Customer Journey Facilitation Guide

Templates and Instruction

Role Identification

Journey Owner: Accountable for the creation and maintenance of the Customer Journey and responsible for animating teams to provide associated dependent components (persona, voice of customer, etc)

Facilitator: Manages the journey stakeholders, participants, and subject matter experts. They set the working sessions and timeline to complete or collect the required journey components.

Subject Matter Experts: These are the customer, product, or domain/stage experts who ultimately provide the content represented in the journey.

Name:

Name:

Names:

Define the Persona

FACILITY MANAGER

- 30 to 50 Years old
- 55% Male 45% Female
- 5 to 15 years expereince
- 50% have a related Bachlors Degree

"MSGR is an absolute must-have for any team looking to maximize productivity!"

DESCRIPTION

A Facility Manager is responsible for overseeing building operations, maintenance, and security. They ensure compliance with building codes and safety regulations. Additionally, they manage vendor relationships for services such as cleaning, security, and landscaping. They also utilize software for property management and maintenance tracking.

PERSONAL CHARACTERISTICS

- Openness to Technology: Generally open to adopting new technologies
- Task Orientation: Balances big-picture strategy with detail-oriented tasks
- Extraversion: Typically extraverted, comfortable interacting with various stakeholders
- Activity: Hands-on approach, often involved in day-to-day operations

GOALS

- Centralize Maintenance Management: Creating a central location to manage maintenance requests helps in organizing tasks and improving response times.
- Improve Energy Efficiency: Conducting energy audits and implementing plans to reduce energy costs not only saves money but also promotes sustainability.
- Ensure Compliance: Meeting compliance standards for building codes and safety regulations is crucial to avoid legal issues and ensure the safety of occupants.

CHALLENGES

- Managing the balance between operational efficiency and cost-effectiveness
- Ensuring timely maintenance and repairs to avoid disruptions
- Adapting to evolving industry standards and regulations

BUYING ROLES

(Decision maker or influencer)

BUYER'S JOURNEY

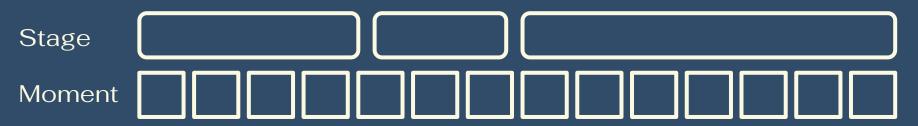(Awareness, consideration, purchase, advocacy)

The persona definition is a brief of the target customer that an organization is looking to engage. The persona is typically defined by a marketing manager and is developed through primary research of the target customer, followed by summarizing the attributes, goals, and challenges of the target customer type.

There are many publicly available templates on tools like Canva or Miro to create a persona brief. The use of AI can accelerate the creation of the persona attributes.

Capture the Journey Moments

Stage

Moment

Journey Stage refers to the aggregate moments a buyer or journey actor would execute. Example "I Browse" "I Configure" " I Get a Price"

Journey Moments are the details of the stage. For example, in the Configure Stage, the moments may include: I select a product, I define my preferences, I choose accessories, and I receive a bill of materials.

Facilitation Guide: Capturing the key moments of the journey is best done in a workshop with the subject matter experts. The facilitator should predefine the journey stages to be mapped and define the start and end moments. The team of subject matter experts would capture the related moments on sticky notes and put them in order under the stages.
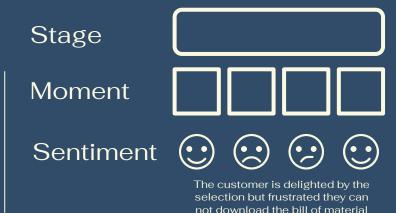
Pro Tips:

