



# Visualizing your customer's experience with an experience journey map

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Marcio Leibovitch | UX Masterclass 2013



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Tuesday, 24 September, 13

Hi everybody, thanks for being there. Can you hear me well?

This talk is about mapping the user experience to help us understand the steps people go through when dealing with a product or a service, the strengths and the weaknesses of this experience and how we can make it better.

# WHO'S THIS GUY?

But before we get started, let me quickly introduce myself.



image: ©Depositphotos/STYLEPICS

# BRAZIL

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My name is Marcio and I was born in the beautiful city of Rio de Janeiro, Brazil...



...where I graduated in... electronic engineering a long time ago. But I never had the chance to work as an electronic engineer. I fell in love with computers and as soon as I finished school I started designing user interfaces in a time where computers looked like these.



image: ©pc-museum.com

# 1992

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I was already working with what we call today “user experience” but had no idea that it would be called like this one day.



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In Brazil I worked for companies like globo.com, the biggest media portal in Brazil, and for Michelin, the tire company, on their websites, intranets and extranets.



# CANADA

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In 2004 I moved to Montreal, Canada



# YU CENTRIK

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In 2005 I started working at Yu Centrik, where I've been working as a User Experience Director since then.



- Since 2003
- User Experience, Product and Service Design
- Multidisciplinary experts



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Yu Centrik was created in 2003, we celebrated our 10th anniversary this summer.

We are a multidisciplinary team committed to creating user experiences for people and with people, by integrating psychology, human factors and technology. We help our clients define, shape and improve their products and services.



User research and international usability testings



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We are the proud Canadian member of the UX alliance – our global network of user research companies, that brings to you the UX Masterclass.

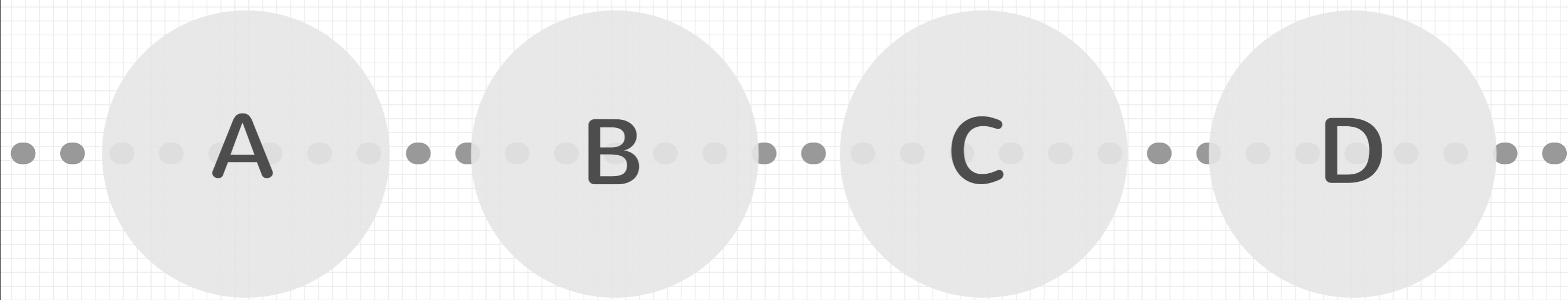
# **WHAT IS AN EXPERIENCE MAP?**

Let's start by defining what an experience map is.

# A visual representation of the **COMPLETE** user experience

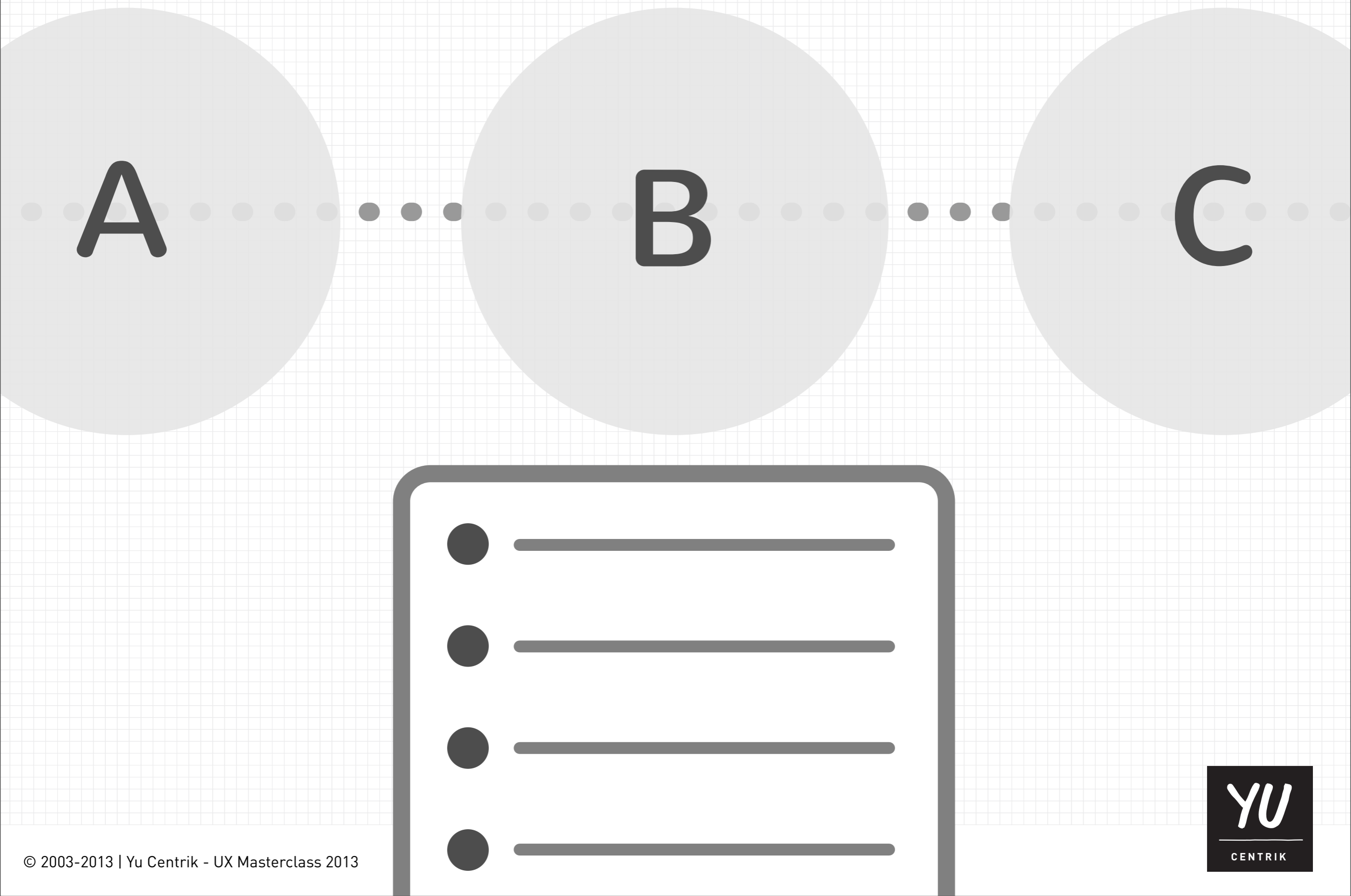
Basically it's a visual representation of the complete user experience. It shows the highs and lows, the strengths and the weaknesses of the experience and how people feel while interacting with the products and services your company offers.

And when you show this you're really telling the story of the experience.



It shows the points of interaction one makes with a product or service – we call these touchpoints...

