Journey Mapping – Designing your experience

Everything you need to take the 2nd step in Journey Mapping
This presentation is designed for a Journey Mapping Facilitator and/or event sponsor that have already experienced a Journey Mapping “Learn” event and want to move to the next step by implementing a “Design” session.

We seek to provide you with tools and techniques you might need to keep moving forward with your customer centered transformation.

If you have any questions, the team at Oracle is eager to help. designingcx.com
What’s in this presentation?

1. Goals & overview of a Journey Mapping “Design” session
2. Preparing for your session
3. Running your session
4. Sample materials: Personas, Metrics, etc.
GOALS & OVERVIEW
What are the Goals?

• **Primary Goal**: Experience how Journey Mapping will work for your customers & your business
• Expand the reach & prepare internal teams to apply CXJM in your day to day business
• Identify projects that are worth pursuing
CXJM Starts Customer Centric Transformations

Journey Mapping can be your on ramp to creating a culture of customer centered transformation

1. **Learn CXJM**
   - Generic Scenario to learn basic methodology

2. **Design CXJM**
   - Customer persona used on a portion of your lifecycle

3. **Execute**
   - Disciplined & Validated Test Methodology

The methodology should be learned before first before using it on your business to design new experiences, and then executing it with validated data and insights.
CXJM Starts Customer Centric Transformations

**Learn CXJM**
- Identify Need
- Generic Scenario to learn basic methodology

**Design CXJM**
- Share
- Customer persona used on a portion of your lifecycle

**Execute**
- Teach
- Disciplined & Validated Test Methodology

**Recommend**

Using Journey Mapping to Design new experiences is a critical step before execution as part of customer centric transformation efforts.
The 3 Key Differences for the “Design” step

It’s the same process as the Jen/ZoomGo scenario, with 3 changes:

1) Use or build a persona, review brand attributes, document key trends

2) Create a custom behavior line that will be the basis for your map

3) Develop your own impact metrics
2 PREPARING FOR YOUR SESSION

1 Goals & overview

3 Running your session

4 Sample materials
Begin Preparation
Start 2-3 weeks before your session

2-3 Weeks Prior
✓ Build persona(s)
✓ Select portions of the lifecycle for each board
✓ Identify 12-24 participants
✓ Enlist coaches*
✓ Order Materials

1 Week Prior
✓ Create scaffolding for action line, impact metrics, brand
✓ Finalize your agenda & time blocking
✓ Customize the presentation PowerPoint deck

1 Day Prior
✓ Print blank canvas & hypothesis sheets
✓ Meet with coaches for final pre-flight check
✓ Set up room & materials

* Oracle may be able to help provide coaches if there aren’t enough trained coaches at your organization
Start By Creating Persona(s)

...a representation of the goals, attitudes, and behaviors of a specific group of users that may engage and relate to a brand (product or service) in a similar way.

Designing for meaningful experiences requires FOCUS. If you try to delight everyone, you will delight no one.
Market Segments & Personas

Journey maps are based on a persona, not a segment

Species:

- **Persona**
  - Research-driven
  - Used to design experiences
  - Representative of an individual customer
  - Relatable & real
  - May belong to one of your segments
  - Can be described in detail

- **Segment**
  - Clearly identified groupings that can be measured
  - Emphasis on analytics / BI
  - Used to execute & measure
  - Marketing accessibility (you can reach them)
  - Aggregated, impersonal description of a group

**Humanize & Connect**

**Analyze & Size an opportunity**
## Define Your Persona

### Profile
- **Location**: Where does he/she live & work?
- **Professional**: What is their job? If B2B, add detail on role in decision making, influence, responsibilities
- **Education**: Level and kind of schooling completed

### Behaviors
- **Usage & loyalty**: Type of usage, online stats, how they engage with us, behavior, usage rate, how loyal
- **Attitude & Beliefs**: What does he/she think of us? The category?
- **Lifestyle**: Social group, status, openness to innovation, media habits, proficiency
- **Interests & Hobbies**: What does he/she do in their free time, how important is that to them?

