ADAPTIVE PATH'S GUIDE TO

EXPERIENCE MAPPING

TROUBLE SPOT

LOW POINT

HIGH POINT

adaptive path

BRANDON SCHAUER
CEO

MAPPING THE FUTURE

Organizations collectively spend billions of dollars each year on experiences intended to attract, serve, and retain customers. They build new stores and launch new websites; answer thousands of questions in call centers; market, advertise, and promote in multiple channels; experiment with trendy mobile apps; roll out new products; and re-engineer services. In short, organizations create and manage a myriad of touchpoints that they want to add up to a differentiated customer experience.

Of course, customers don't care about these efforts. They care about meeting their needs across touchpoints and across the competitive landscape.

When done well, an experience map illuminates the holistic customer experience, demonstrating the highs and lows people feel while interacting with your product or service. The process of mapping uncovers the key customer moments that, once improved, will unlock a more compelling and more valuable overall experience. We've used experience mapping in our practice, among other methods, to generate insights, support new initiatives, and build stronger futures for the organizations we partner with.

Our mission at Adaptive Path is to guide our clients towards great human experiences. We've created this guide for others who are ready to take on that challenge.

As you collaboratively create and use your experience map, let us know what you discover!

The Value of Experience Mapping

An experience map is a strategic tool for capturing and presenting key insights into the complex customer interactions that occur across experiences with a product, service, or ecosystem. At the heart of an experience map lies the customer journey model, an archetypal journey created from an aggregate of all customers going from point A to point B as they attempt to achieve a goal or satisfy a need.

The activity of mapping builds knowledge and consensus across teams and stakeholders, and the map as artifact allows you to create and support better customer experiences. In short, experience mapping is a journey that can involve and impact your entire organization.

Customers are increasingly choosing products and services based on the quality of the experiences they have with them.

These experiences often break down when they span multiple channels. As a result, organizations need a holistic, human-centered view of the experiences they create. In short, they need a map.

Advances in technology and changes in customer expectations are placing more emphasis on the interconnectedness of *channels* and *touchpoints* that support customers attempting to satisfy their goals and needs. Smart organizations have realized a lack of interconnectedness is a major competitive risk. A few examples:

→ *Retailers* are grappling with new customer behaviors that have changed the very essence of what an in-store experience is and can be.

→ *Healthcare providers* are seeking new ways to provide patient-centered continuity of care while maintaining quality and minimizing cost.

→ *Financial institutions,* in response to growing regulation, are adopting new cross-channel service approaches to differentiate their brand and products.

New challenges require new approaches. Organizations are recognizing the need to think holistically, but they are struggling to do so. Projects often focus on individual touchpoints, technologies, and features without a clear picture of the total customer experience, and ownership exists for touchpoints and products, but not for the customer journeys that cut across them. This verticalization of functions and roles within organizations prevents individuals from collaborating, and prevents them from seeing how their work fits within the overall customer experience.

A failure to examine the customer experience holistically and in context can lead to failure in meeting your customers' needs. Making sound decisions and investments requires a solid understanding of those needs, associated behaviors, and underlying motivations. Experience mapping is directly aimed at grappling with and conquering this type of complexity.

SOME KEY DEFINITIONS

Touchpoint: A point of interaction between a person and any agent or artifact of an organization. These interactions take place at a certain point in time, in a certain context, and with the intention of meeting a specific customer need.

Channel: A medium of interaction with customers or users. Print, the web, mobile, voice calls, and brick and mortar locations are all common channels for reaching out to and interacting with customers. A channel defines the opportunities or constraints of a touchpoint.

More: http://adaptivepath.com/ideas/there-is-no-spoon-the-construct-of-channels

THE VALUE PROPOSITION

Create a shared frame of reference around the customer experience.

Build organizational knowledge of customer behaviors and needs across channels.

Identify specific areas of opportunity to drive ideation and innovation.
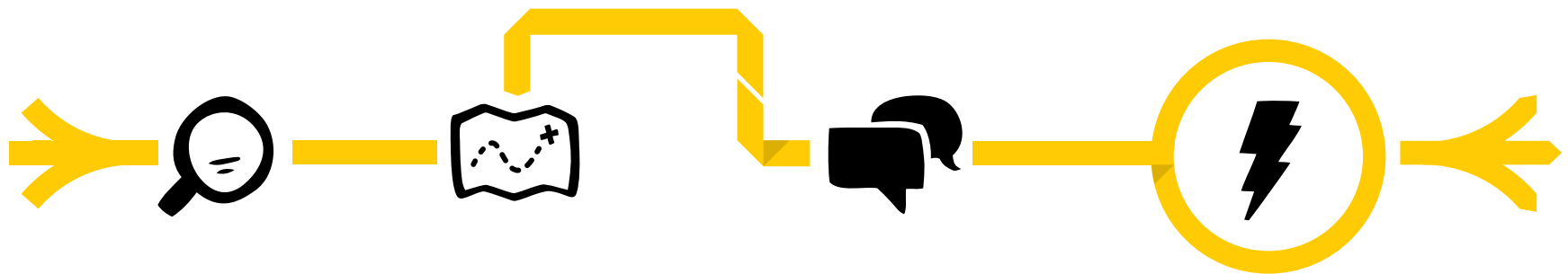
Distribute key customer insights in a form that is both usable and easy to understand.