# WHAT IS AN EXPERIENCE MAP?

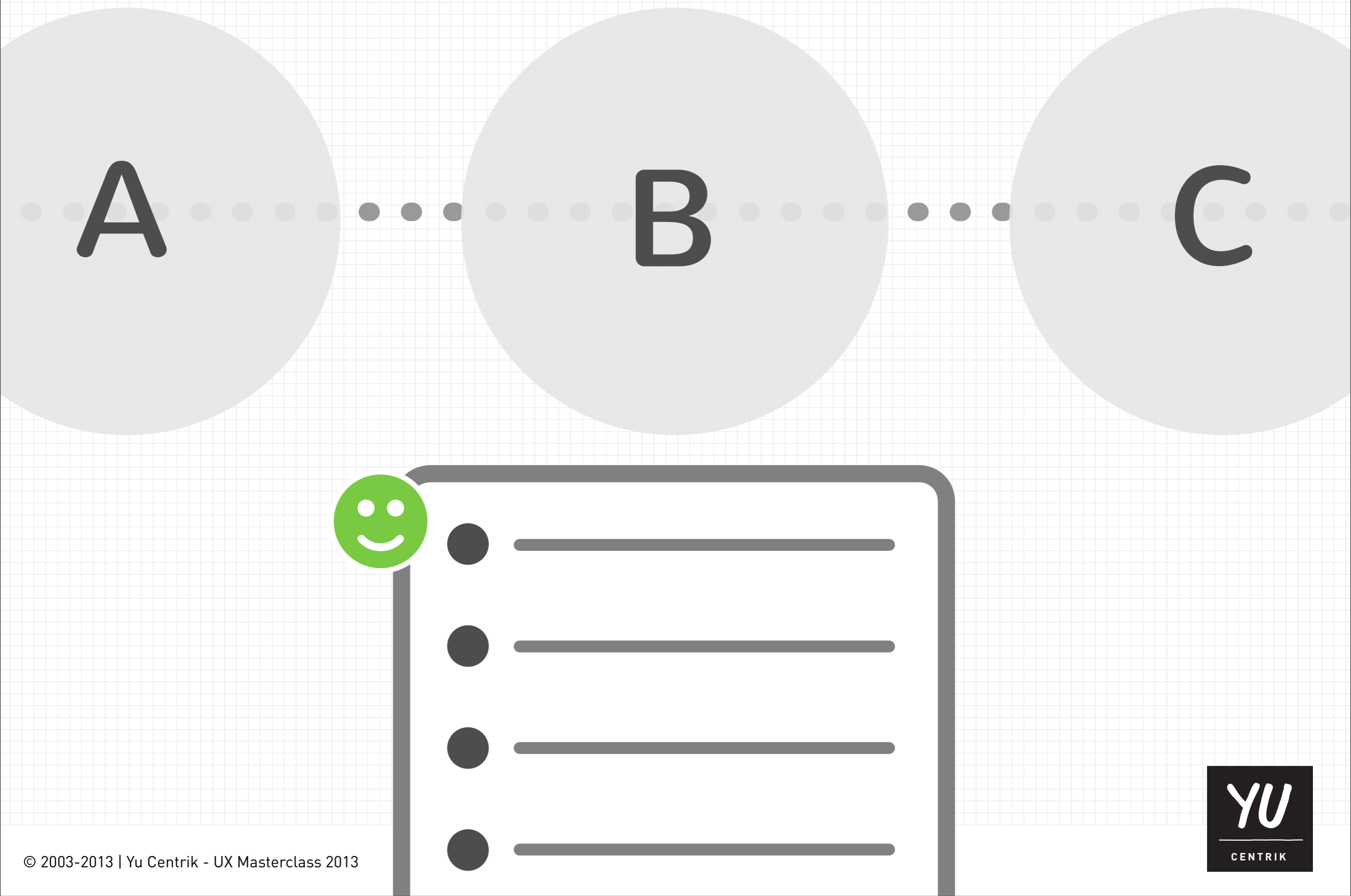


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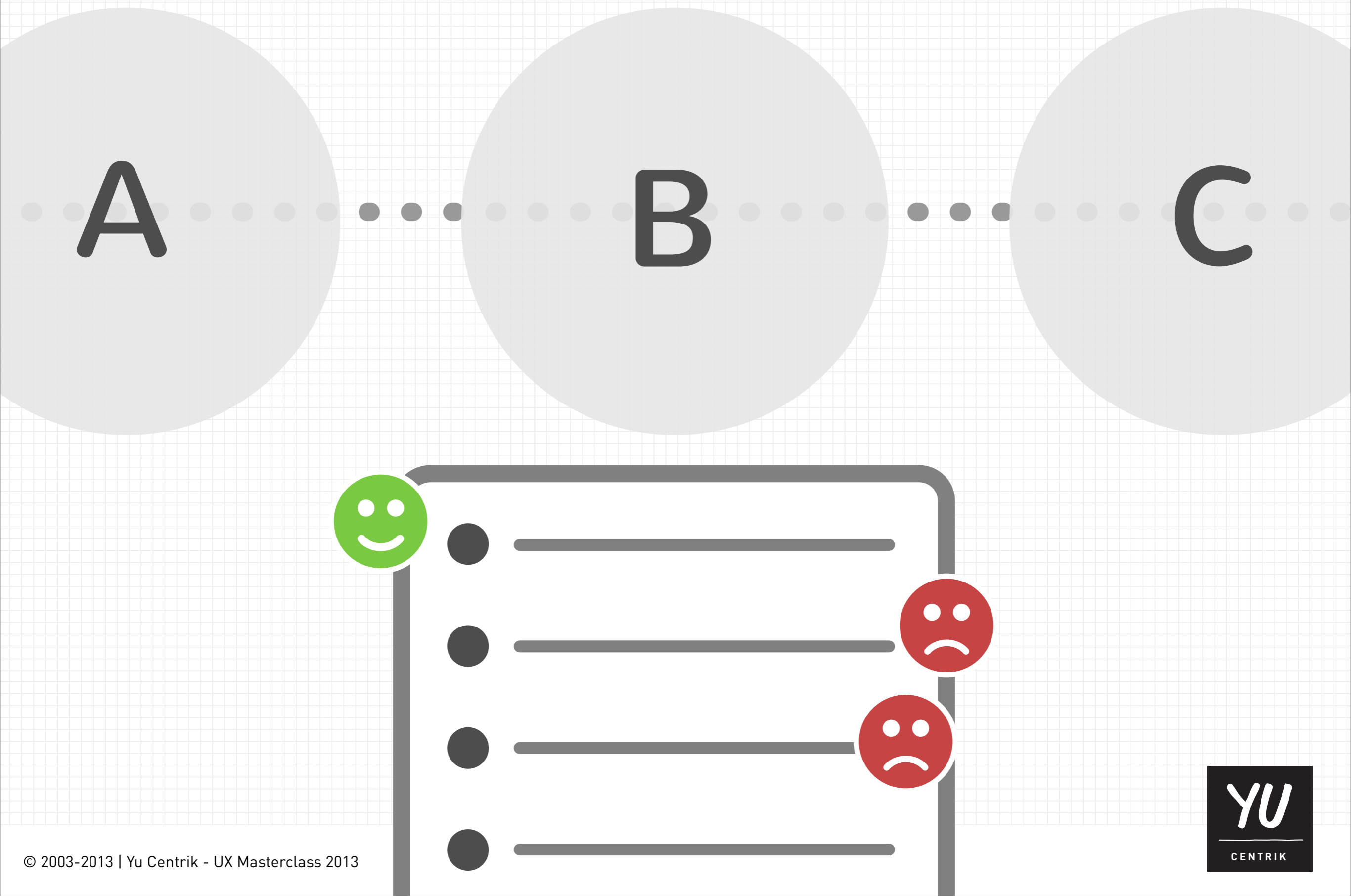
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...what happened at these points of interaction...

# WHAT IS AN EXPERIENCE MAP?



...what emotions were experienced...

# WHAT IS AN EXPERIENCE MAP?



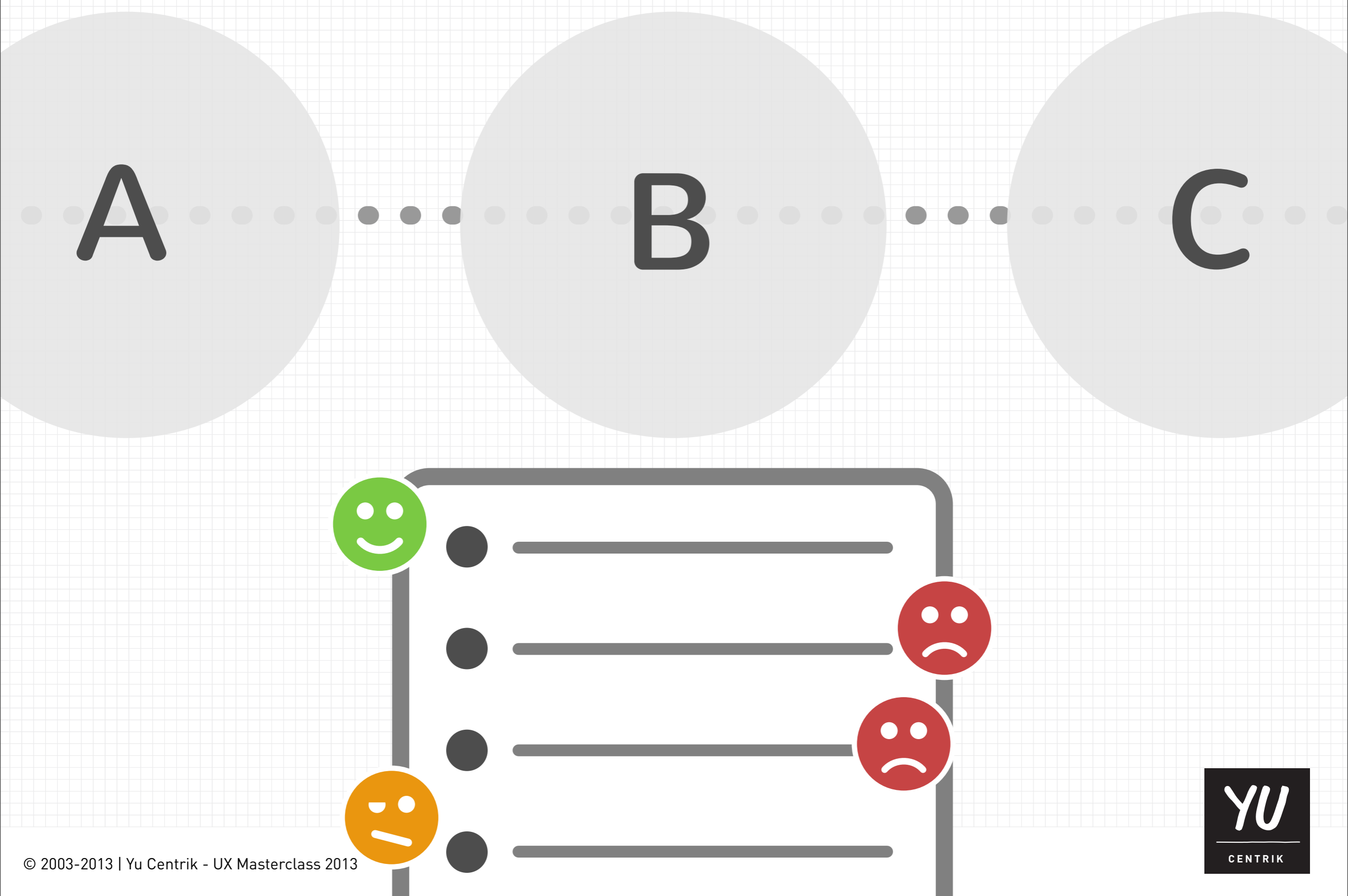
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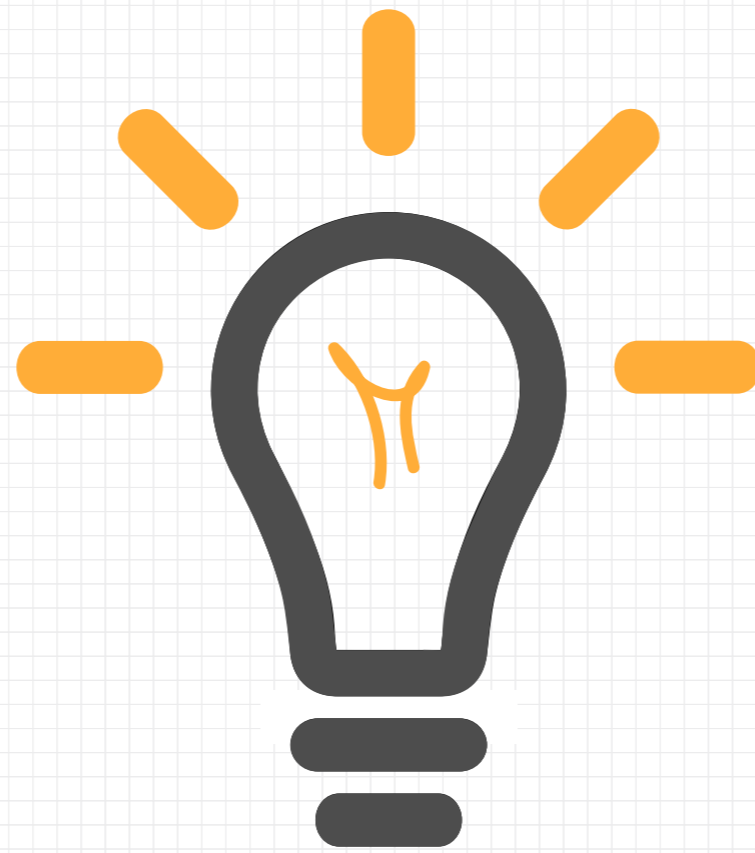
...what emotions were experienced...

# WHAT IS AN EXPERIENCE MAP?



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...what emotions were experienced...



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...and of course – what can be learned...

An experience map is a strategic tool that gives us key insights into the complex customer interactions

An experience map is also known as a customer journey map, although I'm sure there are those that would argue about the subtle differences for hours on end...

So what are some of the common elements of an experience map...?

# SOME EXAMPLES

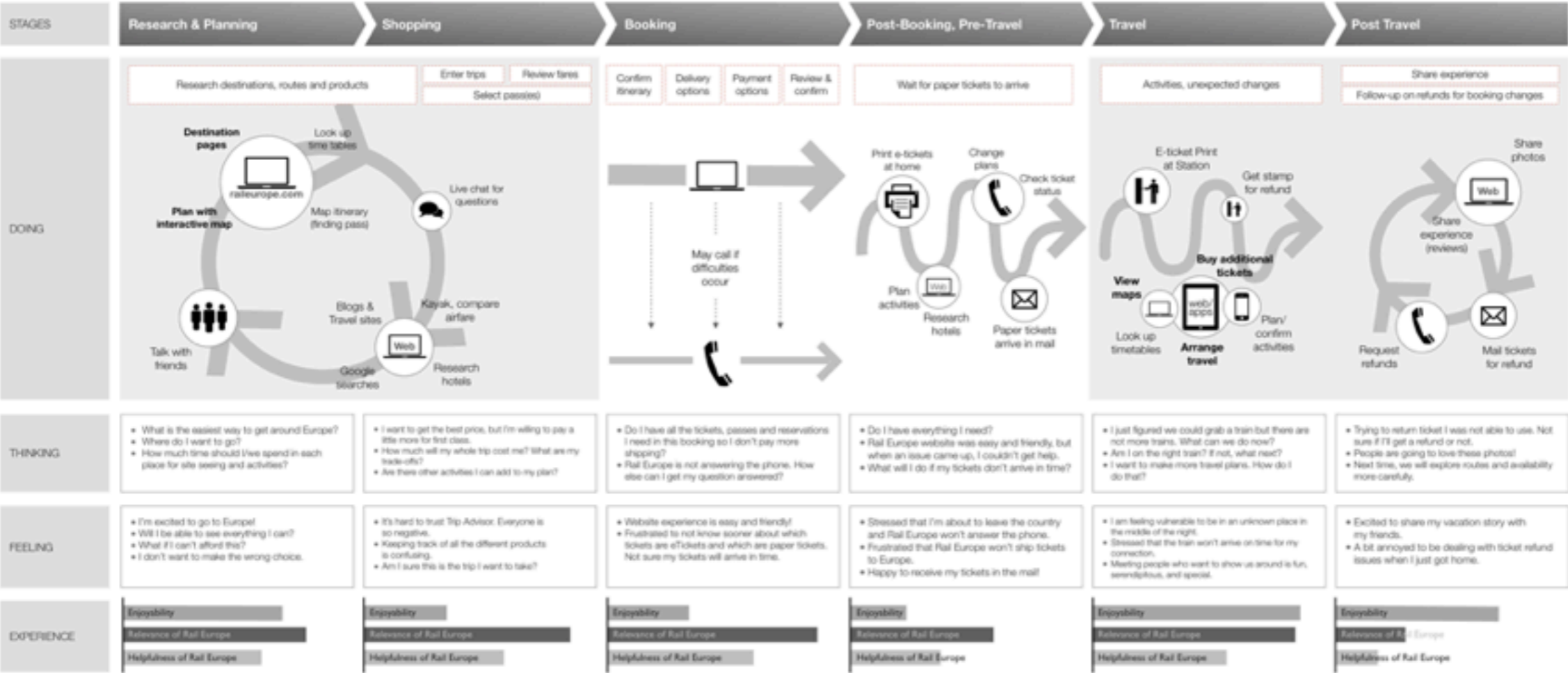
Rail Europe Experience Map

Guiding Principles

- People choose rail travel because it is convenient, easy, and flexible.
- Rail booking is only one part of people's larger travel process.
- People build their travel plans over time.
- People value service that is respectful, effective and personable.

