

# When and How to Create Customer Journey Maps

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Topics: [Design Process](#) [Research Methods](#) [Strategy](#)

**Summary:** Journey maps combine two powerful instruments—storytelling and visualization—in order to help teams understand and address customer needs. While maps take a wide variety of forms depending on context and business goals, certain elements are generally included, and there are underlying guidelines to follow that help them be the most successful.

## What Is a Customer Journey Map?

Because this question is such a common one, let's start with the direct answer:

**Definition:** A customer journey map is a visualization of the process that a person goes through in order to accomplish a goal. It's used for understanding and addressing customer needs and pain points.

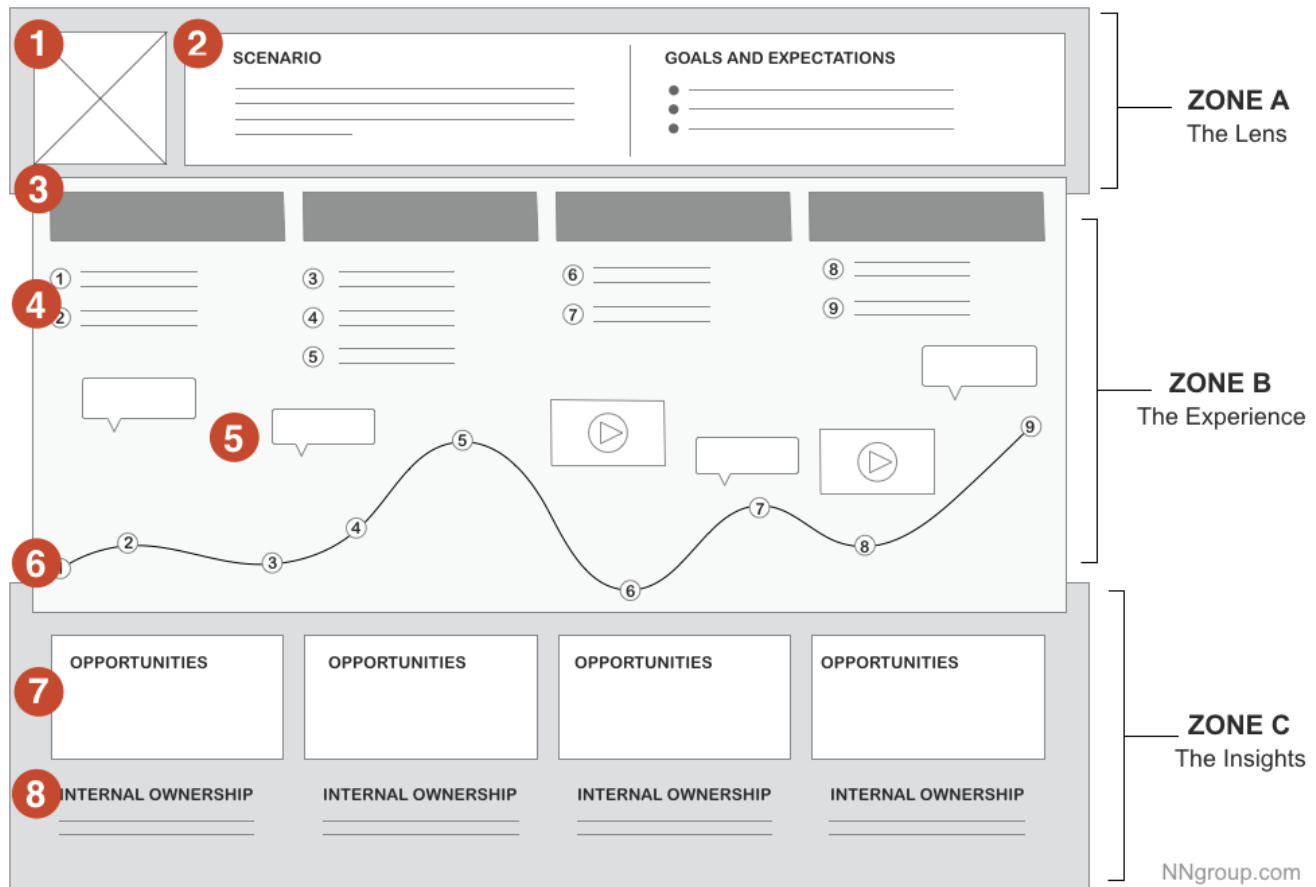
In its most basic form, journey mapping starts by compiling a series of user goals and actions into a timeline skeleton. Next, the skeleton is fleshed out with user thoughts and emotions in in order to create a narrative. Finally, that narrative is condensed into a visualization used to communicate insights that will inform design processes.

