

Customer Journey Mapping

Workbook

A practical workbook for customer experience, marketing, sales, product, support, and operations teams.

1. Start with a focused journey

A journey map is a shared picture of what a customer is trying to accomplish and what happens as they interact with your organisation. It is not simply an internal process diagram. A process map shows what the organisation does; a journey map connects those actions to the customer's needs, expectations, effort, and experience.

1.1 Choose a useful scope

Avoid mapping every possible customer interaction at once. Choose a journey with a clear start and finish, a recognisable customer group, and a business or customer outcome worth improving.

Scope question	Example / guidance	Your decision
Who is the customer?	First-time buyer, returning customer, administrator, subscriber, or support user.	_____
What are they trying to do?	Compare plans, make a purchase, set up an account, solve a problem, renew.	_____

Where does the journey start?	A search, referral, campaign, product issue, or renewal reminder.	_____
Where does it end?	Successful setup, resolved issue, repeat purchase, or completed renewal.	_____
Why map it now?	High drop-off, repeated complaints, long resolution time, inconsistent hand-offs.	_____
What is out of scope?	Adjacent journeys or customer types that would make this exercise too broad.	_____

1.2 Define the outcome

Complete this statement before proceeding:

We are mapping the journey of _____ who want to _____.

We will focus on the period from _____ to _____ because _____.

1.3 Evidence to gather before the workshop

Customer voice: interviews, survey comments, reviews, complaints, call transcripts, support tickets.

Behavioural data: web analytics, funnel conversion, search terms, abandonment, product usage, repeat visits.

Operational data: response times, transfer rates, first-contact resolution, fulfilment delays, rework.

Frontline insight: observations from sales, customer success, support, implementation, and account teams.

Existing artefacts: emails, forms, confirmation screens, help articles, scripts, policies, and onboarding steps.

Evidence log — record what you have and what is missing.

Evidence source	Date / period	What it may tell us	Limitations / gaps
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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2. Build a customer persona grounded in evidence

A persona is a practical summary of a customer group—not a fictional biography. Focus on context, goals, constraints, decision criteria, and behaviours that influence the journey. Do not treat a single interview or an untested stereotype as representative of all customers.

Persona field	Prompts	Notes
Persona / segment name	Use a descriptive label, not a real person's identity.	_____
Context	What situation brings this customer to you?	_____ _____
Primary goal	What outcome are they trying to achieve?	_____ _____
Success criteria	How will they know the task is complete?	_____ _____
Motivations	What makes this outcome important now?	_____ _____

Concerns / barriers	What creates hesitation, confusion, or risk?	_____ _____
Knowledge / confidence	What do they already know? Where do they need guidance?	_____ _____
Channels used	Where do they research, ask questions, transact, or seek help?	_____ _____
Accessibility / constraints	Time, device, language, connectivity, permissions, accessibility needs.	_____ _____
Evidence behind this profile	Which data points or research sources support it?	_____ _____

2.1 Persona validation check

Which details are supported by multiple sources?

Which statements are assumptions that need testing?

Are there important differences between new and returning customers?

Could customers with accessibility, language, or device constraints experience the journey differently?

What would make this persona inaccurate or incomplete?

3. Map the stages of the journey

The six stages below are a starting point. Adapt them to the journey you selected. Some journeys begin with a problem rather than awareness; some do not include a purchase; and customers may loop backwards, skip stages, or switch channels.

Stage	Customer's likely question	Possible customer action	Potential organisational touchpoints
1. Awareness / discovery	Do you understand my problem?	Searches, sees a recommendation, notices an issue.	Search results, ads, social posts, referral, website.
2. Consideration / evaluation	Is this right for me?	Compares options, reads reviews, asks questions.	Product pages, comparison tools, demos, sales conversations.
3. Purchase / commitment	Can I proceed confidently?	Selects an option, submits details, pays, signs.	Pricing, checkout, contract, payment, confirmation.

4. Onboarding / first use	How do I get started?	Sets up account, configures service, tries key task.	Welcome email, setup guide, app, implementation, training.
5. Support / problem resolution	Can I get help without repeating myself?	Searches help, contacts support, follows instructions.	Help centre, chatbot, phone, ticket, escalation.
6. Retention / advocacy	Is this still worth my time and money?	Renews, expands use, recommends, or leaves.	Usage reports, account reviews, renewal notices, surveys.

