Resources: Mapping the User Experience: Aligning for Value

"Adaptive Path's Guide to Experience Mapping" (2013)

This is a free guide to experience mapping from the good folks at Adaptive Path. In less than 30 pages, they are able to describe the mapping process with both detail and clarity. This includes an excellent discussion of the value of experience mapping in general.

Mary Jo Bitner et al, "Service Blueprinting: A Practical Technique for Service Innovation," *Working Paper, Center for Leadership Services, Arizona State University* [pdf] (2007).

This 24-page paper is very detailed and includes practical information. "Service blueprints allow all members of the organization to visualize an entire service and its underlying support processes, providing common ground from which critical points of customer contact, physical evidence, and other key functional and emotional experience clues can be orchestrated."

Gianluca Brugnoli, "Connecting the Dots of User Experience," *The Journal of IA 1/1* (2009) http://journalofia.org/volume1/issue1/02-brugnoli/jofia-0101-02-brugnoli.pdf

This is a well-referenced, slightly academic article on cross channel design. Gianluca provides some practical tips on how to map systems. The highlight of the article is his tool, the customer journey matrix. He observes: "The user experience takes shape on many interconnected devices and through various interfaces and networks used in many different context and situations. To achieve their goals through the interaction flows, users tend to combine an increasing number of different applications and tools within wide and fuzzy ecosystems, where technical factors blend in with behaviour and intention."

Ram Charan, *What The Customer Wants You To Know* (2007) http://www.amazon.com/What-Customer-Wants-You-Know/dp/1591841658

Ram Charan is a business power-house, having consulted the biggest names in many industries. This is a slim volume that is very accessible. He makes a strong call for a re-imagined sales process, one that focuses on your customer's customer in what he calls "value creation selling."

Silvana Churruca, "Experience maps, user journeys and more…" *UX Lady* [blog] http://www.ux-lady.com/experience-maps-user-journey-and-more-exp-map-layout/ (2013)

This blog post highlights some of the key elements of experience mapping in a good overview. She covers layouts, content, elements, and complexity with many examples.

"CX Journey Mapping Toolkit" http://designingcx.com/cx-journey-mapping-toolkit/

This is an excellent collection of guides, tools, and templates for journey mapping in general, created and maintained by designers at Oracle.

Steve Denning, "Why Building A Better Mousetrap Doesn't Work Anymore." *Forbes* (2/2014) http://www.forbes.com/sites/stevedenning/2014/02/28/why-building-a-better-mousetrap-doesnt-work-any-more/

In this article, Steve Denning discusses the value of ecosystems. Stand-alone products aren't enough anymore, he believes. Companies must instead think across products and services, conceiving them as a connected system of experiences. He writes: "The winners will be determined not only by building a better mousetrap, but also how that mousetrap fits into the things that customers are trying to get done is their lives, in other words, their individual ecosystem. The quandary for companies is how to meet the idiosyncratic needs of millions of different customers?"

Hugh Dubberly, "A System Perspective on Design Practice" [video] (2012) http://vimeo.com/51132200

This is a video of a talk Hugh gave at Carnegie Melon University in 2012. While he doesn't talk about experience maps or alignment diagrams directly, he does advocate that models are needed for systems design. The tool he highlights is more of a concept map, but nonetheless underscores the need for designing at the system level, with abstractions of the system documented in some way.

Chris Ertel and Lisa Kay Solomon, *Moments of Impact* (2014) http://www.amazon.com/Moments-Impact-Strategic-Conversations-Accelerate-ebook/dp/B00DPM7YE0/

This is a comprehensive book about how to harness the talent of a group of people in a focused way to make strategic decisions. Don't waste time in yet another 2-day strategy offsite where everything and anything gets discussed but without reaching a decision.

Kim Erwin, "Consumer Insight Maps: The Map as Story Platform in the Design Process. Parsons Journal for Information Mapping iii/1 (winter 2011) https://www.id.iit.edu/media/cms_page_media/87/ConsumerInsightMapsPJIM.pdf

Consumer Insight Maps are lesser known deliverables and not really experience maps. They fall into the category of alignment diagrams, however, because they seek to align customer traits with business outcomes. Parts of them even look like mental model diagrams, with stacked boxes of behavior, but there is much more detail and context around them. In her own words: "The user experience takes shape on many interconnected devices and through various interfaces and networks used in many different context and situations. To achieve their goals through the interaction flows, users tend to combine an increasing number of different applications and tools within wide and fuzzy ecosystems, where technical factors blend in with behaviour and intention."