**Journey mapping combines two powerful instruments: storytelling and visualization.**

Storytelling and visualization are essential facets of journey mapping because they are effective mechanisms for conveying information in a way that is memorable, concise and that creates a shared vision. Fragmented understanding is chronic in organizations where KPIs are assigned and measured per individual department or group because many organizations do not ever piece together the entire experience from the user's standpoint. This shared vision is a critical aim of journey mapping, because without it, agreement on how to improve customer experience would never take place.

Journey mapping creates a holistic view of customer experience, and it's this process of bringing together and visualizing disparate data points that can engage otherwise disinterested stakeholders from across groups and spur collaborative conversation and change.

## Deconstruction of a Customer Journey Map



*While journey maps vary based on the specific context for which they are used, they tend to follow a general model that includes zones for the “lens,” the mapped experience, and the insights learned throughout the process. See below for diagram annotations.*

**Zone A:** The lens provides constraints for the map by assigning (1) a persona (“who”) and (2) the scenario to be examined (“what”).

**Zone B:** The heart of the map is the visualized experience, usually aligned across (3) chunkable phases of the journey. The (4) actions, (5) thoughts, and (6) emotional experience of the user has throughout the journey can be supplemented with quotes or videos from research.

**Zone C:** The output should vary based on the business goal the map supports, but it could describe the insights and pain points discovered, and the (7) opportunities to focus on going forward, as well as (8) internal ownership.

## Why Do You Need a Journey Map and When Should You Have One?

Journey maps should always be created to support a known business goal. Maps that do not align to a business goal will not result in applicable insight. The goal could be an external issue, such as learning about a specific persona’s purchasing behaviors, or an internal issue, such as addressing lack of ownership over certain parts of the customer experience. Some potential business goals that journey mapping could be applied toward are listed below.

**Shift a company's perspective from inside-out to outside-in.** If an organization lets internal processes and systems drive decisions that affect customer experience, a journey map could help turn the culture of that organization by refocusing on the thoughts, actions and emotions of customers. Journey mapping sheds light on real human experiences that often organizations know very little about.

**Break down silos to create one shared, organization-wide vision.** Because journey maps create a vision of the entire customer journey, they become a tool for creating cross-department conversation and collaboration. Journey mapping could be the first step in building an organization-wide plan of action to invest in customer experience, as it helps answer the question, "Where do we start?" by highlighting areas of friction.

**Assign ownership of key touchpoints to internal departments.** Often, areas of inconsistencies and glitches in customer journeys exist simply because no internal team has been tasked with ownership of that element. Journey maps can create clarity around alignment of departments or groups with different stages or key touchpoints in the journey that need addressing.

**Target specific customers.** Journey maps can help teams focus in on specific personas or customers, whether that means understanding differences or similarities across the journeys of multiple personas, prioritizing a high-value persona or exploring ways to target a new type of customer.

**Understand quantitative data.** If you are aware through analytics or other quantitative data that something specific is happening—maybe online sales are plateauing or an online tool is being underutilized—journey mapping can help you find out why.

## Key Elements of Customer Journey Maps

While journey maps can (and should) take a wide variety of forms, certain elements are generally included:

**Point of view.** First and foremost, choose the "actor" of the story. Who is this journey map about? For example, a university might choose either students or faculty members, both of which would result in very different journeys. "Actors" usually aligns with personas, if they exist. As a guideline, when creating a basic journey map, use one point of view per map in order to provide a strong, clear narrative.

