

Create Better Customer Journeys with the

Customer Journey Mapping

Workbook

With Jeannie Walters, CCXP &



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How to Use This Workbook

Most customer journey mapping templates aren't very useful for one simple reason: There is no one-size-fits-all solution to customer journey mapping.

This workbook isn't a complete solution either, but it's designed to get you and your team thinking more clearly about how to build and use the journey maps that are right for you.



Helpful Tips:

- **Do all exercises in order.** It may be tempting to jump straight ahead to the customer journey mapping template... avoid that urge! Completing the exercises in this workbook is key to creating a better journey map and using it once complete.
- **For the purposes of these exercises, each journey map should correspond to *one customer persona* and *one part of the journey*.** Keep the journeys simple rather than cluttered.
- **Involve your teams.** Customer journey mapping is not a one-person job! Involve stakeholders from the start, building cross-departmental teams when possible for a broader perspective and better companywide buy-in.
- **Involve your customers.** Customer journey mapping also is not about guessing what your customers are feeling and experiencing! Use known feedback from customers to help guide you.

How to Use This Workbook

Completing this exercise alone? Consider putting together even a small team to complete these exercises with you – the results will be more complete and actionable.

If you absolutely can't get anyone in your organization to collaborate with you, complete each exercise in order for a single journey. Then share with your team as an example and encourage them to participate in refining the journey map with you.

Working on this with your team? That's great! Share this workbook with everyone who will be involved. For each exercise, first ask every participant to complete it on their own. Then compare your responses and record everything helpful in a "master" version of the workbook.

The workbook can be used over and over for many customer journeys – save copies of each workbook in a single shared folder to give your teams easy access to them all.

Working with Jeannie and the Experience Investigators Team? She'll guide your team through each step, helping you choose which customer personas and journeys to map, working through the journey mapping process with your team, and working with you to turn your insights into actionable next steps.

If you'd like to hire Experience Investigators to facilitate a Customer Journey Mapping workshop, simply email Inquire@ExperienceInvestigators.com.

Additional Customer Journey Mapping Resources:

Articles

- [Why Journey Map? Three Problems They Can Solve](#)
- [Four Ways the Experts Master Journey Mapping](#)
- [COVID-19 Makes Journey Mapping More Important Than Ever. Here's How to Build One](#)

Videos

- [3 Problems Journey Maps Can Solve](#)
- [Using Journey Maps to Navigate Covid-19](#)

Courses from Jeannie Walters & Learning

[Customer Experience: Journey Mapping](#)

This course gives organizations a resource to plan their entire customer service program and create maps that reflect each of the customer's touchpoints with your company.

Certified Customer Experience Professional (CCXP) Jeannie Walters shows how to set up a customer journey mapping program for success, introduces tools and techniques to execute the journey mapping process, and explains how to go deeper to test your understanding and take action.

[Learn More](#)

[Journey Mapping: Case Study in Action](#)

In this practical sequel to the introductory course, instructor Jeannie Walters walks through creating an actual customer journey map from start to finish.

Jeannie covers each step, including setting goals, gathering data, facilitating a journey mapping workshop, interviewing customers to validate the map, and more. Along the way, she offers plenty of tips and techniques to help focus the process and move your team toward an actionable goal.

[Learn More](#)

Why Journey Map?

Customer Journey Maps (CJM) can help you understand how your customers experience your brand. You can use CJM to...

1. **Find points of friction** for your customers so that you can reduce the effort for them
2. **Uncover duplication of efforts** or ways our siloed organizations create inefficiencies or irritations for your customers
3. **Stress-test new processes**, products, services, or offerings for your customers
4. **Envision long-term changes** to improve the experience for all your customers

Why Does Customer Journey Mapping Fail?

When consulting and running Customer Journey Mapping workshops with our clients, it's common to hear of unsuccessful attempts to create journey maps in the past. Often these failures occur when...

1. A journey map is treated like a deliverable
2. Journey mapping is checked off a to-do list and then ignored
3. Customer Relationship Management (CRM) software drives the mapping process
4. Parts of the journey are left out
5. Journey maps aren't focused on action that drives change

Five Guiding Principles of Customer Journey Mapping

1. Assemble a Cross-Functional Team of Customer Champions.

Involve a diverse team from the start. Ask your champions to help shepherd specific projects to completion and update the map again. Then share what you've learned all over again!