1) The Journey Stages and Moments should be written from the customer's point of view. "I the customer....." statements
2) Subject Matter Experts should be defined by Journey Stage / Product and Customer Persona and present during the workshop
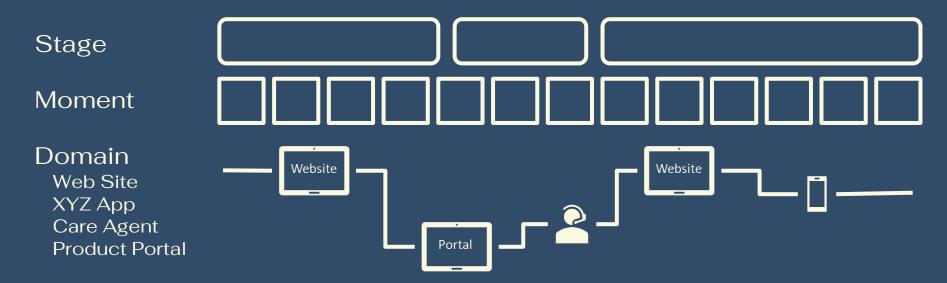
Collect Customer Voice & Sentiment

Customer Feedback on journey moments and stages is key in an organization's understanding of what a persona expects in a journey. The facilitator will collect customer feedback in various ways, and it can be aggregated narrowly (through a few interviews) or broadly (through statistically relevant surveys). Feedback tools on existing web experiences, such as Medailia, tend to be full of customer voices. Once the customer voice has been captured, the facilitator and SME can apply sentiment and observation statements.

Pro Tip: No matter how much you communicate with your customer, you can always do more.

Stage

Moment

Sentiment

The customer is delighted by the selection but frustrated they can not download the bill of material

Map the Experience

An experience map, completed by the facilitator, is a visual representation of the domain or locations where the Journey moments take place. For to-be maps, there may be gaps in the domain or tools in the journey.

Stage

Moment

Domain
Web Site
XYZ App
Care Agent
Product Portal

Website

Portal

Website

Define User Stories

User Story Template:

Ideation Name:

Pain Point to Solve:

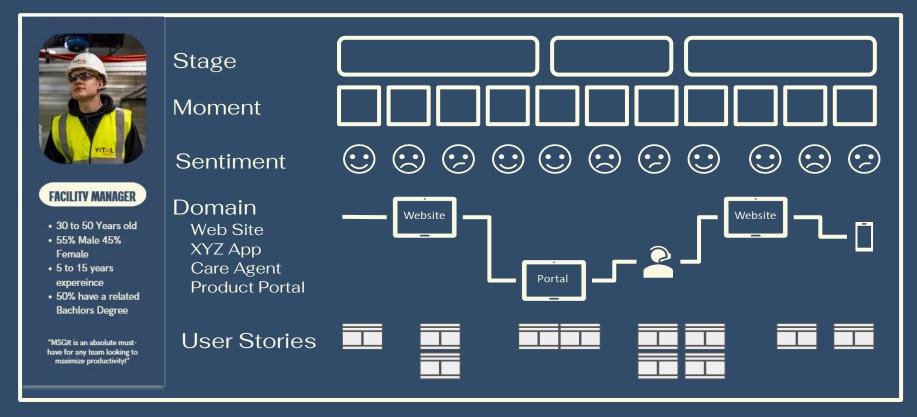| Story Description: A bulleted step by step of the story to be delivered	Draw It: A picture is worth a thousand words

Domains or Stakeholders to Animate:

The user story section of the journey is used to capture the necessary work or development to address a broken or missing journey moment. The facilitator should work with the subject matter experts to capture the ideations or defects for each moment, then create user stories for each. The user story template ensures enough information is captured to make the story actionable in the development or transformation program. A business process analysis or product owner typically completes the user story template.

ProTip: The user stories captured in the journey map should be entered and managed in the development portfolio

Compile the Journey Map Canvas

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Stage

Moment

Sentiment

Domain
- Web Site
- XYZ App
- Care Agent
- Product Portal

Website

Portal

Website

User Stories

Facilitation Tips and Tricks

1) Journeys Maps are not just an exercise to draw out a to-be journey, they are an opportunity to engage and manage stakeholders and their expectations

2) For face-to-face workshops, the team can collaborate around a blank wall; the facilitator should pre-print the Journey Stages and the Existing Domains and use sticky notes to capture the rest.

3) The use of the Journey Canvas as a portfolio tool is a powerful way to ensure alignment of development time and work.

4) The Journey team should review and refresh a journey at least once a year.