Lens

Customer Journey



Journey Model

Qualitative Insights

Quantitative Information

Opportunities

GLOBAL			PLANNING, SHOPPING, BOOKING			POST-BOOK, TRAVEL, POST-TRAVEL	
Communicate a clear value proposition.	Help people get the help they need.	Support people in creating their own solutions.	Enable people to plan over time.	Visualize the trip for planning and booking.	Arm customers with information for making decisions.	Improve the paper ticket experience.	Accommodate planning and booking in Europe too.
STAGE: Initial visit	STAGES: Global	STAGES: Global	STAGES: Planning, Shopping	STAGES: Planning, Shopping	STAGES: Shopping, Booking	STAGES: Post-Booking, Travel, Post-Travel	STAGE: Traveling
Make your customers into better, more savvy travelers.	Engage in social media with explicit purposes.		Connect planning, shopping and booking on the web.	Aggregate shipping with a reasonable timeline.		Proactively help people deal with change.	Communicate status clearly at all times.
STAGES: Global	STAGES: Global		STAGES: Planning, Shopping, Booking	STAGE: Booking		STAGES: Post-Booking, Traveling	STAGES: Post-Booking, Post-Travel

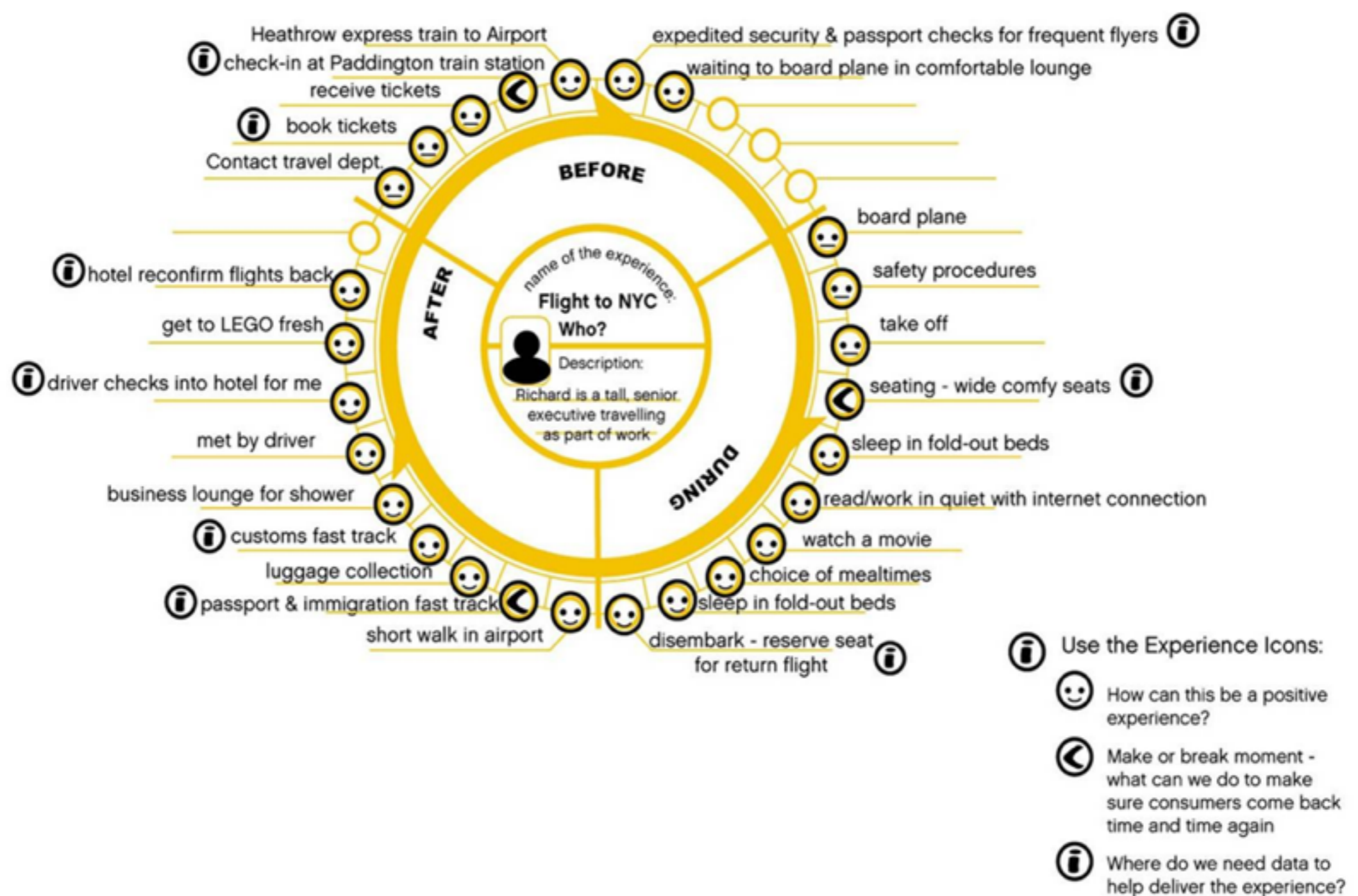
Takeaways

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The experience map represents the whole journey from the moment the need or the desire to use a product or service raises to the moment these needs are accomplished



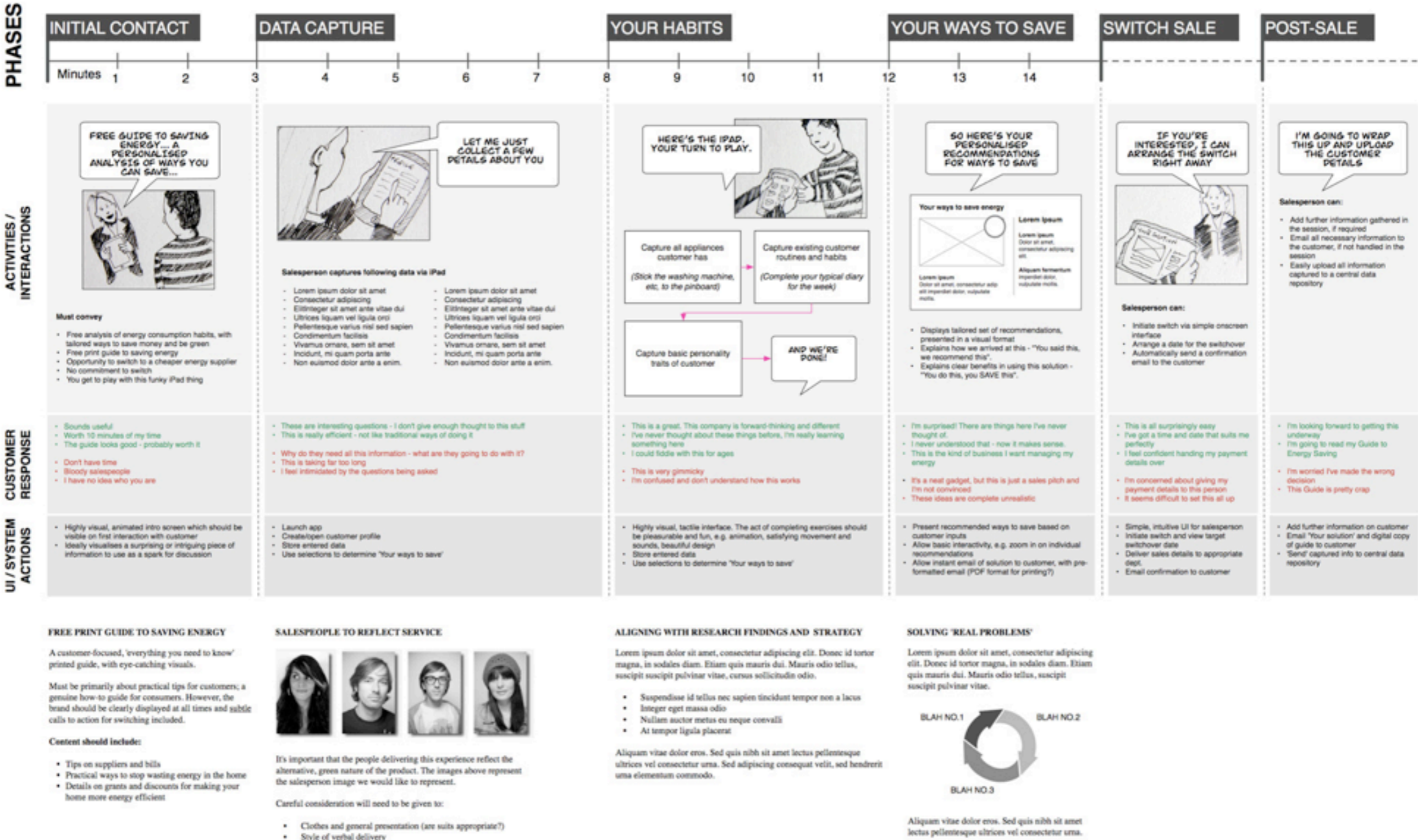
## Designing the Experience - Example WOW



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There's no single best visual representation, but some key components are common and must be present to give us the insights we need.

# YOUR WAYS TO SAVE: experience map





## Back-up User Journey

Frank

(This is a core user journey based on Frank, but also applies to Fiona, Samuel, Sam and Ian.)

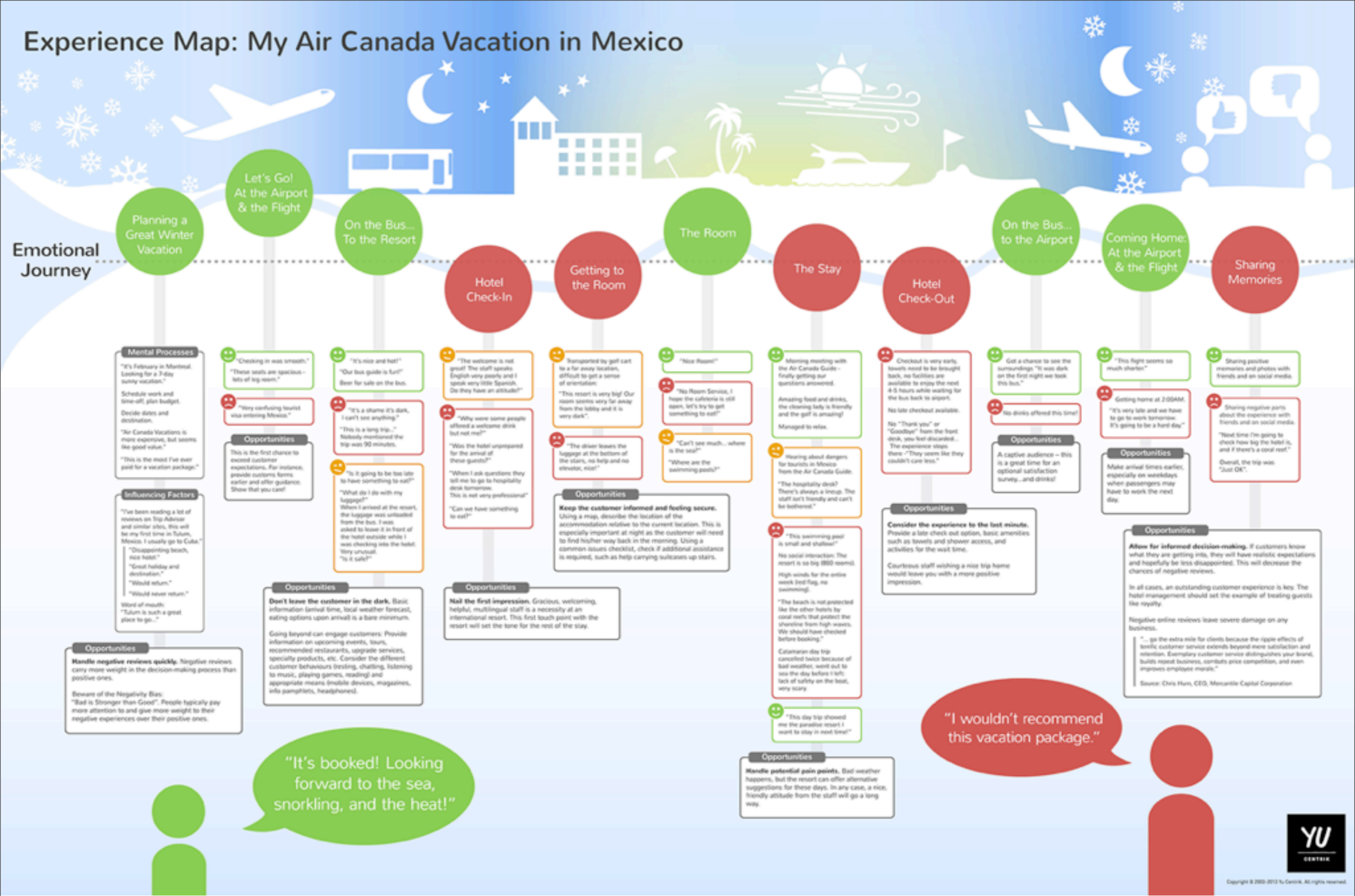
Frank runs his own building company. His work is very demanding and he is busy managing staff and suppliers on several work sites. Despite his busy schedule, Frank also places a high priority on his private life, and works hard to balance both. He is often on the road, and his mobile is crucial for staying on top of jobs and keeping in touch with his wife during the day.