2. Treat "Journey Map" as a Verb, Not a Noun.

Journey maps are only useful when they are used. We don't say, "we did marketing once, so we're good for a while." Just like marketing, budgeting, or delivering our products, we need to see mapping as an ongoing part of business.

3. Map from the Customer Point of View

One of the biggest misconceptions about customer journey maps: That they're just a series of interconnected process maps. A customer journey map is different in one key way: It's all about the customer's view. This leads to perspectives that highlight where the experience isn't what the process map assumes.

4. Each Map Should Correspond to a Customer Persona and Objective

A customer journey map designed to serve everybody serves nobody. Before getting started, it's key to have a specific customer persona in mind and know what that customer is trying to achieve along the course of the journey.

5. Involve Your Customers

Customer Journey Mapping is not a guessing game. Mapping the current state of your customer's journey helps identify where changes are needed to get to the ideal state. Use any real customer data you have to better understand what they're truly doing and experiencing at each step.

Let's get started with our first exercise!

Pre-Journey Mapping Exercises

In this section:

- **Define Your Customer Journey Mapping Scope & Goals**
- **Identify Your Customers & Their Objectives**
- **Collect & Review Available Data**

Exercise 1:

Define Your Customer Journey Mapping Scope & Goals

What should your customer journey map focus on? To help identify the scope and goals of the journey maps you'll be building, follow these steps. You may already have a problem you're looking to solve or a specific journey identified, but these are still helpful steps to align your goals and scope.

1. Ask: What Does Your Company Sell?

Set a timer for three minutes. Ask everyone participating in this exercise to write down what your company sells. This can be a mix of broad and specific products and/or services. You can also include what these products and services DO for your customers.

Our Company Sells...

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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Exercise 1:

Define Your Customer Journey Mapping Scope & Goals

2. Review Your Answers to the Previous Question.

Review the answers that each participant wrote down, asking your team to raise their hand when somebody else wrote down something they did. Try to keep a general tally of what the most commonly identified items are and record them below.

3. Discuss: Which of these Journeys is the Most Straightforward?

Once again, refer to the answers from the first question in this exercise. As a group, identify which of these items are the most straightforward – meaning few steps, consistent systems and outcomes, and fewer places of ambiguity. Record the top answers below. This is especially helpful for the first journey map. You can always add to it later!

The five items most common items are...

1. _____
2. _____
3. _____
4. _____
5. _____

The five items most straightforward items are...

1. _____
2. _____
3. _____
4. _____
5. _____

Exercise 1:

Define Your Customer Journey Mapping Scope & Goals

4. Choose a Common, Straightforward Scope for Your First Map

Review the two lists you created on the previous page. Are there any answers that appear on both lists? These make perfect candidates to serve as the scope of your first customer journey map.

Our Customer Journey Scope will be: _____

? What About Our Other Products & Services?

By design, your customer journey map won't encompass all your products and services. Simplicity is key – trying to create a journey map that's too broad can prevent you and your team from taking action and making progress.

Consider your first journey map a template that can serve as a template for other future journey maps!

Exercise 2:

Identify Your Customers & Their Objectives

You've chosen a scope for your customer journey map – that's fantastic! The next key step is to define your customer that will be going through the journey in order to better understand them.

Ask: What Customer Segments/Personas Experience This Journey?

If you already have customer segments or personas defined, that's great! You can simply record their information on page 14.

If you don't already have customer personas defined and recorded, take a few minutes to answer these questions. Have everyone participating in this exercise answer the questions themselves:

1. Customer's Main Objective:

What does our typical customer want to do in the moment of this customer journey? What specific benefits are they seeking?

Exercise 2:

Identify Your Customers & Their Objectives

2. Customer's Context:

What emotional state is this customer experiencing? What is motivating this customer?

3. Customer Demographics:

Who is this customer?

Exercise 2:

Identify Your Customers & Their Objectives

If your team has answered the questions on the previous two pages, take a moment to review and discuss your answers, then record a summarized response below.

If you're working directly from a previously created customer persona and have their information recorded elsewhere, record the persona name below so it's clear to all who this journey map is for.