### Needs
- **Usage Goals**: What is she/he looking to accomplish? How important is it to them?
- **Emotional Goals / Quote**: What is at stake emotionally? What would a quote in their words say?
- **Motivations & Triggers**: What motivates him/her, what makes them tick?

(See samples in section 4 and on the following slide)
**Sample Persona**

<table>
<thead>
<tr>
<th><strong>Location</strong></th>
<th>Los Angeles, CA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Professional</strong></td>
<td>College Sophomore, studying psychology, planning to attain her masters degree</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td>In 2nd year of college</td>
</tr>
<tr>
<td><strong>Usage &amp; loyalty</strong></td>
<td>Mobile first for all her banking, ATM second, rarely uses a PC/Mac to access her account, only went into a branch to open her account. Deposits check(s) via mobile app once per week.</td>
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<tr>
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<td>She cares about her friends, family, and wants to give back</td>
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**Lindsay**
Age: 20
Student
Select a Portion of the Lifecycle

This is the foundation on which each behavior line is built

- Select a portion of the lifecycle that relates well to the persona(s) you have selected
- Aim for enough detail for roughly 15-25 steps on the behavior line (so it will span an 8’ board)
- Scenarios can span more than one board but our recommendation is to have a discrete scenario on each board

Diagram:

- **BUY**: Market & Sell
- **OWN**: Support & Serve
- Purchase Scenario
- Support Scenario
Preparation Options

The extent of your preparation will impact your mapping activity

Assumptive Pre-work

Create a simple assumptive persona

Create a scaffold of behavior lines after creating a quick assumptive behavior line

Research Anchored Pre-work

Deep research-driven personas

Build full behavior lines in advance with input from multiple parties

Both approaches can work well
We recommend that you frame out behavior lines for all your boards, then reduce them to 4-5 steps that provide a scaffold for the teams to have as a starting point:

- Provide 1st & last step, plus a few in the middle for each board

- Write them out on green post-its® ahead of time
Preparing Impact Metrics
Impact Metrics lead to results, not just indicate activity

Bottom line
results $
Preparing Impact Metrics

Impact Metrics lead to results, not just indicate activity

Unclear connection to measurable financial impact*

Bottom line results $

* Some advanced organizations have measured the financial impact for a 1% gain in their NPS metric. This is rare and organizations usually cannot quantify the link between KPIs and financial performance.
Preparing Impact Metrics
Impact Metrics lead to results, not just indicate activity

KPI
INCREASE CUSTOMER SATISFACTION

INCREASE REORDER RATE

Unclear connection to measurable financial impact*

Direct connection to measurable impact

Bottom line results $

* Some advanced organizations have measured the financial impact for a 1% gain in their NPS metric. This is rare and organizations usually cannot quantify the link between KPIs and financial performance.
Examples of Impact Metrics
Acquisition, Retention, & Efficiency gains

- There’s a direct connection between these impact metrics and the financial bottom line

<table>
<thead>
<tr>
<th>Acquisition</th>
<th>Customer</th>
<th>Improved</th>
<th>Operational</th>
</tr>
</thead>
<tbody>
<tr>
<td>Costs</td>
<td>Retention</td>
<td>Efficiency</td>
<td>Efficiency</td>
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</tbody>
</table>
Examples of Impact Metrics
Acquisition, Retention, & Efficiency gains

• There’s a direct connection between these impact metrics and the financial bottom line

<table>
<thead>
<tr>
<th>INCREASE REFERRAL RATE</th>
</tr>
</thead>
</table>

| Acquisition Costs | Customer Retention | Improved Efficiency | Operational Efficiency |
Examples of Impact Metrics
Acquisition, Retention, & Efficiency gains

- There’s a direct connection between these impact metrics and the financial bottom line