Further organizational evolution towards customer-centered thinking.

Experience Mapping
The four steps to making sense of cross-channel customer journeys

UNCOVER THE TRUTH

Study customer behavior and interactions across channels and touchpoints

CHART THE COURSE

Collaboratively synthesize key insights into a journey model

TELL THE STORY

Visualize a compelling story that creates empathy and understanding

USE YOUR MAP

Follow the map to new ideas and better customer experiences

The Activity
Experience mapping is a collaborative, iterative process for synthesizing and visualizing the holistic customer experience. The activity of experience mapping results in an artifact – an experience map.

The Artifact
An experience map presents, with richness and depth, key insights into your customers' complete experience. It is a tool that supports charting new courses of action.

> *You want to tell a story, but it has to be a true story.*

STEP 01

UNCOVER THE TRUTH

The value of an experience map is directly tied to the quality of insights it communicates.

Piecing together the big picture of how and why customers are interacting with different channels, touchpoints, products and services is where your journey begins. Start with the obvious, don't reinvent the wheel, talk to your customers, never rely on just one data source, and be iterative!

As a best practice, we recommend you scour your organization for existing data and insights relevant to the experiences you are attempting to map. It will help you get started, while bringing focus to your research around remaining, unanswered questions.

While doing new research takes more investment of time and money, it's a critical step in the experience mapping process, to ensure you end up with an artifact you can confidently use to support strategic thinking.

TOI VALENTINE
Experience Designer

DISCOVERY WITH RIGOR

The research and discovery process is an essential investment to ensure that your experience map captures the full customer story. Not everything you find will end up in your experience map, but the value at this stage is developing a firmer understanding of both the customer experience and the context around it.

As you work toward this understanding, look to a variety of information sources. For early stage discovery, call center logs, customer satisfaction surveys, or existing personas could be excellent resources. Your research should collect insights that add breadth and depth to the existing knowledge you uncover, and for this, talking to customers is indispensable.

Leverage your existing research and subject matter experts, but never rely on just one data source. Triangulate your problem space to get the full picture, and let the process tell you if you still have knowledge gaps. In order for others to buy into the story your map will tell, they need to know it's an authentic story built from strong insights based on real data.
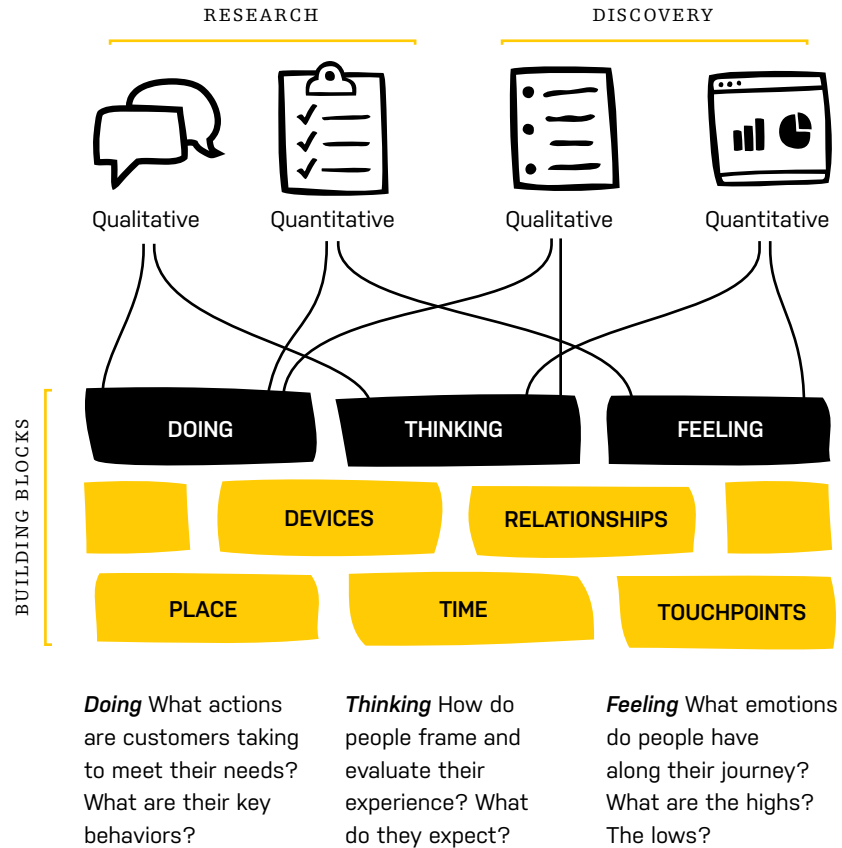
As you collect your data, don't expect it to be organized. Research and discovery is all about assembling the parts that let you build a strong foundation for your experience map.