3.1 Journey map worksheet

Fill one row for each meaningful step. Use the customer's point of view. If a step differs by channel, record the difference rather than averaging it away.

Stage / step	Customer action & goal	Touchpoint / channel	Thoughts / questions	Emotion (1-5)	Pain point / evidence	Opportunity
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1. _____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —
2. _____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —
3. _____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —
4. _____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —
5. _____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —
6. _____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —

Emotion scale: 1 = very negative / high frustration; 2 = negative; 3 = neutral or mixed; 4 = positive; 5 = very positive. Add a short explanation for each score.

3.2 Look for loops and detours

Where does the customer repeat a step or provide the same information twice?

Where do they leave your channel to find an answer elsewhere?

Where do they wait without knowing what will happen next?

Where do they switch from digital to human support—or the reverse?

Where does the organisation believe a step is complete but the customer does not?

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4. Examine touchpoints and channels

A touchpoint is any moment where the customer interacts with your organisation, product, people, or information. A channel is the route used for that interaction. One touchpoint can appear in several channels, and a channel can contain many touchpoints.

Touchpoint	Channel	Customer need at this moment	What currently happens?	Effort / friction	Evidence or signal	Consistency issue?
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____

_____	_____	_____	_____	Low /	_____	_____
-	—	—	—	Med /	—	—
				High		
_____	_____	_____	_____	Low /	_____	_____
-	—	—	—	Med /	—	—
				High		

4.1 Channel consistency review

Customers often judge the whole experience, not individual departments. A website may promise a response in one day while a support channel gives a different expectation. Record gaps between channels and decide which source should be authoritative.

Consistency question	Yes / No / Unsure	Example or corrective action
Do names, prices, policies, and eligibility rules match across channels?	_____	_____
Can the customer continue without repeating information?	_____	_____

Are response times and next steps clearly explained?	_____	_____
Can customers access a human when self-service fails?	_____	_____
Are accessibility and mobile needs supported consistently?	_____	_____
Do teams have a shared view of the customer's previous interactions?	_____	_____

5. Map internal hand-offs

Hand-offs occur when responsibility moves between teams, systems, or channels. They are common sources of delays, lost context, repeated questions, and unclear ownership.

Map the hand-off from the customer's perspective as well as the internal process.

Customer need / trigger	Team or channel handing off	Receiving team	Information transferred	Expected time	Failure mode / customer impact
_____	_____	_____	_____	_____	_____
-	-	-	-	-	-
_____	_____	_____	_____	_____	_____
-	-	-	-	-	-
_____	_____	_____	_____	_____	_____
-	-	-	-	-	-
_____	_____	_____	_____	_____	_____
-	-	-	-	-	-

5.1 Hand-off diagnostic prompts

Is it clear who owns the next action and who updates the customer?

Is the reason for the hand-off explained in plain language?

Does the receiving team get enough context to avoid making the customer start over?

Is there a visible service-level expectation or escalation path?

What happens if the receiving team does not respond?

Can the customer check progress without contacting the organisation again?

Choose one hand-off to improve first and describe the desired future state:

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6. Identify and describe pain points

A pain point is a moment where the customer experiences unnecessary effort, uncertainty, delay, risk, cost, or disappointment. Describe the observed problem before proposing a solution. 'Add a chatbot' is a solution idea; 'customers cannot find the refund status and contact support repeatedly' is a pain point.

6.1 Pain point inventory

ID / stage	What the customer experiences	Who is affected / how often	Evidence	Customer impact	Business impact
P1 / _____ -	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
P2 / _____ -	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
P3 / _____ -	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____

P4 / _____ — —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —
P5 / _____ — —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —	_____ _____ —

6.2 Evidence quality: separate fact from assumption

Statement	Type	How to validate it
'Customers abandon checkout at the address step.'	Observed fact only if analytics confirms it.	Review funnel data by device and customer segment.
'They abandon because the form is too long.'	Hypothesis about cause.	Usability test, session review, or customer interview.
'A shorter form will increase completion.'	Proposed intervention and expected outcome.	Run a controlled test or compare before-and-after results.

