Customer Experience Journey Mapping
Workshop Toolkit

Bonus companion workshop templates to the book
Happy R.A.V.I.N.G. Customers!
by Carol Buehrens

About the book…

> " *'Happy R.A.V.I.N.G. Customers!' is a hands-on, user friendly book about delighting your customers. It provides a simple process for anyone to get started with this important work, with great real time examples, tools, templates, and checklists …* [Read more] "
>
> – Karyn Furstman, VP Agent & Customer Experience
> Safeco Insurance

"*Happy R.A.V.I.N.G. Customers!*" by Carol Buehrens (MCH Press, 2014), is packed full of strategic, tactical, and practical inspiration.

Follow the steps provided by Buehrens to focus your strategy, goals, and employee culture on what counts, your customers. Help move your organization from being process-driven to customer-driven by following the ideas and techniques in *Happy R.A.V.I.N.G. Customers!*

- Buy it now on Amazon
  amzn.com/099102740X.

- *SAVE 10%!* RavingCX blog readers, go to
  createspace.com/4628573, and
  enter discount code: **CG83XLJ6**

Learn more at happyravingcustomers.com.

Carol is available for speaking engagements, workshops and book signings. Contact Carol directly at cbuehrens@ravingcx.com and read her blog: ravingcx.com

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Customer Experience Journey Mapping Workshop Toolkit

What are your customers doing?

Before you can innovate your customer's experiences, take a step back to assess what your customers are experiencing today. Taking this reality check will help you establish your starting point and will be foundational for the rest of the R.A.V.I.N.G. Customer Process.

At the core of your reality check is to identify what your customers are doing. Do you know every encounter your customers are having with your company, including what they read, hear, and see, through interfaces and correspondences?

Your customers interact with your organization via a variety of different channels, including websites, event sites, microsites, landing pages, emails, applications, intranets, extranets, portals, blogs, marketing campaigns, online references, print materials, press releases, (take a deep breathe now because the list goes on), automated replies, customer support messages, videos, webinars, social media, storefronts, face-to-face, automated voice response systems, mobile apps, and more.

You need to wrap your arms around these interactions and put them into some kind of format that allows you to visualize them, understand, and take actionable steps to improve them. Sounds daunting? Let's take a deep breath and simplify it a little...

First – there are touchpoints.

Each time a customer interacts with your organization, it's a "point" of interaction, or where they "touch" your company. In customer experience terms, this is referred to as a "touchpoint". For example, a customer receives and reads an email you send as part of a marketing campaign. This email is a touchpoint.

Touchpoint form a trail

Your customers move from one touchpoint of your company to the next. They click on a link in an email and go to your landing page, the next touchpoint. Now, on this landing page, your customers download a PDF, another touchpoint. From one touchpoint to the next, your customers experience your company. It's like a little trail – where they go next is up to you. Sometimes their trail is a very enjoyable hike. Their path is clearly marked, the slope is gentle, and the trees are beautiful. Other times, the trail may be confusing, steep and dangerous.

The trail becomes a journey

Each of these touchpoints link together, one by one, to become a customer experience journey that, ultimately, defines your brand. You may have several journeys for your customers and segmented journeys focused on different customer types. Small businesses may have just a few journeys, and larger businesses may have dozens, more complex journeys.

The journey becomes a tool

Journey maps are strategic tools that gather all of the touchpoints into a comprehensive, high-level view. From this view, you can better understand what customers are experiencing, which will lead you to improvements of experiences and touchpoints. To inspire raving customers, each journey should be delightful, cohesive, and a positive continuation of the overall experience with your brand.

Ideas to help you get started in understanding your customer's experiences

First, collect a high-level internal view.

Gather information from your internal teams, touchpoint owners and service stakeholders. Find out what they think the customer experience journey is comprised of.

Put together a high-level map.

Use the Customer Experience Journey Mapping Workshop Toolkit "High-level Journey Map" template. Communicate this to the involved teams to reach a consensus and to establish the beginning of your project.

