always be nouns, but they may not always be physical, e.g., "customer service call."

People: Other important actors in the journey.

Stages: Start at the beginning—what triggered this journey—which will usually be beyond the bounds of your service. As you lay out the story, the stages should feel like natural demarcations. Name them in the language the person in the story would use.

Highlights, Pain Points, and Key Moments: Once you have the story down, it's valuable to note moments that stand out, both positive and negative. It should be clear to anyone looking at your map where they should focus their attention.

Quantitative Data: What data can you correlate to the experience—can you map behavioral metrics to specific moments?

Other Elements: Any other information that seems valuable, for example, opportunities or other services.

Gathering Inputs

QUALITATIVE RESEARCH

The gold standard for gathering the kind of rich qualitative information mentioned on the previous page (needs, context, emotions, and motivations that are otherwise difficult to discover) is the research interview. This goes by a number of names: qualitative research, ethnographic research, empathy interview, and generative research (when used as an input to the innovation process).

If you have done this already with your team or have access to timely, relevant, high-quality research—fantastic! You should be able to mine those interviews for all the categories of information listed above.

Tips for doing research:

- Engage trained, professional researchers to help plan and lead the research process.
- Involve as many cross-functional team members in field research as you can. This can be transformative for the organization; distributing the experience of field research among your team will amplify its value.

If you don't have research (or not enough, or not the right kind): It can still be useful to conduct a mapping exercise with the sources you do have, especially if you are mapping the experience of customers interacting with your service (rather than a more "zoomed out" experience). You will probably be able to assemble a good picture with the knowledge your organization has; the knowledge gaps that emerge from this exercise will help guide further discovery.

Consider also:

- Bring in front-line customer service reps as customer proxies; ask them to play the role of the customer
- Recruit customers to participate in the workshop

See Resources for a list of suggested data sources and questions to help generate inputs.

Planning & Running an Experience Mapping Workshop

Workshop Overview

Whether you're creating a hypothesis, interviewing users, or working from existing insights, the setup is similar. Now, let's start mapping!

BEFORE

- Select participants
- Reserve a space
- Recruit interviewees (Optional)
- Obtain materials
- Assign workshop roles
- Define the scope
- Gather data inputs
- Communicate goals
- Create an agenda

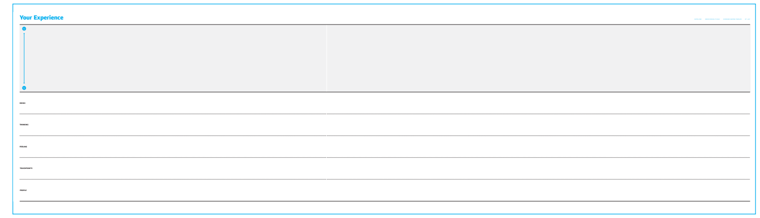
DURING

- Work in teams
- Facilitation tips
- Facilitate share outs
- Document!

AFTER

- Capture workshop outputs
- Put outputs to work in the design process

Workshop Materials



For each team, you will need:

- **ONE PIECE OF BUTCHER PAPER, 6'–8' LONG** Or download one of our plotter-sized experience map templates. Find out the roll width of your plotter and choose the 24" or 32" template accordingly. See Resources for Templates.
- **3"×3" STICKY NOTES** in six different colors
- **BLACK SHARPIES (or other bold markers)** For ease of reading and to encourage brevity.
- **COLORED MARKERS**
- **BLUE TAPE** For hanging up butcher paper or map templates.
- **DRAFTING DOTS**

Optional materials:

- **POST-IT FLIP CHART PADS** These make a useful canvas, and they make it easier to move or clean up after the workshop.
- **AVERY DOTS** ½" size, assorted colors
- **NAME TAGS**

Other things to think about:

- **SLIDES** These are not necessary, but if it's easy to project in your room, you can display helpful information and timers. Prepare a few slides based on your workshop agenda.
- **DOCUMENTATION** It's helpful to document the workshop with still photos, time lapse, or video.
- **FOOD** Consider ordering snacks and beverages—hungry people won't be good participants.

BEFORE

Preparing Your Experience Mapping Workshop

SELECT PARTICIPANTS

The ideal group for your workshop is the cross-functional team who are involved in delivering the experience you're working on. It helps to get a mix of people who both have and don't have access to the front-line customer experience.