orange

	Aware			Engage			Use				Develop		Exit							
Customer Need	I need access and safe storage for my files.			I need to learn the best and most secure ways to backup my business and personal data.			I can store and access files on my mobile.				I can easily sync and share my files.		I want to know what new files I can store?		I want to be able to take my files to my new device.					
Step	Informed that back-up is available			Find out more		Activate service	Personalise	Use		Manage		Sync		Share	Updates	Service upgrade	Upgrade Device	Transfer		
Experience	"My files were being backed-up as soon as I got my phone"			"The staff in the Orange shop explained all my options"			"I can access files when I am out of the office. Its great"				"My colleagues can access my files"		"Orange tell me about upgrades and let me choose if I want them"		"Orange helped me transfer my backed-up files. I'd definitely consider Orange in the future"					
Scenario	Recommendation from friend			Advice and Information			Use		Manage		Sync to other devices		Share		Updates & Upgrades		Helping you Pack			
	<p>Frank hears about the back-up service from a friend who is already on Orange.</p>			<p>Frank was given a range of options on how to back-up and made aware of any costs. Frank personalised the service to suit his needs.</p>			<p>Frank uses the back-up service on his mobile.</p>		<p>Frank manages his backed up files on his mobile.</p>		<p>Frank can sync the files he has backed up to other personal devices.</p>		<p>Frank can share files with friends/family/colleagues.</p>		<p>Frank receives updates on new services available and has the option to upgrade his service.</p>		<p>Frank is given support if he wishes to upgrade his device or switch providers.</p>			
Person	Word of Mouth Customer hears about Orange back-up service through a friend																			
Web	Online Advertising Online adverts about back-up			Online Info Customer can view back-up options online		Activate Online Customer selects the back-up service they want and activates it online	Personalise Customer can alter and personalise their back-up settings to suit their needs. There is an online demo and help forum to assist customers			Manage Online Customers can access their backed-up files on the internet and organise		Sync online Customers can sync their backed-up materials to other devices online		Share Online Customers can share their backed-up materials online		Email updates Customers receive emails about new back-up services		Upgrade Service Customers can upgrade their back-up service online	Upgrade Device Customer can upgrade their Orange handset online and have the ability to transfer their backed-up documents	Leaving Email Customers receive email with information for moving to new provider and how their backed-up files can be transferred
Print	Leaflet Customer gets a leaflet in the box with new phone or is sent leaflet with mobile phone bill - illustration showing how the service works			Leaflet w/ Bill Customer is sent leaflet with mobile phone bill showing the back-up options available													Ads w/ Bills Introduce new back-up services on billers sent with phone bill		Letter Customer receives a letter thanking them for using an Orange customer and are given a USB stick containing all their backed-up documents	
Mobile	Text Message Ad Customer receives text message offer					Activate on Mobile Customers can activate their back-up on their handset	Personalise Back-up can be personalised through mobile web	Mobile back-up Customers can choose which files on their mobile they wish to back-up		Manage on Handset Customers can manage their backed-up material through their handset		Sync on Handset Customers can sync backed-up files through their mobile handset		Share through Mobile Customers can share their backed-up materials through their mobile		SMS Updates Customers find about new services via text message		Upgrade Customer can upgrade their service through mobile phone		
Shop	Shop Assistant Shop assistant tells customer about back-up services when purchasing a new phone			In Store Assistance Customer gets advice from Orange staff on back-up options		Activate In Store Customers can activate the back-up service in-store with the help of a shop assistant	In Store Assistance Customers can get help in store about how to personalise their back-up settings											Upgrade Handset Customer can upgrade handset in-store and transfer their backed-up data		
Call Centre	Sales Call Proposition discussed during retention calls			Call Centre Help Customer can ask call centre staff about back-up options															Upgrade on Phone Customer can contact the call centre to upgrade their phone. The customer will receive the information needed to transfer their backed-up data	
Products Involved	SMS (mobile product)			e-shop (web product)		e-cas (mobile & web product)	Personalisation Services (mobile & web product)	FOX (mobile product)		FOX (mobile & web product)		FOX (mobile & web product)		FOX (mobile & web product)		SMS (mobile product)		e-cas (mobile & web products)	e-shop (web product)	Orange email (web product)
Product Map Reference	1			2		3	4	5		6		7		8		9		10	11	12
Possible Usage Barriers				lack of cost transparency		complex UI	complex UI	complex UI		complex UI		complex UI		complex UI					poor service integration	

# OUR EXAMPLE

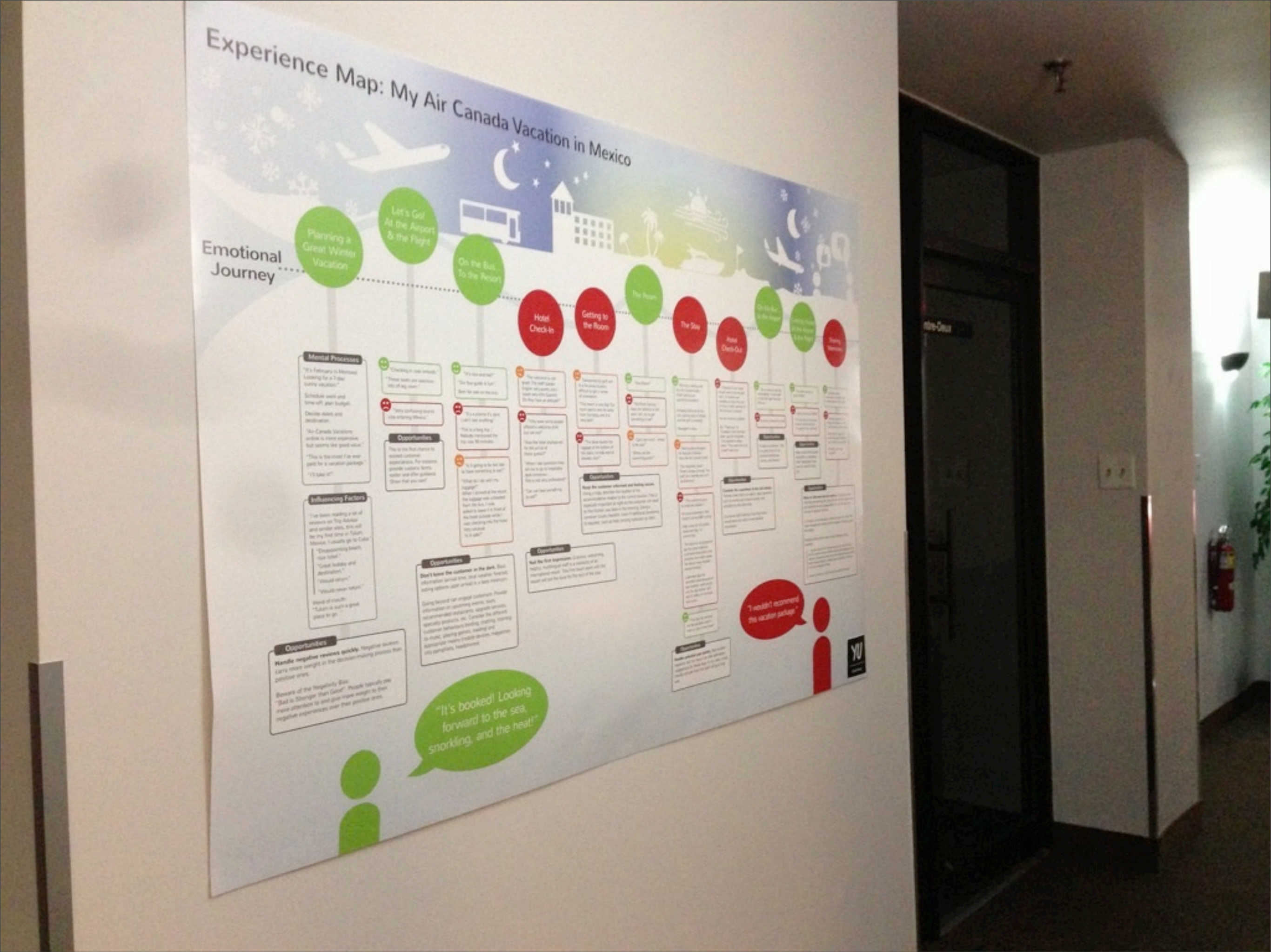
# Experience Map: My Air Canada Vacation in Mexico



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So – this is an experience map! We created this one in our office recently... it shows the emotional journey of someone's one week trip to Mexico they took this last winter.

We're going to get into some of the common elements found in experience maps, and see how we went about building this one...



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This is how it looks in our office wall, to give you a better perspective

# **THE USER STORY**

Before we get into how we design an experience map, let's go through some key concepts.

First, let's talk about the user story – this is what sets the foundation for the experience map

A user story describes the user's experience with a product or service (or both).

Simply, a user story is a description of someone's interaction with a product... or a service or a website or any system...

# The benefits of the user story:

The user story is very beneficial.

# The benefits of the user story:

- Knowing the needs of the user

### The benefits of the user story:

- Knowing the needs of the user
- Knowing the REAL experience

It tells about the REAL experience they had – versus what is just assumed about it ...

### The benefits of the user story:

- Knowing the needs of the user
- Knowing the REAL experience
- Knowing the emotional journey

It tells about the emotional journey of the user (more on this soon...)...

### The benefits of the user story:

- Knowing the needs of the user
- Knowing the REAL experience
- Knowing the emotional journey
- Knowing the touchpoints

It tells about the touchpoints – where and how people interact with a product...

# The benefits of the user story:

- Knowing the pain points

It tells about the pain points – what went wrong?

