

JOURNEY MAPPING

How to create a JourneyMap

Mark Runacus, 2016

WHY CREATE A JOURNEYMAP?

- I hope you find this Step By Step guide useful. When you use it, please let me have comments and suggestions so we can build on and improve it collaboratively.
 - Mapping out the customer journey is an important step for any business which wants to deliver a superior customer experience. Basically, until you understand what's happening NOW, you can't really develop a plan to map out where you want to be NEXT.
-
- Mark Runacus, 2016, London

BACKGROUND

- This is a guide to prepare and run a JourneyMap workshop. The main aim of such a workshop is to develop one or more JourneyMaps.
- This guide assumes that you are the Moderator or one of the Moderators
- In fact it's probably best if there are two Moderators, to maintain energy and also to ensure that everything can be captured - one to annotate whilst the other is moderating.
- Depending on the experience of the group you may be able to complete the workshop in half a day. A less experienced group may need a full day.

OBJECTIVES

- Engage all stakeholders (clients, agencies etc) in the journey process – avoid “Not invented here”
- By engaging with the stakeholders at the beginning of the process you may help them identify issues beyond your scope but which are critical for ensuring a smooth customer journey
- As the “owner” of this guide it’s probably best if you take responsibility for producing the final Journeymap

MIX OF ATTENDEES (6-8)

- You're the moderator. Ideally you have strategic planning experience.
- Invite representatives as "Expert Witnesses" for example:
 - Your senior marketing colleague (your boss?)
 - Marketing Communications
 - Brand
 - PR
 - Digital
 - Representative(s) from customer facing channel(s) (e.g. Call Centre)

THE BASIC FIVE STEP PROCESS

1. What is a journey?
2. Walking a mile in another man's shoes
3. Audience understanding
 1. General JourneyMap or JourneyMaps for key segments
 2. Getting into the audience's mind set
4. Identifying Moments Of Truth
5. Identifying Pain Points

YOUR PREPARATION

- As Moderator(s) before the session you should have captured your own thoughts as to what the journey(s) might be. This will help you encourage the workshop participants.
- Your own rough/draft journeys can be developed following the same process as outlined in this guide

PARTICIPANT PREPARATION - 1

- If there is any existing customer journey research available, this should be summarised and circulated to participants prior to the workshop
- You should also have copies of this information available for your workshop
- But don't worry if there is none, the workshop will be equally productive without it. It just means the resulting journey maps will be more intuitively based than empirically based.

PARTICIPANT PREPARATION - 2

- Ask participants to think about and record their best and worst customer journeys
- (In the session you will be asking them to re-live these journeys but to focus specifically on the Pain Points)

USEFUL RESEARCH

- Web analytics
 - Digital analysis that might show the consumer's digital path to purchase
 - Google Analytics
- Qualitative research
 - Many brands touch on customer journey understanding indirectly within qualitative research.

SESSION 1 – DEFINE A CUSTOMER JOURNEY

- A JourneyMap is a visual representation of the journey that a consumer makes towards a brand, product or service. It's not always about the sale, though it normally is.
- It's important the visual illustrates the consumer's journey **NOT** our contact strategy
- It's equally important that the visual shows Touchpoints across all channels, all media: owned, earned and paid
 - It is not necessarily linear
- There are many applications for a JourneyMap: informing communications planning, informing contact strategy development, and informing creative development to name but a few

SESSION 2 – JOURNEY PRACTICE

- Brainstorm a journey not in your category
 - Group 1: Buying paid TV (e.g. Sky TV)
 - Group 2: Buying a new car (e.g. Ford)
- Get the workshop participants to break into groups
 - Provide them with a flipchart to allow the participants to free form their own stages
 - Provide coloured pens
- Capture all the journeys before you move on to the next session
- Do not have any completed JourneyMaps displayed on the wall

SESSION 2 – KEY STAGES STIMULATION

- To help stimulate the sessions, consider journey phases like
 - Passive consideration
 - Active consideration
 - Information gathering
 - Negotiating
 - Purchase
 - Post Purchase
 - Re-purchase
- It's up to them to create their own journeys. Do not be constrained by only the above stages

