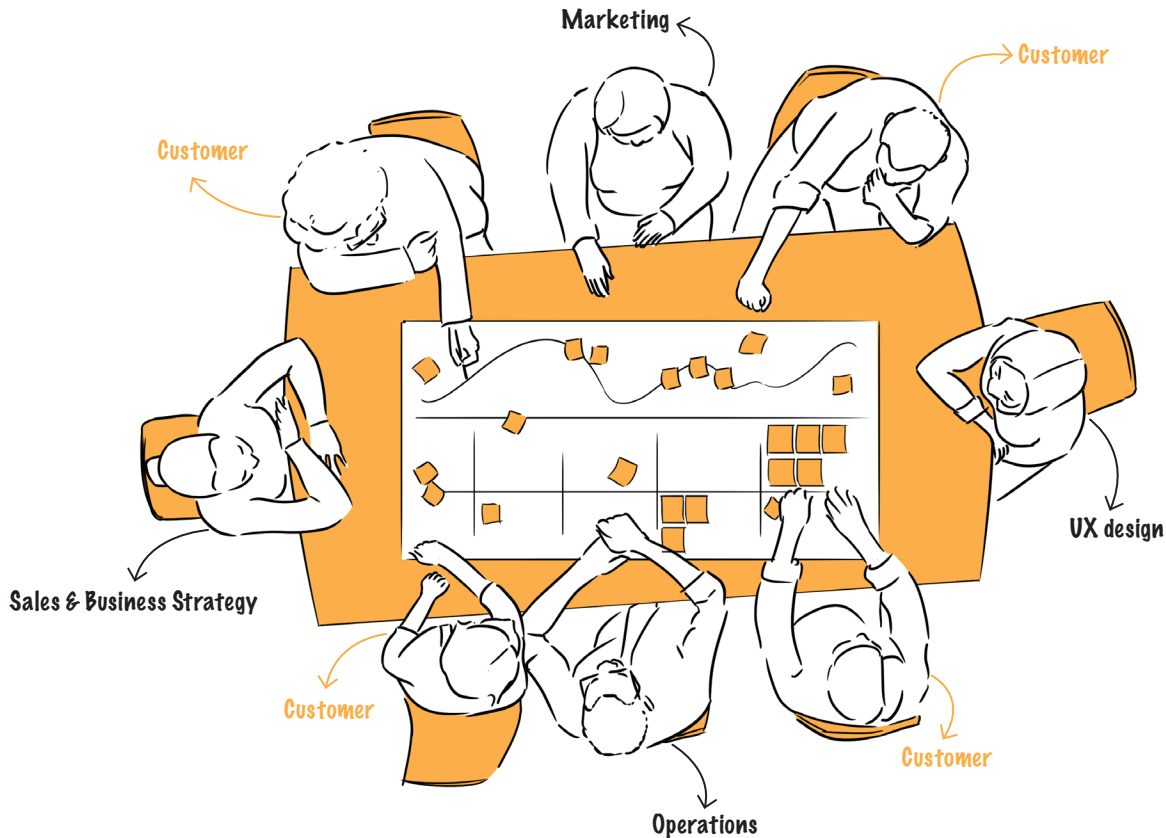




STRATOS
Innovation Group



YOUR COMPLETE GUIDE TO CO-CREATING JOURNEY MAPS with YOUR CUSTOMERS

WHAT DOES IT MEAN TO CO-CREATE A JOURNEY MAP?

Customer journey maps are commonly created by internal teams who might or might not have done in-depth customer research. A co-creation approach to customer journey mapping is a process where you bring customers and your internal team together to co-create the journey map - essentially uncovering rich contextual insights & unmet needs while exploring solutions at the same time.

APPROACH

WHY USE CO-CREATION TO DEVELOP JOURNEY MAPS?

There are different ways, but the most efficient and effective approach is to invite customers into the process as co-creators of the journey. Hands down, there is no more meaningful way to envision future experiences. You need to invite the people who will use and interact with your product or service into the process of designing (not just testing) the interactions and touch points. The collaborative process proves itself extremely valuable – it's more valuable than consumer focus groups or ideation sessions alone. This means the solutions that emerge in these multi-stakeholder sessions or “co-creation” sessions are likely to be more insightful, creative and lead to innovative concepts, as opposed to getting ideas that only bring incremental changes.