<table>
<thead>
<tr>
<th>Acquisition Costs</th>
<th>Customer Retention</th>
<th>Improved Efficiency</th>
<th>Operational Efficiency</th>
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</thead>
<tbody>
<tr>
<td>INCREASE REFFERAL RATE</td>
<td>INCREASED REORDER %</td>
<td></td>
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</tbody>
</table>
Examples of Impact Metrics

Acquisition, Retention, & Efficiency gains

- There’s a direct connection between these impact metrics and the financial bottom line

### Improvement Gains

- **Increasing Referral Rate**
- **Increased Reorder %**
- **Decrease Defect Rate by 2%**

#### Impact Categories:

- **Acquisition Costs**
- **Customer Retention**
- **Improved Efficiency**
- **Operational Efficiency**
Examples of Impact Metrics

Acquisition, Retention, & Efficiency gains

- There’s a direct connection between these impact metrics and the financial bottom line

- INCREASE REFFERAL RATE
- INCREASED REORDER %
- DECREASE DEFECT RATE BY 2%
- INCREASE FIRST CALL RESOLUTION

Acquisition Costs
Customer Retention
Improved Efficiency
Operational Efficiency
Attributes of Desirable Experiences
How does your brand line up with these attributes?

**USEFUL** (function)
Examples:
- Features
- Price
- Selection

**USEABLE** (effort)
Examples:
- Convenient
- Easy
- Intuitive

**MEANINGFUL** (emotion)
Examples:
- Stylish
- Reputable
- Trusted

What your product/service offers customers functionally
How easy is it to engage your organization and offerings
How meaningful experiences are at an emotional level
## Document Your Brand Attributes

Describe what your brand stands for in these 3 areas

<table>
<thead>
<tr>
<th>Premium priced</th>
<th>Intuitive</th>
<th>Trusted</th>
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</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

What your product/service offers customers functionally

How easy is it to engage your organization and offerings

How meaningful experiences are at an emotional level

### USEFUL
(function)

### USEABLE
(effort)

### MEANINGFUL
(emotion)
Selecting Workshop Participants & Coaches

Best Practice Suggestions

- Minimum of 12 to 18 participants from a variety of departments
- Use 3 Posters or 3 Boards with 4-6 participants per board
- Have 1 experienced coach to lead each board

Tip: Journey Mapping “Design” sessions work best when individuals across departmental silos are involved and can build customer empathy together
Getting Materials Ready
You’ll need the same kit as Jen & Zoomgo, with a few additions

Room Setup Option 1

4’ X 8’ ½” thick foam core boards (1.4M x 2.4M x 1.3cm thick)

Supplies

Post-its®, pens, clips, voting stickers, string

Materials

Blank Hypothesis Sheets

Our recommendation is to use foam core boards or other large physical media for the activity for 2 reasons:
1) experience has shown better results when teams can work across an 8’ surface to build their maps
2) sharing the story with others is enabled with boards, but often roll up maps are stored on a shelf, have less enduring impact
Getting Materials Ready

You’ll need the same kit as Jen & Zoomgo, with a few additions:

**Room Setup Option 2**
- 4' x 8' roll-up posters, laminated
- 3M adhesive for mounting on wall

**Supplies**
- Post-its®, pens, clips, voting stickers, string

**Materials**
- Blank Hypothesis Sheets
- CX Design Canvas

Here’s a link to the list of all the materials you’ll need: [http://designingcx.com/cx-journey-mapping-toolkit/](http://designingcx.com/cx-journey-mapping-toolkit/)

Our recommendation is to use foam core boards or Roll up posters for the activity for 2 reasons:
1) experience has shown better results when teams can work across an 8’ surface to build their maps
2) sharing the story with others is enabled with boards, but often roll up maps are stored on a shelf, have less enduring impact
2 Getting Materials Ready
Alternate Working Surface – 3rd Choice

If it is difficult to find and purchase foam core boards or print poasters an alternate surface for journey mapping is a roll of butcher paper and masking tape.

You’ll need flat sections of wall that are 8 feet or more for each map you’re planning to create. The printed Jen / ZoomGo behavior lines are each 8 feet in length.

