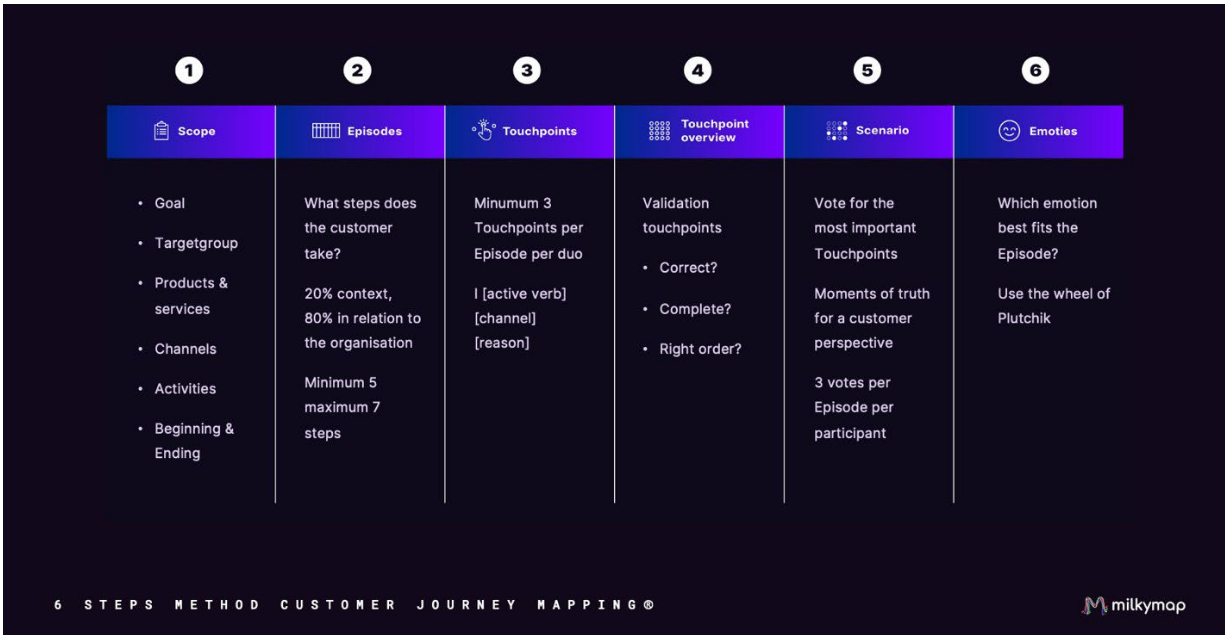
Customer Journey Mapping

Handbook



6 step Customer Journey Mapping method

The 6-step method was created in 2011, and since then more than 100 Customer Journey Mapping workshops were completed using it. The goal is always twofold: a clear overview of what customers experience in the different channels in a specific Customer Journey, but also the internal motivation and support to do something with it. This method differs from other methods because it can be done with a multidisciplinary team in just one day (8 hour offline workshop and 4 hour online workshop) and goes into great detail regarding the different channels and emotions. The visualizations in Milkymap, makes everything digital, shareable and consistent.

Milkymap, the online platform for Customer Journey Mapping, went live in February 2019. Our goal is to have the greatest possible impact worldwide and to enable as many people as possible to create Customer Journey Maps, also known as Milkymaps. The method is pragmatic, clear, easy to copy/learn and to record in Milkymap in a few hours. This way, both experts and beginners can use a Customer Journey Mapping method that has an impact on the organization as a whole, direct colleagues, management, but above all: the customer! Because Customer Journey Mapping is only successful if it has a positive impact on the customer.

This handbook describes step by step how to successfully map a Customer Journey according to the 6-step method of Milkymap. Milkymap provides a Customer Journey Mapping Platform and consultancy, workshops and training to support organizations to implement these methods. But the Milkymap platform can also be used separately.

Especially for remote working, we have added useful tips to this Handbook to facilitate the Customer Journey Mapping workshops online. For questions about this, please contact us. In the Handbook you will see an icon with a screen on the left, so that you can see where we specifically explain something about facilitating the workshops online.

Good luck Milkymapping and hopefully your customer's next experience will be their best.