APPROACH

BUSINESS BENEFITS OF TAKING THE CO-CREATION APPROACH

A faster and more efficient path to ideal experience insights

The internal team can learn about customer needs and have the ability to probe deeper for design criteria. Within the same session, you can co-create concepts and get their feedback on the impact these concepts may have on their end-to-end experience.

Deeper insights that support key moments

Having consumers map the journey with the internal teams will likely challenge some of your assumptions or at least correct some of the biases your internal team may have. The process can save time and money. It makes it easier to get decision makers to buy-in if they know that the future state map involved direct input (dreams and desires) from consumers.

Cost effectiveness

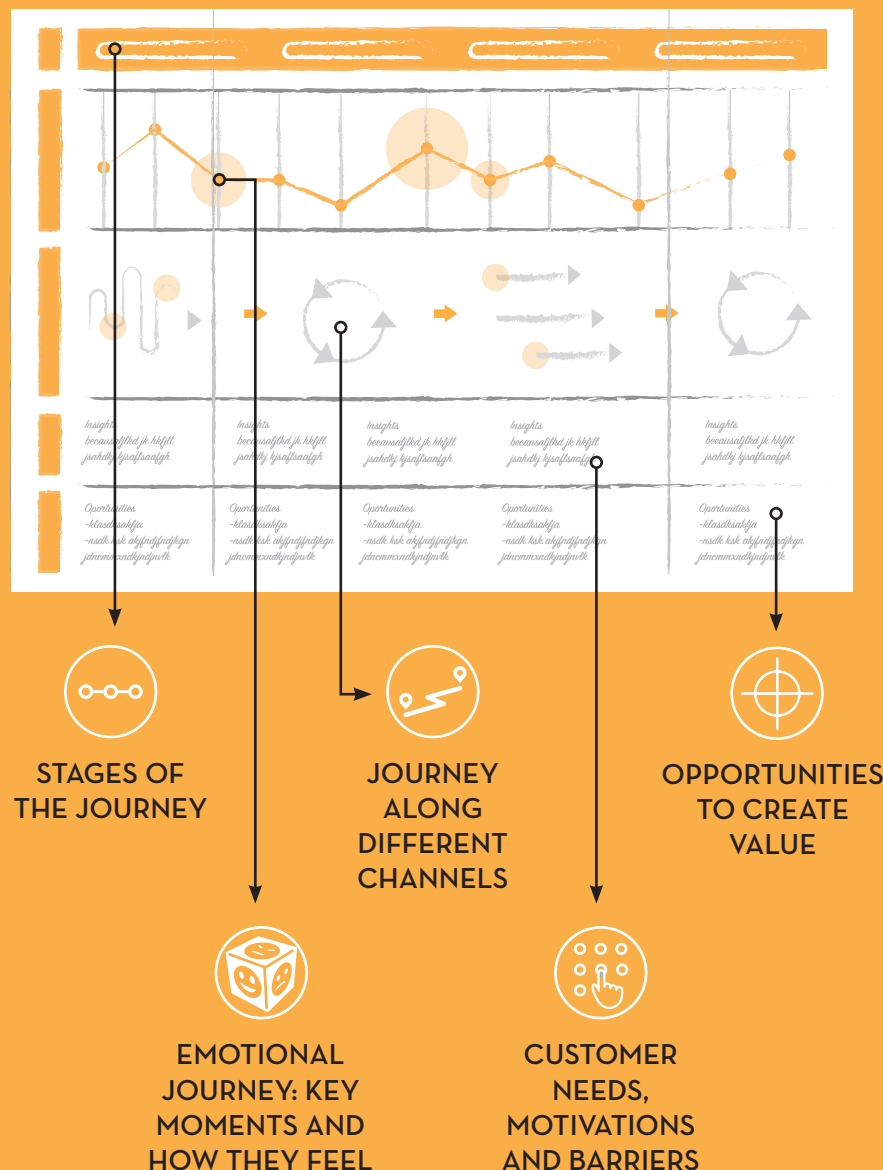
In the traditional UX approach, researchers gather user needs and requirements using surveys, interviews and observations to write up a long report that a design team may try to consolidate on a wall poster. This approach is typically lengthy and costly. Using a co-creation approach to journey mapping can significantly minimize the cost of explore/frame/discovery phases of the design process.