The question of whether to just use a whiteboard with post-it® notes sometimes comes up. We don’t recommend this approach since you’ll be unable to preserve the work you’ve done after your journey mapping session.
Plan Your Day

High-level and detailed agendas are required

- Set a high level agenda for participants
  - Begin with Jen/ZoomGo “Learn” session to teach methodology
  - Follow with your custom “Try” session using your persona & scenario

- Use the Excel tool to build a minute by minute time blocking so the facilitator can keep the group on track

1 1/2 Day Sample Agenda

<table>
<thead>
<tr>
<th>CX Journey Mapping Workshop</th>
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</thead>
<tbody>
<tr>
<td><strong>Time</strong></td>
</tr>
<tr>
<td><strong>DAY 1</strong></td>
</tr>
<tr>
<td>9:00 - 9:20</td>
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<td>9:20 - 10:30</td>
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<tr>
<td>10:30 - 10:40</td>
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<tr>
<td>10:40 - 11:15</td>
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<tr>
<td>11:15 - 12:00</td>
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<tr>
<td>12:00 - 12:45</td>
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<tr>
<td>12:45 - 1:30</td>
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<tr>
<td>1:30 - 2:00</td>
</tr>
<tr>
<td>2:00 - 2:10</td>
</tr>
<tr>
<td>2:10 - 3:30</td>
</tr>
<tr>
<td>3:30 - 4:30</td>
</tr>
</tbody>
</table>

Our recommendation is to ‘Learn’ the methodology on day 1, and devote day 2 to Try it on your business
1) It takes time to both learn and integrate a new methodology. Teams start day 2 refreshed and ready
2) You’ll have a greater chance of developing actionable innovations if you have adequate time in a Try session
Plan Your Day - options
Alternate time schedules for compressed Design sessions

Running a 1-day session will give participants a taste for journey mapping, but is less likely to yield actionable projects and will not fully prepare them to use journey mapping in their day to day work.
Customize The PowerPoint Slides

- Customize our standard PPT presentation for your scenarios

- The areas we suggest you customize are:
  - Lifecycle focus areas (slide 5)
  - Personas (slide 6)
  - Board #1-3 scaffolding (slides 7-12)
  - Slides that have post-its with examples:
    - On-stage people & things (slide 16)
    - Back stage people & things (19)
    - Attitudes (18, 22, 23)
    - Impact metrics (25)
    - Needs (28, 33)
    - Roles & Processes (30, 34)
    - Innovations (38, 40)
    - New Attitudes & Behaviors (42)
  - CX Design Canvas – both the customer and brand sections on the left side need to be filled in with your brand information and the persona you’re working with

- “Design” PowerPoint Slides: www.designingcx.com
Preparation Checklist
Make sure you are ready to go…

- Create persona(s)
- Select portions of the lifecycle for each board
- Create scaffolding for action line (or create complete line)
- Select Impact Metrics
- Document Brand Attributes
- Select 12-18 participants
- Enlist 3 coaches
- Get materials ready (Boards/Posters, supplies, materials)
- Finalize your agenda & time blocking
- Customize the presentation slides
- Meet with your coaches beforehand
3  RUNNING YOUR SESSION
Kicking It Off
Setting expectations for the day

- Lay the foundation by explaining why you’re teaching the methodology first, then trying it on your business next
- Explain the overall goal of driving customer-centric transformation and the Learn, Try, Apply model
- Select teams for the boards that might not usually work together
- Try to keep the energy level up, and make it fun for the participants
Run The “Learn” Jen & ZoomGo Story

Focus on helping everyone get solid on the methodology

• Teach the methodology & encourage customer empathy
Run the “Design” Activity

Prove that Journey Mapping will work on your business

- Use your customized PPT and the Excel time blocking to guide you
- Creating the behavior line will be the most important and difficult part of the day
- Keep things moving, work to keep things in synch across the 3 groups
Behavior Line Group Technique

How to get input from the entire room

When 3 teams are working on 3 boards it is often worthwhile to conduct a read out once behavior lines have been created. Since there is likely specific expertise and insight spread around the room, it is wise to allow others to make suggestions on what behaviors might have been omitted as part of the customer’s journey.