The Building Blocks of Experience Mapping

Human experience is complex, and mostly intangible. Yet the challenge of experience mapping is to uncover, little by little, critical information about your customers' experiences. Through trial and error, we've developed a simple framework to guide the discovery and research work required in the experience mapping process. We call them building blocks. The key building blocks are Doing, Thinking, and Feeling, but to understand the full context of customer experience, we also consider Place, Time, Devices, and Relationships. Don't forget Channel and Touchpoints!

We recommend sorting your research and discovery work into building blocks by asking yourself key questions along the way. We've provided a few examples for Doing, Thinking, and Feeling to help you get started.

RESEARCH

DISCOVERY

Qualitative   Quantitative   Qualitative   Quantitative

BUILDING BLOCKS

DOING   **THINKING**   **FEELING**

DEVICES   **RELATIONSHIPS**

PLACE   **TIME**   **TOUCHPOINTS**

Doing What actions are customers taking to meet their needs? What are their key behaviors?

Thinking How do people frame and evaluate their experience? What do they expect?

Feeling What emotions do people have along their journey? What are the highs? The lows?

Quantitative Research

Many insights can be drawn from reviewing web analytics and digging deep into data sources that reveal what current customers are doing when they interact with your organization. Paired with customer satisfaction data, you can spot issues in your customer funnel or see which channels and touchpoints generally get higher or lower marks.

In addition to analyzing existing data, you may find it useful to create a survey targeted at existing and prospective customers. A survey can answer basic questions, help validate what you learn in qualitative studies, or yield insights that help prioritize the focus of your customer interviews. It may also make stakeholders feel more comfortable that the experience map is based on a large enough sample size of customer data.

We're big fans of quantitative research when it comes to experience maps. However, customer conversations and observations are your primary tool to learn, identify patterns, and capture the richness of human experience.

Qualitative Research

Having conversations with customers is a common and reliably successful method used to gain insights for an experience map. You'll want them to focus on a story that is relevant to the product, service, or problem area you are investigating. When possible, interviewing or observing customers in their natural setting will provide you with the richest data.

We recommend following a directed storytelling technique that guides the conversation with a series of open-ended questions. Your goal is to encourage the paticipant to share their story. Foster an engaging conversation, rather than pointed questions, and focus your observations on the experience mapping building blocks. Remember that the core building blocks are Doing, Thinking, and Feeling.

Try to get a sense for the customer's lasting impression of the experience, and make sure to document with rigor. Combined with the findings from your discovery process, and any additional qualitative data you've collected, your customer conversations and observations will form the backbone of the story your experience map will tell.

SKETCHNOTING

Creating sketchnotes of your customers' stories as they are recounted to you can help you create visual artifacts that engage stakeholders better than text notes.
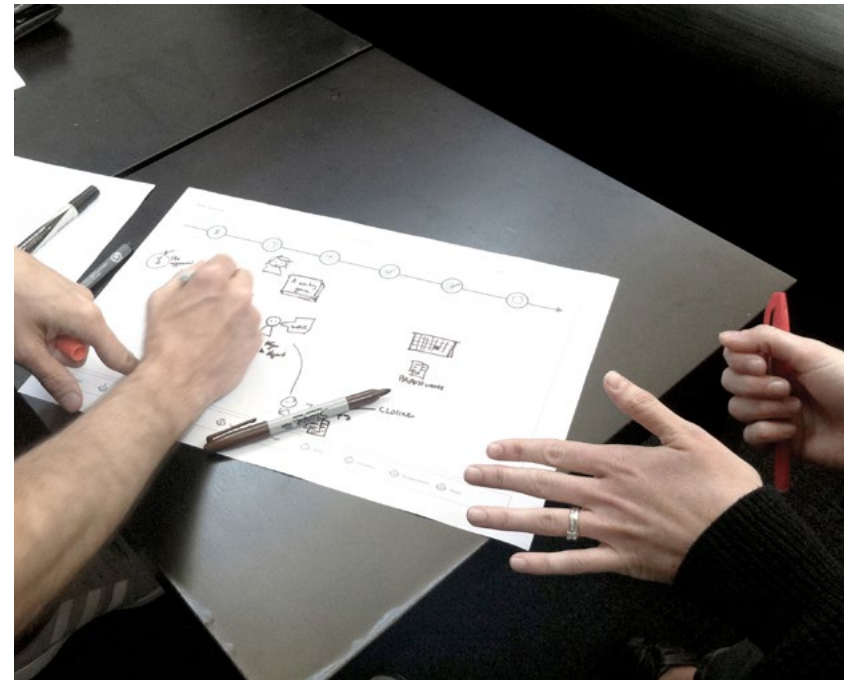
THINKING
(FRAMING)

HEARING

SEEING

FEELING
(MOTIVATIONS)

DEVICE

DOING
(BEHAVIOR)

TIME   RELATIONSHIPS   PLACE

(CONTEXT)

> *It's the activity,*
> *not the artifact.*

STEP 02
CHART THE COURSE

This is not a solo adventure.

