How to Run a Virtual or In-Person Customer Journey Mapping Workshop

Published 23 September 2020 - ID G00721656 - 29 min read

By Analysts Michael Chiu, Jason Daigler

Initiatives: CRM Strategy and Customer Experience and 1 more

Customer journey maps, though useful, are often misunderstood, skipped due to perceived complexity, or postponed until an external facilitator can help create them. To reap the rewards of CJMs, application leaders supporting customer experience should organize a customer journey mapping workshop.

Overview

Key Challenges

- Organizations often don’t understand the benefits and usefulness of customer journey maps (CJMs), and therefore, relegate them to “nice to have” as opposed to “must have” status.

- Many organizations are intimidated by the apparent complexity of CJMs, and question whether they justify the time and resources required to build them. These organizations often choose not to build CJMs and instead look for “simpler” customer experience (CX) tools and projects.

- Furthermore, given the COVID-19 pandemic, the fear of a poor quality CJM workshop, due to remote working conditions, may reduce the motivation to have one. Alternatively, managers may seek to delay CJM workshops until in-person working conditions return.

- Those organizations that do realize the need for CJMs frequently struggle with assembling and operationalizing them, as well as with determining their ownership and governance. This can lead to a loss of momentum and the abandonment of customer journey mapping initiatives.

Recommendations

As an application leader supporting CRM strategy and CX, you should:

- Partner with CX leaders at your organization to organize a do-it-yourself customer journey mapping workshop. Achieve this by first investing the right amount of preparation time in selecting attendees, reaching consensus about the customer persona and journey to address, and coordinating logistics.

- Guide attendees during the workshop by using a CJM template to map the customer journey selected for your organization.
Introduction

Customer journey mapping is one of the most useful ways to diagnose and improve CX. Among CX project leaders and team members in a recent Gartner survey, customer journey mapping and automation was ranked as one of the highest priorities in 2020 for the greatest number of respondents. Only CX measurement metrics had more respondents place it within their top five priorities (see Survey Analysis: Customer Experience Maturity and Investment Priorities, 2020).

Customer journey mapping is a collaborative process of gathering qualitative and quantitative data to understand customers’ desired journeys, and identify gaps between their expectations and their perceptions of the experience, delivered by a brand at steps along their journey.

CJMs have multiple benefits, as Table 1 illustrates.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CJMs serve as starting points.</td>
<td>A CJM can serve as an initial baseline of the “as-of today” customer journey, upon which further improvements can be built.</td>
</tr>
<tr>
<td>CJMs improve CX from the outside-in, not the inside-out.</td>
<td>They help identify customers’ perceptions, wants and needs (the “outside”) and bring organizational resources into alignment (the “inside”).</td>
</tr>
<tr>
<td>CJMs help you “walk a mile in your customer’s shoes.”</td>
<td>A CJM helps employees experience the journey from a customer’s perspective.</td>
</tr>
<tr>
<td>CJMs align departmental efforts.</td>
<td>They can break down silos and foster better interdepartmental cooperation to improve customer outcomes.</td>
</tr>
<tr>
<td>CJMs work as diagnostic tools.</td>
<td>Organizations can use CJMs to identify the interrelationships that exist among the steps in a customer journey.</td>
</tr>
</tbody>
</table>

Source: Gartner
Customer journey maps (CJMs) can be designed for a wide variety of customers, even those not included in traditional views of what constitutes a customer or a consumer. For instance, while CJMs are commonly used at B2C companies, they are just as applicable to B2B companies. This is because B2B companies have individual employees — purchasing agents, general managers and procurement administrators — who conduct, sponsor or influence business on behalf of their organization. CJMs can be designed for these employees.

Additionally, CJMs can be used by teams whose “customers” are internal employees and coworkers. This situation commonly arises with IT departments, whose “customers” are the organization’s employees for whom the department provides IT support. CJMs may also be used by sales support call centers, whose agents support field salespeople working for the same organization.