Best regards,
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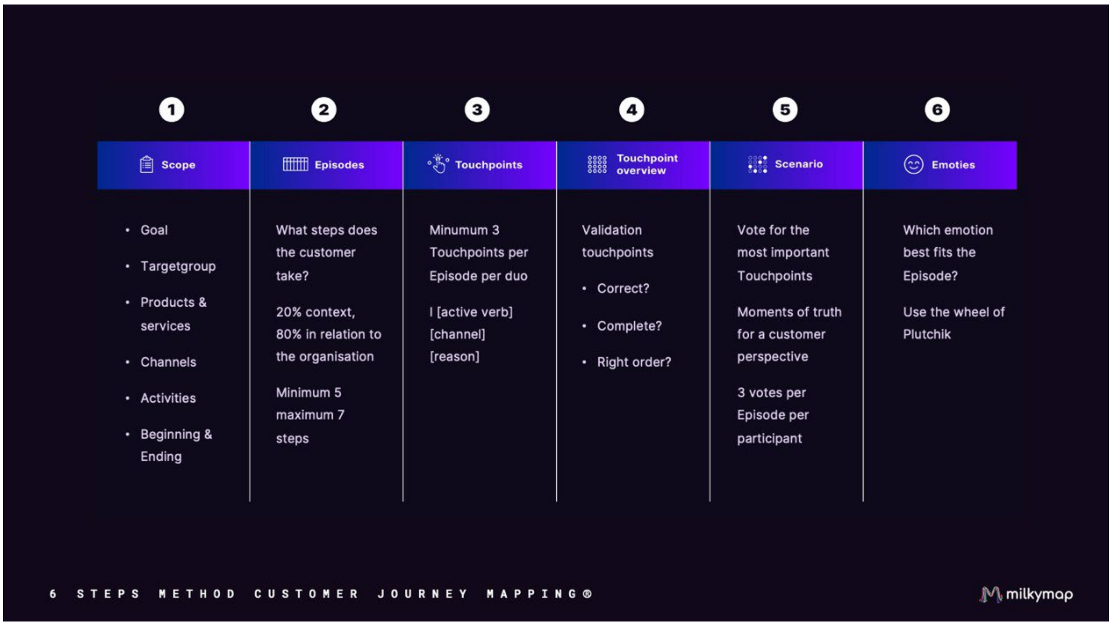
Introduction

Milkymap's Customer Journey Mapping method consists of 6 steps;

1. Scope
2. Episodes
3. Touchpoints
4. Touchpoint overview
5. Scenario
6. Emotions



These steps have been used in recent years during more than 100 workshops & training courses for companies, organizations and institutions worldwide. The steps have been carefully chosen based on the following arguments:

1. An effective training/workshop that can be completed in 1 day
2. Easy to learn
3. Multidisciplinary team for a good dialogue and support, help break down silos
4. Provides sense of urgency but also a sense of excitement
5. Output is clear and actionable
6. Different officials and stakeholders can work with it

Preparation

To make the Customer Journey Mapping workshops a success, it is necessary to make the following preparations.

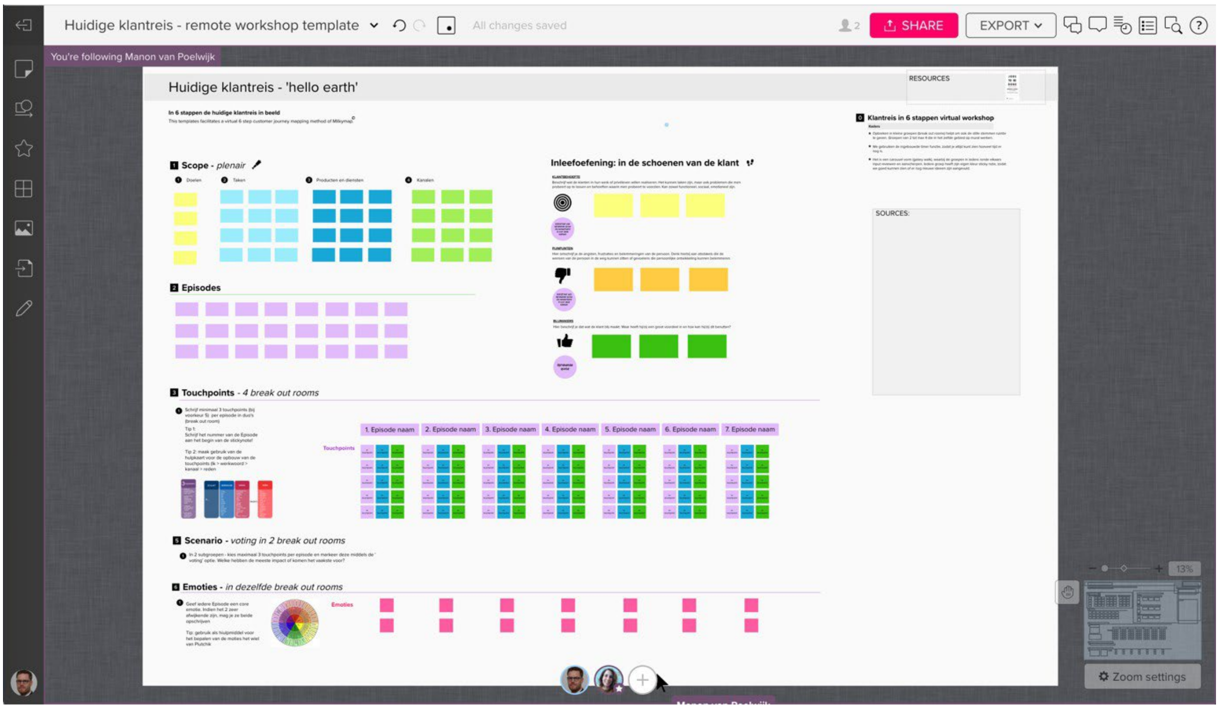
Offline (8 hours):