We love making experience maps. We want to stress, however, that it is a collaborative activity. The process of experience mapping is just as important as the actual artifact, and stakeholder participation creates direct customer empathy among the people who can most affect the experiences customers have.

By this point in your experience mapping project, you should have a key group of stakeholders from across the organization who have been kept in the loop of your discovery and research. Even better, some of them have participated. The discussions experience mapping fosters, the consensus it builds, and the shared reference it creates will be critical to push your organization toward embracing new insights and taking action.
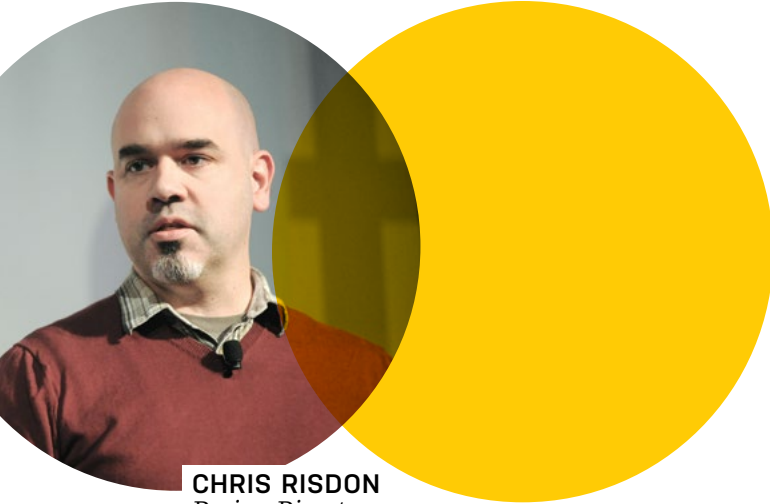
CHRIS RISDON
Design Director

THE ANATOMY OF AN EXPERIENCE MAP

A few years ago, we did a survey of publicly available experience maps and compared them to the ones we have created in our practice. While there were few quality examples and major differences in how all these maps were designed, we did see some patterns that led us to define a basic framework for designing an experience map. The components of this framework are: the lens, the customer journey model, and the takeaways.

1 *The lens* is an overriding filter through which you view the journey, such as a persona, more general experience principles, or a value proposition.

2 *The customer journey model* depicts the range of interactions customers have across channels, touchpoints, time, and space in pursuit of satisfying one or more needs.

3 *The takeaways* summarize key findings from the experience mapping process.

The moment you conceive of a plan to map the customer journey, you need to chart a course to actionable results. The takeaways signal which way you are recommending the organization head next.

Your takeaways could include:
→ Strategic insights
→ Recommendations
→ Design principles

Takeaways are typically added to the map late in the process, once you have begun to pivot from understanding the current state of your customer experience to envisioning the future state. There are different takeaways you could include, but they should answer the questions "So what?" and "What now?"

More: http://adaptivepath.com/ideas/the-anatomy-of-an-experience-map

Rail Europe Experience Map

An experience map, at its core, is a visual narrative of the customer journey. Your goal is to bring this data to life through a visually engaging infographic that is easy to comprehend. Your model should include the key building blocks – Doing, Thinking, and Feeling – but your information design should emphasize the most important dimensions of all of your customers' journeys. This could be transitions between phases, switching channels, or the location of interactions.

GUIDING PRINCIPLES EMERGE AS YOU BEGIN TO UNDERSTAND THE JOURNEY.

IDENTIFY THE STAGES OF THE TYPICAL CUSTOMER JOURNEY.

BUILDING BLOCKS PROVIDE STRUCTURE TO THE JOURNEY MODEL.