'Support is slow.'	Too broad without a measure.	Define median and 90th-percentile response times, by issue type.
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6.3 Rate each pain point

Use a consistent scale. These ratings help teams compare issues; they do not replace judgement or customer research.

Rating	1 — Low	3 — Medium	5 — High
Frequency	Rare / isolated	Occurs regularly for a segment	Frequent or affects many customers
Severity	Minor inconvenience	Delays task or causes extra effort	Blocks completion, causes harm, or triggers abandonment
Emotional impact	Little frustration	Noticeable uncertainty or annoyance	Loss of trust, anxiety, or strong dissatisfaction

Business impact	Small local cost	Measurable rework or conversion loss	Material revenue, retention, compliance, or reputation risk
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Pain point ID: ____ Frequency (1-5): ____ Severity (1-5): ____ Emotional impact (1-5): ____ Business impact (1-5): ____

What evidence supports these scores?

What evidence would change our view?

7. Investigate root causes

Treat the visible pain point as a symptom until you understand why it occurs. Root-cause analysis helps avoid fixing the surface problem while the underlying issue remains. Consider process, policy, information, technology, skills, capacity, incentives, and measurement.

7.1 The five-whys worksheet

Step	Ask / record your answer
Problem statement	What specifically happens, to whom, and at what point? _____
Why 1	Why does this happen? _____
Why 2	Why does that happen? _____
Why 3	Why does that happen? _____
Why 4	Why does that happen? _____

Why 5	What underlying condition may be contributing?
Validation	What data or observation can confirm or disprove this explanation?

7.2 Root-cause categories to test

Process: unnecessary steps, duplicate entry, unclear sequence, too many approvals.

Information: unclear instructions, missing status updates, conflicting content, jargon.

Technology: errors, slow performance, poor integration, inaccessible design.

Policy: restrictive rules, unclear eligibility, avoidable exceptions, confusing terms.

People and skills: insufficient training, inconsistent scripts, unclear authority to resolve issues.

Capacity and ownership: queues, understaffing, competing priorities, unassigned cases.

Measurement and incentives: teams optimising their own metric at the expense of the overall journey.

7.3 Root-cause confidence

Candidate cause	Evidence for	Evidence against	Confidence (low / med / high)	Next validation step
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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8. Generate and prioritise improvements

Generate several possible interventions before choosing one. The best response may be to remove a step, clarify information, change ownership, improve a system, offer human assistance, or change a policy—not necessarily add another tool.

8.1 Idea generation

Pain point	Remove / simplify	Clarify / guide	Enable / automate	Human support / policy change
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

8.2 Impact-versus-effort scorecard

Score each idea from 1 to 5. For effort, 1 means relatively easy and 5 means difficult. For impact, 1 means limited improvement and 5 means substantial customer or business value. Include confidence and risk so that an attractive idea is not selected on impact alone.

Idea	Impact 1-5	Effort 1-5	Confidence 1-5	Risk / dependency	Decision
_____	—	—	—	_____	Test / plan / park
_____	—	—	—	_____	Test / plan / park
_____	—	—	—	_____	Test / plan / park
_____	—	—	—	_____	Test / plan / park
_____	—	—	—	_____	Test / plan / park

8.3 Choose the next action

Quick win: meaningful benefit, manageable effort, low dependency.

Strategic change: high benefit but needs cross-team planning, funding, or system work.

Experiment: promising idea with uncertainty; test on a limited scale first.

Defer or stop: low value, weak evidence, unacceptable risk, or a dependency that is not ready.

Selected improvement:

Why this is the best next move:

What must be true for it to work?

Who should be consulted before launch?

9. Design the improved journey

Describe the future experience in terms of what the customer will be able to do, understand, and feel. Avoid defining success only as an internal system change. A new form, automation, or help article is useful only if it removes a real obstacle without creating a new one.

Design question	Future-state decision
What is the customer trying to accomplish?	
What steps can be removed or combined?	
What information must be clear before the customer acts?	
What confirmation or status update is needed?	

Where can customers self-serve—and when should a person step in?	
What context must travel between channels and teams?	
What accessibility, privacy, security, or compliance checks apply?	
How will we recover if the new experience fails?	

