Customer Journey Maps CJM – (40%)

Adapted from The Customer Experience Book by Alan Pennington

A CJM is basically composed of a customer life cycle divided into stages – that is, the ‘backbone’ of the journey and at each stage a series of interactions (touchpoints) that the customer has.

When you first start to create a map, it is good to begin at a very basic level and then refine the stages and descriptions as more detail is added.

Let’s take a simple customer journey that we can all relate to and illustrate the steps to the creation of more detailed CJM.

Level 1 - The ‘Heartbeat’ Map

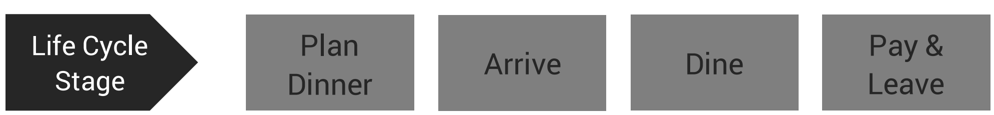
This is so called because of the outline of the map that you will create. The challenge is to identify no more than four stages of the journey and name them using verbs to describe the stage.

Step 1

To do this you simply picture exactly what you would be doing as a customer and to assist the thinking you should create a scenario. In this example, the scenario is:

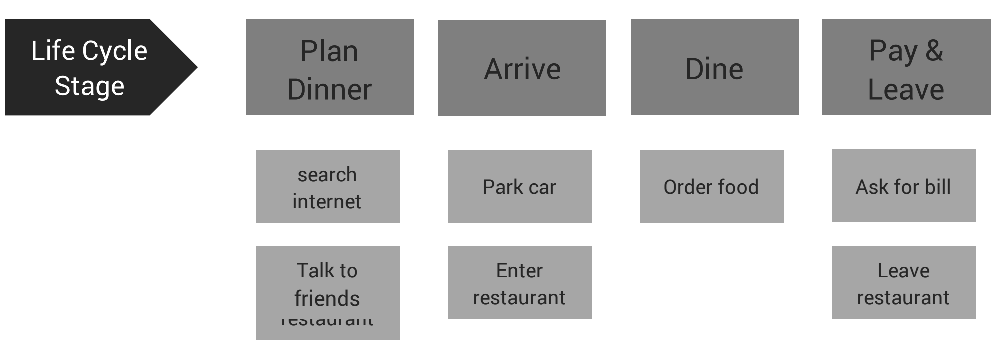
‘I am going to take my group of friends out for a Valentine’s Day celebration dinner’.

Then write each stage out on a sticky note and place it at the top of your poster sheet in sequence.

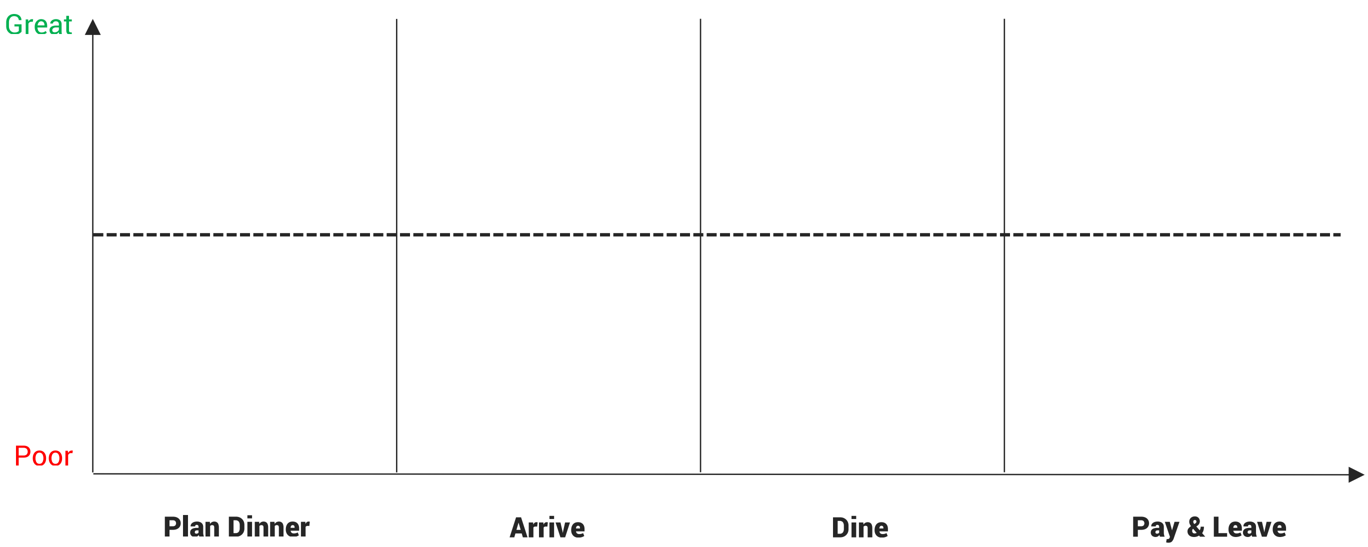


Step 2

Having established the ‘backbone’ the next challenge is to identify up to four interactions per stage (having just four avoids getting to detailed too quickly). Each interaction is a brief description using a **verb** as they are actions and is written out on a sticky note and added underneath the appropriate life cycle stage.