1. A room for 13 people, the 8 to 12 participants and the facilitator (you)
2. A beamer or a large screen
3. 4 colors post-its (for each break out group a different color) and pens
4. A PowerPoint presentation with approach and method
5. Prints of the Touchpoint template and Emotion wheel.
6. Flip over / brown paper roll and tape
7. Coffee and tea (and a Milkyway or apple!) for during breaks
8. Organize or prepare lunch, outside the room is recommended
9. A snack for after lunch
10. Get a good sleep!

Online (4 hours):

1. Zoom (www.zoom.us) account, or another video conference tool with the option to organize break out rooms
2. Mural (www.mural.co), or another digital whiteboard during the session. Prepare the template, so it fits the steps to be taken in this workshop.
3. Account in Milkymap (www.milkymap.com) for elaborating the Customer Journey
4. Instruction and outline of the workshop
5. Link to the meeting and all participants' email addresses
6. Send a snack (;-) to the participants in advance, so they are prepared for an energetic workshop with the necessary energy break.

With the online version we choose to do this in 4 hours. It's important to thoroughly prepare an online workshop to keep everyone focus and add necessary structure.



Example Online template in Mural for Current Customer Journey workshop, copyright Milkymap

Go through the scoping with the client and a few participants and determine the episodes in an outline. This saves you some time. In addition, it is wise to validate afterwards, more so than with the offline workshops.

Step 1 – Scope

We start by determining the scope when we create a Customer Journey Map. There is not just one Customer Journey Map or one target group. It is always necessary to determine why the Customer Journey Map is being created. With this starting point, the approach can differ, but so can the outcome of the workshop. Before the workshop, take plenty of time (minimum 30 minutes) to determine the scope (pre-scoping), together with the client. You will do this again during the workshop, with the whole multidisciplinary team. If you go through this too quickly, there is a big risk that you will not get the output you wanted afterwards and that discussions during the day will take quite a long time. The risk being that every exception will come up during the steps you go through, which is a waste of time. So be well prepared and discuss the questions below with the entire group.

You answer the following question in the pre-scoping conversation with the client:

1. Why are we going to create the Customer Journey Map?

a. To understand and communicate the customer experience, and/or
b. To better tell the customer's story and/or
c. To optimize internal processes, and/or
d. To map the customer experience, and/or
e. To detect pain points and moments of magic in the customer journey, and/or
f. To analyze where in the customer journey an improvement is necessary, and/or
g. To contribute to internal projects that make changes to processes.
h. Other, i.e…

2. Which (customer) processes play a role and which do not?

Naming (customer) processes in advance is important because it indicates which processes are affected and which are not. In this way, the group of participants, who may be internally focused, can better understand the scope from the customer's perspective. It also immediately brings discussions to the table about what the customer will go through and what not. This often concerns back-office departments, customer service and/or the website. The (customer) processes are your bridge to the external customer, they help to take a first step towards the customer. Therefore, always ask: which customer processes do we include during the workshop?

3. Who is the target audience? Which persona(s) do we take with us? Which customer segments?

It is often not desirable to map the Customer Journey Map for all customers, simply because this results in a too general Customer Journey that does not say much. In addition, if the target group is too broad, the workshop becomes too complex and difficult for the facilitator to manage. It also makes no sense to create a Customer Journey Map for all customers, as that is too broad of a scope.
You can choose one target group and afterwards test the Customer Journey Map against the other target groups. *Customers can also be users, patients, citizens etc.