## The benefits of the user story:

- Knowing the pain points
- Discovering opportunities

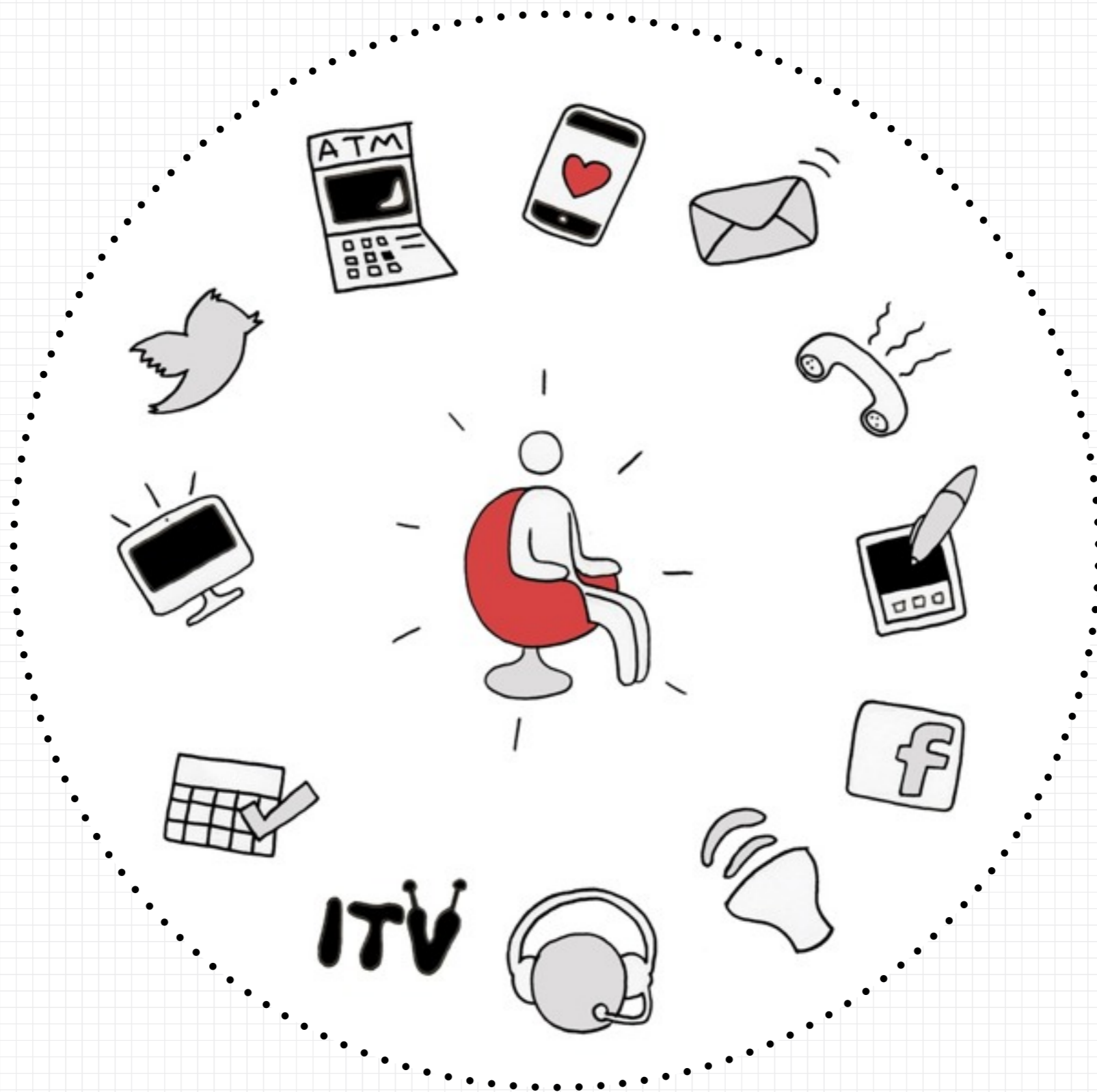
### The benefits of the user story:

- Knowing the pain points
- Discovering opportunities
- Seeing the big picture

Perhaps most importantly, it tells about the big picture – getting a holistic view of the whole experience.

# TOUCHPOINTS

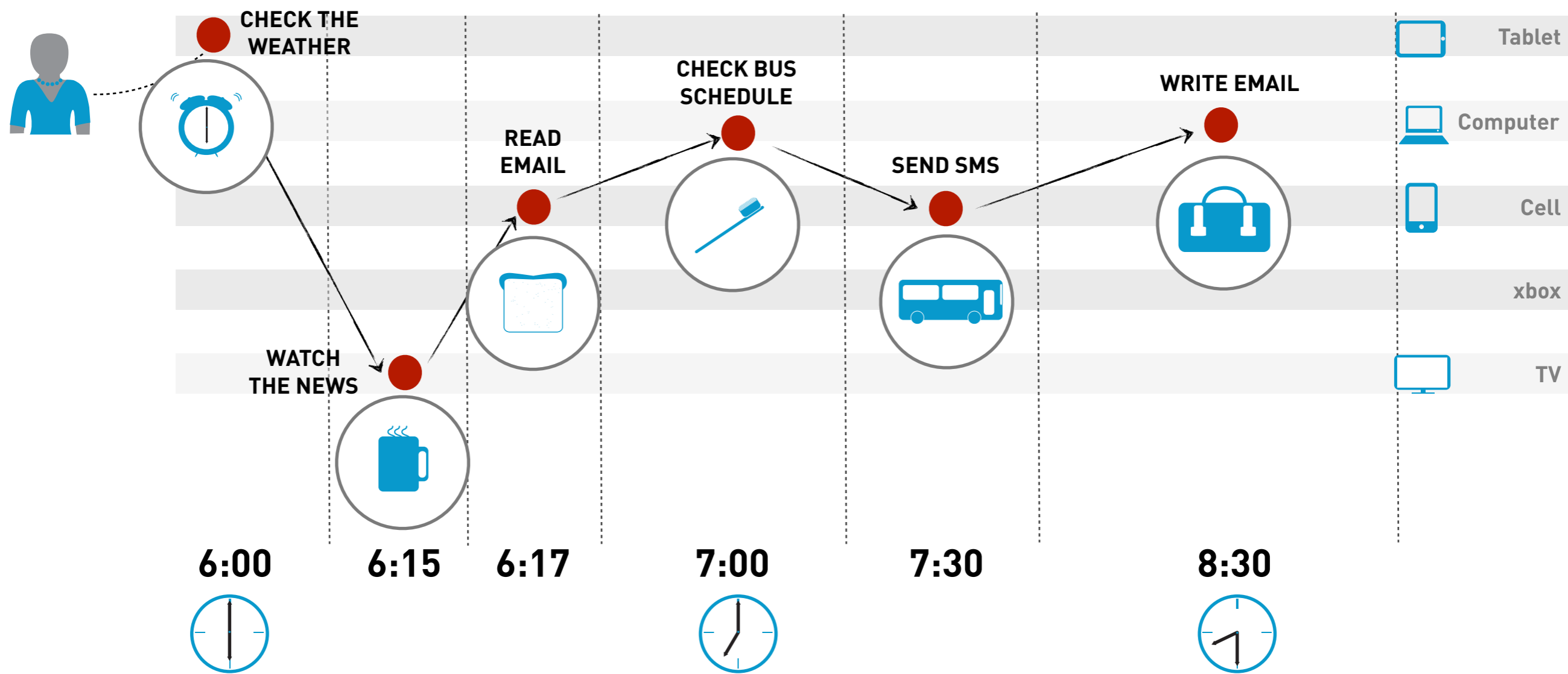
Another important concept is the “touchpoints”. What are they?



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This is a term for the various methods by which users interact with the product or a service – using a website on their desktop computer, using it on their mobile phone, calling the company for tech support, meeting a sales person in a store... going to a facebook page of the company... etc.

# A typical morning with tech...



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This is a simple example of a map that includes touchpoints – showing someone’s morning interactions with technology, from the time they get up at 6AM, to the time they arrive at work.

In this layout, you can see the touchpoints here ... (checking the weather, watching the news)... each one representing an activity where a device was used.

You see what happened, and when – but this doesn’t show emotions...

# **THE EMOTIONAL JOURNEY**

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So we talked about the user story and about touchpoints. Let's talk about the emotional journey.

This is a way to learn about how someone experiences a service or a product across the different touchpoints they encounter.

By tracing their steps and getting feedback about their emotions, you can really identify the things that work ... and more importantly things that leave negative lasting impressions.

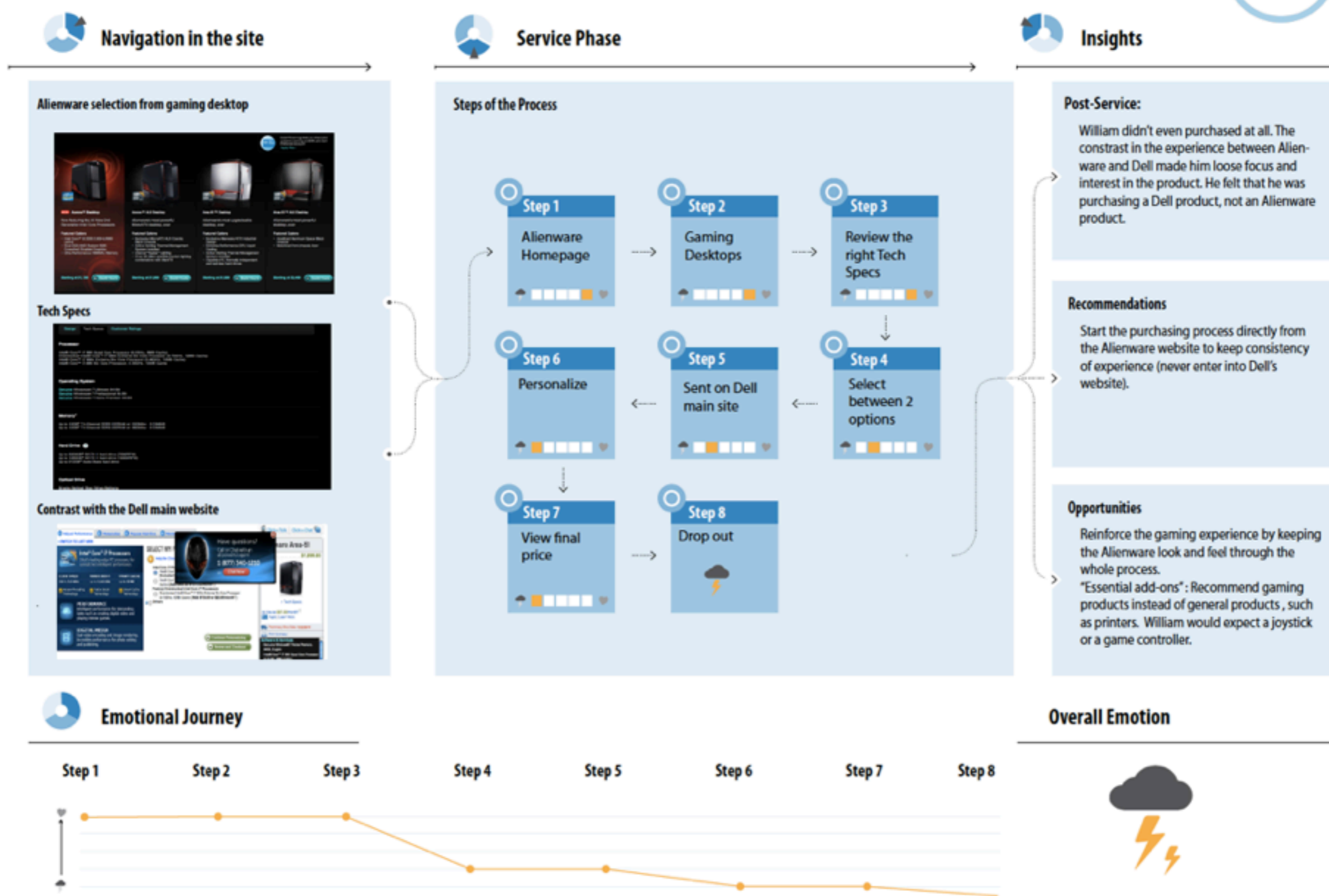


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We have to remember that we are all human beings and that humans are driven by emotion. The emotions people feel while using a product or service shape the entire experience. And the lasting impressions that we just talked about are all related to the emotions we have.

Paying attention to these emotions can reveal the most effective ways to improve your offering.

We need more information about what happened at each of those touchpoints... we want details – and we want to find out why... It is very important to understand the emotions of your users!