1. Each team completes 25-step behavior line
2. First team reads their persona description, then reads out the behavior line steps
3. The participants from other teams each write behaviors that they think might fit in the story on green post-its®, and place them beneath the line
4. Repeat the process for the next 2 boards
5. Teams review the input they received and decide whether to incorporate it on their board
Wrapping Up

Solicit feedback, set next steps for action

• Sample questions to ask:
  – Did we discover that Journey Mapping will work on our business?
  – Were any innovations/projects identified that we should pursue further?
  – Could you see using Journey Mapping day-to-day?

• Next Steps – What Now??
  – We suggest you hold a meeting at the conclusion of the event with key stakeholders to discuss:
    • Any innovations or projects that were identified and should be worked on
    • If and how to move to the “Apply” step of CX transformation
Goals & overview
Preparing for your session
Running your session

SAMPLE MATERIALS
**Sample Persona**

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<tbody>
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Lindsay  
**Age:** 20  
**Student**
Meet Gail

Travel Agent on Apollo for 25 years
She is very comfortable with the green screen, but a little suspicious of all these new point and click applications. She believes she can do anything faster in a green screen environment and the help profiles available there. She is not so comfortable with Web tools and the online knowledge base. With her years of experience, she believes she knows more about the GDS than anyone else in her office or in fact the people on the help desk. She has a very established client base of leisure travelers, and is proud that many of them have come to her to book all of their travel for years, and trust her with arranging travel for their most memorable occasions.
Sample Persona (B2B)

Meet Paul

Moving his business to Worldspan

Paul is the dynamic owner/manager of a very large and growing corporate-focused travel agency with a strong web presence. After years on another GDS, he has decided to move his business to Worldspan. Paul has built his reputation providing his customers the best combination of the convenience of booking on the web and/or contacting an agent by phone, as well as very competitive rates. He believes that his success is built on being able to provide exceptional service. He is well connected in his community, where his personal reputation and business reputation are intertwined.
DISCUSSION - Business Metrics

Need Phase – Organization’s Perspective:
“When a customer has a need for a product or service, are they aware of our brand?”

Example KPI

Example Financial Measure
DISCUSSION - Business Metrics

Need Phase – Organization’s Perspective:
“When a customer has a need for a product or service, are they aware of our brand?”

Example KPI
ADVERTISING
REACH AND FREQUENCY

Example Financial Measure
DISCUSSION - Business Metrics

Need Phase – Organization’s Perspective:
"When a customer has a need for a product or service, are they aware of our brand?"

Example KPI
ADVERTISING
REACH AND FREQUENCY

Example Financial Measure
RETURN ON ADVERTISING SPEND
Research Phase – Organization’s Perspective: “When a customer begins their research, do they know our products or services could meet their needs?”
ACTIVITY – Business Metrics

Research Phase – Organization’s Perspective: “When a customer begins their research, do they know our products or services could meet their needs?”

Example KPI

INTERACTION RATE

Example Financial Measure
ACTIVITY – Business Metrics

Research Phase – Organization’s Perspective:
“When a customer begins their research, do they know our products or services could meet their needs?”

Example KPI
INTERACTION RATE

Example Financial Measure
NUMBER OF OPPORTUNITIES
SELECT Phase – Organization’s Perspective:
“What did our customer select, and how does it contribute to a financial benefit for us?”

Example KPI

Example Financial Measure
ACTIVITY – Business Metrics

Select Phase – Organization’s Perspective:
“What did our customer select, and how does it contribute to a financial benefit for us?”

- Select
- Purchase
- Recommend
- Own
- Maintain

Example KPI

Example Financial Measure
ACTIVITY – Business Metrics

Select Phase – Organization’s Perspective: “What did our customer select, and how does it contribute to a financial benefit for us?”

