

Customer Journey Mapping

Time: 45mins - 1 hour

Team: 3-5 people

Prep: Gather research, data and insights about the project in advance

When to use Customer Journey Mapping

Plotting your customer's journey is extremely valuable because it outlines the perspective of your buyer during their journey with your company/brand. This understanding uncovers opportunities for the business during the buyer's journey.

If at a certain touchpoint you realise the customer is having an inadequate experience, then this may be an area you need to prioritise moving forward. Having clear customer journey maps is also useful for internal education around the buyer and the steps they need to go through to confirm a decision.

Before you begin, some useful tips

- Make sure personas have been defined.
- Decide an end-to-end experience you would like to map per persona, remembering the journey for each persona could look very different.
- It's important as with other exercises that the right people are in the room i.e. team members with insight and data about target customers. This could be a mix of people from sales, marketing and digital for example.

Steps

Step 1: 5 mins

Working together, decide the persona you'd like to plot a journey for, the scenario they are in and the goals and expectations they may have in this scenario. A scenario, for example, may be a buyer's journey to purchase a specific product. Their goals and expectations around this may be a quick and easy purchase with immediate aftercare follow up.

Step 2: 5 mins

Plot the phases of the journey that the customer will go through, add as many of these as you see fit. These might include buyer stages like "Inspiration" or "Research" through to "Decision-Making".

Step 3: 25 mins

Start filling out the map together as a team. Our recommendation would be to take it a phase at a time but feel free to take time to add as many stickies as possible across the map to help get a shape on things first.

It's important to discuss as you go, check each other's assumptions and, importantly make notes on where you're missing data. If you don't know what happens at a touchpoint that's not a problem. What this tells us is actually we need to gather more data about a buyer at that moment and this may ultimately result in a new opportunity for us once we garner this new insight.

Step 4: 15 mins

Once you and your team have filled the map completely, take a step back and go through it together. Are you all in agreement about each phase? Are there areas you need more information? Are there areas you need validation for?

Take notes and revisit/validate the map once you have more insights to add.

What happens next?

Decide what areas of the customer journey you'd like to prioritise moving forward. Have you found low-hanging fruit to pursue? As per step 4, do you need to develop more insights or conduct more research?

Share the customer journey map with the wider team and make a plan to take advantage of the opportunities you and the team have uncovered.



Persona Type:
Lola

Scenario:
Lola is seeking to purchase a new productivity tool for the business

Scenario goal & expectations:
Easily purchase a new tool

Journey Phases → Awareness & Consideration → Decision → Onboarding → Post-Sales → Renewal

Journey Phases	Awareness & Consideration	Decision	Onboarding	Post-Sales	Renewal
Actions What does the consumer do?	Collect information Insight into products and prices Understand if it will add value				
Touchpoint What part of the service, campaign or brand do they interact with?	Website Contact with sales Product demo				
Customer Need What does the customer need at this moment?	Needs a product that will help				
Customer Feeling What is the customer feeling? <i>Add dots or emojis towards the top of the box if your customer is happy and toward the bottom if unhappy. Draw a line between the phases' dots to get a simple line graph of the customer's emotions at various stages in the journey.</i>	 Frustrated	 Doubtful			
Pain Points Where are they experiencing friction?	Poor availability Unclear website No email/marketing campaigns Too many promises that aren't kept	Poor availability Unclear website No email/marketing campaigns	Unclear user guide Login problems Inadequate training Client wishes vs product roadmap does not align		
Opportunities	Improve website: clear and transparent information Better reachability Content campaigns Marketing emails & campaigns	Marketing campaigns Improve website Add new references Make it easier to sign contract	Improve level of training Create case studies Create instruction videos Set up guide folder for users	Improve onboarding materials	

Persona Type:

Scenario:

Scenario goal & expectations:

Journey Phases

Awareness & Consideration

Decision

Onboarding

Post-Sales

Renewal

Actions

What does the consumer do?

Touchpoint

What part of the service, campaign or brand do they interact with?

Customer Need

What does the customer need at this moment?

Customer Feeling

What is the customer feeling?

Add dots or emojis towards the top of the box if your customer is happy and toward the bottom if unhappy. Draw a line between the phases' dots to get a simple line graph of the customer's emotions at various stages in the journey.

Pain Points

Where are they experiencing friction?

Opportunities