



JOURNEY MAPPING PROCESS CHECKLIST

1. BEFORE YOU MAP

- Define the scope of the journeys to be mapped
- Select personas for which you will map (develop personas, if they don't exist)
- Outline goals and objectives of map
- Select success metrics for the map
- Select and invite customers to participate
- Select and invite stakeholders/internal participants
- Conduct a pre-workshop prep meeting with participants
- Select mapping framework
- Gather and read existing customer feedback about journeys to be mapped
- Determine mapping method, i.e., butcher paper/sticky notes, digital platform, etc.
- Purchase supplies (butcher paper, sticky notes, markers, dots, masking tape, packing tape)
- Get snacks and drinks for the workshop

2. MAPPING WORKSHOP

- Prep the room (hang butcher paper, set out sticky notes and markers, etc.)
- Make sure participants have room to stand and to discuss
- Assign a "parking lot" area on the wall for ideas, solutions, micro/other journeys, etc.
- Map what customers are doing, thinking, and feeling
- Map the current state
- Listen to your customers as they map; let them do all the talking
- Add other swim lanes (e.g., channel, step owner, etc.) to the map, as needed
- Don't process map
- Don't problem solve – post solutions and ideas on the parking lot
- Post micro journeys or other journeys to be mapped on the parking lot
- Map at enough detail to really understand the experience
- Be sure to capture handoffs and transitions
- And capture steps that might be outside of your control
- Use red and green dots to vote on highlights and low points of the journey
- Add data and metrics to the map
- Bring the journey to life with artifacts (audio, video, pictures, documents, etc.)
- Identify key moments of truth
- Ask customers to do a readout of their journeys; now you can ask questions

3. AFTER THE WORKSHOP

- Add data and metrics to the map, if not done during the workshop
- Add artifacts to map (audio, video, pictures, documents, etc.), if not done during the workshop
- Do a debrief with stakeholders
- Assign owners to each step of the customer's journey
- Validate maps with customers, if they weren't in the room
- Digitize your maps

4. NEXT STEPS

- Create service blueprints
- Map the processes that support the service being delivered, especially where pain points were uncovered onstage for the customer (process mapping and/or value stream mapping)
- Prioritize moments of truth
- Conduct root cause analysis
- Develop action plans for updating processes and fixing pain points
- Assign owners and deadlines

5. DESIGN FUTURE STATE

- Identify future state mapping workshop attendees
- Invite participants to attend
- Prep attendees (similar checklist as “1. Before You Map”)
- Conduct workshop
- Ideate solutions for current pain points and for a future ideal experience
- Map the desired future state
- Ask customers to provide a readout and explanation of the desired future state
- Ideate backstage and behind-the-scenes processes
- Develop future state service blueprint
- Map future state processes

6. AND FINALLY...

- Prototype and test the new experience design with customers
- Fail fast! Prototype and test again, as needed.
- Implement the new experience – onstage, backstage, and behind the scenes
- Train employees on new processes
- Train employees on how to deliver the new experience to/for customers
- Close the loop with customers
- Update maps with the new journey
- Use maps as a teaching tool to onboard new employees
- Update your customer room walls with the new/updated maps
- Monitor and measure customer feedback to ensure the journey continues to meet expectations
- Map again as customer needs and expectations change

7. BUT DON'T FORGET...

- Map journeys for other constituents, as well, starting with employees
- Train your CX Champions how to map journeys in their departments/functional areas
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