IDENTIFY KEY OPPORTUNITIES AS YOU WORK.
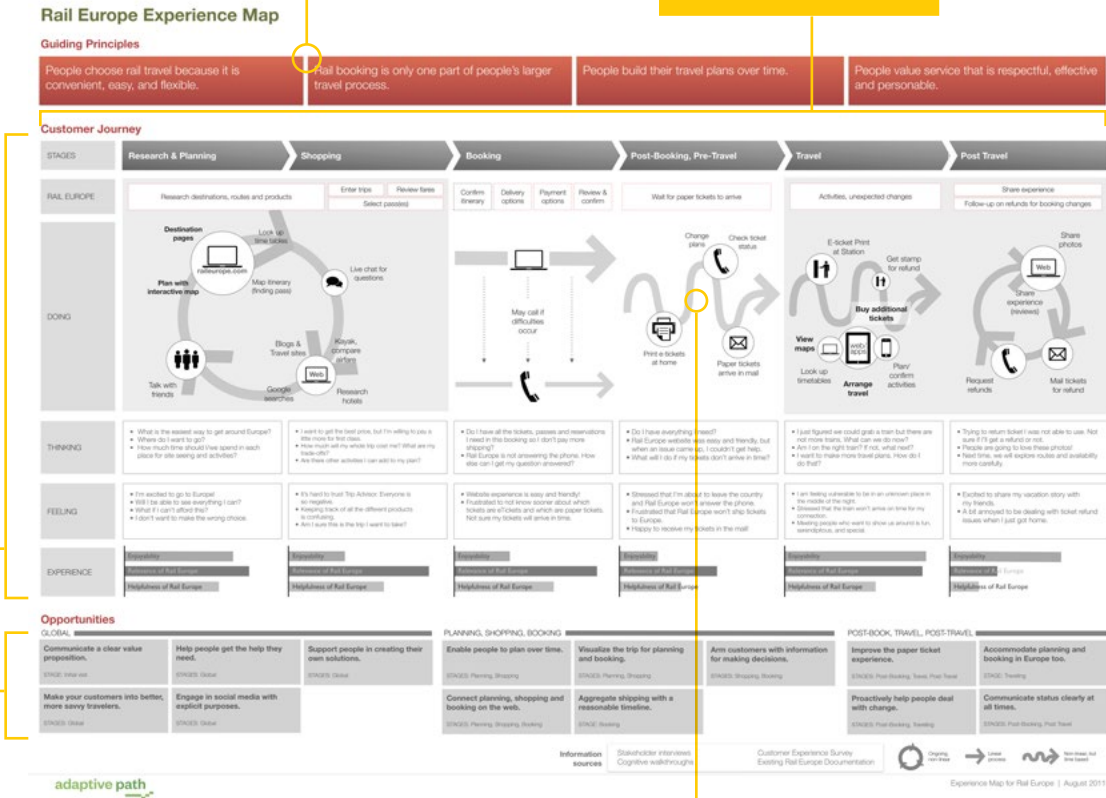
SHOW WHAT CUSTOMERS ARE DOING SO READERS CAN UNDERSTAND THE EXPERIENCE AT A GLANCE.

The Experience Mapping Workshop

You've formed a group of key stakeholders from across the organization. It's now time to get them all together and take stock of what you've learned.

An experience mapping workshop is hard work, but fun and incredibly productive. Your role as facilitator is to create a clear context, outline the goals, guide participants through the activity, and keep everyone motivated and happy. The goal of your workshop is to deconstruct your research into the building blocks and then construct a customer journey model from those pieces. You will need the right physical space, attendees, supplies, and a sufficient amount of time in order to run a successful session.

FACILITATING A SUCCESSFUL WORKSHOP

Organizational cultures vary, but a good rule of thumb is to schedule well in advance, and prepare to facilitate with great professionalism. Here are the steps we recommend:

1 *Set the context* Prepare a short presentation to catch everyone up on your discovery and research work.

2 *Organize yourselves* Divide participants into teams of four to six. Make sure each team has a balance of different roles and functions.

3 *Deconstruct* Each team will need to go through the research notes and pull out the building blocks.

4 *Stage* As the sticky notes build up, have one person from each team move them to the butcher paper, starting with Doing.

5 *Construct* From this point on, the team should start to group duplicate stickies and begin finding relationships among them.

6 *Shape* By the end of the session, each group should be moving from figuring out the customer journey to arranging the key insights into a story.

Workshop Supply List
→ Butcher paper
→ Painter's tape
→ Black sharpies
→ Sticky notes (5 or more colors)
→ A camera

Facilitation Tips
→ Keep groups to six people or fewer
→ Create handouts with clear instructions
→ Provide copies of research notes
→ Remember to take breaks
→ Share out across groups
→ Take lots of pictures

PARTNERSHIPS

MARKETING

EXHIBITS

GUEST SERVICES

USER EXPERIENCE

INFORMATION TECHNOLOGY

MEMBERSHIP

PROGRAMS

EXECUTIVE

ASSEMBLE DIVERSE TEAMS AND PERSPECTIVES

THE ROUGH MAP

After the dust has settled, you should have a pretty good grasp of your customer journey model and many insights to consider including in your experience map. Your next step is to clean up the outputs from your session. Don't let too much time go by without sharing what you have modeled.

Building a draft version of your map will take some time, because you are beginning to think through your story in its basic, outline form. Once you're done, share it with others. Make sure you can walk through it from top to bottom and end to end. Explaining your draft map aloud will help you identify what's important and what's extraneous.