Drill down to the details of each touchpoint.

Ask front-line employees and (if you can) customers! Look for service gaps, inconsistencies, frustrations, and other red flags. The Customer Experience Journey Mapping Workshop Toolkit "Journey Map Details" templates are perfect for this.

Host a journey workshop.

Get everyone in the same room and show your touchpoint findings. Learn more — you'll be amazed at what might surface. Break down the silos!

Put the final "Current state" together.

Use Customer Experience Journey Mapping Workshop Toolkit templates to detail each touchpoint and string them together to form the journey. Tape it on the wall for all to see and discuss. Remember, your customer's experience isn't about a single touchpoint – it's about the journey.

Customer Experience Journey Map templates

On the following pages, you'll find the Customer Experience Journey Mapping Workshop* templates that you can use to capture your own customers journeys. The first two pages are examples of how they can be filled in.

Once you capture your own customer's journey, you can begin to look for opportunities to improve, delight and surprise them! *I hope this collection gives you a big jumpstart on your road to success!*

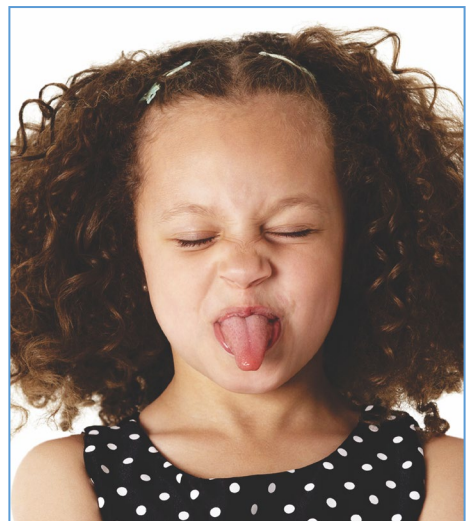**Learn how you can request this workshop for your company.*
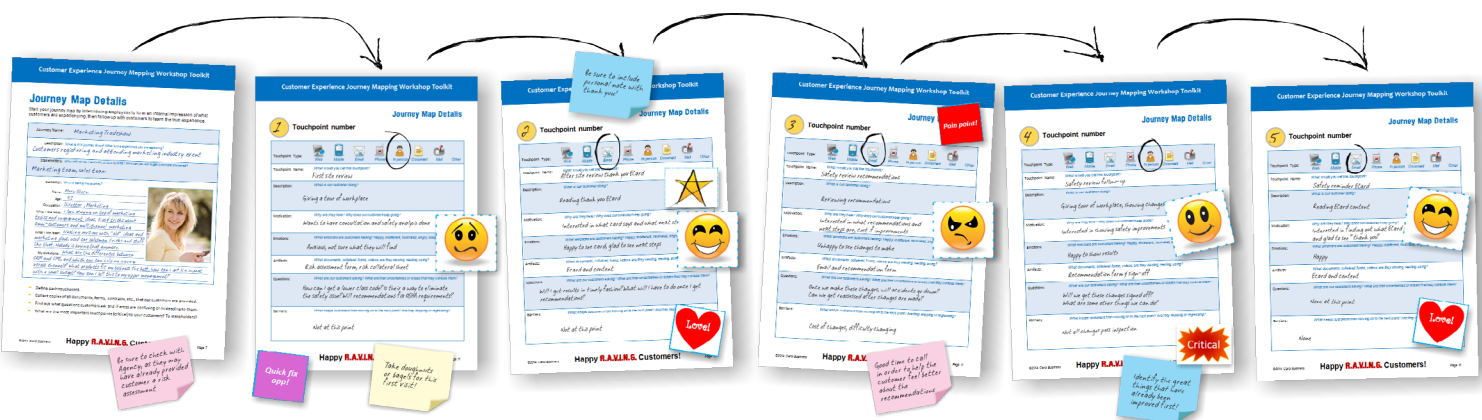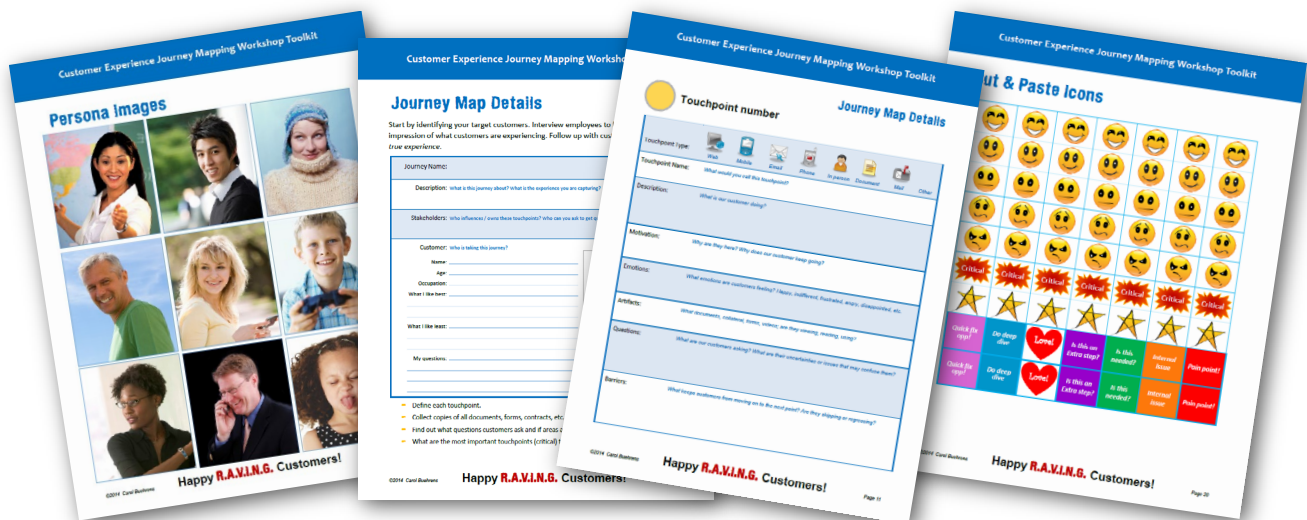
Journey Map Details – *Example only*