Joel Flom. "The Value of Customer Journey Maps: A UX Designer's Personal Journey," *UX Matters* (Sept 2011).

This is a good case study around the use of customer journey maps (CJMs) at Boeing. There's also a good illustration of a CJM with an interesting layout and form. Look at this article if you need some arguments for convincing others to use CJMs. The author was first skeptical of their use, but concludes: "By producing journey maps that illustrate an optimal customer experience, we enable stakeholders and executives to identify, prioritize, and maintain focus on the changes that matter."

Dave Gray et al., *Gamestorming* (2010) http://www.amazon.com/Gamestorming-Playbook-Innovators-Rulebreakers-Changemakers/dp/0596804172/

Gamestorming is an indispensable collection of activities and exercises in interactive workshops. There are detailed instructions and examples with each. There's also an excellent introduction about designing and running workshops, in general, which is a big part of the experience mapping process: getting everyone on the same page with the alignment diagram as a catalyst.

Luke Hohmann, *Innovation Games* (2006) http://www.amazon.com/Innovation-Games-Creating-Breakthrough-Collaborative/dp/0321437292/

Like *Gamestorming*, this is a collection of innovation workshop techniques focused on "game-like" techniques. There are lots of exercises that use metaphors (e.g., Speedboat, Design The Box) and interactive techniques (Buy A Feature) that get results through serious play.

Jim Kalbach and Paul Kahn, "Locating Value with Alignment Diagrams," *Parsons Journal of Information Mapping, 3/2* (April 2011).

After my talk at the Euro IA in Paris (2010), where I first introduced the notion of "alignment diagrams," Paul Kahn and I authored this piece explaining the concept and its relevance to various disciplines.

Jim Kalbach, "Alignment Diagrams: Focusing the Business on Shared Value," *Boxes and Arrows* (Sept 2011).

This follows in the footsteps of the piece I co-authored with Paul Kahn, but is more practical in nature. I conclude: "alignment diagrams can reduce complexity for both customers and for organizations. They are an antidote to the challenges our business partners face. At a minimum, alignment diagrams start a conversation towards coherence, bringing actions, thoughts, and people together to foster consensus. More importantly, they focus on creating value—for both the customer and the business."

Jim Kalbach, "Principles of Alignment Diagrams." *ExperiencingInformation.com* (Jan 2012). http://experiencinginformation.wordpress.com/2012/01/04/principles-of-alignment-diagrams/

In this blog post, I outline what I consider the key principles of alignment diagrams. There is no specific technique for alignment diagrams; rather, they are a class of documents already found in the design canon. It's the principles behind them that tie them together, and once you grasp these, it should open doors for a variety of approaches depending on the situation.

Jim Kalbach, "Project Canvas" (2011)
http://experiencinginformation.wordpress.com/2012/08/05/the-project-canvas

For some reason, defining projects formally is difficult or tedious for many people. As a result, setting your goals and intents at the outside of projects gets skipped over.

Mike Kuniavsky, *Observing The User Experience* (2nd ed, 2012)
http://www.amazon.com/Observing-User-Experience-Second-Practitioners/dp/0123848695/

Birgit Mager "From Shareholder Value to Share Values." *Touchpoint* 4/3 (Feb 2013)

This is a lesser-known article with an important message. Birgit Mager has been a pioneer in service design for the past two decades. In this article, she stresses the need for focusing on value creation beyond just financial growth.

Peter Merholz et al., *Subject To Change* (2008)

This is an excellent book on UX strategy from a group of folks from Adaptive Path. With a sense of urgency, they call for an elevated importance in experience design in general. "The experience is the product," they declare. See my review of this work.
http://experiencinginformation.wordpress.com/2008/05/12/book-review-subject-to-change/

Jess McMullin, "Searching for the Center of Design." *Boxes and Arrows* (Sept 2003)

Jess makes a call to think beyond user-centered design and embrace value-centered design. This principle underlies the basic notion of an alignment diagram: "Value-centered design starts a story about an ideal interaction between an individual and an organization and the benefits each realizes from that interaction."