Iterate in sticky-note form until you feel the basic spine of your story is there but don't make it perfect just yet. Much of your editing will happen when you move from stickies to sketching.
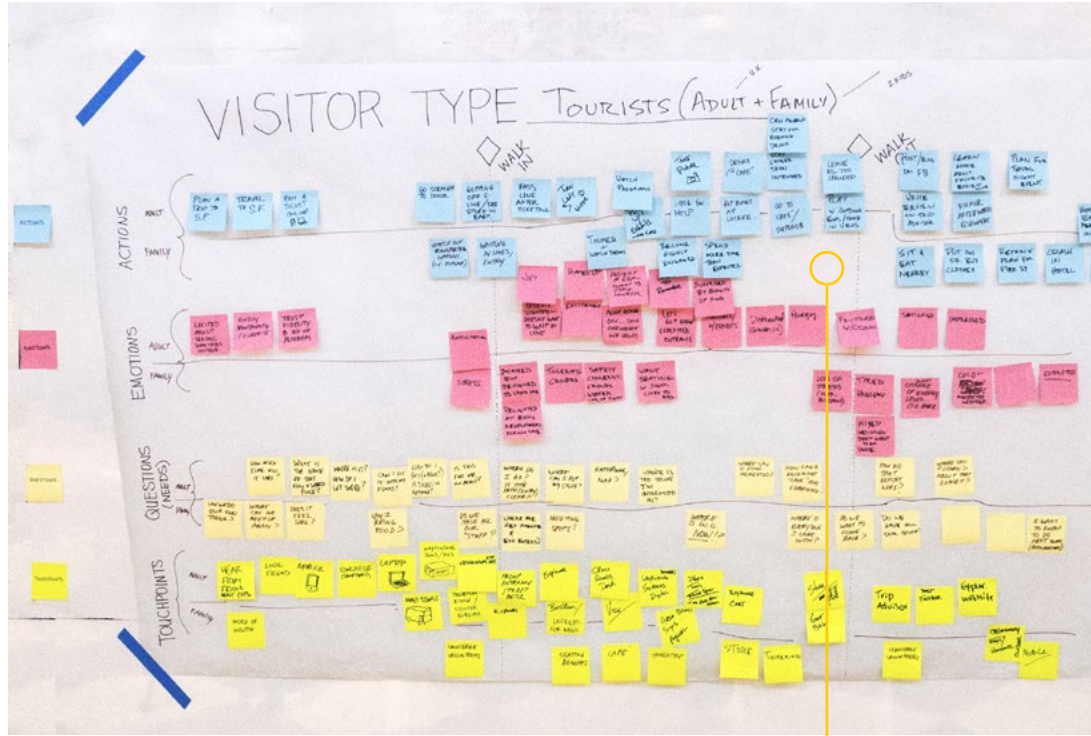
" *Design for impact.*

STEP 03
TELL THE STORY

Like any good story, there's a beginning,
a middle, and an end.

Your workshop activities and sticky note work will have resulted in a strong outline. To ensure your experience mapping project ends with a bang, not a whimper, invest time in crafting and visualizing a compelling story.

You have correlated your data, modeled the key moments of your customer journey, and identified some engaging quotes that summarize key insights. Before you begin visualizing your map, you will need to make some decisions about what will be included in your story, and what won't. This means separating important insights from nice-to-have details, while identifying the relative priorities among your building blocks. Take a moment to evaluate your work and identify the key components of the story your map will tell.
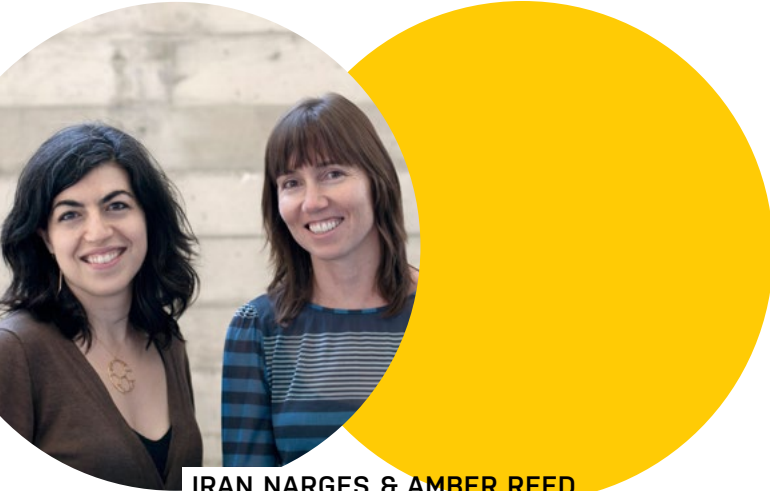
IRAN NARGES & AMBER REED
Visual Interaction Designers

MAKING IT REAL

A good experience map has a lot in common with a good poster. What makes a good poster? Above all, hierarchy.

Your map should make a strong statement immediately, but work on multiple levels. A way to determine the right hierarchy is to consider what would stand out when viewed from different distances and for different lengths of time. What would stand out after one quick glance? After one minute? After ten minutes? What should stand out from across a room, and what is OK to be discovered after closer inspection?