This is also possible for the personas that are there or to be created. This is not part of the workshop, but Milkymap has extensive experience with creating personas. Make sure that if you do not treat all target groups in the workshop, you do give them a place in the entire process. This prevents discussions afterwards that the entire Customer Journey Map is incorrect, because it does not cover all target groups. Naming and parking this with the scope is a good idea.
The trick is to make the right choice when scoping. Discuss this in advance with the client, so that you will not be faced with surprises during the workshop itself. For example, it may happen that the business market goes against the consumer market, so that a discussion arises as to who falls within the scope and who does not. Prepare for that.

4. Who are the internal stakeholders involved & the multidisciplinary team?

The composition of the group is perhaps the most important aspect of the workshop. By putting together a multidisciplinary team, you get input from different angles with regard to the Customer Journey.
In addition, these stakeholders can also discuss the customer and the customer process with each other. In practice, it is precisely this aspect that proves to be of great added value. The response is often: "how wonderful that we finally had so many different departments in one (Zoom) room, enlightening and important. We should do that more often."

Make sure that the group is mixed and that all departments are represented. Agree on this in advance with the client. Of course, there are internal stakeholders who are not present during the workshop, but you still want to get involved. By noting these during the scoping, they are given a place in advance (visually). This realization helps the group think wider than those present and afterwards these internal stakeholders can and should be involved in the validation of the Customer Journey Map.
If internal stakeholders are unable to attend, while they are important in visualizing the Customer Experience and creating the Customer Journey Map, reschedule the workshop. Do not compromise on the quality of the participants!

Departments and functions that add value to a Customer Journey Mapping workshop are:

1. Manager and/or customer service employee
2. Manager and/or employee finance
3. Manager and/or employee business intelligence
4. Manager and/or marketing employee
5. Manager and/or sales employee
6. Manager and/or employee process management
7. Manager and/or store employee
8. Don't forget the customer!

As you can see it says 'and/or', since you want at least 1 of the two in your workshop and sometimes an official in between, such as a senior or a team leader. Don't have too many managers in the workshop.

Always involve a customer, either in the workshop, interviews, or post-validation. All three is even better.

5. What is the name of the Customer Journey Map?

A seemingly easy question, however, many people find it difficult to answer this question properly. Often internal departments, abbreviations or process steps are named, instead of a description from the customer's perspective. For example: 'I am moving' or 'I cancel my subscription' or 'I become a customer' or 'I order a product' or 'I report a malfunction via the website' are good Customer Journey Map names. Starting with 'I' is a condition to describe the name of a Customer Journey Map from the customer's perspective. In addition, you can have a channel or persona appear in the name of the Customer Journey Map, to bring extra focus.

Please note, during the start of the workshop…

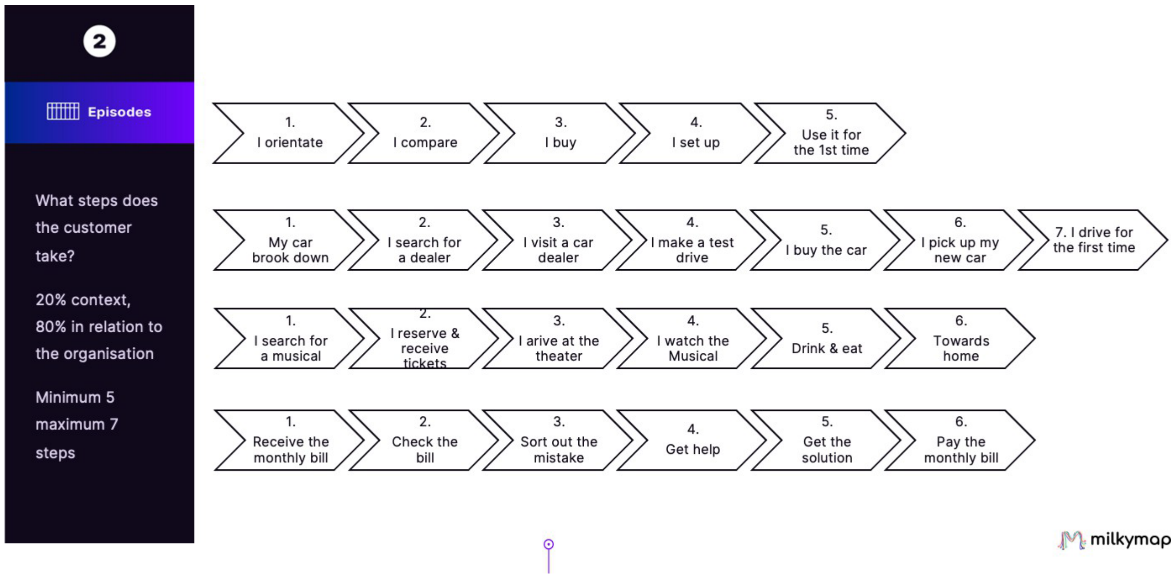
It is important to (re)determine the scope together during the workshop. So you deal with the questions above again, in addition to the preliminary interview with the client and some additional questions about channels and tasks that the customer performs. See the 6-step overview.
This prevents discussions during mapping and afterwards. Determine the scope together in a process in which the workshop participants are forced to think about the customer, his/her world and why they are present at the workshop. They are experts in a certain area and understand what the customers are going through. In this step they find out that they will make a good contribution to the workshop. This will result in better involvement and energy further on in the workshop.