Step 3
Then draw a centre line from left to right horizontally across your page – this represents the average expectation line. On the left side draw a vertical axis and label the top half **'Great'** and the bottom half **'Poor'**. This vertical axis is measuring the customer expectation of the individual interactions.



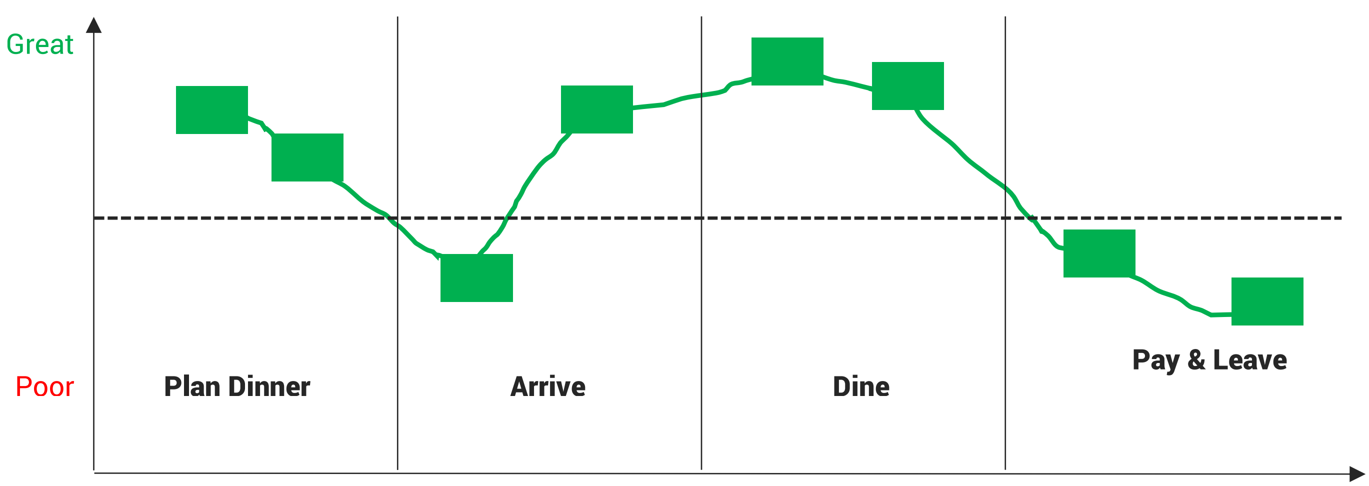
Step 4

Now we move all of our interaction sticky notes on to the centre line and review each one by answering the question:

'Do I expect this interaction to be average, great or poor, or somewhere in between?'

Check your **Customer Profile and look at the 'pains' section** your customer might have.

Move the stickie notes to a position the team has agreed on. Having completed this for each interaction, connect them using a marker.



As you can see you have now created a basic CJM which has already started to highlight that not all interactions have the same potential value or impact on the customer.

Now let's get more granular…

Level 2 - The More Detailed CJM

As you worked through the Level 1 – Heartbeat map you will have identified a more detailed level of interaction even if it was not captured. With the Level 2 map we begin to expand the range of the journey map backbone stages and we will become more granular in the capturing of interactions, but following the same principles of 'outside-in' and using verbs to capture the interactions.

Step 1

The following outlines a standard backbone that covers the end-to-end life cycle of a customer journey. This serves as a template for you to edit and adjust.

Explore	Aware	Select	On board	Use	Get service	Re-commit	Leave	Return

Test this standard backbone against your customer journey and where appropriate change the language but not the meaning of the stage.

You also need to test to see if there are specific stages based on your project that require their own stage. For example, in the insurance sector you would add the stage 'Claim', in a software business you may have to add 'Technical Support'.

To qualify as an additional stage in a customer journey it must be a significant part of the customer experience unique to your project/sector. You should not exceed 12 stages in a journey backbone.