Further examples of organizations that could benefit from CJMs for their nontraditional customers include:

- A software company designing an app marketplace for its partners.
- A franchiser designing an experience for its franchisees.
- A government agency designing a service center for its citizens — the “citizen journey.”

To create a CJM for your customers’ key journeys, you can enlist the help of an external service provider or agency. Many of these have facilitators who can lead your team’s efforts to create CJMs. A variant of this approach is to recruit outside help to create your first CJM and, in doing so, learn the process before trying to create additional CJMs on your own.

Another option — the one we focus on in this report — is to organize a do-it-yourself customer journey mapping workshop. In addition to helping make the customer journey mapping process part of your organization’s knowledge, the do-it-yourself approach has other advantages:

- No one knows your customers better than you do; running your own customer journey mapping workshop capitalizes on this expertise.
- It can help transform participants into customer-centric stewards once they witness the journey through the eyes of the customer.
- As your organization’s CX evolves, CJMs can become outdated, often rapidly. Keeping CJMs current requires a nimble and responsive approach to update them quickly and easily. The do-it-yourself approach enables you to make changes when they are needed, without having to wait for external help.
- It’s typically not enough to build just one CJM. As you map additional journeys — such as onboarding, customer service, returns and advocacy — you will increasingly need to draw on the
Below, we identify and discuss the preparation, administration and postworkshop requirements for a do-it-yourself customer journey mapping workshop.

Analysis

Take Sufficient Time to Prepare for the Customer Journey Mapping Workshop

Every organization that serves a constituency needs at least one CJM, whether that constituency consists of customers, citizens, employees, partners or others. The first step toward leading a customer journey mapping workshop takes place several weeks in advance: It involves recognizing the need for such a workshop and securing the necessary participation, buy-in, resources and visibility.

Use the benefits of CJMs as described above to obtain people's commitment to the workshop. Involve, partner with and seek advice from members of other departments involved in your customers’ journeys — such as those in sales, market research, customer service, operations, fulfillment, marketing, billing and product management.

Once the decision to hold a customer journey workshop has been made, preparations can begin.

Choose Attendees

We recommend the following regarding attendees:

Group size. We recommend the ideal number of workshop attendees to be between 10 and 15.

Representation. Attendees should represent a wide variety of departments and areas of functional expertise. Given their knowledge and interactions with customers, likely departments from which attendees will come include marketing, customer service and sales. But technical departments — such as IT, engineering, R&D and product management — also need representation given that so much of CX depends on technology.

When selecting attendees, ensure there will be sufficient knowledge in the room to address the customer journey selected (see “Select the Customer Journey to Map” below). Attendees should also have at least a basic knowledge of the organization’s internal processes.

Customer involvement. Consider inviting some external customers to your journey mapping workshop. Advantages include customers bringing valuable perspectives and knowledge to the table: Among other things, they have firsthand knowledge of your organization’s CX, they know the most and least commonly used touchpoints, and they can identify the shortcomings of existing customer journeys. Remember that one of the objectives of a CJM is to chart the journey from the customer’s perspective — not the employee’s — so who better to attend the workshop than customers themselves?
In many organizations, employees might also be customers of the organization, but true external customers bring a unique perspective — one not biased by the organization’s politics, norms and processes. Additionally, a customer’s opinion has unparalleled weight when it comes to designing customer journeys.

Disadvantages of inviting actual customers to your journey mapping workshop are that they may have unrealistic expectations of the customer journey, and other employees may be more reluctant to speak up with actual customers present.

If you want to invite customers to your workshop, ensure they fit with the persona you have chosen for the workshop. Additionally, set proper expectations about the workshop with customers beforehand, and what will be done with the resulting customer journey map. Explain to customers if they will be looped in on outcomes.

**Gather or Build Personas**

Before you can build a CJM, you must identify a “persona” for whom the CJM will be designed. In this context, a persona is a representation of your most valuable customers, including their wants, needs, goals and mindsets. It’s commonly depicted as a single individual with a picture and a name, and serves as a powerful tool to help teams empathize with their customers.