Step 2 – Episodes

To structure the Customer Journey Map and to be able to create a storyline, you prepare an overview of the Episodes. These are like chapters in a book and consist of several Touchpoints. An Episode can already take place before the customer contacts the organization, or after they have last been in contact with the organization. It is the entire journey viewed from the customer's point of view, in full context. This goes beyond the act on the subject you want to focus on. This makes it possible to understand what is happening in the context of the Customer Experience. Take as a starting point that you want a maximum of 80% of the Customer Journey to be in direct relationship with the organization, 20% is then context, the indirect relationship with the organization.

You compose a minimum of 5 and a maximum of 7 Episodes with the group. When more than 7 episodes are used, this makes the Customer Journey Map very cluttered and the Touchpoints (the level below) aren't specific enough. When too few episodes are used, this puts too much information in the Episodes and which full of Touchpoints and there is no longer a clear overview. Then it is no longer clear what exactly happens in the Episodes. As a facilitator you guide the group in drawing up the episodes, it takes some practice before you master this in a live (online) workshop.

An Episode is therefore like a chapter in a book, there is a logical order in it, see the examples below.



PLEASE NOTE: It is important to compose the Episodes with the participants in the workshop itself. This way, you create support and understanding. The group can jointly share what is and is not in an episode, so that the writing of Touchpoints is more coordinated and the quality of the output is better.

It is therefore important as a Customer Journey Mapping expert to guide the dialogue without being too controlling, but with the scope in mind. This step contributes to thinking from the context of the customer. When this exercise is done correctly, the next exercise, writing the Touchpoints, is also easier. The group can think together from the customer's point of view, because they have gone through this process together.

As a facilitator you compose the Episodes together with the group, plenary

Step 3 – Touchpoints

A Touchpoint is a moment when a (brand) experience is created for a (potential) customer. This can take place in various direct channels, but also in indirect channels. It doesn't always have to be your organization's channel, but it could be your neighbor or co-worker, and even a competitor's channel. The customer does something for a reason, where an event occurs with an intention. The event has an impact on the customer experience and how this customer thinks and feels about your brand/organization. A Touchpoint is a detailed description of what happens in an episode of the Customer Journey.

A Touchpoint has a fixed structure and consists of I [active verb] [channel], (be)cause [reason].

This structure of Touchpoints has the following advantages:
1. Starting with 'I' forces to think from the customer's point of view
2. You are complete
3. You are short but clear
4. You are consistent
5. You always have a channel in a Touchpoint
6. You always have a reason, so that you get a grip on the customer's needs, you have captured the customer's intention.
7. You always write down an active verb, so you know what the customer is doing. Not subjectively, but objectively.

In the workshop you have the participants, in groups, write the Touchpoints on post-its. One Touchpoint is written on each post-it. Be sure that the participants write the number of the episode in the top right corner of the post-it.