Our Chosen Customer Persona:

The customer persona we'll be using for this customer journey map is: _____

Their main objective within this journey is: _____

Their emotions and motivation are: _____

Their general demographics are: _____

Exercise 3:

Collect & Review Available Data

By now, you've identified the scope and customer persona for your journey map. You're well on your way! When building your journey map, any data you have about your customer or journey is extremely valuable.

Data may include:

- **Voice of the Customer (VoC) metrics** like Net Promoter Score (NPS), Customer Satisfaction Score (CSAT), or Customer Engagement Score (CES)
- **Qualitative customer feedback** from surveys and feedback forms
- **Existing known systems, procedures, and touchpoints** that may be relevant to the particular journey.

? What If We Don't Have Any Data Available?

If you don't have a lot of data to use, that's okay! But try challenging yourself to play detective and see if you can't find helpful information in any of these places:

- **Social Media & Other Online Channels:** Are customers talking about your brand or products online?
- **Email or recorded communication:** Try searching your email archives for product or service names and emotional words. Review contact center recordings or talk to service agents for insights.
- **Existing systems:** Even systems that aren't specifically customer-focused, like internally-focused process maps, may shed light on how the customer moves through their journey, where points of strength and weakness are, and more.

Exercise 3:

Collect & Review Available Data



Use this page to record any relevant data points or external documents that may be relevant to the specific scope and audience of the journey we'll be mapping.

Key Data & Sources of Data...

Customer Journey Mapping Template

In this section:

- **Customer Journey Mapping Walkthrough**
- **Customer Journey Mapping Template**

Customer Journey Mapping Walkthrough

1. Persona Name

Persona Name: _____

Phases:

Awareness	Consideration	Selection	Purchase	Satisfaction	Loyalty	Advocacy
-----------	---------------	-----------	----------	--------------	---------	----------

Actions & Touchpoints:

2. Phases

3. Actions & Touchpoints

The Seven Steps:

On this and following pages, we'll identify and explain the seven steps of our customer journey mapping template.

Refer back to this walkthrough as needed throughout your own journey mapping process.

Emotions:

4. Customer Emotions

Goals:

5. Customer Goals

Ideas & Opportunities:

