UX MASTERY

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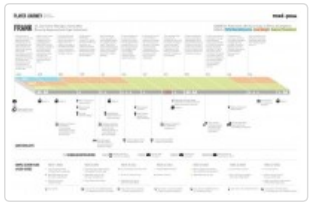
How to Create a Customer Journey Map

Posted on September 16, 2014 by **Megan Grocki** in **Culture**, **Tutorial** – **42 Comments**



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

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

What is a Customer Journey Map?

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

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

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

How Do We Use Them?

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

I also use journey maps to gain internal consensus on how customers should be treated across distinct channels. Holding collaborative workshops with cross-disciplinary teams mixing people who otherwise never communicate with each other can be extremely valuable in large organizations in particular.

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

What Components Does a Journey Map Include?

Must-haves

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

Nice-to-haves

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

The Process

1. Review Goals

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

2. Gather Research

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

3. Touchpoint and Channel brainstorms

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

4. Empathy map

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

5. Brainstorm with lenses

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

6. Affinity diagram

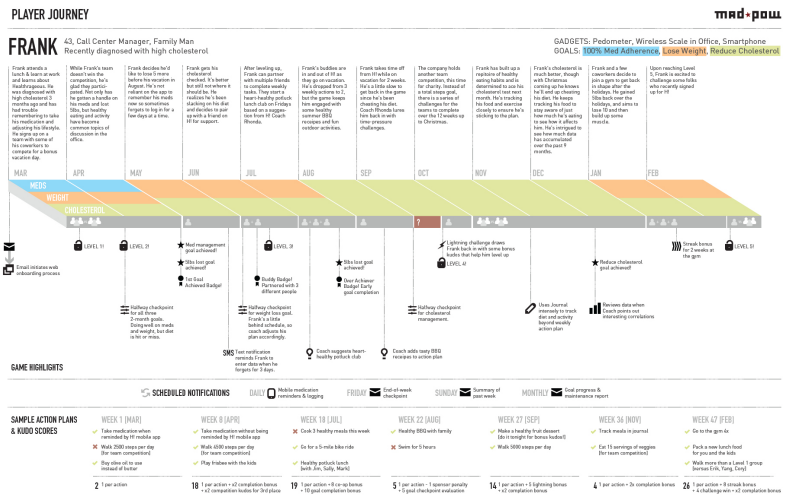
This is a method to visually organize ideas and find cohesion in the team’s concepts. Affinity diagramming helps us shift from casting a wide net in exploring many possibilities, to gaining focus on the right solutions for this audience. All team members should put their ideas generated in the lensed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

7. Sketch the journey

Drumroll, please. This is the part you’ve been waiting for! It’s now time to put together all the pieces: timeline, touchpoints, channels, emotional highs and lows, and all the wonderful new ideas the team generated for how to improve the future customer journey. Get creative with how you lay it out—it doesn’t have to be a standard left to right timeline. It could be circular or helical. It could be one large map or it could be an interactive, clickable piece with embedded video. There are no templates, and there are infinite possibilities.

8. Refine and digitize

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



Healthrageous Journey c/– Mad*Pow

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

9. Share and use

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

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

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

Tips

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

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

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

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Customer Journey Map, Experience Map

About Megan Grocki

Megan Grocki is an experience strategy director at Mad*Pow. With over 15 years of experience in research, experience design and strategy, she helps clients discover the expectations and behaviors of their audiences and identify opportunities for engagement. By being the ultimate user advocate, she is able to illustrate the big picture centered on relationships that unfold over time and across channels between an individual and an organization. She works with with clients to merge their business objectives with the needs of their audiences to create a vision that will yield meaningful experiences. She has presented and led workshops at several UX, healthcare, and strategy industry events.

In her spare time she is earning her master's degree in gastronomy with a concentration in food policy at Boston University. She hopes to leverage her design and strategy chops to educate the public about the connections between their health and what they eat, and use design to help affect changes in food policy at local, national and global levels.

| View all posts by Megan Grocki → | Blog | Twitter

42 comments on "How to Create a Customer Journey Map"

Justin
September 17, 2014 at 8:30 am

The post is incredibly good and very well explained. Well done Megan. Thanks UX Mastery for gathering this content and people.

Reply

Matthew Magain
September 25, 2014 at 1:40 pm

Thanks Justin—I agree Megan did a great job explaining it, and we're pretty proud of the resulting animation!

Keep an eye on the site as we tackle other UX techniques.

Reply

Max Rutherford
September 23, 2014 at 10:11 pm

Megan – can you kindly post a better quality image to your final visual please – it certainly seems it will be worth reading your output. Good work!