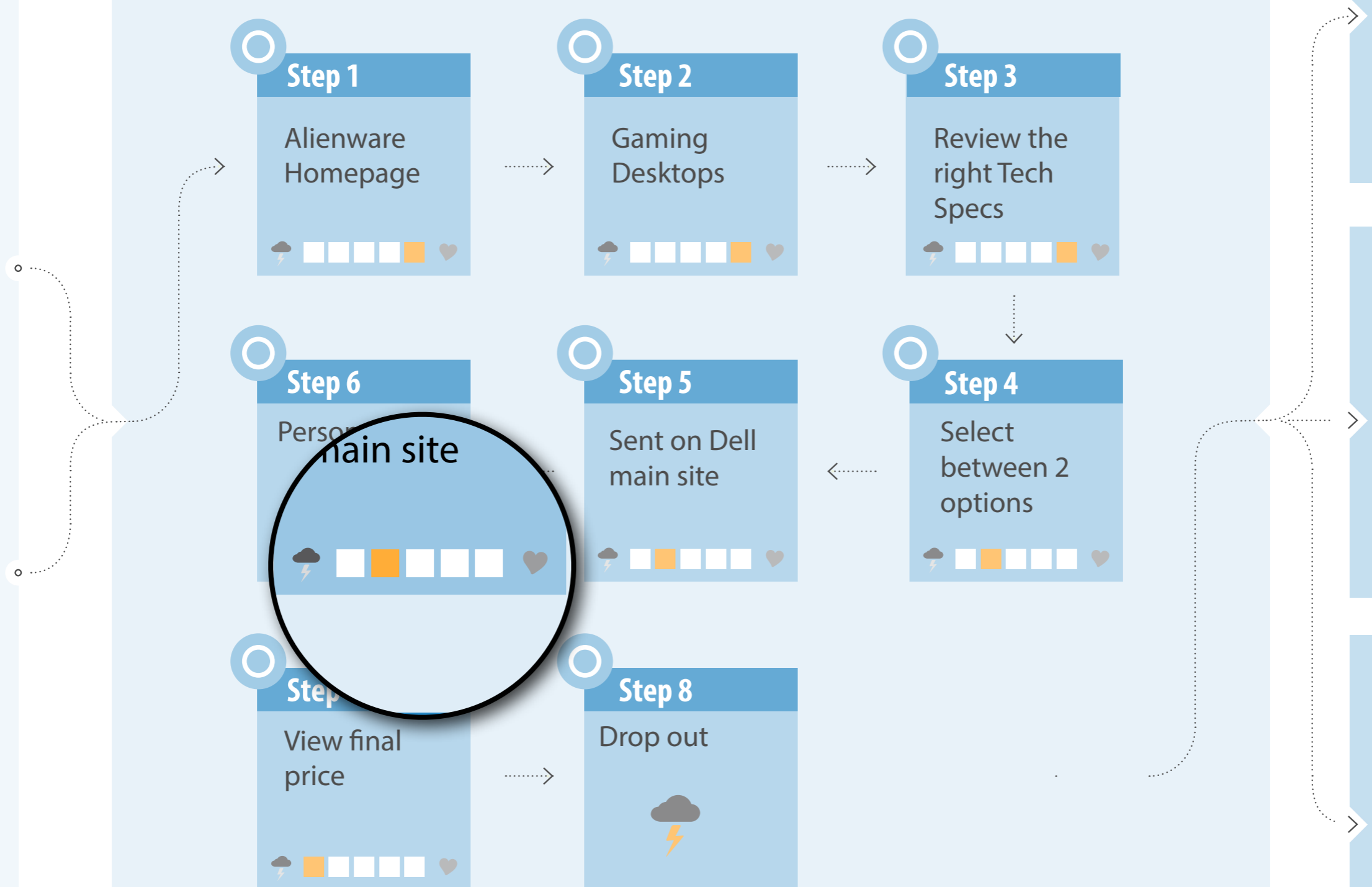


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So here's an example of a customer journey .... showing a particular experience of someone buying a gaming computer on DELL's website...

You have some useful elements here... The steps they took...

## Post-Service:



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but unlike the previous example, this one shows the emotional journey of the person during the experience...

For each page there is a rating showing whether the person had positive or negative emotions at that respective stage.

You can see the experience starts out positive – the person is excited about buying a new computer – they’re on the Alienware site (being a brand owned by DELL)... navigating to gaming desktops, reviewing the technical specs of the various models... but things go downhill when he is redirected to the main Dell website to continue the purchase... he wasn’t expecting to go there – he didn’t want to buy a DELL computer. From this point onward, the experience was changed significantly enough for him to abandon the purchase – and the overall emotion was a storm cloud with lightning... I.E. “bad”.



## Emotional Journey



## Overall Emotion



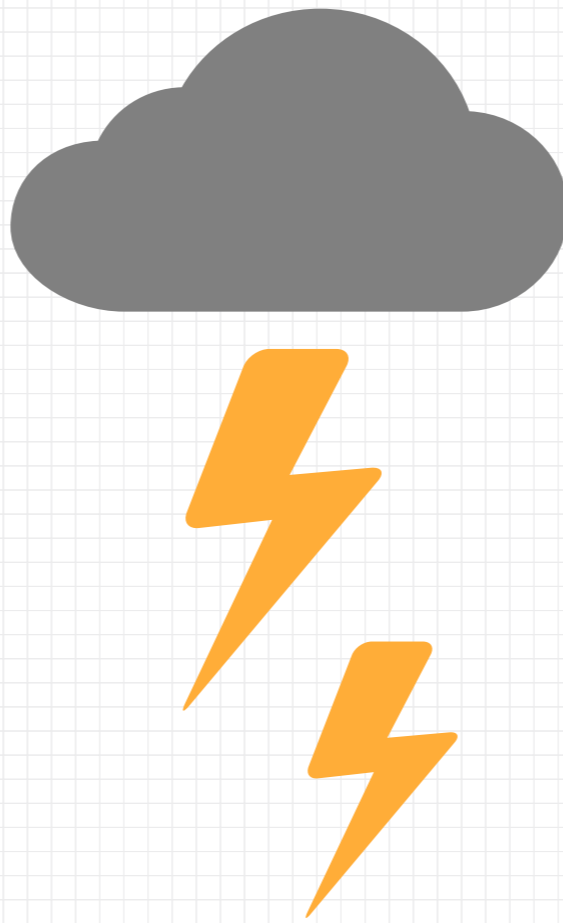
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...and through the various steps you can see how things changed... its pretty clear this ended up being a bad experience...

# **OPPORTUNITIES**

User story, touchpoints, emotional journey. They all lead to opportunities. Once you can see what works and what doesn't work, you can look at how to make improvements...

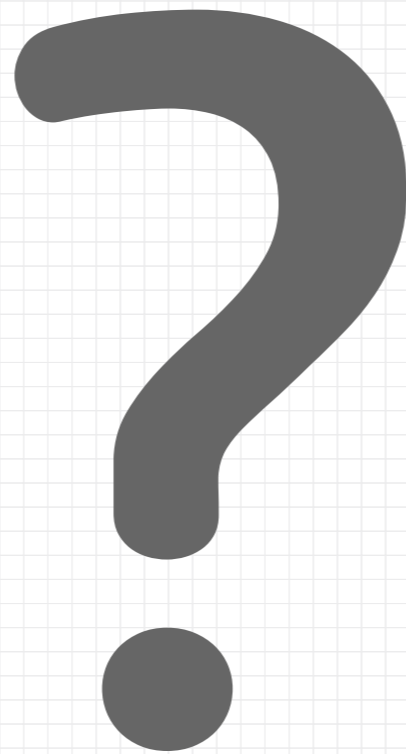
# Opportunities to fix problems



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People usually want to fix things that hurt the overall experience of a product...

When you find that the person or people have had negative experiences at a certain stage you really need to understand why... and ask the right questions...



Look at the behaviour of people this point – what needs do they have that aren't being met? What motivated them to reach this stage and what were they expecting out of it? This is the perfect opportunity to solve problems... the clues are there.

# Opportunities for innovation



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Insight from customers or people using a service often lead to innovation – someone says “well that was nice – but i wish they had provided this!”

Some valuable knowledge!

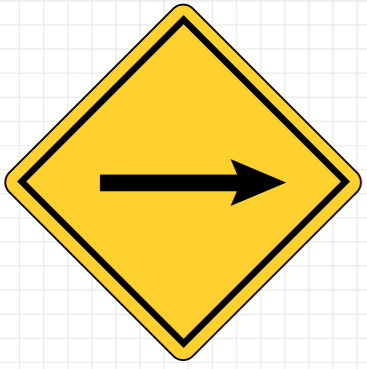
# EXPECTATIONS & THE TRAVEL EXPERIENCE

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Our example is based on a travel experience. Modern travel is a great subject to break down and evaluate... people will tell you – “Oh I went on the best trip!” or “I just got back from the biggest waste of time and money ever!”.



Let's take a short detour here to look at an important element of UX:



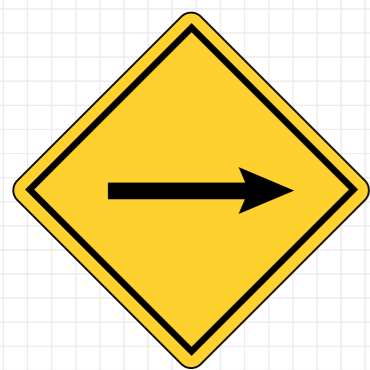
What someone **expects** from a product or service **greatly influences** how they experience it.

“What someone expects from a product greatly influences how they experience it.”

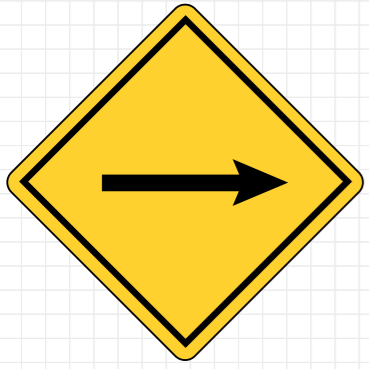
When designing products or services, it's important to make sure what you're trying to create is going to meet (and hopefully exceed) what people expect...

This is no different with travel – people build expectations of their next great vacation on which they're going to spend their hard-earned money.

So where do expectations come from?



# Where do expectations come from?

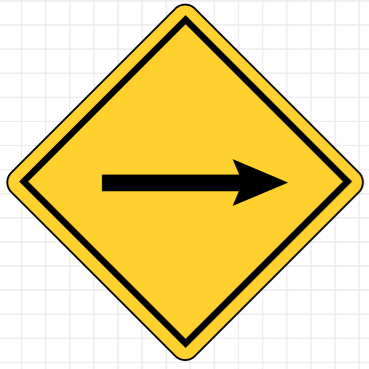


# Where do expectations come from?

- Prior Experiences

### Prior Experiences:

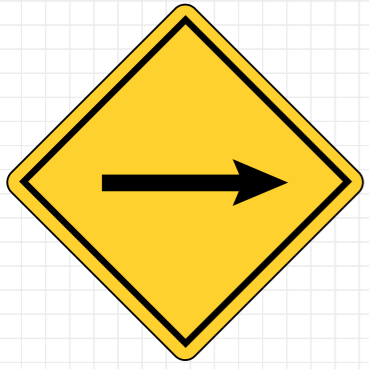
Someone's prior experiences create expectations – So, “the last time” someone does something greatly influences “the next time” they do it. The “last time” I flew I was offered a drink and a meal and a towel and some peanuts... this time I got nothing (an unfortunate reality of modern flying experience).



## Where do expectations come from?

- Prior Experiences
- Online Reviews

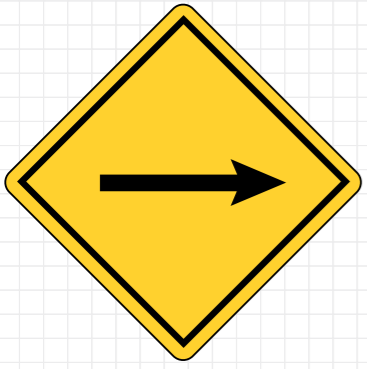
Online Reviews : people researching vacations online – reading trip advisor, Expedia and others



## Where do expectations come from?

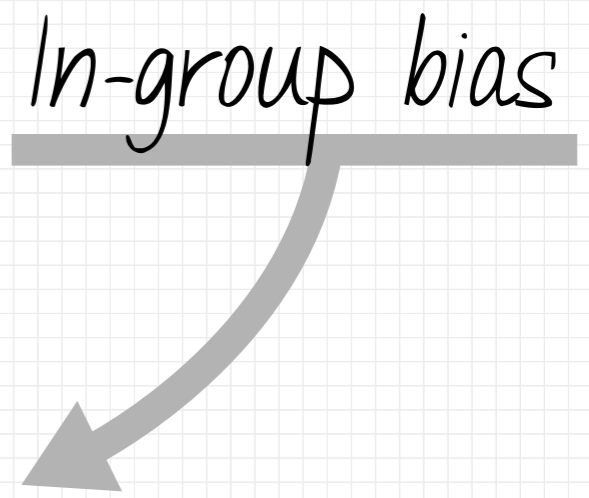
- Prior Experiences
- Online Reviews
- Personal Recommendations

Personal Recommendations (and this is a big one) positive or negative reviews from someone you actually know– people in your circle – have a huge impact on decisions you'll make...



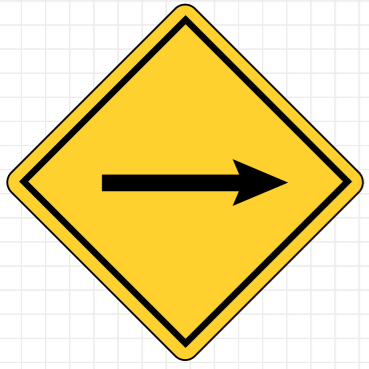
# Where do expectations come from?