Turning your map into a compelling visual story means thinking through both the work you've done and the work you want to inspire. Here are some suggestions for how to reach the end of your journey successfully:

1 *Have a point of view.* Can you summarize the key points you want someone to walk away with after viewing the map? What story do you want them to tell to other people?

2 *Consider your audience.* What kind of details will help them best understand the story? Which insights are essential for them to make good strategic and design decisions?

3 *Design for impact.* What immediate next steps do you want your map to initiate? What other uses of the map are you hoping to encourage in the short-, mid-, and long-term?

Your goal is to craft a communication piece that can stand on its own, inspire new ideas, and have longevity as a strategy and design tool. In the end, every map is unique.

More: http://adaptivepath.com/ideas/exploratorium-mapping-the-experience-of-experiments

HIGHLIGHT AREAS OF GREATEST OPPORTUNITY.

CHOOSE THE STORY YOU WANT TO LEAD WITH AND USE SCALE, CONTRAST, AND COLOR TO CREATE HIERARCHY.

"YAY!"

"OH, NO!"

"CAN SOMEONE HELP ME?"

	RESEARCH		PURCHASE		USE	
THINKING	• How will this process work? • What sort of payment plans are available?	• How do I even get started?	• Is there a trial period for this product? • Would a friend like this product?	• Can I save money by buying multiple products? • Can I buy it online? Do I need to go to a store?	• Does this store have a return policy? • Why is nothing about returns or warranties written on their website?	• I'm happy about my purchase and would be willing to tell others about this service!
FEELING	• Excited, but a little anxious • Unsure • Ready to get started	• Worrying about money • Wants to consult friends and family for advice	• In the mood to spend • Convinced • Excited to own something brand new		• Happy • Relieved • Impressed	• Satisfied • Ready to refer friends and family to service
DOING	• Browsing the internet • Comparing experiences with friends and family • Doing background research	• Reading horror story reviews online • Watching commercials • Reading advertisements	• Interacting with sales staff • Sharing information about the purchase via social networks	• Driving to brick-and-mortar store to buy product	• Relaxing • Writing rave reviews online	• Using the new product on a regular basis • Refering friends and family

MAKE SURE SUPPORTING INFORMATION IS PRESENT, BUT SECONDARY.

Sketching your story

Sketching is a great tool for generating ideas and exploring approaches to visualizing your map. Your final visual should convey the essence of the story immediately, so if you can't sketch it, you may not have your story yet.

As you sketch, experiment with how the different building blocks could drive the narrative. A few examples:

1. Take Feeling and draw the emotional journey of your customers.

2. Try using your customers' actions (Doing) across time as the spine of the story.

3. Choose Place and organize your key insights by decision points within a physical context.

Then layer other building blocks and data onto that foundation. The key is to realize ideas quickly, iterate your story and visual model, and keep at it until a compelling narrative emerges.

To tell a great story, you'll need to focus, communicate hierarchy, sketch fearlessly, and try to keep it simple. When it all comes together, it's time for the final payoff: using your experience map.

EMOTIONS-BASED — 1

ACTION-BASED — 2

Key Decision Pts w/ Needs — 3
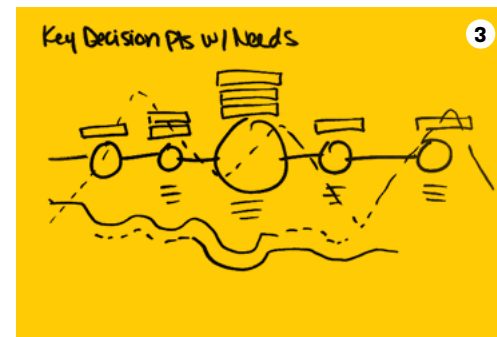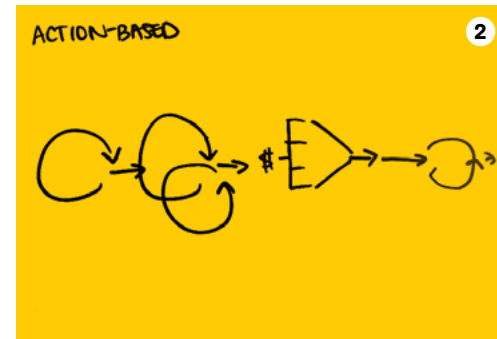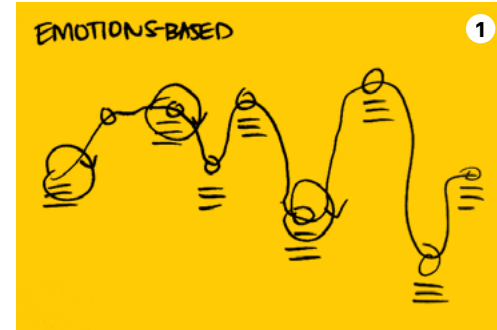
> *It's a catalyst,
> not a conclusion.*

STEP 04
USE YOUR MAP

Your journey has just begun.