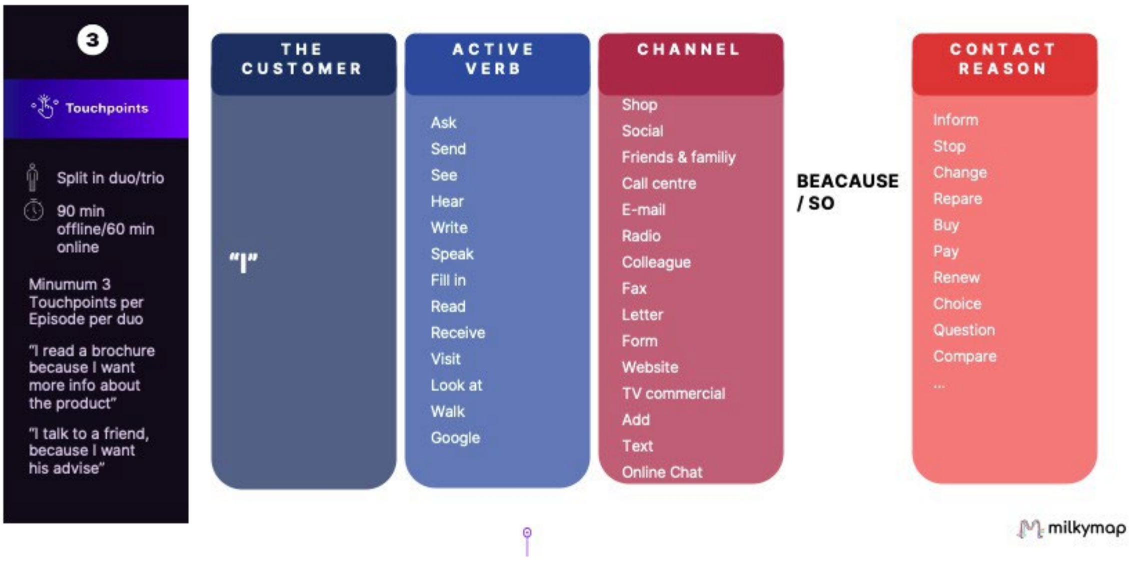
Each group (always 4 groups!) writes down 5 Touchpoints per episode. All the Episodes! So if there are 7 episodes and 4 groups, then it would be 7*4*5=140 post-its. This ensures that you have enough range and that you can detect exceptions or special events.
Practice shows that less or more than this number does not benefit the quality of the Customer Journey Map. Setting up the Touchpoints takes 90 minutes in the offline (physical) workshop.

In the online workshop you send the 4 groups into break out rooms (separate online conference rooms), so that they can work on the Touchpoints with 2 or 3 people. Use the timer in the Mural to get the pressure (cooker) on so the group can see time passing.
As a facilitator you have two ways to control and help the group. First you have the digital brainstorm board (Mural), where you can see if there is any progress writing on the post- its. You can monitor all groups at once. Which is a great advantage of online! You can go into the break out rooms to help and get out again and hop to the next group. Do not take more than an hour for this exercise.

Working with a clock is preferred, so that the group visually sees time passing, online as well as offline.

Setting up Touchpoints carries the risk that people will start a discussion about internal processes and tell anecdotes about what is not going well within their own organization. It is therefore important to walk around during the preparation of the Touchpoints (add yourself to the break out rooms) and help with the preparation of the Touchpoints. The workshop facilitator never participates in preparing the Touchpoints.

Below is the method that is also in the Powerpoint and a handout (you printed before the workshop) that the group can use to set up the Touchpoints.



Template to create Touchpoints

Some examples:
1. I am visiting the website because I want to file a complaint
2. I am looking for a parking space to park my car
3. I am calling the contact center because my address is incorrect
4. I consult with my partner to weigh the pros and cons

During the preparation of the Touchpoints, the workshop facilitator collects the Touchpoints in the meantime. Hanging up the Touchpoints on the brown paper during this process gives the facilitator an idea of the Touchpoints that are being described.
Adjustments to speed, quality and quantity are possible this way. You can already put the post-its together by channel. In addition, the facilitator can also hang up Touchpoints that are the same or similar to each other. This also applies to topics that are related. Write characters like '?' on the Touchpoints if you have a question about it or '#' if you want to know how often this occurs. You can then come back to this in Step 4.

In the online workshop you do not collect the Touchpoints, but you arrange them during the break that the participants have between Step 3 and Step 4 in Mural. This way you can go through it faster and better later on. So let the group do the work and watch, but don't change the order or location of the Touchpoints.

The result after writing down all the Touchpoints

Stap 4 – Touchpoint overview

When all post-its have been hung on the wall, grouped per channel and per subject, it is important to go through them with the group:

1. Do you understand what's on the post-it?
2. Does it start with 'I'? Is the verb actively written (an activity)?
3. Is there a channel on it?
4. Was there a reason mentioned?
5. Is there overlap and can you remove post-its?
6. Which post-its belong in another Episode?
7. Which post-it appears in multiple Episodes? (make a new post-it)
8. Are we missing a Touchpoint? Have a participant write a post-it and attach it.

With the online workshop this is simple: they are already in Mural, so you share your screen, zoom in and you can present it to the group.

Make sure that this step does not take more than 30 minutes. There is a risk that discussions will arise about how things are going and, for example, which letter will be sent at what time. That is less relevant for now, as it is too detailed to discuss in the workshop. Write these things down on a flipchart and take it with you after the workshop. What matters is that everyone has heard the Touchpoints and that there is order and structure in the post-its. This helps for steps 5 and 6 and for the elaboration afterwards. The group also experiences the complexity of the Customer Journey Map and the number of Touchpoints. During the validation after the workshop, there is also an option to add, change or delete the Touchpoints.

