

ELEMENTS FOR
AN ACTIONABLE
**CUSTOMER
JOURNEY MAP**



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ELEMENTS FOR AN ACTIONABLE

Customer Journey Map

A SUCCESSFUL CUSTOMER JOURNEY MAP (CJM)

should capture the various stages of interactions and experiences with your brand from a customer's perspective. More importantly, however, it should visually present the emotional responses that the experience generates with your users. But once you have completed your CJM, how can you evaluate its effectiveness? Here is how ...

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The team at Key Lime has examined over 100 journey maps and created a guide for those that want to grade their CJM against the best of the best. This playbook contains a ten point evaluation that will enable you to identify the critical elements of a successful CJM and objectively evaluate the data.

If you take five minutes to Google "Customer Journey Map example" there are over 10,000 examples across the web. You'll quickly find that while the scope of the journeys may be different, most journey maps include basic elements such as what the target user is:

- Thinking
- Doing
- Feeling

However, if you want to move the needle in terms of customer engagement, you'll have to move more than just the basics.

In order to benchmark your CJM, we've included an example of a CJM that we created here at Key Lime Interactive that scores a perfect 30 out of 30 on this best-in-class criteria.

Make sure to have your own CJM handy as you read through the guide below.

Key Lime Interactive's Customer Journey Map Playbook

A perfect score on this evaluation is a 30.

Each criteria is evaluated on a 0-3 scale where:

- 0 = no information/criteria is missing
- 1 = does not meet standards, insufficient information
- 2 = meets standards, could benefit from more information
- 3 = meets standards, hits all targeted information

1 Target persona: A well-defined target persona is essential to the creation of a successful Customer Journey Map. Is your target persona a brand advocate? Is s/he more likely to engage with your brand in-store or via mobile? Keeping these triggers visible on the CJM allows the reader to better understand the customer's perceived obstacles, limitations, and subsequent actions. Lean personas can be used as a substitute. These are often the product of an internal workshop conducted with stakeholders. Above all, this section should clearly communicate "who is this customer"?

2 Holistic view: Although your questions may be aimed at one particular aspect of a customer's experience, you would be doing your team a disservice if your CJM did not touch on all of the following aspects: pre experience, primary actions, and post experience.

For retail, typically the five stages are:

- Awareness
- Consideration
- Purchase
- Use/Retention
- Advocacy

Considering that none of these steps occur in a vacuum, neither should your CJM. As customers engage with your brand, they begin to formulate ideas and emotions that carry throughout an entire journey. Understanding the groundwork in which these assumptions are built is the first step in bridging any gaps between your offerings and your customer's expectations.

3 Guiding Principles: These statements are written from the customer's perspective and are universal truths as well as deal breakers for them. It should be emphasized that any, and all, information on this CJM should be specific to this customer/persona. That is not to say that all of the Guiding Principles must be exclusive to this customer/persona. Quite the contrary. There are often overlaps between universal truths across your various customers and their Journeys. Take this guiding principle for example, "I should be able to install this myself." Although this may be true for multiple personas, it may be particularly unique to this personas that is a "Do-it-yourself-er" and prides him/herself on being a technophile. There can (and often should be) unique truths that exemplify the differentiators within a specific customer's journey.

4 Interaction Trigger/Doing: When you think of a CJM, think of telling a story. Keeping this in mind, remember that your customer's actions speak louder than their words. And your customer journey map should reflect that. Does your CJM offer a clear, succinct statement of "what" your customer is doing at that point in time? This idea should be flushed out in more detail when you combine it with the next elements (Thinking & Feeling).

5 Thinking/Moments of Truth: One of the goals of a successful CJM is to replace "we (your team) think" with "they (your customers) said." Ask yourself, are each of your customer's interactions accompanied by what they are thinking at that point in time? Does it describe the persona's needs/wants/desires? Including quotes from your customers themselves is highly suggested. Top marks are given to CJM that can also identify which of these thoughts can turn into "Moments of Truth" (MOT). MOT are crucial points in your customer's journey when an outcome or interaction can determine the overall trajectory of their experience.

"Ultimately, customer journey maps should encourage your internal audience to speak the same language, feel the same emotions, and think the same way your customers do about your brand."