Better alignment

When taking a traditional, linear approach to journey mapping, the roles of researchers and designers are clearly segregated, and the customers are not involved in the building of the map. The process of co-creating a journey map leads to strategic synergies and a common vision across departments.

ANATOMY OF A JOURNEY MAP

Through the process of journey mapping, you can visualize insights and develop experience strategies for the future—bringing incredible value to your organization.



HOW TO START BUILDING A JOURNEY MAP

Journey maps can contain a number of different elements. There isn't a formula to do it, but if you are just getting started you might do the following steps.

STEP 1 ESTABLISH THE SCOPE

- ☐ **DETERMINE THE BOOK ENDS**
Decide when the experience starts and ends for your scenario. (e.g. a finite amount of time like one day, one year or a full service cycle)
- ☐ **RECOGNIZE THE JOURNEY STAGES**
Define the typical stages the person goes through during this journey. (e.g. awareness, decision-making, registration, evaluation)
- ☐ **CURRENT OR FUTURE STATE**
Are you looking to fix current challenges and barriers that exists in your service or do you want to build the ideal journey to differentiate your brand in the future?

STEP 2 DEPICT ACTIONS

- ☐ **CAPTURE ACTION STEPS**
What actions is the customer taking to accomplish his or her goals?
- ☐ **IDENTIFY KEY MOMENTS**
Which steps are the most critical to the customer? (These are interactions that must go well or the rest of the experience is in jeopardy).
- ☐ **HIGHLIGHT TOUCH POINTS**
Where do the customer and the organization interact with each other? What objects, interfaces, people or places are involved?



HOW TO START BUILDING A JOURNEY MAP

STEP 3 UNDERSTAND MOTIVATIONS

For each of the actions & behaviors captured in STEP 2, map the thoughts that are going through the participant's mind. Annotate the thoughts in a question format or a quote (e.g. "Does the company know what's best for me?" "Am I choosing the right option?" "There are a lot of options to choose from.") You can annotate types of decisions and motivations by writing:

QUESTIONS THEY ASK
CONCERNS AND PAINPOINTS
DECISIONS THEY ARE MAKING
EXPECTATIONS
MOMENT(S) OF TRUTH



STEP 4 DESCRIBE EMOTIONS

For each of the action steps, map the participants emotional state on a scale and annotate the feeling in a caption (e.g. "frustrated while waiting for payment to come through").

POSITIVE EMOTIONS

(e.g. excited, confident, engaged, relaxed, etc.)

NEGATIVE EMOTIONS

(e.g. confused, frustrated, ignored, lonely, etc.)



Note: If you have not done research yet, you can start with a hypothesis of what your customers actions, motivations and emotions might be and validate it through a co-creation session with customers.

KEEP IN MIND...

CO-CREATION IS A MINDSET BEFORE IT IS A METHOD

Share the value of co-creation. It's a good idea to educate all your stakeholders about the difference and the benefits between this and other methods. To keep everyone on the same page, show how and when you are going to invite customers into the process. Establishing the role the customers will play throughout the experience mapping journey will relieve any anxiety your team might feel about trying out a new method. Lastly, show examples of companies who have taken the lead by shifting from a "customers as passive receivers" mindset to "customers as creative experts of their own experiences" mindset.

INVITE THE RIGHT MIX OF PEOPLE

It is helpful to have a design team member involved because they will be doing the implementation. Designers are trained to think about the user's experience, and help visualize key moments or touch points, which can often say more than words. When making an invite list for customers or consumers, bring back some of the best customers you've had from previous research work. Look for the participants that showed the most interest in the topic and are enthusiastic about the future—you're likely to get much better results.

WHO WILL PARTICIPATE IN THE SESSION?

EXISTING CUSTOMER SEGMENT

BUSINESS STAKEHOLDERS

- ☐ UX
- ☐ MARKETING
- ☐ SALE
- ☐ FRONTLINE



DECISION MAKERS

NEW CUSTOMER SEGMENTS

KEEP IN MIND...