Example roles might be: tech, business, product, design, ops, front-line employees, brand/marketing, risk, and legal*****—it's valuable to include multiple perspectives on the problem space and to build alignment and empathy within your organization. This group should also participate in subsequent ideation sessions (make an effort to include them in the empathy research process as well, if possible).

RESERVE A SPACE & INVITE ATTENDEES

Getting your workshop on the calendar and in a room of sufficient size may be one of your more challenging tasks. You will be working in groups of 4–6, at the wall.

- Make sure your room has plenty of wall space and that you will be able to tape up large sheets (roughly 6'W×2'H)
- Make sure to reserve extra time before and after your workshop for setup and breakdown

---

***Special plug for including risk and legal partners in ideation:** Enlisting their expertise early on in co-creation allows them to help the team identify potential obstacles and design around them. This is more efficient (and fun!) than encountering them late in the design process as the people who have to tell you your amazing new service concept breaks 15 laws.

RECRUIT INTERVIEWEES (OPTIONAL)

- When recruiting external participants, work with Experience Design Research (fka User Labs) if possible, to recruit participants
- When recruiting staff, make sure their leadership is aware of their time commitment and has given permission for them to attend
- Set participants' expectations that they will be interviewed and then participate in group workshop activities
- Recruit 3–6 participants (interviewees), one per group; the group size for this format should be 3–5 people including the interviewee
- 3–4 hours should be plenty of time
- Consider arranging for interviews to be captured on video or audio

ASSIGN WORKSHOP ROLES

Don't tackle this alone—line up a few helpers to fill the following roles (one person may take on more than one role if needed):

Workshop facilitators emcee the workshop, introduce activities, and run the clock.

Team facilitators help workshop participants break into assigned groups and lead teams through activities.

Note takers capture key points, either on a whiteboard/easel or in their own private space (i.e., laptop, notebook).

GATHER DATA INPUTS & COMMUNICATE GOALS

Synthesize multiple data sources so they can be more easily consumed:

- Gather all data inputs to use as reference for the workshop
- Communicate and share research insights

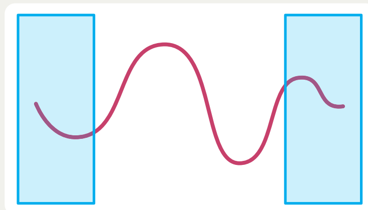
Outline your goals clearly, which might include:

- Create a shared understanding of the current-state experience
- Build empathy among the team
- Align around priority areas to address
- Create a foundation for ideation based on insights

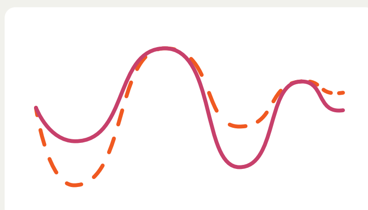
DEFINE THE SCOPE

It's important to explicitly define this for your participants. The more you remove ambiguity from the workshop activities, the more smoothly they will go.

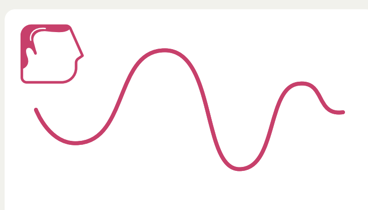
Beginning & End
If your service is part of a longer journey, use the longer journey, e.g., "buying a home" rather than "getting a mortgage"—use the frame that's meaningful and relevant to the customer. Consider starting with the trigger that initiates the journey.



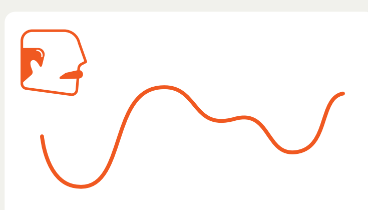
Different Paths
You may either know or hypothesize that there are particular paths or phases that are distinct and meaningful...



Different People
...Or you may have different customer types, personas, or archetypes that you've identified.



You may choose to have different groups map different stages or variants—decide how you will divide them before the workshop begins.



CREATE AN AGENDA

Send out your agenda ahead of time so people know how you'll be using your time together. This will vary depending on whether you are conducting an initial hypothesis workshop or synthesizing the output of empathy research interviews and other data. Remember, more people and more data equals more time.

NOTE: If you and your team have conducted a larger number of empathy research interviews, you should unpack your findings with your immediate team before the workshop. Use the patterns you discover to form a point of view on which journeys and customer archetypes you want to bring into the workshop.