6 Feeling: Emotions are the underlying triggers for action. Any CJM without a well-defined emotional state (e.g. confused, excited, upset etc.) at each interaction is lacking a critical component. Think of your CJM's audience as you evaluate this component. Is it clear to your team of stakeholders how your customer is feeling at each particular stage? The more empathetic your CJM becomes, the more direct your recommendations can become. The use of colors or emoticons are easy to implement and can be highly useful.

7 Touchpoints: Identifying the different platforms throughout your customer's engagement gives your team a picture of how this customer engages with your brand. Iconography is useful to communicate ideas like: engagement via online-chat or reviewing product offerings via mobile. Your CJM should include touchpoints from beginning to end. A great way to help communicate this information is by including a legend that defines the icons used for the various touchpoints.

8 Opportunities: Each individual touchpoint should be delineated as either an "Opportunity" or a "Strength." This allows for a clear understanding of where the pain points, and successes, fall on this customer's journey. These opportunities help point out whether you may need to rethink anything from your product offerings to marketing strategy. Ask yourself, does this section help identify a customer's need you never knew existed? These "Gaps" identify the junctions between your customer's expectations and your brand's value proposition.



Rick Damaso leading a CJM workshop for one of Key Lime Interactive's Fortune 500 clients.

Ultimately, customer journey maps should encourage your internal audience to speak the same language, feel the same emotions, and think the same way your customers do about your brand. Often times, an outspoken leader within a design or product team can overpower the overall direction of UX/UI based on "their instincts." CJM can be a powerful, data-driven tool to help when internal alignment may be out of sync.

A unified view of your customers' challenges, preferences, and priorities ensures that your resources and efforts are going in the right direction. It is critical to remember that CJM are living entities. Without upkeep, even your "Future-State" Customer Journey Maps can quickly become "Current-State" without data that is accurately mapped back to, and updated from, recent research.

As UX evangelists, we at Key Lime Interactive promote a customer-driven vision that is optimized and based on research insights. A well designed CJM can serve as a powerful tool for your team and help you see that vision come to fruition.

9 Actionable Recommendations/Strategy:

This section should speak directly to your stakeholders, designers, and product managers. In many ways, it should serve as a beacon for how your team can begin thinking about how to improve your customer's experience. These recommendations do not have to be revolutionary and the goal should not be to reinvent the wheel. This section should, however, offer a clear, succinct goal that will remedy the obstacles faced by your customer. Actionable recommendations can be a loaded concept, so a quality CJM should keep it simple and exclude jargon.

10 Ownership: A CJM should also clearly identify the owner(s) of the stages/interaction with the customer. This is not to pass criticism or give praise. Instead, the concept to remember here is accountability. Calling out Susan Jones the Marketing Manager or Jane Thornton the UX Architect and Project Lead will empower your team and its leaders to take action. Clearly defining these teams and its responsibilities also encourages cross-functional communication, and serves as a starting point for conversations.



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Journey Mapping Workshop Score Card

NAME:

CRITERIA:		SCORE (CIRCLE ONE)		
1	TARGET PERSONA Is the target persona and related personas identified for each journey map?	1	2	3
2	HOLISTIC VIEW Is the journey holistic? Are stages included like Research, Evaluate, Purchase, Use, Review and Recommend?	1	2	3
3	GUIDING PRINCIPLES Are guiding principles included?	1	2	3
4	INTERACTION TRIGGER Are interaction triggers documented?	1	2	3
5	THINKING Does the journey map document the main persona's needs/wants/desires at each interaction.	1	2	3
6	FEELING Is the emotional state at each interaction document along with severity and impact on perception of brand and/or product.	1	2	3
7	TOUCH POINTS Does the JM include touch points at each stage?	1	2	3
8	OPPORTUNITIES Does the JM highlight opportunities?	1	2	3
9	ACTIONABLE RECS Does the JM include actionable recommendations?	1	2	3
10	OWNERSHIP Does the JM identify the owner/stockholder responsible for each interaction with the customer?	1	2	3

TOTAL SCORE:

- 30 - 27** Rocking Journey Map!
- 26 - 24** Not bad. Doing well.
- 23 - 21** Average job. Meh.
- 20 - 18** Needs some major work.



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