Alexander Osterwalder, *Business Model Generation* (2010)

After researching business models for his thesis work, Osterwalder made a big splash with his business model canvas. This book shows you how to use that canvas in detail. But it goes beyond that and discusses principles of business design. The dual nature of the business model canvas – frontstage and backstage, as he says – make it a type of alignment diagram by definition.

Andy Polaine, Lavrans Løvlie & Ben Reason, *Service Design* (2013).

This book provides a compact overview to service design as a field, with hands-on tools and tips for practitioners. Chapter 5 discusses service blueprints in some detail and positions them as a key activity is the service design process.

Michael Porter and Mark R. Kramer. "Creating Shared Value." *Harvard Business Review* (Jan 2011)

Strategy guru Michael Porter made a big splash with this landmark concept and article. The authors observe: "Companies … remain trapped in an outdated approach to value creation. They continue to view value creation narrowly, optimizing short-term financial performance in a bubble while missing the most important customer needs." Companies, they believe, must take the lead in brining business and society together for the larger, greater good – the shared value we can all get from good business.

Adam Richardson. "Using Customer Journey Maps to Improve Customer Experience," *Harvard Business Blog* (Nov 2010) and "Touchpoints Bring the Customer Experience to Life," *Harvard Business Blog* (Dec 2010)

This pair of articles from Frog Design expert Adam Richardson covers some basics of CJMs. The second one dives deeper into touchpoint analysis and provides some good tips and examples of what to potentially look for and map. The important thing about these articles is that they appear in a leading business venue. Pointing to these can help get the attention of stakeholders at different levels

Michael Schrage, *Who Do You Want Your Customers To Become* (2012)

This is a short ebook with a powerful message. Rather than looking at who your current customers are and trying to satisfy or even delight them, you should strive to transform them: enable them to become somebody or something they currently are not. The simple question, "who do you want your customer to become?" reframes your focus greatly and goes beyond just better services and experiences and looks at transformational meaning.

"Service Design Tools" (Accessed 2014)

This website is a collection of tools for design, in general. A fair portion of it focuses on games and activities for groups to use in co-creation exercises. In addition to customer journey maps and touchpoint maps, there are a wealth of tools related to experiencing mapping, in general.

Steve Portigal, *Interviewing Users* (2013) http://www.amazon.com/Interviewing-Users-Uncover-Compelling-Insights-ebook/dp/B00CEKR872/

Steve Portial is a recognized expert in user research. This book is a must-read for anyone going into the field to engage in ethnographic research. There is a wealth of practical information and tips in this volume.

Lynn Shostak, "Design Services that Deliver." *Harvard Business Review* (Jan 1984)

This is one of the original articles to mention the use of maps, or in this case blueprints, to model a service experience. It provides detail on how to create a map as well as some examples. That this article appeared in the Harvard Business Review is also telling: mapping isn't just a tool for designers, but also a tool for how to design a business.

Christoph Spengler et al. "360° Touchpoint Management – How important is Twitter for our brand?" Marketing Review St Gallen (2010) http://www.accelerom.com/en/wp-content/uploads/2012/10/2010_Marketing-Review_360-degree-Touchpoint-Management.pdf

Tyler Tate, "Cross-Channel Blueprints: A tool for modern IA" [blog] (2012) http://tylertate.com/blog/2012/02/21/cross-channel-ia-blueprint.html

This is a simple blog post with a powerful message: to design across channels you need a picture of the experience across channels. To do that, you need to blueprint the experience. He gives a simple tool to focus on the cross channel condition that supplements a larger experience map well.

Edward Tufte, Envisioning Information (1990) http://www.amazon.com/Envisioning-Information-Edward-R-Tufte/dp/0961392118/

Edward Tufte, *Visual Explanations: Images and Quantities, Evidence and Narrative* (1997) http://www.amazon.com/Visual-Explanations-Quantities-Evidence-Narrative/dp/0961392126

Edward Tufte is the leading thinker in information design. These two books are two of his many tomes outlining fundamental principles of information design. Understanding these concepts helps greatly in creating alignment diagrams.