SESSION 3 – PRESENT PRACTICE JOURNEYS

- From Step 2, you should be able to get the workshop participants to review the various journeys they have developed and cluster together the common key phases in those journeys
- Ask each group the following:
 - What did you learn?
 - Show the template of the map
 - What were the Key Stages?
 - What were the Need States? (The same all the way through or did they change?)
 - What were the Touchpoints?
 - What were the Pain Points?
 - What were the Key Drivers?
- Note: You don't have to fill in the template just speak to it

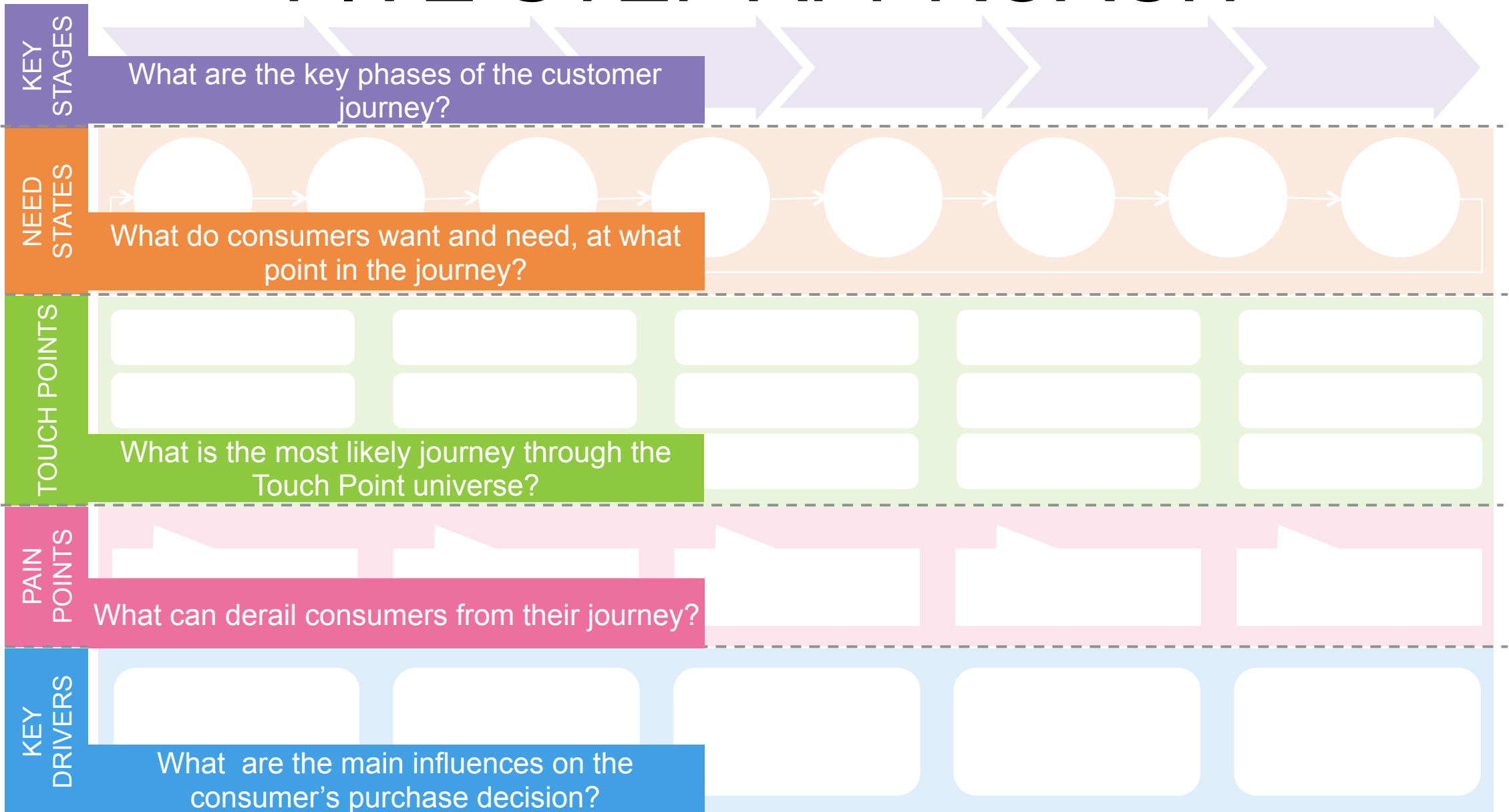
SESSION 4 – THE FIVE STEP APPROACH

- In this part of the workshop you should show and explain the template by going through the Five Steps
- Some of them will probably already have been identified – if not in name – during the earlier parts of the workshop
 - Key Stages
 - Needstates
 - Touchpoints
 - Pain Points
 - Key Drivers