Example KPI

UP-SELL / CROSS-SELL RATE

Example Financial Measure

AVERAGE ORDER SIZE
Purchase Phase – Organization’s Perspective: “How effective were we at getting our customers to convert?”

Example KPI

Example Financial Measure
ACTIVITY – Business Metrics

Purchase Phase – Organization’s Perspective: “How effective were we at getting our customers to convert?”

Example KPI: CART ABANDONMENT RATE

Example Financial Measure
ACTIVITY – Business Metrics

Purchase Phase – Organization’s Perspective:
“How effective were we at getting our customers to convert?”

Example KPI
CART ABANDONMENT RATE

Example Financial Measure
REVENUE PER TRANSACTION
ACTIVITY – Business Metrics

Receive Phase – Organization’s Perspective:
“How efficiently and effectively did we deliver our product or service?”

Example KPI

Example Financial Measure
ACTIVITY – Business Metrics

Receive Phase – Organization’s Perspective:
“How efficiently and effectively did we deliver our product or service?”

Example KPI
AVERAGE DELIVERY TIME

Example Financial Measure
ACTIVITY – Business Metrics

Receive Phase – Organization’s Perspective:
“How efficiently and effectively did we deliver our product or service?”

Example KPI
AVERAGE DELIVERY TIME

Example Financial Measure
DELIVERY COST PER TRANSACTION
ACTIVITY – Business Metrics

Use Phase – Organization’s Perspective:
“How are our customers using our products or services?”

Example KPI
Example Financial Measure
ACTIVITY – Business Metrics

Use Phase – Organization’s Perspective:
“How are our customers using our products or services?”

Example KPI
RATE OF ADOPTION

Example Financial Measure
Use Phase – Organization’s Perspective: 
“How are our customers using our products or services?”

Example KPI

RATE OF ADOPTION

Example Financial Measure

VOLUME OVER TIME
Maintain Phase – Organization’s Perspective:
“Are we making it easy and effortless for customers to resolve their issues?”

Example KPI

Example Financial Measure
ACTIVITY – Business Metrics

Maintain Phase – Organization’s Perspective:
"Are we making it easy and effortless for customers to resolve their issues?"

Example KPI
SELF-SERVICE RATE

Example Financial Measure
ACTIVITY – Business Metrics

Maintain Phase – Organization’s Perspective:
“Are we making it easy and effortless for customers to resolve their issues?”

Example KPI
SELF-SERVICE RATE

Example Financial Measure
COST PER CHANNEL
Recommend Phase – Organization’s Perspective:
“How likely is it our customers will become advocates of our brand?”

Example KPI

Example Financial Measure
ACTIVITY – Business Metrics

Recommend Phase – Organization’s Perspective:
“How likely is it our customers will become advocates of our brand?”

Example KPI
REVENUE PER REFERRED CUSTOMER

Example Financial Measure
ACTIVITY – Business Metrics

Recommend Phase – Organization’s Perspective:
“How likely is it our customers will become advocates of our brand?”

Example KPI
REVENUE PER REFERRED CUSTOMER

Example Financial Measure
CUSTOMER CHURN RATE
CX Journey Mapping Toolkit

On this page, you'll find all the CX Journey Mapping tools, resources, and guides that we're sharing — everything you need to kick-start your team towards a powerful approach for customer-centered actions and CX innovation.

Setup
1. Journey Mapping Supplies — supply list (pdf) [original blog post]
2. Supplies Checklist — checklist (pdf) [original blog post]
3. Journey mapping mood starters — mats kit (pdf) [original blog post]

Resources
1. CX Journey mapping states architecture story — scenario (pdf) [original blog post]
2. Journey Mapping Storyline — storyline (pdf) [original blog post]
4. CX Design Canvas — journey canvas (pdf), blank canvas (pdf) [original blog post]
5. CX Design Hypothesis — hypothesis (pdf) [original blog post]
6. Table Top CX Journey Map — blank template (pdf) [original blog post]