6. Your Ideas & Improvement Opportunities

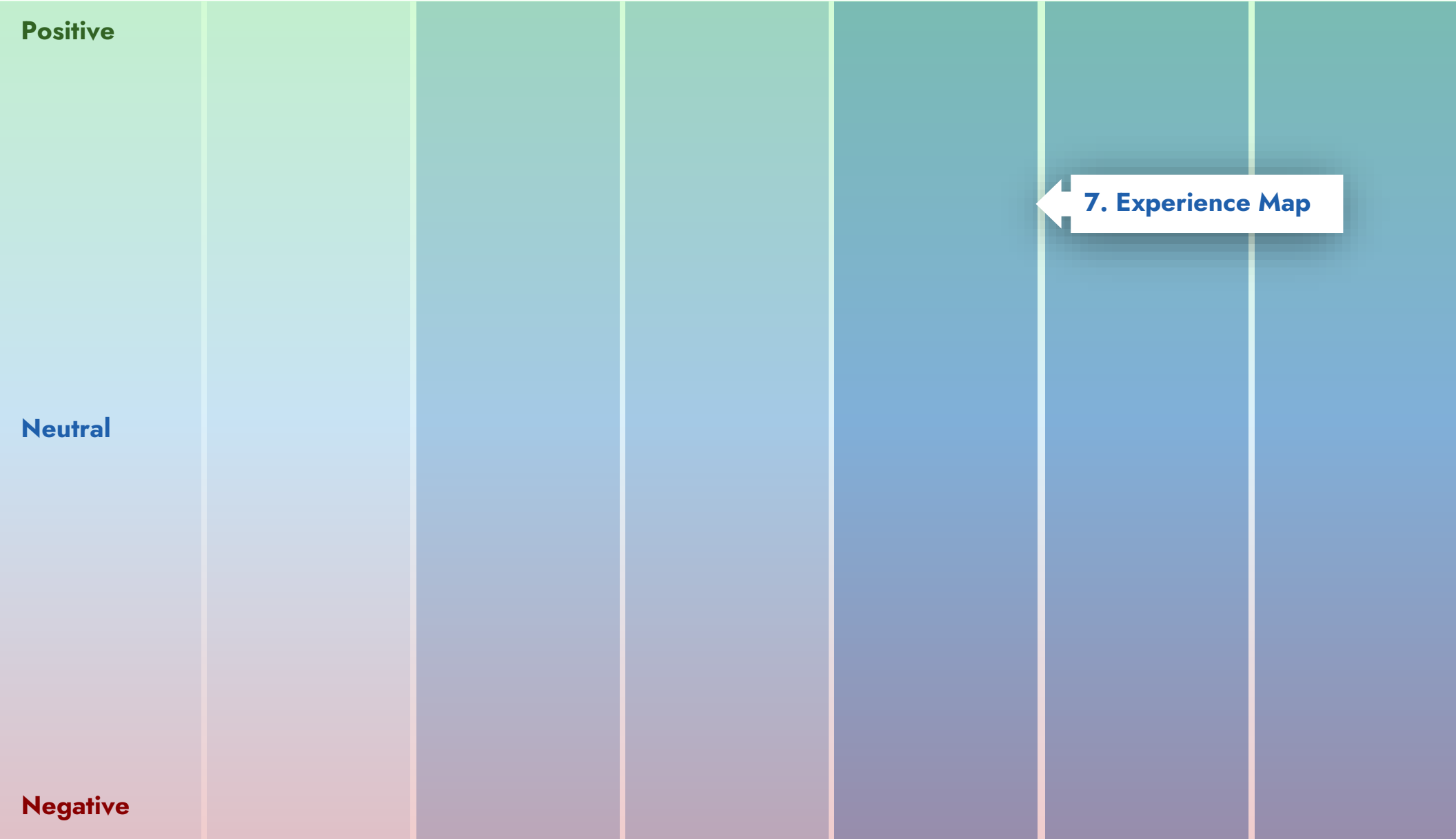
Customer Journey Mapping Walkthrough

Phases:

Persona Name: _____

Awareness	Consideration	Selection	Purchase	Satisfaction	Loyalty	Advocacy
-----------	---------------	-----------	----------	--------------	---------	----------

The Experience:



Positive

Neutral

Negative

7. Experience Map

Customer Journey Mapping Walkthrough

Let's quickly review each of the seven sections.

1. Persona Name

Record the name of the specific customer persona you've chosen to build a journey map for. Make sure everyone involved in the process understands who your persona represents.

2. Phases

These phases have been pre-filled for you, but experienced journey mappers may want to edit these to fit any specific needs.

3. Actions & Touchpoints

For each phase, identify the key touchpoints and actions in your customer's journey (software companies may have a well-defined "onboarding" phase, for example).

These are often the largest, most significant moments in the journey, but you could also collect micromoments – those little moments in the customer journey that can have a large impact.

The touchpoints you choose to include should be guided by the scope and goals your team established earlier.

4. Customer Emotions

For each phase, ask: What is your customer feeling? Use adjectives, emoji, or hand-drawn faces to represent these emotions – just make sure they're unambiguous and meaningful.

Remember to use the data you've collected to accurately represent what you know!

Customer Journey Mapping Walkthrough

Let's quickly review each of the seven sections.

5. Customer Goals

For each phase, identify: What is the customer trying to accomplish in this particular step? What is the best possible outcome of each touchpoint/interaction for the customer?

Remember to keep things focused on the customer. Your internal goals may not necessarily align with your customers' goals at certain points. That's okay, but for this exercise, record the customer goal.

6. Your Ideas & Improvement Opportunities

Review the sections you've already completed in order to identify opportunities to improve touchpoints.

Where can you make things easier for the customer? When can you acknowledge difficult moments in the journey or make them easier? How can you increase the likelihood customers reach their goals?

7. Experience Map

The Experience Map offers an opportunity to visually plot what customers are feeling throughout each phase of their journey. It's a chance to record earlier-identified customer emotions and display them in a way that's quantifiable and easy to interpret at a glance.

Ready to build your own customer journey map?

Using the exercises you completed earlier and the template on the following pages, create a journey map with your team. It doesn't have to be perfect: Keep it simple and focused. You can do this!