SESSION 5 - AUDIENCE PARTICIPATION

- Ask (some) participants to re-live their best and worst journeys (as per Participant Preparation – 2)
- Get them to apply their journeys to the Five Step mapping template
- Get the participants to identify and focus on the Pain Points

FIVE STEP APPROACH



SESSION 6 – UNDERSTANDING THE AUDIENCE

- Use this session to get into the personality of your target audience
- If you're producing one general JourneyMap, then only one audience type would be required
- If you have a hypothesis that there are likely to be several – distinct – journeys, then ensure you have the relevant audience definitions
- Bring along audience information and get the workshop participants to validate, add to, and complete the audience information
- Are there any particular channel considerations for each persona?

SESSION 6 - EXAMPLES OF PERSONAS

- This is when you should develop Pen Portraits of different types of customers
- If you haven't developed one before, a quick Google search should help you:
<http://www.chrisg.com/how-to-create-pen-portraits-and-understand-your-target-audience/>

SESSION 7 – IDENTIFYING THE NEED STATES

- Using the Persona(s) you've developed, have the workshop participants identify the consumer's Needstates
- How do consumer's want to feel at each phase?
- What do consumer's need from the brand at each phase?
- What information needs do consumers have at each phase?
- Place in chronological order
- Then cluster them together to begin to define the Key Stages
 - Show examples

SESSION 8 – IDENTIFYING THE TOUCHPOINTS

- Using the Key Stages and Needstates, brainstorm the Touchpoints for each Stage
- How will the consumer try to reach brands, obtain information, or fulfil their Needstates in each phase
- Remember: Touchpoints will be in all channels, in all media, including earned, owned and bought media. Don't forget face-to-face, retail and word of mouth.

SESSION 9 – IDENTIFYING THE PAIN POINTS

- Having mapped out the Touchpoints, get into the consumer mindset and imagine how easy it will be for the consumer to satisfy his/her Needstate
- Where are the potential Pain Points? Where might the journey be more difficult? What might stop the consumer fulfilling her/his needs? Get participants to think about their own experiences, when their Needstates have not been fulfilled properly.
- It's important brands identify the Pain Points so that they can address them, and create a contact strategy which is as *frictionless* as possible

SESSION 10 – REVIEW AND SUMMARY

- Bring together the key learnings
 - What are the Key Stages?
 - Which Needstates have you identified?
 - What are the unexpected and/or most important Touchpoints?
 - What Pain Points have you identified? What can be done to address these?
- Explain that YOU will go away and identify the Key Drivers
- The group will then reconvene to review your completed JourneyMap

FOLLOW UP– IDENTIFYING THE KEY DRIVERS

- You should come back to the group with the Key Drivers
- Key drivers are those things which have most influence on the consumer's final purchase decision e.g.
 - Word Of Mouth
 - Brand
 - Price

①

WHAT IS A JOURNEY MAP

Definition
v contact strategy

Stimulate
Key Stages
thinking

②

CREATE A MAP
(OUT OF CATEGORY)

Practice session
in brainstorm
eg Pay TV, Car

③

GROUP PRESENTATION

Learnings

④

OUR
5 STEP APPROACH

Key Stages
Need States
Touchpoints
Pain Points
Key drivers

⑤

REVIEW PRE-WORK

Focus on
Pain Points

⑥

AUDIENCE

Present Personal
(or brainstorm them)

Group
brainstorm ⑦

NEED STATES

Identify the
Need States for the
Personals)

Group
brainstorm ⑧

TOUCHPOINTS

Identify the
Touchpoints

Group
Brainstorm ⑨

PAIN POINTS

Identify the
Pain Points

Group
brainstorm ⑩

REVIEW

Summary
Next Steps

POST
WORKSHOP

KEY DRIVERS