A persona must be rooted in data and facts, which can come from interviews, surveys, analytics tools, ethnographic studies and focus groups, to name a few sources. A persona without a basis in data and facts can result in inaccurate assumptions about customers’ needs, which in turn can lead to a CJM designed for customers who don’t exist!

Before the workshop, establish for which persona your team will be designing a CJM. We encourage having only one persona per workshop, but we have seen successful workshops based on two personas. As an example, in the field of B2B software, the sales and buying process may require two individuals — a purchasing agent and a business unit employee who buys the software.

**Select the Customer Journey to Map**

Which journey will you map out during the workshop? We recommend picking a specific journey with an identifiable start and end, and, during the workshop, mapping out that entire journey from end to end. Additionally, we advise selecting a journey of importance to both your customer and your organization, one which perhaps results in a “moment of truth.” For instance, if your organization has a single product, your chosen journey might begin with how customers first become aware of that product and end with how they advocate for it. Stages such as research, purchase, and ownership would come in between.

This approach will give attendees the benefit of seeing the interrelationships between the various stages of the journey.

**Collect Data and Insights**
Prior to the workshop, collecting data and insights about the chosen journey can save time and rework later. Ideally, data collection should take place both before and after the workshop.

- **Before the workshop** — use customer data to familiarize attendees with how customers undertake and perceive the journey.

- **After the workshop** — review your customer data to check whether the journey map that the workshop has produced matches the reality.

Before the workshop, mine your voice of the customer (VoC) data. Segment your VoC data, so that you can identify the segment that most closely matches the chosen persona. Then examine that segment’s data to assess behavior, thought processes, sentiment and the like. You may need to use a broad definition of VoC and obtain data from many different sources including marketing platforms, sales systems and social media, among others.

For instance, where your CJM includes digital channels, use applications such as web analytics for validation. For stages in a call center journey, utilize interactive voice response (IVR) or other call center data. IT operations monitoring tools, such as digital experience monitoring (DEM) applications, can also help (see *I&O Leaders Must Use Monitoring Metrics to Optimize Customer Experience*), so too can artificial intelligence (AI) (see *5 Steps to Understand Customers More Efficiently Through AI*).

More innovative approaches to the pre-workshop data and insight gathering process would be for workshop participants to experience the customer journey themselves as incognito “mystery shoppers,” or to “shadow” genuine customers along the way. Customer observation studies and customer interviews can also help.

Any data that reveals more about the journey that customers take is valuable, but we recommend distilling the most salient insights into a brief summary document, with supporting information in an appendix. Distribute this document to the workshop’s attendees one week before it takes place, and use it to inform — but not dominate — the workshop discussion.

**Set an Agenda**

Figure 1 shows a suggested agenda for a half-day (four-hour) workshop for an in-person CJM workshop.

We recommend reducing the time by up to two hours if the CJM workshop is conducted in a virtual setting, while keeping the allocation of time proportional to what is depicted below.

*Figure 1: Suggested Agenda for a Half-Day In-Person Journey Mapping Workshop*
Agenda for Customer Journey Mapping Workshop

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Duration (Mins)</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 AM</td>
<td>8:10 AM</td>
<td>10</td>
<td>Workshop objectives and agenda</td>
</tr>
<tr>
<td>8:10 AM</td>
<td>8:25 AM</td>
<td>15</td>
<td>Introduction to customer journey mapping</td>
</tr>
<tr>
<td>8:25 AM</td>
<td>9:15 AM</td>
<td>50</td>
<td>Practice exercise</td>
</tr>
<tr>
<td>9:15 AM</td>
<td>9:25 AM</td>
<td>10</td>
<td>Break</td>
</tr>
<tr>
<td>9:25 AM</td>
<td>9:40 AM</td>
<td>15</td>
<td>Discussion of the persona we will use</td>
</tr>
<tr>
<td>9:40 AM</td>
<td>10:30 AM</td>
<td>50</td>
<td>Building of end-to-end steps for organization’s customer journey</td>
</tr>
<tr>
<td>10:30 AM</td>
<td>10:40 AM</td>
<td>10</td>
<td>Break</td>
</tr>
<tr>
<td>10:40 AM</td>
<td>11:30 AM</td>
<td>50</td>
<td>Building of remaining swim lanes: expecting, thinking, feeling, touchpoints</td>
</tr>
<tr>
<td>11:30 AM</td>
<td>11:40 AM</td>
<td>10</td>
<td>Break</td>
</tr>
<tr>
<td>11:40 AM</td>
<td>12:00 PM</td>
<td>20</td>
<td>Next steps and wrap-up</td>
</tr>
</tbody>
</table>

ID: 377419 © 2019 Gartner, Inc.