SAMPLE AGENDA
for a hypothesis workshop

9:00 AM	**Welcome & Orientation** (30 minutes)
9:30 AM	**Hypothesis Journey Mapping** (90 minutes)
11:00 AM	**Break** (15 minutes)
11:15 AM	**Shareout & Discussion** (60 minutes)
12:15 PM	**Lunch** (45 minutes)
1:00 PM	**Identifying Initial Opportunities** (90 minutes)
2:30 PM	**Reflections** (60 minutes)

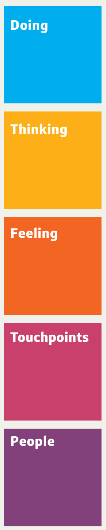
SAMPLE AGENDA
for a workshop with research inputs
(see Gathering Inputs p.12)

9:00 AM	**Welcome & Orientation** (30 minutes)
9:30 AM	**Construct Initial Maps** (105 minutes)
11:15 AM	**Break** (15 minutes)
11:30 AM	**Analyze Maps** (60 minutes)
12:30 PM	**Lunch** (60 minutes)
1:30 AM	**Shareout** (60 minutes)
2:30 PM	**Reflections** (45 minutes)

The above agendas are samples, consider them a starting point and modify as needed.

DURING

Conducting Your Experience Mapping Workshop



Setup & Kickoff

SETUP (30 minutes before the workshop)

- Identify where each team will work within the room
- Hang up templates (or butcher paper)
- Set out supplies
- Test A/V if showing slides
- Set up recording equipment
- Create a sticky note legend for each of the different colors. Ask your teams to use the same colors for **DOING, THINKING, FEELING, TOUCHPOINTS,** and **PEOPLE**—it will help the group to read the maps later and record the output.

WELCOME & ORIENTATION (30 minutes)

Thank participants for being there and kick things off with introductions, icebreakers, and intention setting, as appropriate for your group.

A Few Suggestions

- Have participants share their goals for the session. It's a good way to establish focus, and it's also an opportunity to address any misaligned expectations.
- Stoke! Do something physical; even a simple stretch can change the energy in the room
- Throw in an icebreaker: "What was your first job?" is surprisingly fun

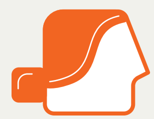
You've already decided how many teams you need and what each will focus on. Once everyone is warmed up and introduced, it's time to start working in groups.

- Create cross-functional teams to combine knowledge from other disciplines and help align teams around a common perspective
- Encourage teams to take note of unresolved questions and follow up at the end of the workshop

Construct Initial Maps

START WITH STORIES (30 minutes)

Each team should assign one member to serve in each of the following roles. The customer stand-in could be a member of the team who tells a story from research; or for a hypothesis workshop, this could be a front-line staff member who is close to the experience.

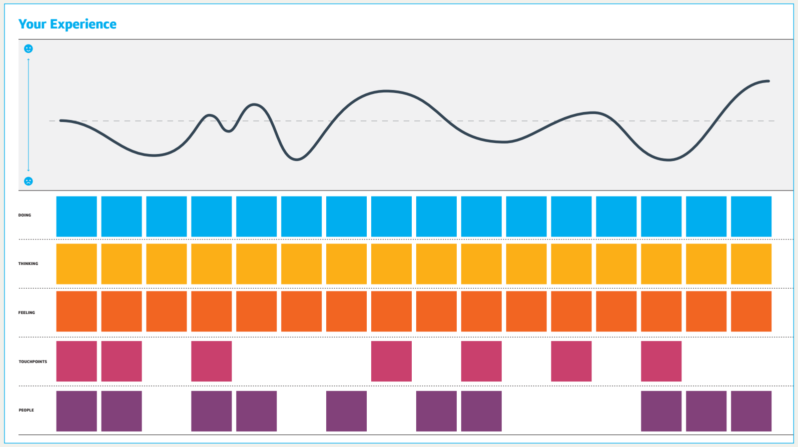


Customer proxy conveys the story of the customer experience in the first person, represent the POV of the person whose experience she's relating.

Interview facilitator asks questions and guides the conversation, probing for the specific facets to be mapped.

Note taker captures detailed notes, paying special attention to verbatim quotes (by hand; even small laptops are distracting).

