



## Tool 2

# Customer Journey Map

A **customer journey map** is a tool that captures and communicates a customer's journey through a specific product or service experience, such as signing up for a loan or making payments throughout the lifetime of a product. Customer journey maps are typically generated for each user persona you create for your target customers. Like personas,

journey maps are best done as a group activity that captures knowledge from various customer-facing employees within your organization, such as sales agents or call center staff. By creating a customer journey map, you'll gain clarity on what your customers do, how they think, and what they feel when they interact with your product or service.

**PRO TIP – Consider step 2 below and create a touchpoint inventory for your journey. From there, pick out key touchpoints that may highlight the most important interactions from your customer's perspective. Rule of thumb: a good customer journey map reveals opportunities; too many touchpoints and it may lose focus, too few and you may not have enough data points to work with.**

### STEPS

#### 1 a

##### CONTEXT

Consider the journey you want to characterize with your journey map (e.g., purchasing a product or service), and the customer personas you wish to target. The journey should be unique to a specific customer segment.

*Who are your customers and what's the context of their engagement with you? What do you do for them and what can they do for you? What are they trying to achieve?*

#### 1 b

##### STAGES

Once you've established the overall journey, define distinct stages of the process. If it's purchasing a new financial service, for example, stages might include:

1. Awareness of need
2. Research
3. Selection
4. Purchase / Onboarding
5. Use
6. Product upgrade

#### 2

##### TOUCHPOINTS

Identify customer touchpoints along the journey and map them through each stage. Describe what your customer is doing at each touchpoint.

*At which points does your customer interact with your organization? Which channels do they come through? What happens each time they interact? Who in your organization delivers the service – and how?*

#### 3

##### QUALITATIVE CUSTOMER DATA

Describe your customer's thoughts and feelings at each touchpoint along the journey.

*What concerns, considerations, and emotional responses does your customer feel at every step of the journey? What would you like them to feel?*

#### 4

##### MOMENTS OF TRUTH (Highs and lows)

Finally, once you've mapped out the journey, identify key interactions that may provide opportunity for intervention.

*What are important points along the journey that most affect your relationship with the customer? Are there any significant gaps in their journey? Bright spots?*

##### SUGGESTED TIME

2-8 hours

##### ROLES

2-4 collaborators

##### MATERIALS NEEDED

template, pages 18-19  
pens  
paper  
sticky notes

**PRO TIP – When does the customer journey really start, and when does it end? How can you know what your customer feels at each touchpoint along the way? If you're feeling stuck, a customer journey map may be a good opportunity to work with a design facilitator.**



## Tool 2

### Customer Journey Map (1/1)

#### 1a. CONTEXT:

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#### 1b. STAGES

What are the stages of the journey?



<b>2. TOUCHPOINTS</b> What is your customer doing at each touchpoint throughout the journey?		
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<b>3a. CUSTOMER THOUGHTS</b> What is your customer thinking at each touchpoint?		
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<b>3b. CUSTOMER FEELINGS</b> How does your customer feel at each touchpoint?		
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<b>4. MOMENTS OF TRUTH</b> What positive and negative experiences occur throughout the journey?		
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