In our restaurant example, the enhanced backbone would look like this

Explore	Aware	Select	**Book**	**Arrive**	**Dine**	**Pay**	Leave	Return

Step 2

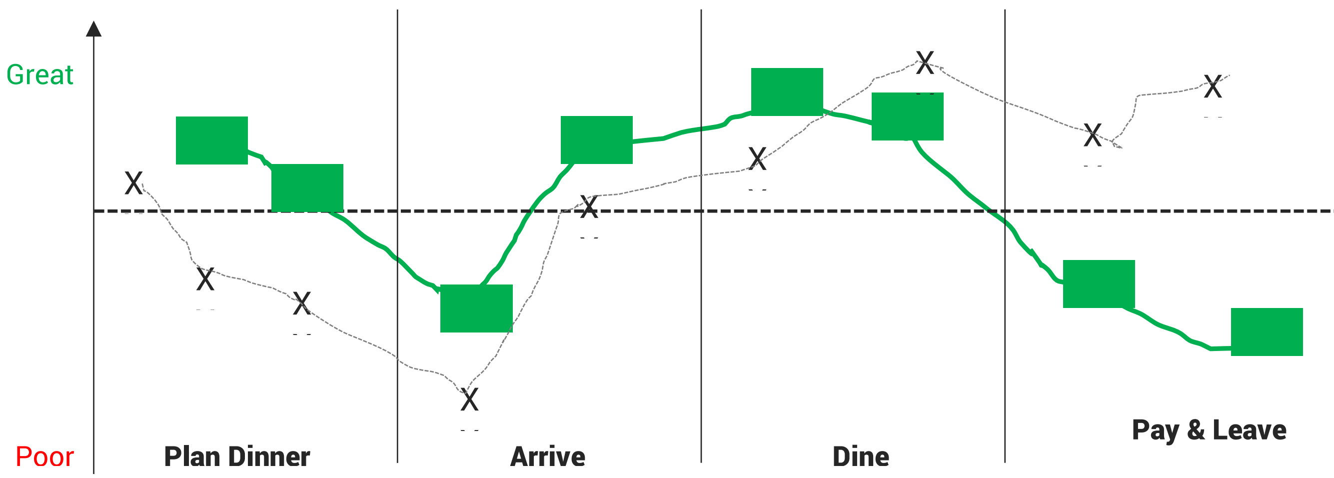
Having established the detailed backbone of the journey the next task is to take each stage and step through a simple set of tasks.

Stage by stage in sequence, establish the needs of the customer at each stage in the journey.

Check the **Customer Profile and in particular at the 'jobs-to-be done'** section. Look at both tangible and emotional needs your customers might have. Examples:
'I need to be recognized'
'I need to feel welcomed'
'I need the table to be ready'
'I need the table I asked for'

Using an X for each interaction (jobs-to-be-done) you plot the actual experience and again connect the 'Xs'. What you will see are differences or gaps that be both positive and negative between the expectation and the actual experience.

Where they are below the expectation there is a problem, and where you are exceeding the expectation the question is whether that is positive or potentially an overinvestment in an area that the customer does not value that highly.



Step 3
An interaction captures the customer connecting with someone or something as they carry out an activity. The activity may or may not be with the company as a CJM captures the experience from the customer perspective.

So, for example, 'talk to friends' or 'read reviews on TripAdvisor' should be captured even though they are not controlled by the company. They might provide opportunities for partnerships.

Step 4
Once all the stages are completed you will have the core of a Level 2 map. Ask yourself:

How many company-owned interactions happen at each stage?
Who in the company is responsible for the interaction?

Create icons for different departments (e.g. website admin, receptionist, host, server, call center person) and add them to your map.
Once you have an icon-coded version you will be able to see at a glance where the ownership of the experience lies at different points in the journey. Where there are multiple icons in the same stage you have an opportunity for breakdowns, handoffs or duplication in the customer experience as it is highly likely that the customer is being handed off to other departments: for example, during 'On board' the handover may be between marketing, sales, customer services, operations, finance and legal.

The finished map records the key stages of the journey in sequence and the key interactions that a customer could undertake as a part of that journey. At this stage, the only reference to time is in the natural sequencing of the different stages.

Marking

Format
Create a digital version of your map. Save as **PDF** and upload to LEARN by no later than March 6, 12 noon.

I will look for the following (in equal parts):
Aesthetics /5
Is the map designed in a visually pleasing way? Does it convey important information effectively? Is it designed for glance-ability?

Content /5
Does the map provide relevant content, e.g. are you pulling data from your secondary research and surveys?

Detail and Effort /5
Does the map show attention to detail? That includes design decisions as well as grammar. Has the team put in obvious effort to design this map?