Reply

Matthew Magain
September 25, 2014 at 1:41 pm

That's been done, Max.

Cheers

Reply

Steve Chihos
October 1, 2014 at 7:43 am

Excellent Post Megan!
Your process and explanations are easy to follow and very useful. I love the video too. I help people & groups as they through change and an early step in creating a compelling future is gaining a shared understanding of where we actually want to go. Techniques like the ones you've described here are so important to structuring the kind of dialogue needed to build that understanding!
Thanks for sharing!
–Steve

Reply

Ivan Kasapov
December 4, 2014 at 7:59 pm

Great article, I agree with everything you've written. In my daily workflow, I use Mediatoolkit.com for media listening activities and I highly recommend it, because it enables me to be careful around the challenges you mentioned. :)

Reply

Arjen
January 28, 2015 at 10:16 pm

Great article Megan! As a Customer Journey Research provider from The Netherlands, it's very interesting to read. The process and examples are well explained!

Reply

Lisa
February 26, 2015 at 9:16 pm

This is a really great article. It is well written and a step-by-step tool for mapping and exploring user journeys. The video is also excellent! Thanks!

Reply

Judy Cotter
March 2, 2015 at 5:19 am

Hey Megan!!

Just doing a little bit of research on customer journey maps for a talk and boom!! here you are!! This is very helpful information!!!

Judy

Reply

Daniel
April 22, 2015 at 5:14 pm

Hi Megan,

Great work. Thanks for sharing your methods.

Reply

Eureka
April 24, 2015 at 12:19 am

Hi Megan,

Thanks for this article! However, several points are still unclear. For example – step 5) Brainstorm with Lenses. What exactly is the team brainstorming for? What ideas are we looking for? Shouldn't the customer journey map be based on observing what frustrations and triumphs people have at each stage in the journey?

Similarly, I didn't understand clearly how affinity diagramming fit into this process. Is it simply gathering and organizing all the data from research into potential steps in the customer journey?

Hope to hear from you soon! :) And thanks again!

Best wishes,
Eureka
UX Researcher at Piktochart

Reply

Challis Hodge
September 22, 2015 at 7:22 am

I had the same thought. I assume these are the steps for creating a future state journey map, not a current state.

Reply

marc woolf
April 30, 2015 at 2:08 pm

Great post Megan! Thank you for the explanation and process mapping.

Reply

Yuri
May 1, 2015 at 10:38 am

Thank you for your post and the video!
We use it sometimes to explain our students in just several minutes how to build CJM. On step 4 we also try to identify mood (experience). And on step 10 we usually say "Iterate!" (:
We also created a tool to create customer journey maps online – http://uxpressia.com.

Reply

Gayathri G
July 29, 2015 at 2:51 pm

Beautifully explained…Amazing how relevant this is for transporting your customer to a virtual world during a sales demo!

Reply

Ayman
July 30, 2015 at 6:16 pm

Hello Megan,

Very nice article & informative vide, ths for the share.

Regards,
Ayman

Reply

Tyra
September 25, 2015 at 7:43 am

Thanks for the great information. Very helpful and well-outlined. Much appreciated!

Reply

Glyn Peach
January 11, 2016 at 1:21 am

Love the intelligence and delivery. Off to put to good use hopefully! Thank you Megan.

Reply

Kathleen
January 19, 2016 at 6:45 am

Thank you for your thoughtful post. I'm finding that different groups in my company (engineers, sales, client services) all want and could benefit from user research assets such as personas and journey maps. However, they each prioritize different content. Do you happen to know of a tool that enables storing and maintaining a lot of content pieces (modules) about a persona and enables dynamic updating of "child" content? For example, if I tweaked the empathy map in the master, all the child artifacts that included the empathy map would be updated. I'd be happy to pay for a good solution, but have not found any. I also work on a mac… Thanks in advance for your help!

Reply

VIVEK SHARMA
February 19, 2016 at 7:53 pm

hi Megan thanks for your post being a student I have to create an assignment of a customer journey map of any service or any product can you tell me which software is to be used for this purpose.

Reply

Jitendra Kumar Singh
February 21, 2016 at 8:08 pm

Hello Megan for sharing extreamly good idea about customer journey map.Really Great Work.Keep it up

Reply

Carmen
March 4, 2016 at 3:02 am

Thanks for brilliantly mapping the steps in visual form!

Reply

Fulvio Solinas
March 4, 2016 at 6:14 pm

Excellent Megam,
process mapping really well done.

Reply

David Philpott
April 21, 2016 at 11:36 pm

Hey guys, what tool do you use Megan for the journey map? Can people recommend good free alternatives?

Reply

Kayode Olorunfemi
April 27, 2016 at 1:30 am

Great stuff… very helpful video.