Customer Journey Mapping Template

Phases:

Persona Name: _____

Awareness	Consideration	Selection	Purchase	Satisfaction	Loyalty	Advocacy
-----------	---------------	-----------	----------	--------------	---------	----------

Actions & Touchpoints:

--	--	--	--	--	--	--

Emotions:

--	--	--	--	--	--	--

Goals:

--	--	--	--	--	--	--

Ideas & Opportunities:

--	--	--	--	--	--	--

Customer Journey Mapping Template

Phases:

Persona Name: _____

Awareness	Consideration	Selection	Purchase	Satisfaction	Loyalty	Advocacy
-----------	---------------	-----------	----------	--------------	---------	----------

The Experience:

Positive						
Neutral						
Negative						

Post-Journey Mapping Exercises

In this section:

- **Identify Moments of Truth & Potential Actions**
- **Prioritize Actions**
- **Summarize & Share**

Exercise 4:

Identify Moments of Truth & Potential Actions

What are *Moments of Truth*? **These are the moments when the journey is either *made or broken* for your customer.** As you identify these moments, record them in the spaces below.

1. Record Key *Positive Moments of Truth*

Below, record the key positive moments in your customers' journey as you identify them.

Use the Emotions and Experience Map sections of your journey map as a starting point. **Look for moments where the experience you deliver exceeds the promise** you've made to your customers and for moments when you've anticipated potential customer problems or anxiety and presented solutions proactively.

Then, ask: **For each moment we've identified, what makes that moment particularly great for the customer?**

Positive Moments of Truth in the customer journey include...

- 1. _____ Because... _____
- 2. _____ Because... _____
- 3. _____ Because... _____
- 4. _____ Because... _____
- 5. _____ Because... _____

Exercise 4:

Identify Moments of Truth & Potential Actions

2. Record Key Negative Moments of Truth

Below, record the key negative moments in your customers' journey as you identify them.

Use the Emotions and Experience Map sections of your journey map as a starting point. **Look for moments where the experience you deliver doesn't live up to the promises** you've made to your customers, and for moments when customers often get stuck, frustrated, or anxious.

Then, ask: **For each moment we've identified, what makes it particularly difficult for the customer?**

Negative Moments of Truth in the customer journey include...

- | | |
|----------|------------------|
| 1. _____ | Because... _____ |
| 2. _____ | Because... _____ |
| 3. _____ | Because... _____ |
| 4. _____ | Because... _____ |
| 5. _____ | Because... _____ |

Exercise 4:

Identify Moments of Truth & Potential Actions

3. Record Potential Actions

With your journey map completed and your Moments of Truth clearly identified, it's time to take action.

Below, write down a list of potential action items. Use the list you just created as a guide, looking for:

- Positive moments that can be systemized, taught to others, and/or applied to other touchpoints
- Negative moments that can be efficiently resolved

Ask everyone involved to record their own answers and then review and discuss together, or brainstorm together from the outset.

Don't worry about the feasibility of these action items – we'll review and prioritize them next.

Potential Actions Include...

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____

Exercise 5:

Prioritize Actions

1. Review Your Potential Actions

By now, you've hopefully got a long list of potential actions to explore. But which ones should you prioritize?

Review your list of potential actions, asking:

- What impact will this action have on our business outcomes? Is it worth the investment to fix it?
- How feasible is this? Is it something we could fix quickly, or would it be a long-term diversion?
- What is our customer experience mission? Does this action get us close to delivering the experience we've promised our customers?

2. Record Your Potential Actions

Use the **Journey Map Priority Matrix** on the following page:

1. For each of the potential actions you've identified, choose a square that describes them best.
2. Record each potential action in the appropriate square.
3. When it's time to act, start with the high impact/high feasibility items, moving to the high impact/low feasibility and low impact/high feasibility items later. Reconsider items recorded as low impact/low feasibility – these may not be actions worth pursuing.

Exercise 5:

Prioritize Actions

Journey Map Priority Matrix

High Impact / Low Feasibility

High Impact / High Feasibility

Low Impact / Low Feasibility

Low Impact / High Feasibility

Exercise 6:

Summarize & Share

By now, you've accomplished so much:

- You've built a customer journey map for a specific customer persona and journey.
- You've identified high and low points in your customer's journey.
- And you've created a prioritized list of potential action items that can have a meaningful impact.

