A Customer Journey Map is a visualisation of a customer's experiences with a company. It shows the touchpoints, experiences and emotions as the customer interacts with the business. A Journey Map provides a clear representation that can help to provide a better understanding of customer expectations.

The Journey Map provides a chronological narrative of the stages and steps that a customer needs to pass through in order to achieve his or her objectives. As well as the customer's experience the Journey Map captures their emotions and expectations.
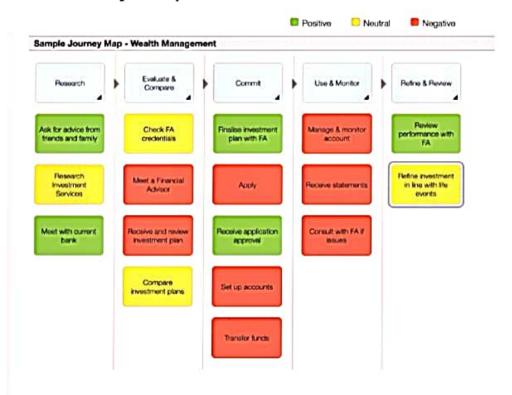
The Journey Map can be used to discover business challenges and opportunities as they relate to the customer's interaction with the business.

Building an Outline for a Customer Journey Map in Blueworks Live

A Discovery Map is ideal for holding the basic Stages and Steps in a Customer Journey.

Create a Discovery Map for your Customer Journey and document the Stages of the Journey as Milestones and the Steps in the Journey as Activities.

Figure 1: Wealth Management Customer Journey Map outline as a Blueworks Live Discovery Map

Sample Journey Map - Wealth Management

Legend: 🟩 Positive 🟨 Neutral 🟥 Negative

Research	Evaluate & Compare	Commit	Use & Monitor	Refine & Review
Ask for advice from friends and family	Check FA credentials	Finalise investment plan with FA	Manage & monitor account	Review performance with FA
Research Investment Services	Meet a Financial Advisor	Apply	Receive statements	Refine investment in line with life events
Meet with current bank	Receive and review investment plan	Receive application approval	Consult with FA if issues	
	Compare investment plans	Set up accounts		
		Transfer funds		

Journey Map Concept Blueworks Live

Journey Map Concept	Blueworks Live
Stages	Milestones
Steps / Customer Activities	Activities (Performed by Customer)
Pain Points	Problems
Responsible	Business Owners
Technology Systems	Systems
Who knows?	Experts
Operational Processes	Linked Processes on activities
Experience / Feeling	Custom Property (Excited / Neutral / Frustrated) or Use Colour for the Steps as shown in the sample above
Customer Goals / Thinking	Custom Property
Touchpoints / Using	Custom Property
Opportunities	Custom Property
KPIs	Custom Property

Customer Journey Map Information Model for Blueworks Live

Some of the information typically used to build a Customer Journey Map can be found in the default Blueworks Live properties. Where Blueworks Live does not have existing fields, a few custom properties can provide the extra information that is required.

Most of the information would be entered against the Journey Map Stages (Milestones in Blueworks Live), but detail could also be added to Steps (Activities).

The table below provides a typical information model for a Journey Map and how it can be mapped to Blueworks Live.