PLAN & PREPARE TOOLS TO ENABLE CO-CREATION

The conventional way to make a customer journey map is with post-its and a wall space. However, there are many other more effective ways to extract people's ideas, emotions and behaviors, such as using projective tools and generative research methods. You can build customized toolkits to help consumers articulate not only what they want to be doing at each touch point but also how they want to feel. **A great resource for this is “Convivial Toolbox” by Liz Sanders.** Building visual and kinesthetic tools takes preparation but it can bring amazing results within a short amount of time.

(For specifics about using **generative tools** that help with envisioning future experiences, contact us via email at anthony@thestratosgroup.com)



KEEP IN MIND...

IT'S A CRIME IF YOU DON'T PRIME

Get your participants ready and set expectations! Priming homework is a set of activities we ask participants to complete before they arrive for the session. These activities go beyond a pre-read, a report or summary. The homework is designed to actively prepare the participants to articulate their needs, dreams and desires.



IF IN DOUBT, TEST IT OUT!

Pilot test the co-creation workshop plan before you bring in all the different internal stakeholders. Be open to getting honest feedback on how it went.

Take notes on how you can better customize the workshop activities to fit your internal culture and the project goal at hand. Don't forget to document the outcomes at all times.

By including customers in the design (not just testing) process, you'll be one step closer to innovative solutions with long term business value.



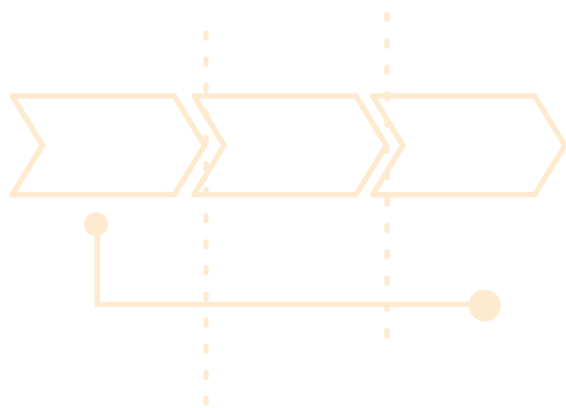
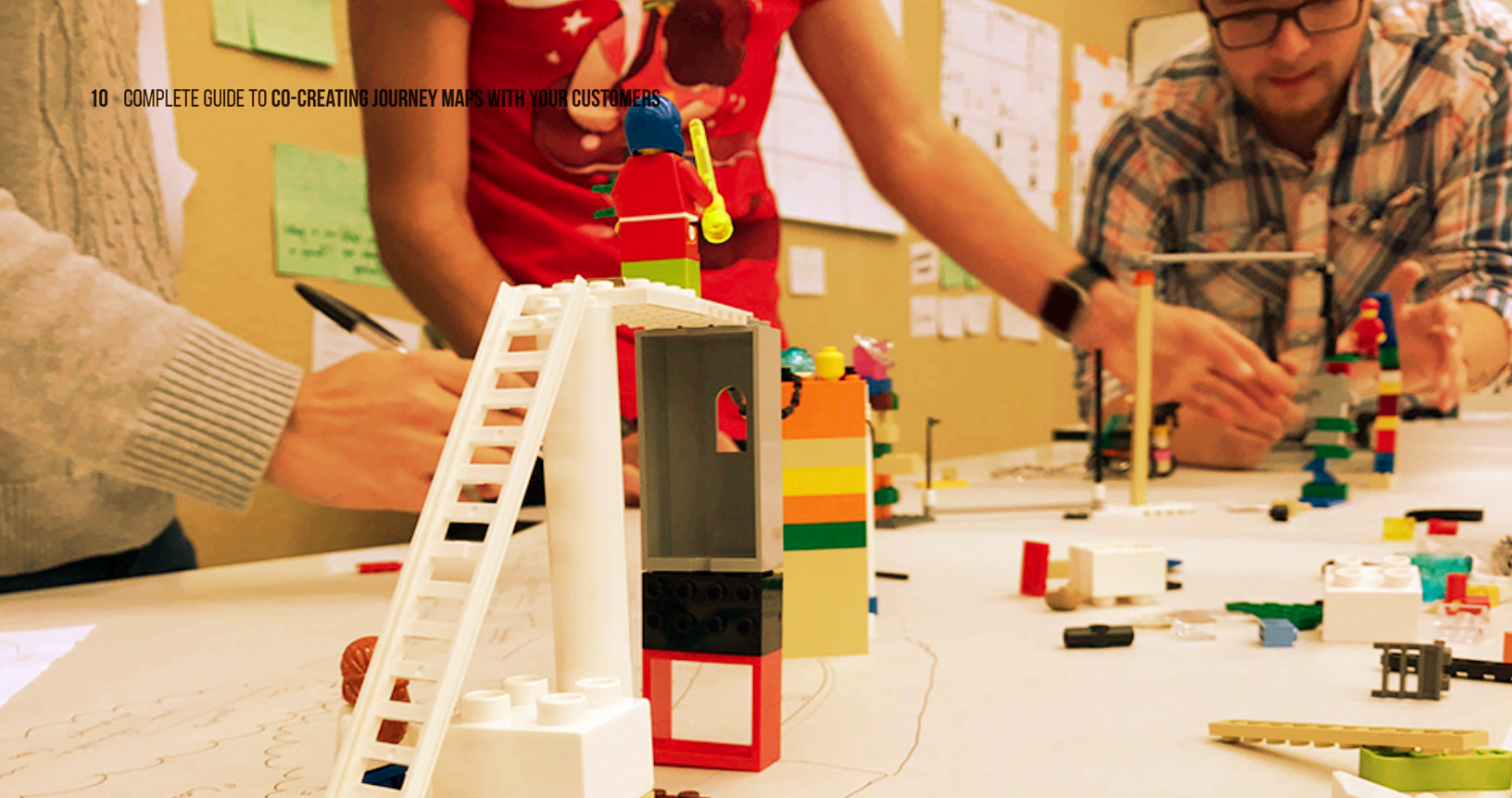
“RULES OF ENGAGEMENT”