It's helpful to get a run-through before starting to map in order to get a sense of the scope of the story and what to account for. Expect the speaker to jump around in time; it will be helpful to go back over the story. Consider using the tabloid size map template as a note-taking and synthesis tool (optional).



STORIES TO STICKIES (45 minutes)

Now start building the map using one of the poster-size templates. Make sure teams refer to the sticky note color key—each team member can take a different category. If you have recruited interviewees, ask them to continue to talk through the experience and provide additional detail as needed.

TIP: *Don't do all the Doing in one go*—once you've established a segment of the story, go back and fill out the other main categories. Don't worry if you don't have a sticky for each moment.

- **DOING:** It's always easiest to start with Doing—these are the customer's actions. Go through them step by step, making sure to account for the actions without getting so granular that you get bogged down.
- **THINKING:** Remember, thinking can be expressed as a first-person statement, e.g., "This email looks like a phishing scam"
- **FEELING:** This should be a single emotion word or very short phrase, e.g., "Suspicious"
- **TOUCHPOINT:** This is a place where the person and the service come into contact, e.g., "Funds Alert Email"
- **PEOPLE:** Other actors in the story (may not be present at each step)

ADD HIGHS & LOWS (30 minutes)

If using the wall-size template, start to draw in the emotion line in the upper area, representing emotional highs and lows. This is a great place to add stickers and annotations—we like to draw faces on multi-colored Avery dot stickers. Once you've filled out the journey, you should be able to identify **HIGHLIGHTS, PAIN POINTS,** and **KEY MOMENTS.**

Analyze Maps

ADD LAYERS (60 minutes)

Take a step back, then dig into your maps moment by moment. Other categories may be relevant—here are some you might add. Consider using stickers or tape flags to supplement the sticky notes.

» **STAGES:** These should emerge from the data you have. Don't impose these in advance; remember to represent the customer's point of view and language.
» **METRICS:** Any data relevant to the stage; it may even be helpful to note metrics you'd like to have
» **OPPORTUNITIES:** Any opportunity or idea to address customer pain points or amplify positive moments
» **PLACES:** All the places a customer may be in or go to while interacting with the service
» **SERVICES:** Other services customers interact with during the stage

Shareout

GALLERY WALK & SHAREOUT (60 minutes)

Present maps team by team—this is a time to see what broader patterns and variations emerge.

» **A person from each team tells the story of their map:** Ideally, you'd like to capture their presentation with video so the video can be reviewed for clarification if needed
» **Identify opportunities and pain points:** Fresh eyes from other teams might note additional areas of focus
» **Identify similarities between maps:** As you tour through the maps, identify where the similarities lay—similar stages? peaks? pain points?
» **Compile full list of opportunities:** As you tour through the maps, compile a list of the top opportunities; you will use these during the final step of the workshop
» **Identify knowledge gaps:** Where would you like to learn more?

REFLECTION (45 minutes)

As a final activity before you thank and release your participants, ask them to reflect on the workshop.

» What was the biggest thing they learned?
» What surprised them the most?
» Did it confirm or change any beliefs?
» What will they take into their work based on the workshop?

DOCUMENT

» After your participants have gone, photograph all the materials at the end, ideally in high resolution, and make sure the images are uploaded to a secure location in the cloud
» If you have space, you can keep the materials up for team members to look at, or print high-resolution photos at plotter size
» Finally, digitize the data—spreadsheets are a great tool for this

AFTER

After Your Experience Mapping Workshop

WHAT NEXT?

If the main purpose of your workshop was to build alignment and empathy among your team, you're almost done! Using the artifacts and documentation you just created, capture and share back out to the larger team and your stakeholders what you learned.

If you conducted a hypothesis workshop, you should now have a better sense of where to target future research.

If you want to go a few steps further and create a single artifact from the multiple journeys, you have a bit more work to do.

SYNTHESIZE & DIGITIZE

To combine multiple stories into a single overarching journey, take the step-by-step breakdown you have created of each person's story and line them all up. This can be done with sticky notes (if you have a luxurious amount of wall space), but spreadsheets also work well for this.

The stories will have shared moments throughout. Make sure these moments line up vertically, leaving space for variation. When you are able to scan across the stories compared in this way, you will find patterns, or areas of commonality, as well as divergences.

It's easy to create a journey from the similarities. The divergences are harder and will require judgment calls that are outside the scope of this toolkit.

Putting Your Map to Work

Hopefully you and your team have gotten value out of the activity already. Now that you have a clearer picture (literally) of the current state of the experience, how will you use it to move forward?