Reply

Ulrik Sandberg
April 30, 2016 at 3:17 pm

1+1=3
Ger dig snabbt en bild av värdet i kundresan ur kundens perspektiv. vilka tjänster skall jag erbjuda med utgångspunkt från kundens resa

Reply

Scott Nelles
May 9, 2016 at 11:41 pm

Well Done Megan! Great video.

One thing I'd maybe add for what it's worth is the idea of interviewing Stakeholders as you begin the process. They can add some great ideas into what they perceive the customer pain points and relevant journeys to be. But more important than that, is that the Stakeholders will be more "bought-in" to your feedback when you present the final Journey Map product. That part is priceless.

Thank you for putting this together!

Reply

Ernest
May 28, 2016 at 1:10 pm

Hi, thanks for such an a valuable and insightful article. I'm just curious to understand more about affinity diagram. Could you elaborate more? From my understanding, I gathered that affinity diagraming is more of an activity than a documentation that requires a team discussion to gain consensus and categorize the deliverables from the preceding procedures into something more visual/documented? Could you elaborate more and point me in the right direction?

Reply

Paul Libor
June 9, 2016 at 4:56 am

Trying to get in touch with Mad Pow Megan Grocki, does someone have her direct email address?

Thanks, Paul L

Reply

Yuri

July 1, 2016 at 2:38 am

Some time has passed since we did that, but I think it's still actual for the community. This year we've published a list of free customer journey maps templates here – https://uxpressia.com/templates.
It is a pretty bunch of customer journey maps templates created for different business domains (including Healthcare, Travel, Banking, Telecom, etc.). All of them are based on the actual experience.
You can download the template as PDF or start creating online map inside our tool based on that template.

Reply

Fred Voorhorst
July 5, 2016 at 9:52 pm

All perfect and fine, but what I am always missing in discussions about user journeys is an overview of what we are 'competing' with. To achieve a touchpoint (meaning the client or user gives his or her attention to my app, or my service, or simply to me), what else is screaming for attention that the user then has to ignore.

I tried to discuss this here:
http://www.expressiveproductdesign.com/competing-for-attention/

And did an attempt to create a template to help uncover the competition here:
http://www.expressiveproductdesign.com/stickiness-creating-products-services-make-people-come-back/

Not sure if I am there yet. What do you think? Is 'competition' an issue in user journey mapping, and how do we best deal with this?

Reply

Alice Dylan
July 11, 2016 at 7:12 pm

Great article!! In addition to all the pointers mentioned, would like to add the importance of CRM in regards to customer journey mapping. Traditionally retail stores, call centers, social media, and other channels were separately managed. However, now businesses cannot take the risk of handling these channels separately as it will result in a disjointed customer service.

Today the objective should be to have a broad single channel with multiple touch points. And that is only possible when all channels are merged.

Buisnesses who use a robust CRM software like ConvergeHub, Zoho or Infusionsoft are able to combine all communication channels
to have a consolidated view of the customers and deliver consistent experience across all channels. So whether customers want to make a purchase, renew a service, or resolve a problem, they can do so in any of their preferred channels.

As the customers move across physical store, online e-commerce, social media and call centers, businesses can map the entire customer journey to provide a unified experience.

Reply

Mark
July 25, 2016 at 3:54 am

I dont see the highs and lows in the CJM?

Reply

Steven Li
August 12, 2016 at 6:35 pm

This post illustrates well on this concept, thanks Megan, hope I have chance to translate the article into Chinese soon.

Reply

Domonique Townsend
September 4, 2016 at 3:43 pm

This is an awesome and very helpful post! Thanks for sharing these tidbits! I'd love to learn more.

Reply

Abhilash Sreekumaran
November 14, 2016 at 1:58 am

This is immensely resourceful and precise. The nuances of user journey and the process explained in a lucid manner, keeping in mind the user journey of the reader. That's a story within a story, using your technique to explain your technique. Thanks a ton, Megan. God bless!

Reply

Rosalind Gregory
June 21, 2017 at 10:34 am

Ditto. Very helpful, clear process to follow and great sample of the outcome. A watershed moment for me in documenting my own businesses CJM

Reply

Lisa Hudson
March 7, 2017 at 7:35 am

Great post and video, thanks.

Reply

Amir
March 30, 2017 at 12:06 am

Wonderful post Megan

Reply

Matteo Nebiolo
May 31, 2017 at 8:11 pm

Great work,
thank you very much!

Reply

Kevin
June 17, 2017 at 8:28 pm

Thanks for sharing, very useful post.

Reply

Luke Chambers
June 18, 2017 at 3:15 am

Thanks Kevin.

Reply

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