**Scenario.** Next, determine the specific experience to map. This could be an existing journey, where mapping will uncover positive and negative moments within that current experience, or a "to-be" experience, where the mapper is designing a journey for a product or service that doesn't exist yet. Make sure to clarify the user's goal during this experience. Journey maps are best for scenarios that describe a sequence of events, such as purchasing behavior or taking a trip.

**Actions, mindsets, and emotions.** At the heart of a journey map's narrative is what the user is doing, thinking, and feeling during the journey. These data points should be based on qualitative research, such as field studies, contextual inquiry, and diary studies. The granularity of representation can vary based on the purpose of the map. Is the purpose to evaluate or design an entire, broad purchasing cycle or a contained system?

**Touchpoints and channels.** The map should align touchpoints (times when the actor in the map actually interacts with the company) and channels (methods of communication or service delivery, such as the website or physical store) with user goals and actions. These elements deserve a special emphasis because they are often where brand inconsistencies and disconnected experiences are uncovered.

**Insights and ownership.** The entire point of the journey-mapping process is to uncover gaps in the user experience (which are particularly common in omnichannel journeys), and then take action to optimize the experience. Insights and ownership are critical elements that are often overlooked. Any insights that emerge from journey mapping should be explicitly listed. If politically possible, also assign ownership for different parts of the journey map, so that it's clear who's in charge of what aspect of the customer journey. Without ownership, no one has responsibility or empowerment to change anything.

Even with all the above critical elements included, two journey maps could look completely different, yet both be perfectly suitable for the context in which they were designed. Tradeoffs in scope, focus, and breadth vs. depth are required when deciding on what elements to include. To make informed decisions on those tradeoffs, consider the following:

- What level of detail is needed in order to tell the complete story?
- What elements (such as device, channel, encountered content) are also necessary in order to provide the most truthful narrative?
- Is the purpose of this journey map to diagnose issues with a current experience or to design a new experience?
- What's the balance between external actions (on the customer side) and internal actions (on the organization side)?
- Who will be using this journey map?

## Rules for Creating Successful Journey Maps

Successful journey maps require more than just the inclusion of the "right" elements. Journey mapping should be a collaborative process informed by well-defined goals, and built from research. It requires hard work to keep the process on the right track and to build the buy-in needed to evangelize the insights it provides. Below are some tips for making sure that the process starts and stays in the right direction:

**Establish the “why and the “what”.** First, identify the business goal that the journey map will support. Make sure there are clear answers to these basic key questions before you begin the process:

- What business goal does this journey map support?
- Who will use it?
- Who is it about and what experience does it address?
- How will it be shared?

**Base it on truth.** Journey maps should result in truthful narratives, not fairy tales. Start with gathering any existing research, but additional journey-based research is also needed to fill in the gaps that the existing research won't cover. This is a qualitative-research process. While quantitative data can help support or validate (or aid in convincing stakeholders who may view qualitative data as “fuzzy”), quantitative data alone cannot build a story.

**Collaborate with others.** The activity of journey mapping (not the output itself) is often the most valuable part of the process, so involve others. Pull back the curtain and invite stakeholders from various groups to be a part of compiling the data and building the map.

**Don't jump to visualization.** The temptation to create an aesthetic graphic or jump to design can lead to beautiful yet flawed journey maps. Make sure the synthesis of your data is complete and well-understood before moving to creating the visual.

**Engage others with the end product.** Don't expect to get “buy-in” and foster interest in your journey map by simply sending a lovely graphic as an email attachment. Make it a living interactive document that people can be a part of. Bring up your story in meetings and conversations to promote a narrative that others believe in and begin to reference. One idea is to create a journey-mapping showroom where anyone not on the direct team can come experience the process and resulting artifacts.

To learn more, check out our course, [Journey Mapping to Understand Customer Needs](#), coming up in our [Atlanta](#) and [London](#) UX Conferences later this year.

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