Use this suggested agenda as a starting point for your own, and customize it depending on the needs of your organization. For example:

- You might want to spend more time at the beginning of the workshop discussing the importance of journey mapping to your organization, to ensure buy-in.
- Or you might want to reserve that time for a roundtable discussion of participants’ expectations for the workshop and what they hope to achieve.
- While it may seem sensible to eliminate the practice exercise to save time, we strongly advise against this. The practice exercise is where significant learning about the customer journey mapping methodology takes place, and helps participants understand how to view a journey through the eyes of a customer.

Preparation Specifics to Consider for In-Person CJM Workshops

Gather Supplies

A customer journey mapping workshop should be highly interactive, with participants collaborating and sharing ideas frequently. To encourage this behavior, the workshop will make use of sticky notes (on which to write ideas), butcher paper (on which to affix sticky notes so that large numbers of them can be easily moved around), and pens and markers.

Below is a list of supplies to gather in advance of your workshop:
Identify a Suitable Room and Set It Up

The ideal setting for the workshop is a large conference room with substantial wall space free from permanent hangings and fixtures. The horizontal length of the wall space is much more important than the vertical height, because customer journeys can sometimes consist of 50 to 100 steps — we have seen CJMs created in hallways due to their length. Also, although there is nothing wrong with holding the workshop at your office, you may want to consider taking it off-site — even to a customer’s office — to foster a customer mindset.

In terms of the room setup, cover the walls with butcher paper, then conduct two simple tests:

- **First** — affix some sticky notes to the butcher paper, and come back a few hours later to see if they’re still stuck to the paper. If they’ve fallen off, try a different size or brand of sticky note.

- **Second** — use the markers to draw dots or short lines on the butcher paper, and see if the ink soaks through to the wall. If it has, place another layer of butcher paper over the original one on the wall, and repeat this until no ink soaks through.

Clear out space in front of the walls for attendees to walk through as they work on the journey map. Print several copies of the persona(s) and tape them to the walls, so that the participants can refer to them with ease.

If the room has a projector, use it to show slides containing instructions or examples while participants work on the journey maps.

**Preparation Specifics to Consider for Virtual CJM Workshops**

For a virtual CJM workshop, a physical conference room is replaced with an online platform with communication, presentation and collaboration functionality. Create a shared space that is

- **Sticky notes.**
  - Plain/yellow: number of participants x 50
  - Red: number of participants x 25
  - Green: number of participants x 25

- **Butcher paper.** two or three rolls

- **Masking tape.** two rolls

- **Ballpoint pens.** enough for all participants

- **Marker pens.** enough for half the participants
dedicated to your CJM workshop within your organization's platform, and note the additional functionality requirements specified in the “CJM Template for Virtual Workshops” section below.

Guide Attendees by Using a CJM Template

Introduce the Workshop by Discussing Its Goals

Begin the workshop with a review of its objectives and how the time will be spent, according to the agenda. Emphasize the collaborative nature of the work that will be done, and how participants should refrain from judging others’ comments so as to encourage participants to speak freely.

Next, discuss the nature of customer journey mapping — a discussion you can improve by showing examples of completed CJMs from the internet. In particular, talk about the benefits of customer journey mapping and how these benefits accrue not only to your customers, but also to your organization and to the workshop’s participants.

Another point to emphasize is that the workshop is not a one-off event. Rather, it marks the start of an ongoing customer journey mapping practice that will become part of your organization’s “CX DNA.”