IDENTIFY KNOWLEDGE GAPS

- Reviewing the experience you mapped, record all the relevant questions and places where information is missing
- Contact Experience Design Research; they may be able to connect you with existing research that's relevant. If not, work with them to plan further discovery.
- Work with data scientists and analysts to tie metrics to key experience moments

ALIGN & PRIORITIZE PLANNED WORK

- Identify low-hanging fruit—is there anything that can be done or prioritized right now to improve the current experience?
- Prioritize near-term work against key moments; consider using a framework like Value / Feasibility
- Take the opportunity to align with other groups whose work may overlap

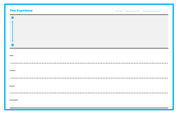
IDEATE!

Customer insights, and the knowledge they give us about what customers value, are an important input for developing future products and services. Structured ideation helps us turn insights into ideas; the resulting concepts are then developed into future vision stories that contain not only the customer value perspective, but the business and employee value.

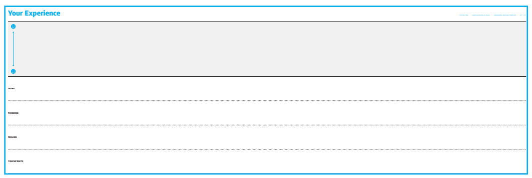
NEW! For detailed instructions on how to use an Experience Map as an input for ideation, see the next toolkit in our series, *Creating Vision Stories*, coming soon.

Resources

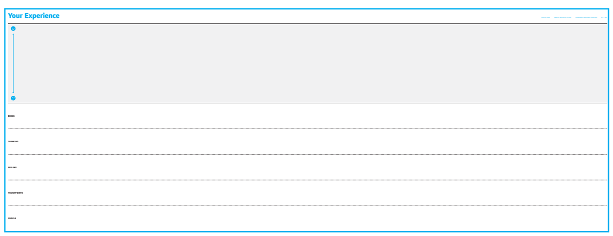
We have prepared experience mapping templates in three sizes that you can download here: bit.ly/ExMapTemplates. Also, check out our **Service Design Resources** on Pulse: bit.ly/SXD-Resources.



Experience Mapping Template, Tabloid
11" × 17"

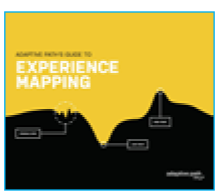


Experience Mapping Template, Poster Size 1
24" × 72"



Experience Mapping Template, Poster Size 2
32" × 84"

SUGGESTED READING



Our Guide to Experience Mapping
Download the PDF version on mappingexperiences.com

HELPFUL QUESTIONS AND SUGGESTED DATA SOURCES FOR GATHERING WORKSHOP INPUT

» How many customers go through this experience? Where do they have trouble?
Ex: Voice of Customer data, quality management defect data

» Where do they fall off the pathway?
Conversion metrics

» What touchpoints do they use?
Ex: Categorical call center data, site or app metrics

» What questions do they have?
Ex: Empathy research interview data, call center data, social data, email contact data

» How does the experience feel? What are the emotional highs and lows?
Ex: Empathy research interview data

» What other resources do they use? (non-Capital One)
Ex: Empathy research interview data

» Where do they spend time? How long do things take?
Ex: Empathy research interview data, especially for the total length and where long pauses happen, time logs for site or app sessions

» How do people perceive the overall experience?
Ex: NPS data, empathy research interview data

Thank You!

We hope you find this guide interesting, informative, and helpful when solving some of the challenges inherent in creating service experiences. We encourage you to take this information not as the final word in experience mapping, but as a foundation to build upon.

We'd love to see how you improve and iterate on running an experience mapping workshop, and we're eager to hear how you've applied this toolkit in your work. Please share your thoughts with us at servicedesign@capitalone.com.

ABOUT THE SERVICE DESIGN TEAM

We're experienced practitioners, strategic thinkers, design doers, teachers, and idea collectors. In 2014, we joined Capital One to design financial services that improve people's lives.

Capital One

AUTHOR & CREATIVE DIRECTOR
Iran Narges

DESIGNERS
Ece Ciper
Tim Gruneisen
Katie Wilson

ILLUSTRATOR
Ece Ciper

PHOTOGRAPHERS
The Service Design Team

HEAD OF SERVICE DESIGN
Kendra Shimmell