

ELEMENTS FOR
AN ACTIONABLE

**CUSTOMER
JOURNEY MAP**



KEY LIME
INTERACTIVE
Optimize the Experience. Inform Design.

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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 experience generates with your users. But once you have completed your CJM how can you evaluate its effectiveness? Here is how ...

The team at Key Lime has examined over 100 customer journey maps (CJMs) 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 do more than just the basics.

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

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? Are they 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

KEY LIME INTERACTIVE'S CUSTOMER JOURNEY MAP PLAYBOOK

A perfect score on this evaluation is a 30. Each criteria is evaluated on a 1-3 scale where:

1 = does not meet standards, insufficient information

2 = meets standards, could benefit from more information

3 = meets standards, hits all targeted information
people from marginalized groups who are often
overlooked.

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?” We do this to build empathy with the customer so that we can truly understand what it feels like to go through their experience.

2. 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 fleshed out in more detail when you combine it with upcoming elements (Thinking & Feeling).

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. It’s important to note that every touchpoint matters, even if some touchpoints are not with your brand, for example, the user visits a competitor’s website or googles something they don’t understand. Every

touch point helps you to understand the broader context of the experience.

3. Core Needs

What are the customer’s ultimate goals? What do they need in each step to get them closer to accomplishing these goals?

Core needs can sometimes refer to more fundamental needs as well – things like safety (psychological and physical).

So for this lane, you should try to put yourself in your person’s shoes and imagine not just what their overall goal is (e.g. to return an item they bought), but also their small needs along the way (e.g. a way to print the return label) and the fundamental needs that underlie the others (e.g. feeling valued as a human whose time matters).

4. Thinking & 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.

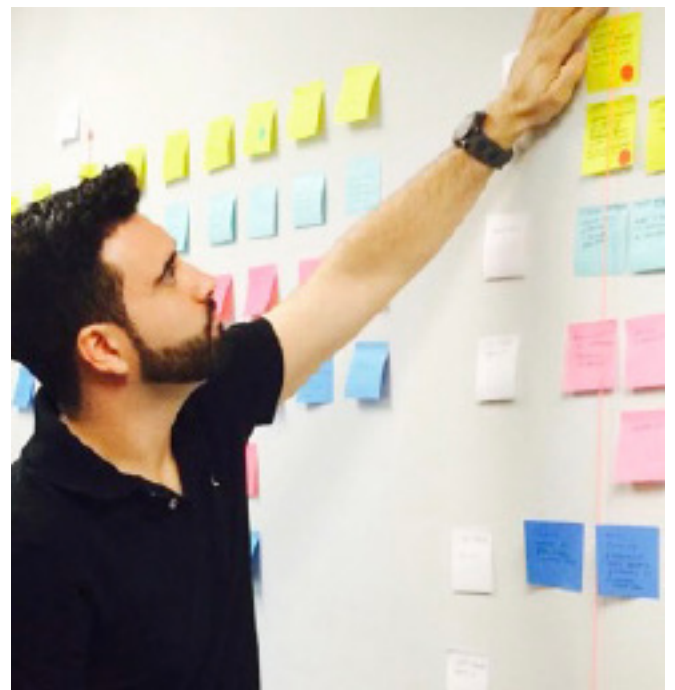
5. Pain Points & Moments of Truth

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 CJMs 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.

6. 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.

"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."



7. Research-based/Data-driven

Alongside being rooted in research, ideally customer journey maps should also showcase data to support what's in the map. For example, Voice of the Customer (VoC) or interview quotes bring the experience to life; stakeholder and other internal knowledge (e.g. customer service reps, product teams) allow you to create maps that help understand the customer from multiple perspectives. Additionally, up-to-date quantitative metrics such as Net Promoter Score (NPS), Customer Satisfaction (CSAT), or product-market fit provide greater context.

All the better if journey maps can be interactive, so that stakeholders are able to access the data being referred to in the maps; think of journey maps as a single source of truth / data hub right in the context of end-to-end experiences.

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. Oftentimes, 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.

8. Prioritization of top opportunities

Prioritizing top opportunities has two goals: to improve the customer experience and also to bring the biggest ROI for the company. Factors to consider in prioritizing are thus twofold - they primarily target value gained for the customer or value gained for the business. Customer factors to consider include customer satisfaction, importance/impact of the step to the customer,

and desirability of the solution to the customer. Business factors to consider can be feasibility/complexity of the solution to implement, viability of the solution over time, and business value.

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.

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 their respective responsibilities also encourages cross-functional communication, and serves as a starting point for conversations.

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.

10. Living and responsive to change

It is critical to remember that CJMs 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.

Gone are the days of printed journey map posters on a wall that go stale before the ink dries. There are plenty of tools on the market these days to create digital journey maps that live in the times. One of the most robust tools available is JourneyTrack, a web-based platform with version history, that makes it easy to archive the past and move into the future. The world changes quickly, and your journey maps should be responsive to those changes.

At the same time, no customer journey map lives in isolation. They often represent just one part of the overall experience. It's thus important to take a step back and look at how journeys work together holistically to form the customer's overall interaction with and impression of your brand.



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JOURNEY MAPPING SCORE CARD

NAME:

CRITERIA:	SCORE (CIRCLE ONE)		
	1	2	3
1 TARGET PERSONA Is the target persona and related personas identified for each journey map?	1	2	3
2 INTERACTION TRIGGER/DOING Does your CJM offer a clear, succinct statement of “what” your customer is doing at that point in time?	1	2	3
3 CORE NEEDS Are the customer’s core needs reflected in each step of the CJM?	1	2	3
4 THINKING/FEELING Does the journey map document the main persona’s needs/wants/desires and emotional state at each interaction?	1	2	3
5 PAIN POINTS & MOMENTS OF TRUTH Does the journey map document pain points and identify MOTs based on customer insights?	1	2	3
6 TOUCH POINTS Does the JM include touch points at each stage?	1	2	3
7 RESEARCH-BASED/DATA-DRIVEN Does the CJM include research-based findings and is it supported by data points?	1	2	3
8 PRIORITIZATION OF TOP OPPORTUNITIES Does the CJM clearly highlight top opportunities?	1	2	3
9 ACTIONABLE RECOMMENDATIONS/STRATEGY Does the CJM include actionable recommendations with clear ownership assigned?	1	2	3
10 LIVING & RESPONSIVE TO CHANGE How easily can your CJM be updated to reflect current and future states?	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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