TIP: give each pair/group a separate color post-its (4 colors), also in the online assignments. In this way it is more convenient in the dialogue to know which post-it has been written by which group.

Here is an example of a wall with the post-its and where the facilitator, Danny Peters in this case, goes through the Touchpoints with the group:

Example wall (workshop Customer Journey Mapping Natuurmonumenten by Milkymap)

Stap 5 – Scenario

In order to be able to tell 'the story' and to visualize properly in Milkymap, it is important to know what the most common scenario is. And additionally, you want to know what the most important moments of truth are. Those are important for your storyline.

A scenario is made up of 1, 2 or 3 Touchpoints per episode which have a logical order. You want to tell the story of the Customer Journey Map with this. Split the group in two and let them both choose 1, 2 or 3 Touchpoints per episode and put an 'S' on it. Online you can use also the ‘Voting’ feature, and look for the hotspots to create the storyline.

This is done by the group itself. In this way, they themselves read through the Touchpoints that you have just read and choose the Touchpoints that occur most often. You then have the logical story of the Customer Journey Map afterwards.

TIP: split the group in half. Have group 1 start with the first episode and have group 2 start with the last episode. This more than doubles the speed.

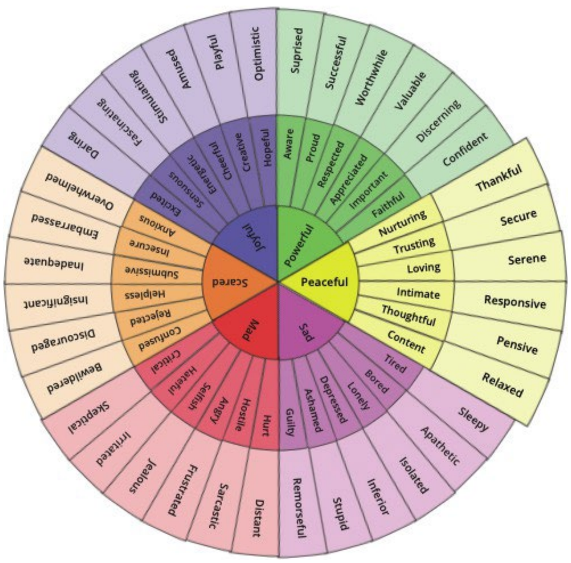
TIP: After they put the 'S' on the Touchpoints, go over the Touchpoints and read them out loud. Have the group close their eyes, so that they can better feel the complete story.

Step 6 – Emotions

To make a striking emotion curve, without extensive market research being required or available, you discuss with the group which emotions best fit which Episode.
The curve that will come out of this step, will help you tell the emotional journey, and it gives you hints for designing the ideal journey.

So each Episode gets 1 or 2 emotions (see TIP sunny day). They write these with the name of the Episode. These emotions are then later included in the emotion curve in Milkymap or you can immediately enter them online during the workshop.

At Milkymap, we like to use Plutchik's wheel of emotions. Having a set of specific emotions to choose from provides users with some structure. It's also easier to compare emotions across maps from different users, especially if you make some effort to discuss their meaning before you start mapping.



Choosing an emotion from the wheel of Plutchik

The level of emotion on the line you draw depends on:
1. The emotion chosen
2. The data and customer views that the group is already aware of
3. The experience and knowledge from the group