Russ Unger et al., *Designing the Conversation* (2013) http://www.amazon.com/Designing-Conversation-Techniques-Successful-Facilitation/dp/0321886720/

This is an excellent book to help craft conversations of various kinds. The techniques range from interviewing users to holding workshops: a perfect companion to alignment diagraming.

James Womack and Daniel Jones, "Lean Consumption." *Harvard Business Review* (Mar 2005) http://hbr.org/2005/03/lean-consumption/ar/1

James Womack is one of the early proponents of the lean movement. In this article, he outlines his framework from "lean consumption": reducing the number of touchpoints, steps, and time consumers take in a service interaction. His research concludes that reduce that time has, without exception, a positive impact on the business bottom line as well. Mapping the touchpoints and steps involved is a key tool to do this.

Indi Young, *Mental Models* (2008)

Indi pioneered a specific technique of alignment diagram called a "mental model" in the early 2000s. This is a detailed book with step-by-step instructions.

"Zero Moment of Truth" http://www.thinkwithgoogle.com/collections/zero-moment-truth.html

This short ebook explores a very simple, yet conceptually powerful approach to reframing your vision and strategy.

Alignment Principles

Jim Kalbach and Paul Kahn, "Locating Value with Alignment Diagrams," *Parsons Journal of Information Mapping, 3/2* (April 2011).

Jim Kalbach, "Balancing Value with Alignment Diagrams," *Touchpoint: The Journal of Service Design* (4/3, 2013).

Jim Kalbach, "Alignment Diagrams: Focusing the Business on Shared Value," *Boxes and Arrows* (Sept 2011).

Jim Kalbach, "Principles of Alignment Diagrams." *ExperiencingInformation.com* (Jan 2012). http://experiencinginformation.wordpress.com/2012/01/04/principles-of-alignment-diagrams/

Birgit Mager "From Shareholder Value to Share Values", *Touchpoint* 4/3 (Feb 2013).

Michael Porter and Mark R. Kramer. "Creating Shared Value." *Harvard Business Review* (Jan 2011)

Indi Young, *Mental Models*. Rosenfeld Media (2008).

Jess McMullin, "Searching for the Center of Design." *Boxes and Arrows* (Sept 2003).

Initiate: Starting A Mapping Project

Investigate: Understanding Users and Businesses

Mike Kuniavsky, *Observing The User Experience* (2nd ed, 2012)
http://www.amazon.com/Observing-User-Experience-Second-Practitioners/dp/0123848695/

Steve Portigal, *Interviewing Users* (2013) http://www.amazon.com/Interviewing-Users-Uncover-Compelling-Insights-ebook/dp/B00CEKR872/

Illustrating: Drawing The Map

Edward Tufte, Envisioning Information (1990) http://www.amazon.com/Envisioning-Information-Edward-R-Tufte/dp/0961392118/

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http://www.ux-lady.com/experience-maps-user-journey-and-more-exp-map-layout/
(2013).

Silvana provides a good overview to the experience map creation process, with tips and detail around things like layout, content, elements and more.

Align

Luke Hohmann, *Innovation Games* (2006) http://www.amazon.com/Innovation-Games-Creating-Breakthrough-Collaborative/dp/0321437292/

Dave Gray et al., *Gamestorming* (2010) http://www.amazon.com/Gamestorming-Playbook-Innovators-Rulebreakers-Changemakers/dp/0596804172/

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Touchpoints

Gianluca Brugnoli, "Connecting the Dots of User Experience," *The Journal of IA 1/1* (2009) http://journalofia.org/volume1/issue1/02-brugnoli/jofia-0101-02-brugnoli.pdf

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Extending The Technique

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Evangelizing

Adam Richardson. "Using Customer Journey Maps to Improve Customer Experience,"*Harvard Business Blog* (Nov 2010) and "Touchpoints Bring the Customer Experience to Life," *Harvard Business Blog* (Dec 2010).

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