9.1 Before-and-after journey comparison

Journey step	Current experience	Proposed experience	Expected customer benefit	Possible unintended consequence

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

10. Build an action plan

Turn the preferred improvement into a small number of accountable actions. Every action should have one directly responsible owner, a due date, a completion signal, and a way to evaluate whether it worked.

Action / deliverable	Owner	Partners	Due date	Dependency / risk	Status
_____	_____	_____	_____	_____	Not started
_____	_____	_____	_____	_____	Not started
_____	_____	_____	_____	_____	Not started
_____	_____	_____	_____	_____	Not started
_____	_____	_____	_____	_____	Not started

_____	_____	_____	_____	_____	Not started
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10.1 30-60-90 day plan

Period	Focus	Example outputs	Your commitments
Days 1-30	Validate the problem and prepare a focused test.	Baseline metrics, customer evidence, agreed scope, prototype or process change.	_____ _____
Days 31-60	Run the pilot and learn.	Test results, feedback, defect log, revised solution.	_____ _____
Days 61-90	Scale, adjust, or stop based on evidence.	Decision record, ownership model, rollout plan, measurement cadence.	_____ _____

10.2 Decision and escalation rules

Who can approve a change?

What risks require escalation?

What result would cause us to pause or roll back?

Who communicates the change to affected teams and customers?

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11. Measure whether the journey improved

Choose a small set of measures that reflect the customer outcome and the operational result. Use a baseline collected before the change. Avoid relying on a single score: a faster process may still be confusing, and a higher satisfaction score may hide a small but severely affected segment.

11.1 Useful customer experience measures

Measure	What it indicates	Use carefully because...
Customer Satisfaction (CSAT)	How satisfied customers were with a specific interaction or outcome.	Question wording, timing, and response bias can influence results.
Net Promoter Score (NPS)	Likelihood to recommend, often used as a relationship indicator.	It is not a direct diagnosis of a specific pain point.
Customer Effort Score (CES)	How easy or difficult customers found a task.	Measure effort at the relevant moment and explain the scale.
First Contact Resolution (FCR)	Whether an issue was resolved during the first	A low repeat-contact rate can hide unresolved issues if customers give up.

	contact, based on your definition.	
Time to resolution	Elapsed time from issue creation to meaningful resolution.	Track median and high-percentile times, not only averages.
Completion / conversion rate	Share of customers who complete a defined journey step.	Segment by device, channel, customer type, and starting point.
Retention / churn	Whether customers continue or leave over a defined period.	Many factors affect retention; do not attribute changes to one intervention without evidence.
Repeat contact / rework	Whether customers or staff must repeat steps or correct avoidable errors.	Define what counts as a repeat and account for legitimate follow-ups.

11.2 Measurement plan

Outcome / metric	Definition and data source	Baseline	Target	Review date / owner
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_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

11.3 Before-and-after tracker

Metric	Baseline period / value	Pilot period / value	Change	Interpretation / next step
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Measurement note: document major changes in traffic, pricing, staffing, campaigns, seasonality, or policy that could influence results. When feasible, compare similar customer groups or use a controlled experiment to improve confidence in attribution.

12. Worked example: reducing checkout friction

The example below is illustrative. The numbers are hypothetical and should not be treated as benchmarks. Use it to see how a broad complaint can be converted into an evidence-backed improvement plan.

12.1 Situation

Customers report that online checkout feels confusing. Internal teams initially suggest adding a chatbot, but the team reviews funnel data, support tickets, and usability sessions before deciding what to change.

Observation	What it suggests	What it does not prove
Many users leave at the delivery-details step.	The step deserves closer investigation.	That the form length is definitely the cause.
Mobile users show a higher abandonment rate than desktop users.	Device experience may be contributing.	That every mobile user has the same issue.
Support tickets mention uncertainty about delivery fees.	Pricing clarity may be a pain point.	That delivery fees explain all abandonment.

Usability sessions show users missing the fee information until late in checkout.	Earlier disclosure may reduce surprise.	That a change will automatically improve conversion.
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12.2 Map the issue

Element	Example
Customer goal	Complete a purchase with confidence about the total cost and delivery timing.
Pain point	Delivery cost and timing are not clear early enough; mobile form fields are difficult to use.
Evidence	Funnel analysis, support-ticket themes, and moderated usability sessions.
Root-cause hypotheses	Late fee disclosure; unclear field labels; unnecessary data entry on mobile.
Possible interventions	Show total cost earlier, simplify mobile fields, clarify delivery dates, preserve entered details after errors.