Familiarize Attendees With the CJM Template

There is no one perfect template for all CJMs. Many templates exist from which you may choose the one that is best-aligned with the needs of your customers.

Typically, templates consist of steps, stages and “swim lanes”:

- **Steps** are the individual steps that a customer takes during a given customer journey. They represent what the customer is doing at any point along the way.

- **Stages** can be groups of steps (for example, the steps that lead up to a transaction can be grouped into the “buying” stage). Alternatively, stages can be single steps (for example, the “awareness” stage eventually leads to the “buying” stage, which in turn leads to the “ownership” stage). Customer goals can be added to stages as well.

- **Swim lanes** describe the behavior and thinking of your customer during the journey.

Figure 2 shows one example of a customer journey mapping template.

*Figure 2: Example of a Customer Journey Map Template*
To summarize, the template asks what a customer is expecting, thinking and feeling, and with which touchpoints he or she is interacting while proceeding through each step of the journey.

**The CJM Template for In-Person Workshops**

Draw or print the CJM template depicted above on butcher paper or large sheets of paper, and tape them to the wall. We recommend lining up several sheets containing this template, end-to-end, to accommodate long CJMs with many steps. You can use masking tape to delineate the template’s borders.

Be sure to have enough predrawn templates for the practice exercise below, and reserve the shorter walls for this. Reserve the longest wall for the organization’s CJM.

Discuss the template with workshop attendees and ensure they understand how it is to be used.

**The CJM Template for Virtual Workshops**

There are a few options to create a CJM template for a virtual workshop:

- One option is to build the template from Figure 1 in a spreadsheet application. Make sure to insert several rows for each swim lane so as to allow multiple participants to add their comments to it without typing over those of their colleagues. Then upload the blank template file to your organization’s digital collaboration platform such that workshop participants can work on it simultaneously.
Another option would be to create the CJM template in an online spreadsheet such that it is immediately shareable with workshop participants, who need to be able to simultaneously edit it as well. The remainder of this research note assumes this is the option chosen.

A related option would be to use online collaboration platforms designed for whiteboarding and brainstorming. Such applications often feature digital sticky notes, which enables a closer replication of an in-person CJM workshop experience.

Still another possibility is using CJM applications and tools. These tools have been specifically designed for CJM initiatives, and have robust capabilities for managing, sharing and collaborating on CJMs.

It is the real-time collaboration functionality with multiple participants that enables successful virtual CJM workshops. If this functionality is not available, consider doing a screenshare of the CJM template on your organization's conferencing or communication platform. While the workshop facilitator calls out instructions, have a preappointed scribe filling out the template as participants suggest ideas. This means that only one person, the scribe, writes in the template as opposed to many (as the latter is a much slower process). Ideally one of the prior options will work.

Regardless of which option above is chosen, in your digital CJM template split the “What is the customer feeling?” swim lane into two: One for positive feelings, and the other for negative feelings.

Practice by Using the Template for a Common Consumer Transaction
Before the workshop, identify a simple consumer transaction that almost everyone in the room will have had and create a corresponding persona. You will use this persona and experience for the practice exercise with the template.

Possible consumer transactions for this exercise include:

- Going through the drive-through of a fast-food restaurant
- Purchasing something on the website of a major online retailer
- Arriving at the airport and getting on a plane
- Watching a movie at the theater
- Buying a cup of coffee

Divide attendees into groups of three to five and instruct them to work in their small groups to fill out the entire template for the chosen consumer transaction. Share some information about the persona you created for this exercise and, if possible, leave the details of that persona projected on a screen so that everyone can refer to them.
As a starting point, advise the groups to agree on the first and last steps of the journey that they are mapping for the selected persona. You may find it easier to begin discussing the last step if it is a customer’s goal (make a purchase, download an app, tell a friend about your organization, etc.). You can then figure out the first step based on how much of the journey to achieve the last step needs to be mapped. Have someone in the group write the first and last steps on separate sticky notes (or in separate spreadsheet cells if conducting the workshop virtually), and place them as “bookends” on the CJM (see Figure 3).