Share with your team **how they should interact in the small group with customers**, including how to address confidentiality issues, if there are any.

Each table should have a **team facilitator** who moderates the activities. The facilitator should be familiar and comfortable with the process and well prepared.

A lot will be said, but **allow your customers to take the lead and have** internal conversations. You can do this using follow-up questions, engaging participants more deeply in the conversation.

Stay focused on the goal of the exercise. This may not be the best time for business teams to bring up questions from other projects—things they have always wanted to ask consumers.



REMEMBER, IT'S A PROCESS...

For those who want to co-create with consumers, there's good news and there's bad news. **The good news is that any organization that wants to create great value for their customers can move towards co-creating value *with* their customers by incorporating these strategic steps!**

And now the bad news. As you already suspect, bringing end users or customers into your journey mapping process is easier said than done. It can be messy and complicated. **If your team is currently using the traditional, waterfall style approach to journey mapping, your organization may not be likely to adopt the co-creation model overnight.** Patience will be the key! Consider taking small steps to educate or show the impacts as outlined earlier in the Ebook.

WORKSHOP PLANNING TOOL

BY STRATOS INNOVATION GROUP

WORKSHOP GOAL



HYPOTHESIS/QUESTIONS



PARTICIPANTS

STAKEHOLDERS



CUSTOMERS

REMEMBER
TO INVITE AND
PRIME YOUR
PARTICIPANTS
IN ADVANCE.

DESIRED OUTCOMES



- 1
- 2
- 3
- 4

ACTIVITIES



- 1
- 2
- 3
- 4

MATERIALS TO BUY



LOGISTICS



FACILITATOR

LOCATION

DURATION

SPACE/SOUND

INCENTIVES

WORKSHOP AGENDA ○→○→○

INTRO

ACTIVITY 1

ACTIVITY 2

ACTIVITY 3

ACTIVITY 4

CLOSURE

TANGIBLE OUTCOMES



FEEDBACK /
LEARNINGS



USE THE JOURNEY MAP YOU CO-CREATED TO...

- Build strategic blueprints and vision
- Activate product and service development insights and ideation
- Break down silos and create organizational alignment across different departments
- Inform commercial sales and marketing teams for targeted messaging and positioning
- Inspire new business models
- Pitch ideal experience concepts and MVPs
- On-board new team members and employees





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Have you used a co-creation approach to experience mapping before?

We can help you build this bridge between you and your customers.

Email us at anthony@thestratosgroup.com or call 614-300-7989.

Read more in our blog, connect with us on LinkedIn or visit our website.