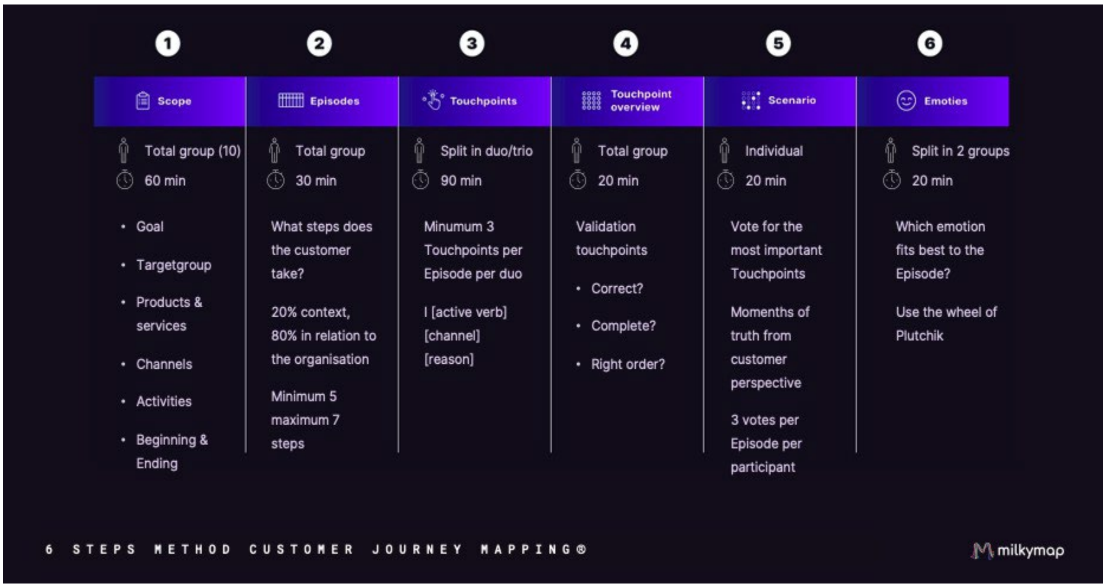
4. Any validation with real customers

TIP 1: You can also work with 2 groups, each starting on one side. One with the first Episode and the other with the last, working toward each other, and ending in the middle. That increases speed and dynamics. After naming the emotions, the groups share them with each other and explain them.

TIP 2: Sunny- and Rainy-day scenario. It can happen that an Episode has more than 1 emotion, for example with Touchpoints that are not going well compared to Touchpoints that are going great OR depending on the (in)consistency level of the service delivered (sunny days and rainy days scenarios). You then write both emotions down in the Episode. Later in the emotion curve, you can split the line in two, one for the sunny and the other for the rainy scenario.

Congrats, your first Journey Map is a fact!

This was the last step of the six step method and the 8 hour offline or 4 hour online workshop flew by. In summary:



It is a pressure cooker model, in which a lot of output is generated in a short time.
So it is advisable to let the group sleep on it, so that you can visualize the results from the workshop. You send the detailed Customer Journey Map to the participants, so that they can provide feedback on it and you can create the final version. It is also a great idea to have someone validate who was not present during the workshop. This way you get even more input and insights.

Capturing the content of the workshop

After the workshop it is time to provide the elaboration and feedback. The Milkymap platform works best for this. Don’t have an account yet, look below for more information. You deliver the following:

This Customer Journey Map contains at least the following information:

1. Customer Journey Map name.
   - In Milkymap.com you create a new Milkymap by [+ create new] and then fill in the Title. Of you go, creating your first map!
2. The scope, with the details of what was in scope for this Customer Journey Map, as a description of the Customer Journey Map.
   - You can put the scope in the description field in Milkymap, below the title.
3. Episodes
4. Scenario, based on the post its marked with an 'S'
   - In Milkymap.com you put the scenario in the description field of the Episode.
5. Picture per Episode, that represents the scenario the best
   - Simply click on [Media] and upload your picture!
6. Touchpoints per Episode.
   - In Milkymap.com you add a Touchpoint lane by clicking on the [+] below the Episode lane, on the left site of the screen. And then choose for [Touchpoint].
7. Emotion(s) per episode with one or two curves (sunny & rainy-day scenario)
   - In Milkymap.com you add a Emotion curve lane by clicking on the [+] below he other lanes. And then choose for [Emotion curve]. If you need a second one, you do can simply Plus [+] another Emotion curve lane the same way as before.

Elaboration in Milkymap

After the workshop you will have a minimum of 100 (for 5 episodes) and a maximum of 140 (for 7 episodes) post-its with the Touchpoints. This is very useful information to build with as it describes all customer actions per channel, per episode and with the customer intent. To properly process these Touchpoints, the online platform called Milkymap works the best. It is created to do just that!

Here you can easily work out the post-its and visualize them well. Create an account here: www.milkymap.com.

After entering it is possible to share the Milkymap, so that you can have it validated by the participants or other stakeholders. They provide comments on the various parts, so that you can review and adjust them where necessary. You now have the entire map of Episodes, channels and Touchpoints available online and you can add images and scores to it.

More information

Visit https://galaxy.milkymap.com/signup/select-plan for more information and to create a Milkymap account.

If you would like to become an ambassador for Milkymap and participate in the affiliate program, please contact us. You receive a percentage of the subscription fee from the paying Milkymap users.

In addition to Customer Journey Mapping, Milkymap also provides the Life Cycle Model. A dashboard solution for managing multiple Customer Journeys in your organization. It makes it possible to measure, visualize and link all contact moments that a customer has to all Customer Journeys that are created and managed in different places in the organization. This is a unique model that was created by Milkymap.

If you have any questions about the methodology, would like training sessions or would like to have a Customer Journey project carried out, please contact our Co-Found Danny Peters via danny.peters@milkymap.com.

Good luck with the workshops! Will you let us know how it went?

Best regards,

The entire Milkymap team