Throughout the exercise, move from group to group to see if any need your assistance. Be sure to also enforce a rule of writing one concept or idea per sticky note or spreadsheet cell.

**Figure 3: Inserting the First and Last Steps**

<table>
<thead>
<tr>
<th>NAME OF JOURNEY:</th>
<th>FIRST STEP</th>
<th>LAST STEP</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the customer doing?</td>
<td><img src="image" alt="Cell" /></td>
<td><img src="image" alt="Cell" /></td>
</tr>
<tr>
<td>What is the customer expecting?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is the customer thinking? Questions?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is the customer feeling?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With which <strong>touchpoints</strong> is the customer interacting?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Stage</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are the customer’s goals for this stage?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next, instruct the groups to fill in the steps between the first and last ones (see Figure 4).

**Figure 4: Filling in the Steps Between the First and Last**
Finally, instruct the groups to fill in each of the swim lanes (see Figure 5).

For in-person CJM workshops, within the “feelings” swim lane, use red sticky notes to represent feelings of dissatisfaction, and green to represent feelings of satisfaction. This facilitates quick identification of pain points and enjoyable points along the journey.

For virtual CJM workshops, recall the recommendation to split the “feelings” swim lane into one for positive feelings, and another for negative feelings. Ensure participants are appropriately categorizing entries into these two swim lanes.

If there are numerous steps in your CJM, after writing them out, it may be helpful to group them into stages and to assign a name to each stage.

Figure 5: Filling in the Swim Lanes
Figure 6 shows, based on our template, what a completed CJM could look like for a customer going through a restaurant’s drive-through.

**Figure 6: Customer Journey Map for a Restaurant Drive-Through**
Map the Customer Journey Selected for Your Organization

Once the participants have familiarized themselves with the CJM template and completed the practice exercise in their small groups, reconvene the entire group. Instruct the participants to map the customer journey for your organization that was agreed upon before the workshop. Emphasize mapping out how the journey proceeds most typically, as customer journeys can have many permutations and branches.

As with the practice exercise, they should start by identifying the first and last steps, and then proceed to filling in the steps in the middle. It’s not uncommon for participants collectively to identify dozens of steps, which should be done collaboratively under your guidance. This is typically the longest part of the process, because reaching consensus on what steps a customer takes and the order in which the customer takes them requires a lot of discussion. Ideally, where one attendee’s knowledge of the steps of the journey ends, another’s starts.

If the participants get “bogged down” in the steps of one part of the journey, and if time is running short, feel free to insert an abbreviated set of steps. You may also flag the sections of the CJM that
need to be revisited in the future, and additional flags for "branches" which could split off into their own independent CJMs.

Once the steps have been agreed upon, group them into stages and use masking tape to represent the borders of each stage.

Then move on to the swim lane phase. In contrast to the process used to list out the steps, which was done collaboratively with all participants working on identifying each step one-by-one, have participants utilize the "swarm" method for the swim lane phase. The "swarm" method allows a participant to insert an entry into any swim lane that corresponds to any step. Because participants can insert entries at any point in the CJM, they avoid the problem of a portion of the CJM getting overly crowded with participants who all want to work on it at the same time. The "swarm" method has the added advantage of playing to the attendees' areas of specialization — it allows those who are, say, highly knowledgeable about the onboarding stage to populate its swim lanes, and others to populate the product returns stage. You may find that only one participant with specialized knowledge can fill out certain parts of the customer journey map.

Once the "swarm" is complete, you may want to invite all participants to read through the entire customer journey from beginning to end, to familiarize themselves with it. Then have participants discuss each stage and its swim lanes. Ask individuals who worked on specific parts of the journey to describe what they did and to share details. Allow time for questions and discussions at this point, and strive to reconcile any differences of opinion between participants.

Throughout this process, utilize the data and insights you collected prior to the workshop to inform the build-out of your CJM. For instance, you may use data describing the distribution of customers throughout your channels to inform the “touchpoints” swim lane. Alternatively, if you have insights about customer satisfaction at various points along the journey, these could guide participants' entries into the “feelings” swim lane.