Your experience map allows you to chart new courses of action to better meet the needs of your customers. It is also a symbol that can unite people from across your organization, supporting a focus on the broader customer experience.

We recommend you circulate your map far and wide. Get it into the organizational bloodstream, so it can begin to impact decision making across your organization. Present it in meetings. Print it large and post it where it will get attention. Produce a tabloid-sized version that will make its way onto the desks of executives. Package it with other insights and recommendations, such as experience principles and personas. Most importantly: use your map as a tool.

PATRICK QUATTLEBAUM
Design Director

EMBRACING COMPLEXITY

We've seen many of our clients struggle to make sense of and design for complex customer interactions that occur in a series of moments across channels, touchpoints, time, and place. In our practice, we've gravitated toward or invented approaches that help take on this challenge. We commonly use methods such as ecosystem mapping, service blueprinting, cross-channel architecture, and (of course) experience mapping.

This seems to be the heyday of experience mapping, although it is not a new concept. As organizations struggle to make sense of their omnichannel customer interactions, mapping the larger experience is increasingly seen as a smart and effective way to do so. As a collaborative activity with a tangible outcome, it helps stakeholders break free of the nearsightedness of their role, their channel, or their touchpoint to look at the organizational capabilities needed to support the holistic customer experience.

Because of course, customers don't care about channels or touchpoints. They care about achieving their goals and meeting their needs. Experience mapping places an outside-in lens on customer behavior and helps stakeholders see the world as their customers do.

Understanding the complexity of your customers' needs is an ongoing challenge, and embracing that complexity necessitates new tools and new ways of thinking. As you use your map to develop and support the future of your product and service offerings, remember that the map itself is just a part of a larger journey in modernizing your organization's approach: from reductionistic to holistic, from touchpoint to ecosystem, and from transactions to relationships.

More: *http://adaptivepath.com/ideas/value-isnt-a-subtractive-process-designing-from-the-outside-in*

Insights to Action

In our practice, we employ experience maps to apply systems thinking toward generating new ideas and concepts collaboratively with our clients. The resulting ideas better account for the relationships between customers and the broader ecosystem of channels, touchpoints, places, and other people. It helps stakeholders feel confident that the strategies derived from their work will benefit both customers and the organization.

Just as no two maps are alike, there isn't a single approach to using an experience map to generate new ideas. We often invent new, just-in-time approaches to meet the unique strategic objectives of our clients or to work within the constraints of time and budget on an initiative. Here are three examples of how an experience map can be put into practice. What these methods have in common is iterative collaboration with stakeholders. Always remember: it's not a solo journey.

Issue/Opportunity Identification and Prioritization
Using the structure provided by your map, chronicle issues or opportunities for addressing customer pain points at each stage of the customer journey. Prioritize according to business and customer value. This method helps you quickly work with stakeholders to identify high-value areas of opportunity.

Experience Storyboards
Using your map and simple storyboard templates, along with additional tools like personas or experience principles, use rapid ideation to generate stories of future experiences. This approach provides stakeholders with a forum for ideas grounded in the insights of your customer journey.

Future Experience Mapping
Using the map as a reference, define the ideal customer journey through mapping out what customers would ideally do, think, and feel as they interact with touchpoints on the way to satisfying their needs. This method encourages cross-functional collaboration to define cross-channel experience principles.

Uncharted Territories

Rigor in your research and creativity in your mapmaking should lead to the use of your experience map as a strategic tool for multiple planning and execution cycles. Yet, the static nature of your artifact will be in opposition to the changing world around it. This is to be expected. Be on the lookout for changes in marketplace, customer needs, and organizational objectives. Hopefully, your experience map has helped drive many of these changes; don't be afraid to change it as needed.

Our goal in writing this guide was simple: to get more organizations to focus on the customer journey across channels, touchpoints, time, and place. Why? Too much thinking goes into the pieces that make up experiences and not the whole. Too little work goes into looking at the big picture and designing to help customers navigate the complex world around them. Too little time is spent working across silos to support the needs of customers.

CHARTING YOUR FUTURE

If you've made it this far through our guide, you know that it takes quite a bit of time and effort to make and use an experience map. We hope the information presented here equips you for the challenge of mapping your customers' journeys. If your organization needs help pulling it off, contact us. We're happy to talk about working together.

For those of you embarking on your own mapping journey, let us know how it's going! We'd love to hear from you and see your maps. Feel free to use the #xmapping tag on Twitter, or send us photos and stories at xmapping@adaptivepath.com.

Happy mapping!

ABOUT ADAPTIVE PATH

We're experienced guides, strategic thinkers, design doers, and expert jugglers.

We make great experiences happen across touchpoints, businesses, and industries.

adaptive path