- Prior Experiences
- Online Reviews
- Personal Recommendations



this is known as the In-group bias in case you want to check it out later...

Don't forget we're talking about human psychology here



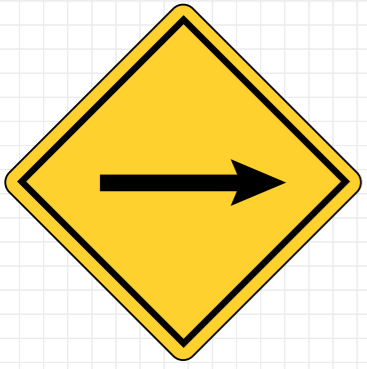
## Where do expectations come from?

- Prior Experiences
- Online Reviews
- Personal Recommendations
- Advertising

*In-group bias*

Advertising: If you're showing the beautiful pictures of a resort and ridiculous people enjoying themselves – you're building up expectations of your product, hopefully you can follow through...

All these things build expectations.



# Are people's expectations being addressed?

An important question to ask when designing or evaluating a product is:

“Are people's expectations being addressed?”

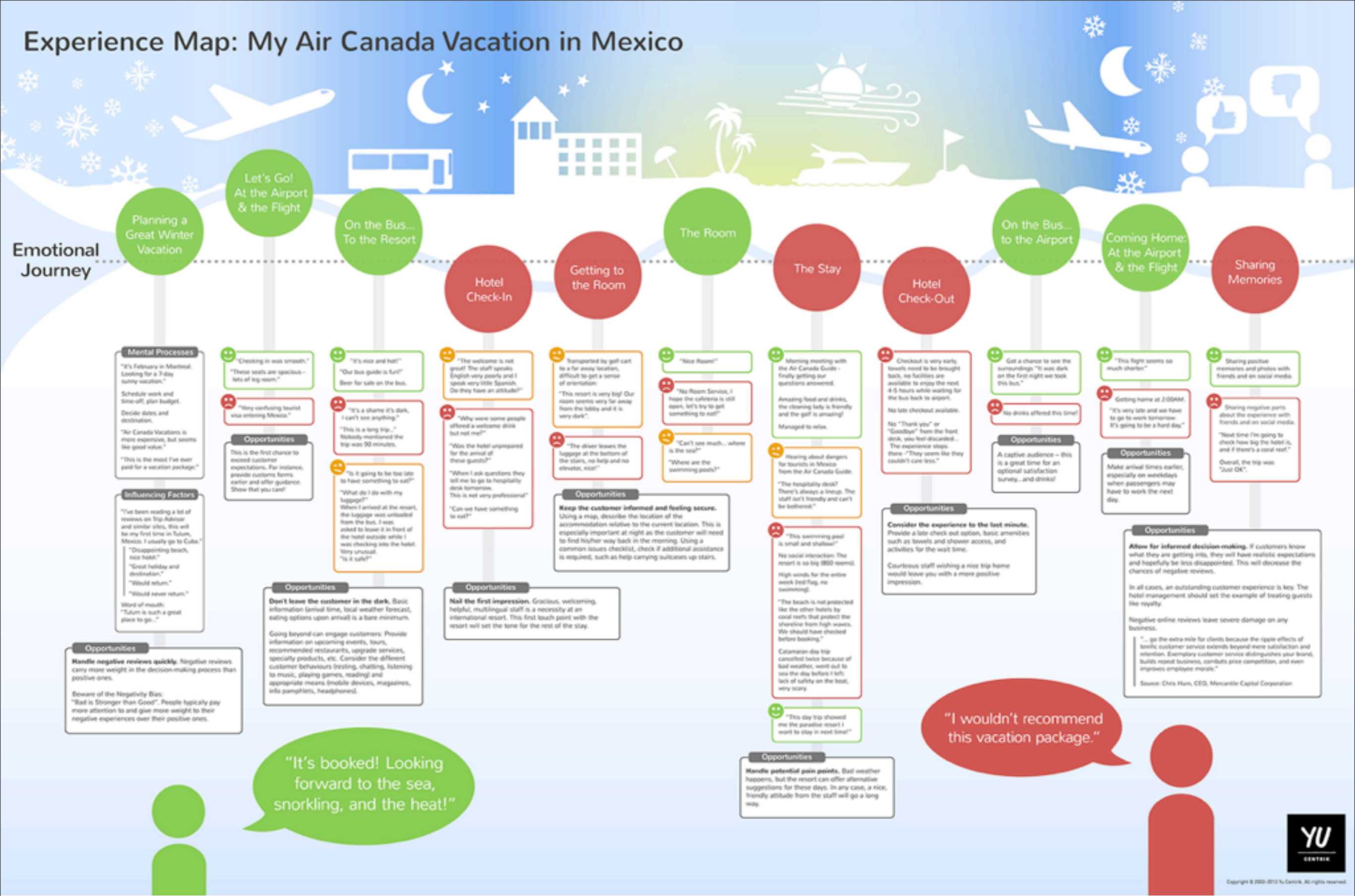
Looking back at the Dell computer buying example – the person was expecting to stay on the same website throughout the whole purchasing process and to be sent to another site to make the purchase, and this had a really negative impact – the trust in the site was affected and the person abandoned their purchase.

This all sounds pretty obvious – but think back to your own experiences with travel or otherwise – you've likely run into situations where you thought you should have been given more information or instruction...

# **CREATING A MAP!**

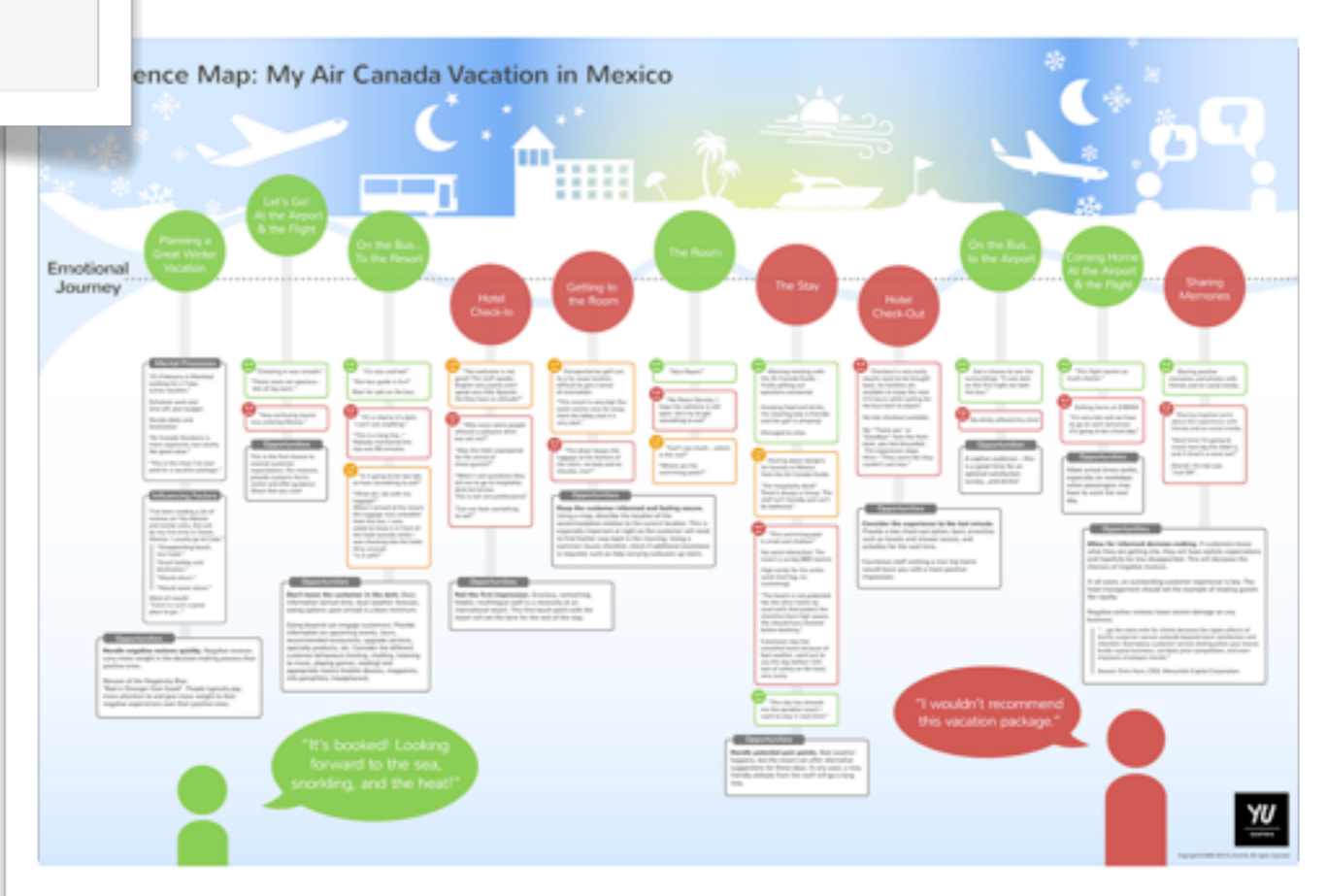
So lets see how we can put these things together to create an experience map...

Experience Map: My Air Canada Vacation in Mexico



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Getting back to our example...



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How do we get there?

# 1. Understand the story

- existing information: stats, logs, surveys
- new information: interviews, surveys with customers, reps, stakeholders - both quantitative and qualitative

- existing information: stats, logs, surveys
- new information: interviews, surveys with customers, reps, stakeholders – both quantitative and qualitative

As in any user research project, the more information you have the better. Just as an information, in our example, we represented the experience of a single person, which for the purpose of our project was ok, but be aware that you need than that to have a more precise representation of the process.

## 2. Summarize the story, create the typical journey

understand people's goals, their motivations, what they are doing, thinking and feeling; what they are interacting with and the context - where, when

understand people's goals, their motivations, what they are doing, thinking and feeling; what they are interacting with and the context – where, when

### 3. Make it visual

Do it together with other teams, in a workshop, using post-its. Make sure people can understand the overall process in a glance - what was good, what was bad

**Workshop! Do it together with other teams, make sure people can understand the overall process in a glance – what was good, what was bad**



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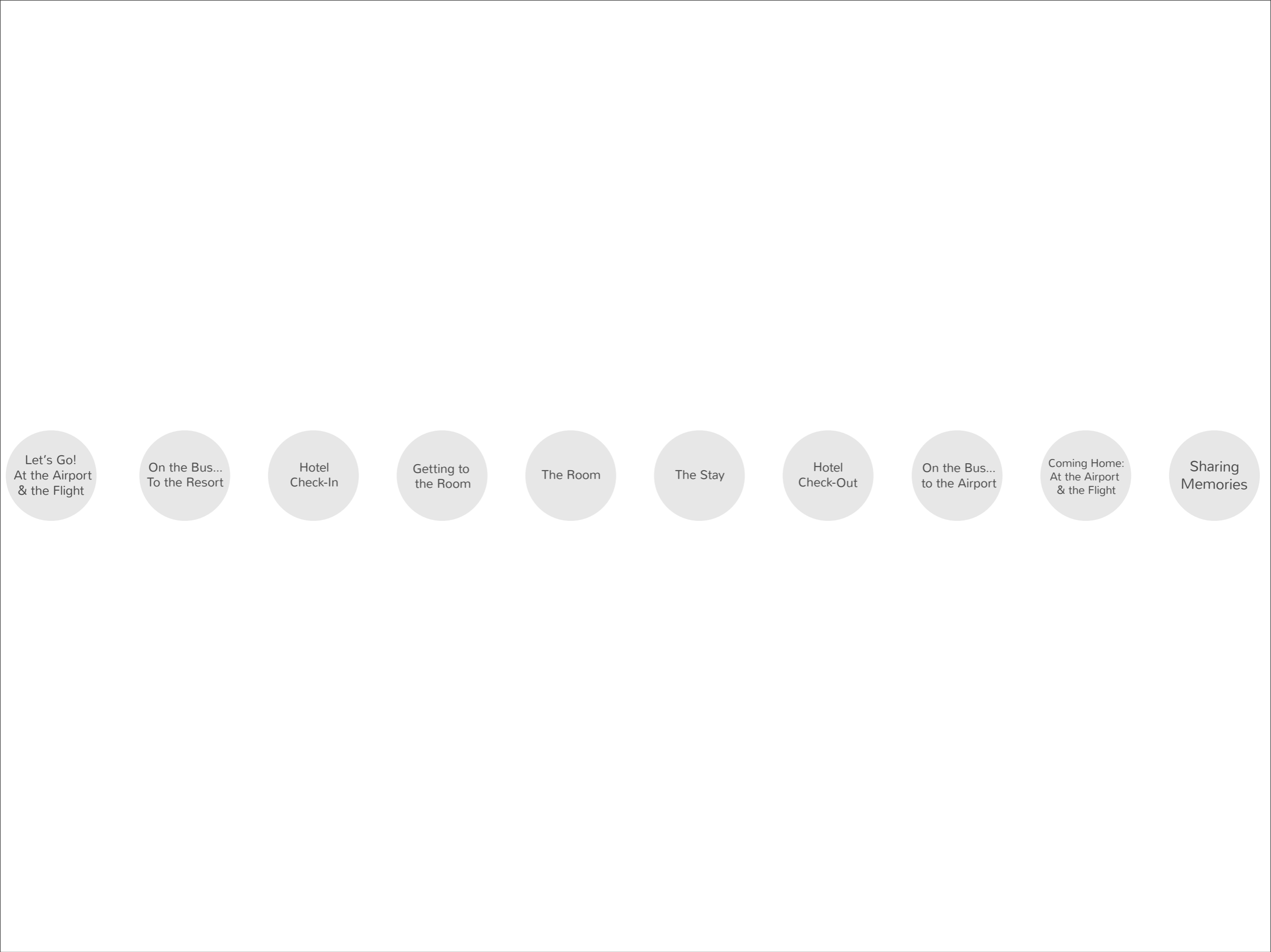
We laid this out on a wall in our office... this is a great way to collaborate with an interview subject and get the best information... much more valuable information than say, getting them to fill out a questionnaire.