Risks to check	Incorrect fee estimates, address validation errors, accessibility issues, or unexpected edge cases.
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12.3 Example pilot plan

Item	Illustrative plan
Change	Display estimated delivery cost and timing earlier; simplify two mobile fields.
Primary metric	Checkout completion rate for eligible sessions.
Guardrail metrics	Payment failure, address errors, customer complaints, refund requests.
Baseline	Record the current rate by device and customer segment before launch.
Success rule	Agree on a meaningful improvement threshold before seeing results; ensure guardrails do not worsen.
Decision	Roll out, revise, or stop based on evidence and customer feedback.

Apply the example to your own journey:

Our customer problem:

Evidence we have:

The cause we need to test:

The smallest useful intervention:

The outcome and guardrails we will measure:

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13. Workshop facilitation guide

A focused mapping session can be completed in 90–150 minutes if evidence is prepared in advance. Complex or regulated journeys may need separate research and validation sessions.

Time	Activity	Facilitator prompt	Output
10 min	Align on scope	Which customer, goal, start, and end are we mapping?	Shared scope statement
15 min	Review evidence	What do we know, and what are we assuming?	Evidence and assumption list
25 min	Map stages and actions	What does the customer do, think, need, and feel?	Draft current-state map
15 min	Mark pain points	Where is effort, delay, uncertainty, or rework highest?	Prioritised pain-point list
20 min	Investigate causes	What evidence supports each root-cause hypothesis?	Cause hypotheses and validation tasks
20 min	Generate improvements	What can we remove, simplify, clarify, or redesign?	Improvement options

15 min	Agree next steps	Who owns the next action, and when will we review it?	Action plan and measurement plan
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13.1 Workshop ground rules

Write from the customer's perspective, not the department's perspective.

Separate observed facts, customer quotes, hypotheses, and proposed solutions.

Include frontline and operational perspectives without letting internal convenience outweigh customer needs.

Look for different experiences across segments and channels.

Avoid blaming individuals; investigate the conditions that make errors or delays likely.

Finish with named owners and validation actions—not only a polished map.

14. Customer journey mapping quality checklist

- ☐ The customer segment and journey boundaries are clear.
- ☐ The map describes a real customer goal rather than only internal tasks.
- ☐ Each major stage includes actions, touchpoints, needs, and emotions.
- ☐ The map includes channel differences, loops, waits, and hand-offs.
- ☐ Pain points are specific and supported by evidence or labelled as hypotheses.
- ☐ Customer impact and business impact are both considered.
- ☐ Root causes are investigated rather than assumed.
- ☐ Ideas are compared using impact, effort, confidence, and risk.
- ☐ The future-state journey explains how the customer experience changes.
- ☐ Actions have accountable owners and realistic due dates.
- ☐ Success measures include a baseline, target, data source, and review date.
- ☐ Accessibility, privacy, security, and compliance risks have been considered.
- ☐ A plan exists to collect feedback and respond to unintended consequences.
- ☐ A review date is scheduled to decide whether to scale, revise, or stop.

Final synthesis and commitment

Complete this page after the mapping workshop. Keep the statements specific enough that someone who did not attend can understand the decision.

Prompt	Team's answer
The most important customer goal is...	_____ _____
The three biggest friction points are...	1. _____ 2. _____ 3. _____
The strongest evidence we have is...	_____ _____
The biggest unresolved assumption is...	_____ _____
The first improvement we will test is...	_____ _____
The person accountable for progress is...	_____

We will know the change helped when...	
We will review results on...	

Top three actions

Priority	Action	Owner	Due date	Success signal
1				
2				
3				

Review notes

What changed after we tested the improvement?

What did customers tell us that we did not expect?

What should be scaled, changed, or stopped next?

Closing thought

A journey map is useful only when it leads to a better experience. Treat this workbook as a living working document: revisit it when customer behaviour, products, policies, or channels change, and update the map with evidence from real interactions.

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