Once attendees agree on the entire journey map, conclude the workshop by discussing the next steps and by thanking the participants. For in-person CJM workshops, be sure to save the CJM either by taking photographs of each section one-by-one, or by recording a video as you walk from start to finish of the CJM. You may also elect to transfer it directly to a digital format within a presentation application. Still another possibility is transferring your work to a customer journey mapping application discussed earlier. Regardless of where you choose to house your customer journey map, decide who will own it and have editing rights to it.

After the Workshop ...

A common but incorrect assumption is that the CJM produced by such a workshop is "set in stone" as the source of the truth. In fact, several steps need to be completed before your CJM is finished, and even then it should be updated regularly.

Assess Whether Your CJM Accurately Reflects Reality
Once you and your team have completed the process of designing a CJM, a crucial next step that cannot be skipped is to assess whether what you have produced accurately reflects how your customers behave. How you validate your CJM will largely depend on the nature of the data and information you can gather.

There are several different ways to ensure your CJM matches reality. A sensible approach is to use more than one of the following:

**Socialize your CJM with the customers that your persona represents.** Start by finding several customers whose profiles correspond with the persona you chose for the workshop. Show them the CJM and have them assess whether the journey depicted is the one they actually take. If you invited a few customers to design alongside you during the customer journey mapping workshop, you have already begun this step.

Question to ask customers include:

- How closely do you follow the steps shown in this CJM?
- Did you engage with our organization through the touchpoints that the CJM indicates?
- Are your expectations, thoughts, questions and feelings consistent with those in the CJM’s swim lanes?

**Revisit your VoC data.** In contrast to the pre-workshop VoC data collection process, the postworkshop VoC data assessment should focus on determining whether your CJM is grounded in reality. Conduct back-and-forth comparisons between portions of your CJM and your data.

Questions to ask yourself include:

- Are the steps in the CJM consistent with what your VoC data suggests?
- Is the information in the CJM’s swim lanes in agreement with your VoC data?
- Where are there inconsistencies?
- Which inconsistencies are extreme and point to a need to revise the CJM?

**Get the data you need.** If the data you need to validate your CJM is nonexistent or hard to acquire, consider what methods would allow you to obtain this data within the constraints of your available time, budget and resources. Perhaps something fairly easy, such as adding another question or two to an existing customer survey, would be all that is required. Or perhaps you would need something more resource-intensive, such as a user study. In general, it’s advisable to exhaust all existing data sources before trying to get new data.
If you discover that the CJM differs significantly from what your customers are actually doing, then it’s time to revisit your CJM. Identify the areas of the CJM in which these deviations arise, and collaborate with the workshop participants to revise them.

**Use the CJM as a Diagnostic Tool to Optimize the Customer Journey**

Once you’re confident that your CJM accurately reflects reality, turn your attention to any inefficiencies that have been identified and any opportunities for improvement. A CJM is an outstanding tool with which to diagnose the areas of your CX that need improvement (see How to Prevent Customer Journey Maps From Becoming Wall Art and Video: How to Build and Use a Customer Journey Map).

Consider your list of improvement initiatives to be the “demand” side of things. Then assess the “supply” side. Investigate what bandwidth, skill sets, resources and time exist throughout the company that could be dedicated to these improvement initiatives.

Utilize a prioritization framework to prioritize the CX improvement initiatives (see How to Prioritize Customer Experience Projects Using a Six-Point Framework), before assigning them to appropriate staff and teams to implement.

**Keep Your CJM Up to Date**

The workshop should not be a one-time-only event. Consider the workshop to be the first meeting — a “kickoff” of sorts — in a set of regularly scheduled meetings to improve that CJM. The first meeting’s output — the CJM — needs to be continuously revisited, improved and adjusted according to changing circumstances and customer preferences and experiences. Begin by planning to revisit your customer journey map each quarter, and move to semiannually if your customer journeys become more stable.