Start by identifying your target customer. Interview employees to form an internal impression of what customers are experiencing. Follow up with customers to learn their *true experience*.
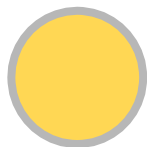
Journey Name:	*Marketing Tradeshow*

Description: What is this journey about? What is the experience you are capturing?

Customers registering and attending marketing industry event

Stakeholders: Who influences / owns these touchpoints? Who can you ask to get questions answered?

Marketing team, sales team

Customer: Who is taking this journey?

Name: *Mary Stern*

Age: *41*

Occupation: *Director, Marketing*

What I like best: *I love staying on top of marketing topics and engagement ideas, tips & tricks about Omni-customers and multichannel marketing*

What I like least: *Wasting my time with "old" ideas and marketing ploys, used car salesman tricks and stuff like that. Nobody is buying that anymore.*

My questions: *What are the differences between CRM and CMS, and which one can help me manage across channels? What products fit my business the best, how can I get big impact with a small budget? How can I sell this to my upper management?*

- Define each touchpoint.
- Collect copies of all documents, forms, contracts, etc., that our customers are provided.
- Find out what questions customers ask and if areas are confusing or misleading to them.
- What are the most important touchpoints (critical) to your customers? To stakeholders?

Journey Map Details

1 **Touchpoint number** — *Example only*

Touchpoint Type:	Web	Mobile	Email	Phone	In person	Document	Mail	Other

Touchpoint Name: *What would you call this touchpoint?*

Email invitation to trade show

Description: *What is our customer doing?*

Provides first notice of event, benefits, and beneficial case-study for multi-channel customers (kicks off conference theme)

Critical

Motivation: *Why are they here? Why does our customer keep going?*

Interested in event, wants to network with peers, learn about new products.