That's worth celebrating! But there's one more critical step: Sharing all your hard work with those who matter.

Remember: Your goal isn't just to learn about the customer's experience; it's to improve it. These final steps will help.

1. Identify Who to Share Your Customer Journey Map & Insights With

Sharing your work allows other individuals and departments to benefit from your customer journey map, even if they weren't involved in the process of creating it.

There are two categories of other people and departments who are worth sharing with:

Category #1: Those who would be interested: Do your findings or potential actions affect a particular individual or department? Have you identified a high or low point resulting from the way another department handles things? Do your recommendations solve someone's problem? Make sure they know.

Category #2: Those with the authority to take action: Do your ideas or recommended actions require buy-in from decision-makers? They'll be key to getting better results for your organization and your customers.

Exercise 6:

Summarize & Share

Below, write down two short lists: one for everyone who might be interested in your journey map and another for everyone with the authority to take action.

Those who may be interested in our customer journey map and findings include...

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Those with the authority to act upon our customer journey map and findings include...

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Exercise 6:

Summarize & Share

2. Summarize your work, key findings, and recommended actions

Once you've identified who to share with, there are many ways to go about sharing.

- One excellent method is in a presentation that connects your findings and recommended actions to key business outcomes.
- You can also invite stakeholders to walk through the journey map with you and help you innovate.
- Make someone's day by highlighting individuals or departments connected to the best moments in the journey and ask them to help carry that into other areas.

No matter how you share and who you share with, the first and most important step is typically to summarize the work you did and key findings you discovered to arrive at your recommended actions.

When preparing to share with others, don't just rely on the journey map – instead, go back through the pre- and post-journey mapping exercises and share your responses. This can lead to better understanding and buy-in.

Even better: use the fill-in-the-blank sections on the following pages to present your earlier answers in one easy-to-scan place.

Exercise 6:

Summarize & Share

Our Customer Journey Mapping Process, Results, & Recommended Actions...

Our Scope (Exercise 1)

As a first step, we set out to map a customer journey that was both common and straightforward.

The journey scope we chose is _____.

Our Customer Persona (Exercise 2)

Next, we selected a single customer persona to focus on.

The customer persona we chose for this customer journey map is: _____.

Their main objective within this journey is: _____.

Their emotions and motivation are: _____.

Their general demographics are: _____.

Our Data (Exercise 3)

We used data from the following sources: _____.

Exercise 6:

Summarize & Share

Our Customer Journey Mapping Process, Results, & Recommended Actions...

The Journey Map

We build out the journey map by looking at several phases in the customer lifecycle, including pre-sale, sale, and customer phases. For each phase, we identified key touchpoints and customer actions, emotions customers typically experienced, specific customer goals, and opportunities we identified to improve the steps along the way. We also mapped out moments on a spectrum of positive experiences all the way to negative ones.

Moments of Truth & Potential Actions (Exercise 4)

Using our journey map, we recorded the best and worst moments in the customer journey.

Key positive moments include: 1. _____ because _____,
2. _____ because _____,
and 3. _____ because _____,

Key negative moments include: 1. _____ because _____,
2. _____ because _____,
and 3. _____ because _____,

Exercise 6:

Summarize & Share

Our Customer Journey Mapping Process, Results, & Recommended Actions...

Prioritized Potential Actions (Exercise 5)

Using everything we'd learned, we narrowed down a prioritized list of potential actions.

- These actions include:
1. _____
 2. _____
 3. _____
 4. _____
 5. _____

Sharing (Exercise 6)

Finally, in order to get broad buy-in, support, and invite collaboration, we're sharing this information with the following individuals and departments: _____

What's next?

This workbook is designed to be a starting point in your Customer Journey Mapping endeavors, but it truly only scratches the surface.

When you're ready to take the next step, Jeannie and the Experience Investigators Team are here for you.

Email Inquire@ExperienceInvestigators.com to discuss custom workshops, consulting, and more.

Click on any item to learn more:

[Learn About Remote Workshopping, Training, & Consulting](#)

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ExperienceInvestigators.com.



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