As you identify ways to improve the CJM, be ready to modify your operations, technology and processes to make these improvements. Importantly, this will rely on your organization's ability to quickly adapt to the needs of your customers as they go through the journeys you have established. Your organization will have to transform itself from one running rigid, monolithic applications, to a “composable enterprise” built on a modular approach and which can react to customer needs more nimbly (see Future of Applications: Delivering the Composable Enterprise).

As you change your customer journey maps and the corresponding CX, the technology that powers them will ideally be based on individual components — “packaged business capabilities” — that can be assembled, disassembled and reconfigured so as to best meet the requirements of the customer journey. The degree of flexibility in the underlying infrastructure supporting customer journeys will determine the adaptability and responsiveness of organizations to its customers. This is a key differentiator among firms competing for the same customers.

**Decide Which Journeys to Map Next**

You may have identified certain “subjourneys” that are important or need work. As you’re now familiar with the process, prioritize which subjourneys are most in need of being mapped, and set
up an additional workshop or workshops to address them. As you map more journeys, the relationships between them will become more evident; You’ll notice opportunities that can be optimized not only within journeys, but across journeys.

**Acronym Key and Glossary Terms**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AI</td>
<td>artificial intelligence</td>
</tr>
<tr>
<td>CJM</td>
<td>customer journey map</td>
</tr>
<tr>
<td>CX</td>
<td>customer experience</td>
</tr>
<tr>
<td>DEM</td>
<td>digital experience monitoring</td>
</tr>
<tr>
<td>IVR</td>
<td>interactive voice response</td>
</tr>
<tr>
<td>VoC</td>
<td>voice of the customer</td>
</tr>
</tbody>
</table>

**Evidence**

1. Gartner’s 2020 Customer Experience Innovation Survey

Gartner’s 2020 Customer Experience Innovation Survey was conducted online from 17 January through 24 February 2020. There were 238 respondents from seven countries in North America, Western Europe and Asia/Pacific: the U.K. (24%), Australia (24%), the U.S. (22%), India (13%), Singapore (13%), Canada (3%) and New Zealand (0.5%). Respondents came from a wide range of industries and company sizes. Respondents’ companies were screened for having a minimum $50 million worldwide annual revenue in FY18 and a minimum of 250 employees worldwide. A follow-up was conducted after COVID-19 from 28 April through 1 May 2020. We recontacted the original respondents to check if their answers to three questions had changed as a result of the pandemic, with 119 respondents participating.

The objective of the study was to explore organizations’ CX maturity levels. We wanted to discover challenges to CX maturation, the actions organizations take to increase their CX maturity, and the roles that technologies play in their CX initiatives.

To qualify for the study, respondents had to be leading the setting of strategic objectives and priorities for at least one CX-related project activity (85%) or on a team responsible for meeting strategic objectives and priorities (15%). They also had to be knowledgeable about business priorities and/or business benefits for at least one CX project in the past year, along with spending more than 25% of their typical work day on CX improvement projects.
Around one-third (32%) of the respondents came from a non-IT background, 34% from an IT background, and 34% from a fairly even background of non-IT and IT.

Quotas were applied for countries, industries, roles, involvement in CX and annual revenue.

The results of this study represent the views of the respondents surveyed.

Recommended by the Authors

Survey Analysis: Customer Experience Maturity and Investment Priorities, 2020
I&O Leaders Must Use Monitoring Metrics to Optimize Customer Experience
5 Steps to Understand Customers More Efficiently Through AI
How to Prevent Customer Journey Maps From Becoming Wall Art
Video: How to Build and Use a Customer Journey Map
How to Prioritize Customer Experience Projects Using a Six-Point Framework
Future of Applications: Delivering the Composable Enterprise
The Gartner Customer Experience Management Maturity Model for IT Leaders

Recommended For You

Summary Translation: Market Guide for Desktop as a Service
Payroll ICQ
Compliance ICQ
Purchases, Creditors, and Accruals ICQ
Enterprise Risk Management ICQ

© 2020 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by Gartner's Usage Policy. Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "Guiding Principles on Independence and Objectivity."