

CXJM Coaching Guidelines

The CX Journey Mapping Coach’s primary role is to:

Engage - introduce yourself to everyone in the group. Create a team mentality. Manage group dynamics; some people may try to dominate, others sit back and observe. Encourage everyone to participate equally.

Equip - provide group with appropriate materials at each step of activity.

Encourage - provide positive feedback and encouragement. Fostering a positive, upbeat attitude keeps participation levels high.

Explain - answer questions. When in doubt, ask the Area Coach (if available) or the Facilitator for clarification. If the group struggles to begin a step, post the first note yourself as an example.

General Tips

- When learning this new skill, remind them to focus on the method, and not the answers/results. The approach is what is meaningful.
- Hand out materials (sticky notes, stickers) only **after** the Facilitator has finished explaining the step. Handing out materials while the Facilitator is speaking distracts attention away from learning the instructions.
- Assumptions are part of the process when not working on your own business. There are no wrong answers, so if there is any doubt whether something is relevant or not.....go ahead and put it on the map.
- Help direct group’s attention back to Facilitator after each step. Side conversations inevitably occur; try to focus attention on Facilitator’s instructions.
- Encourage lighthearted interaction. Journey Mapping is a fun activity and should be treated as such. Highlight clever entries. Push for entertaining and animated attitude/emotion sticky notes.

Things to be mindful of during each step of the activity

Activity Phase	Step	Coaching Tips
Transition from introduction	Break into groups	<ul style="list-style-type: none"> • Introduce yourself to group members
Create Initial Map	On Stage Experience	<ul style="list-style-type: none"> • Mappers may be hesitant to place that first note. Place the first one for them, as a guide. They’ll get the hang of it quickly. • Congratulate them, give them praise, after completing first step. “See, it’s easy!”
	Attitudes & Emotions	<ul style="list-style-type: none"> • “Put yourself in the persona’s mindset. Channel your inner customer.”

		<ul style="list-style-type: none"> • Encourage people to be animated.
	Back Stage Support	<ul style="list-style-type: none"> • “If this isn’t your own business, making assumptions on backend systems is fine.” • “What are the things/systems that the onstage people use? Who are the people that support the onstage things?”
Evaluate	Evaluate Attitudes	<ul style="list-style-type: none"> • Hand out 3 green stickers & 3 red stickers to each person at the board. Then let them place stickers all at once. • “If you step back, the colors will make it obvious where the high/low points are.”
	Prioritize Focus	<ul style="list-style-type: none"> • “There are many right answers, and no wrong answers. Important part is that you’re deciding as a group.” • Could select either an Issue (red stickers) or an Opportunity (green stickers). Both are worth pursuing.
	Determine Impact	<ul style="list-style-type: none"> • Consider what business value could be realized at your selected moment • Select only ONE of the predefined metrics, or create ONE new.
	Readout	<ul style="list-style-type: none"> • Be sure to applaud and give positive encouragement following readout.
Explore	Clarify Needs & Drivers	<ul style="list-style-type: none"> • Map two levels of needs: <ul style="list-style-type: none"> ○ (1) Moment Need – write 1 as a team ○ (2) Emotional Need – write individually • Mappers quickly come up with Moment Need; often struggle with Emotional Needs. • Asking “Why is that Moment Need important to the customer?” helps bring out the Emotional Needs
	Star the most interesting emotional need	<ul style="list-style-type: none"> • “Which emotional needs weren’t met?” • Draw a star on the need which is most interesting or impactful for you to innovate against
	Examine Capabilities (Roles & Processes)	<ul style="list-style-type: none"> • Start by selecting one Person, and one Thing, either on or backstage. If you have more time, do additional ones. • Do this step as a group with one scribe

		<ul style="list-style-type: none"> Encourage group to define the intended role/process of the Person/Thing. Don't judge whether it performed its role properly, yet.
	Evaluate Issues or Opportunities	<ul style="list-style-type: none"> "Were the (green) roles & processes of the People/Things" performed properly to meet the customer's needs?" Identifying systemic issues worth addressing.
Brainstorm	Determine Desired Transformation	<ul style="list-style-type: none"> As a result of new Innovation, what is customer's new attitude and behavior? Place a yellow (attitude) and green (behavior) in boxes on CX Canvas
	Build CX Design Canvas	<ul style="list-style-type: none"> "The boards are becoming busy, full of detail. Let's simplify and narrow focus to frame a specific issue/opportunity." Place sticky notes in the dark outlined boxes
	Brainstorm Innovation	<ul style="list-style-type: none"> "Think freely...don't be concerned with budget or technological constraints." Remind mappers to reference Canvas, not to lose focus of the specific issue/opportunity Group/cluster similar ideas together; helps organize similar ideas for the selection step.
Design New Experiences	Reality Check - Consider Brand Attributes	<ul style="list-style-type: none"> "We just let you brainstorm freely. Before you select a specific idea to pursue, make sure you don't lose sight of your brand attributes." Don't innovate in a direction that isn't consistent with your brand.
	Redesign Experience	<ul style="list-style-type: none"> As a group – share your ideas and pick your favorite (or favorites, if several are similar) If an idea brings out a lot of energy and creative discussion amongst the group – push them to go with that one.
	Build CX Hypothesis	<ul style="list-style-type: none"> "Putting your idea into words can be difficult. It doesn't need to be perfect." Advise group that the next step will be to read their hypothesis to the class. Start thinking about who is comfortable presenting.
	Readout	<ul style="list-style-type: none"> Be sure to applaud and give positive encouragement following readout.