Emotions: *What emotions are customers feeling? Happy, indifferent, frustrated, angry, disappointed, etc.*

May be worried about price and having management approve attendance.

Artifacts: *What documents, collateral, forms, videos; are they viewing, reading, using?*

White paper case-study for multi-channel customers.

Questions: *What are our customers asking? What are their uncertainties or issues that may confuse them?*

Can I get more information? Can I secure early-bird price without completing registration, while I get approvals from management?

Barriers: *What keeps customers from moving on to the next point? Are they skipping or regressing?*

Scheduling conflicts, takes a long time to get approval, price is too high, busy morning and not enough time to read email

Journey Map Details

Start by identifying your target customer. Interview employees to form an internal impression of what customers are experiencing. Follow up with customers to learn their *true experience*.

Journey Name:	
Description:	What is this journey about? What is the experience you are capturing?
Stakeholders:	Who influences / owns these touchpoints? Who can you ask to get questions answered?

Customer: Who is taking this journey?

Name: _____

Age: _____

Occupation: _____

What I like best: _____

_____

_____

What I like least: _____

_____

_____

My questions: _____

_____

_____

_____

Place persona image here

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Persona images

Happy R.A.V.I.N.G. Customers!

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Emotions:	*What emotions are customers feeling? Happy, indifferent, frustrated, angry, disappointed, etc.*							
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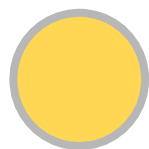| Touchpoint Name:	*What would you call this touchpoint?*
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Cut & Paste Icons

Critical	Critical	Critical	Critical	Critical	Critical	Critical

|						
Quick fix opp!	*Do deep dive*	*Love!*	*Is this an Extra step?*	*Is this needed?*	*Internal issue*	*Pain point!*
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Thank you! I hope you find this resource helpful. As a way to say "thanks" to my friends and followers, we've set up a discount code for the book, below. Enjoy!

- *Carol Buehrens*

SAVE 10%! createspace.com/4628573, enter discount code: **CG83XLJ6**

You can also purchase on Amazon
amzn.com/099102740X
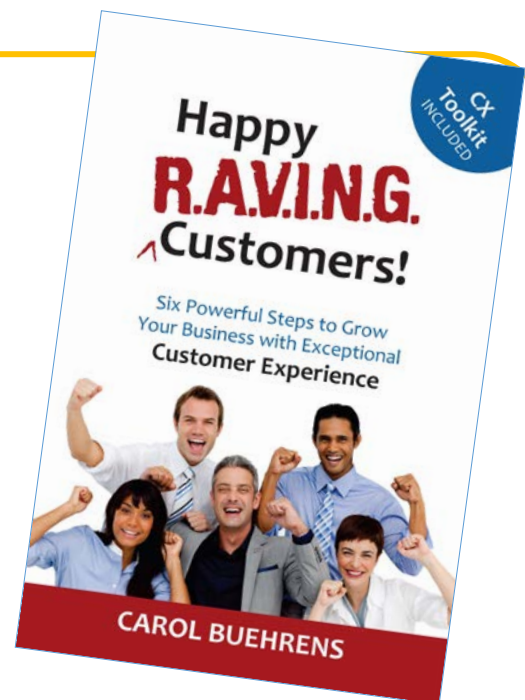
To request this workshop for your company

Contact Carol directly at cbuehrens@ravingcx.com. Customer Experience Workshops can be customized for your company, and include:

- What's Your Plan? Customer Experience Strategy, Goals and Objectives
- Customer Experience Journey Mapping – Your Road to Success
- Who's Your Customer? Developing Customer Experience Personas
- Wave Your Magic Wand – Innovate Your Customer's Experience
- Creating Customer Advocacy at Your Company

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For additional information, see the book site, happyravingcustomers.com