It also helps you retain the big picture while working on something like this...



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We identified the main phases of the experience – she went through a research phase, the trip to the destination, the stay, and the trip home.



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We then expanded these into more specific events, and these became the touchpoints – how she was interacting with Air Canada’s website, their staff, the hotel...

Let's Go!  
At the Airport  
& the Flight

On the bus...  
To the Resort

Hotel  
Check-in

"Our bus guide is fun!"

"Is it going to be too late  
to have something to eat?"

"This is a long trip..."  
Nobody mentioned the  
trip was 90 minutes.

"What do I do with my  
luggage?"  
When I arrived at the resort,  
the luggage was unloaded...

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We then documented the specific events around these touchpoints – and more importantly – how this made her feel. Direct quotes on the experience were recorded.

Let's Go!  
At the Airport  
& the Flight

On the bus...  
To the Resort

Hotel  
Check-in



"Our bus guide is fun!"



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When I arrived at the resort,  
the luggage was unloaded...

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These emotional details were then grouped to get an overview of how she felt at each touchpoint.

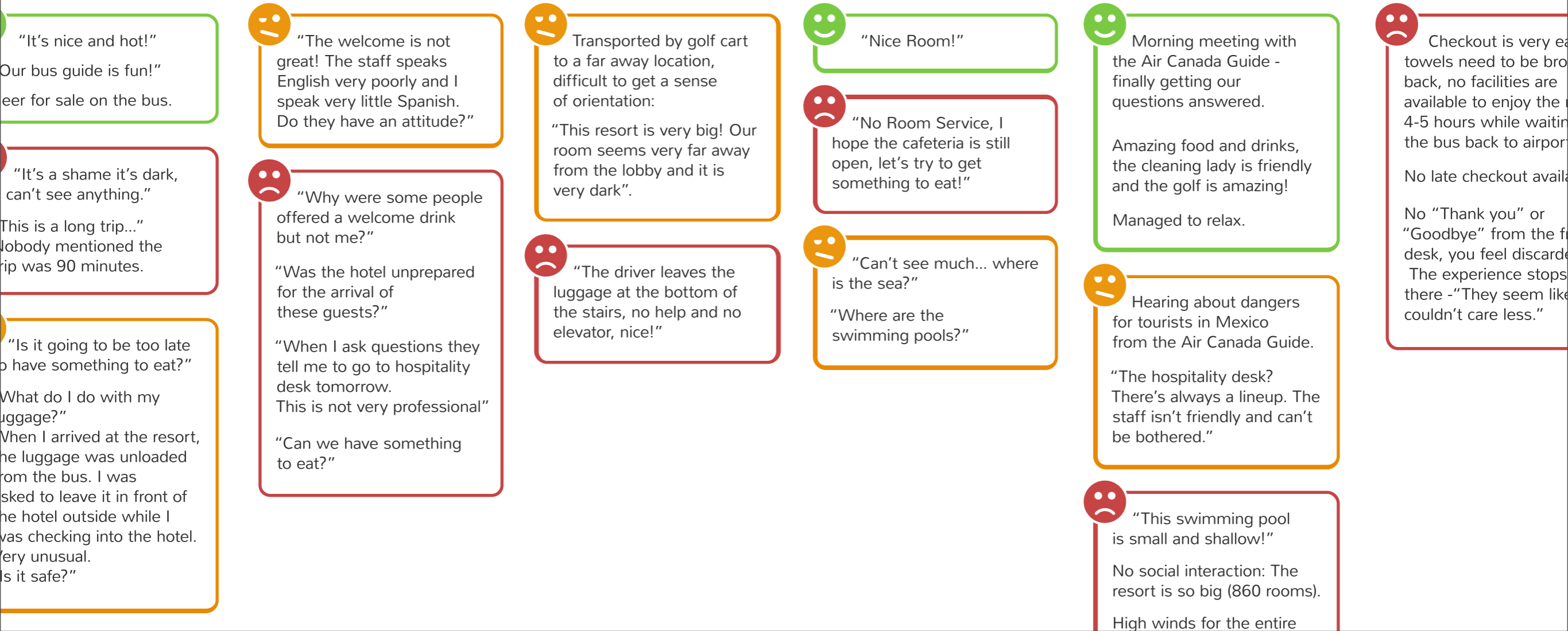
Things that were positive

Things that were negative

Things that were confusing ... Now, things that are confusing to someone are also a negative, but really show opportunities for improvement.



We then have columns with all the content we’ve gathered.



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Now we can adjust the touchpoints on a scale...



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– the higher the touchpoint the more positive the overall experience. This gives a quick overview of what worked and what didn't

You can tell right away that the hotel check-in and check-out were really poor experiences.

So what can be done about them? Opportunities boxes were added to point out ways that improvements can be made.



“Why were some people offered a welcome drink but not me?”

“Was the hotel unprepared for the arrival of these guests?”

“When I ask questions they tell me to go to hospitality desk tomorrow. This is not very professional”

“Can we have something to eat?”

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an example here...

From the negative point:

“Was the hotel unprepared for the arrival of these guests?”

“When I ask questions they tell me to go to hospitality desk tomorrow. This is not very professional”



"Why were some people offered a welcome drink but not me?"

"Was the hotel unprepared for the arrival of these guests?"

"When I ask questions they tell me to go to hospitality desk tomorrow. This is not very professional"

"Can we have something to eat?"

### Opportunities

**Nail the first impression.** Gracious, welcoming, helpful, multilingual staff is a necessity at an international resort. This first touch point with the resort will set the tone for the rest of the stay.

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We get the opportunity:

Nail the first impression. Gracious, welcoming, helpful, multilingual staff is a necessity at an international resort. This first touch point with the resort will set the tone for the rest of the stay.



“Is it going to be too late to have something to eat?”

“What do I do with my luggage?”

When I arrived at the resort, the luggage was unloaded from the bus. I was asked to leave it in front of the hotel outside while I was checking into the hotel. Very unusual.

“Is it safe?”

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Another good one from when the traveller arrives at the resort:

“What do I do with my luggage?”

When I arrived at the resort, the luggage was unloaded from the bus. I was

asked to leave it in front of the hotel outside while I was checking into the hotel. Very unusual.

“Is it safe?”



"Is it going to be too late to have something to eat?"

"What do I do with my luggage?"

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"Is it safe?"

### Opportunities

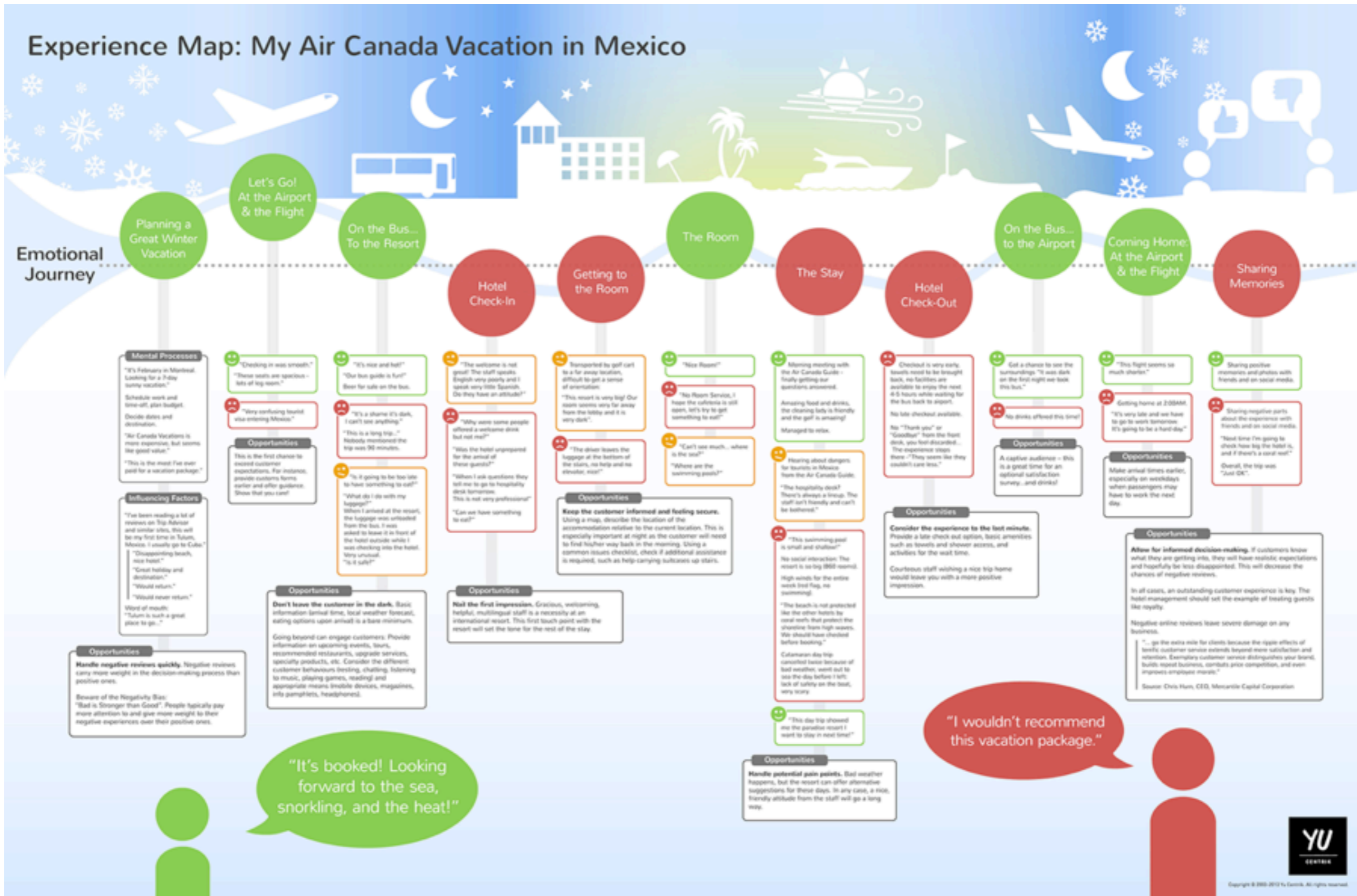
**Don't leave the customer in the dark.** Basic information (arrival time, local weather forecast, eating options upon arrival) is a bare minimum.

Going beyond can engage customers: Provide information on upcoming events, tours, recommended restaurants, upgrade services, specialty products, etc. Consider the different customer behaviours (resting, chatting, listening to music, playing games, reading) and appropriate means (mobile devices, magazines, info pamphlets, headphones).

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We get the opportunity:

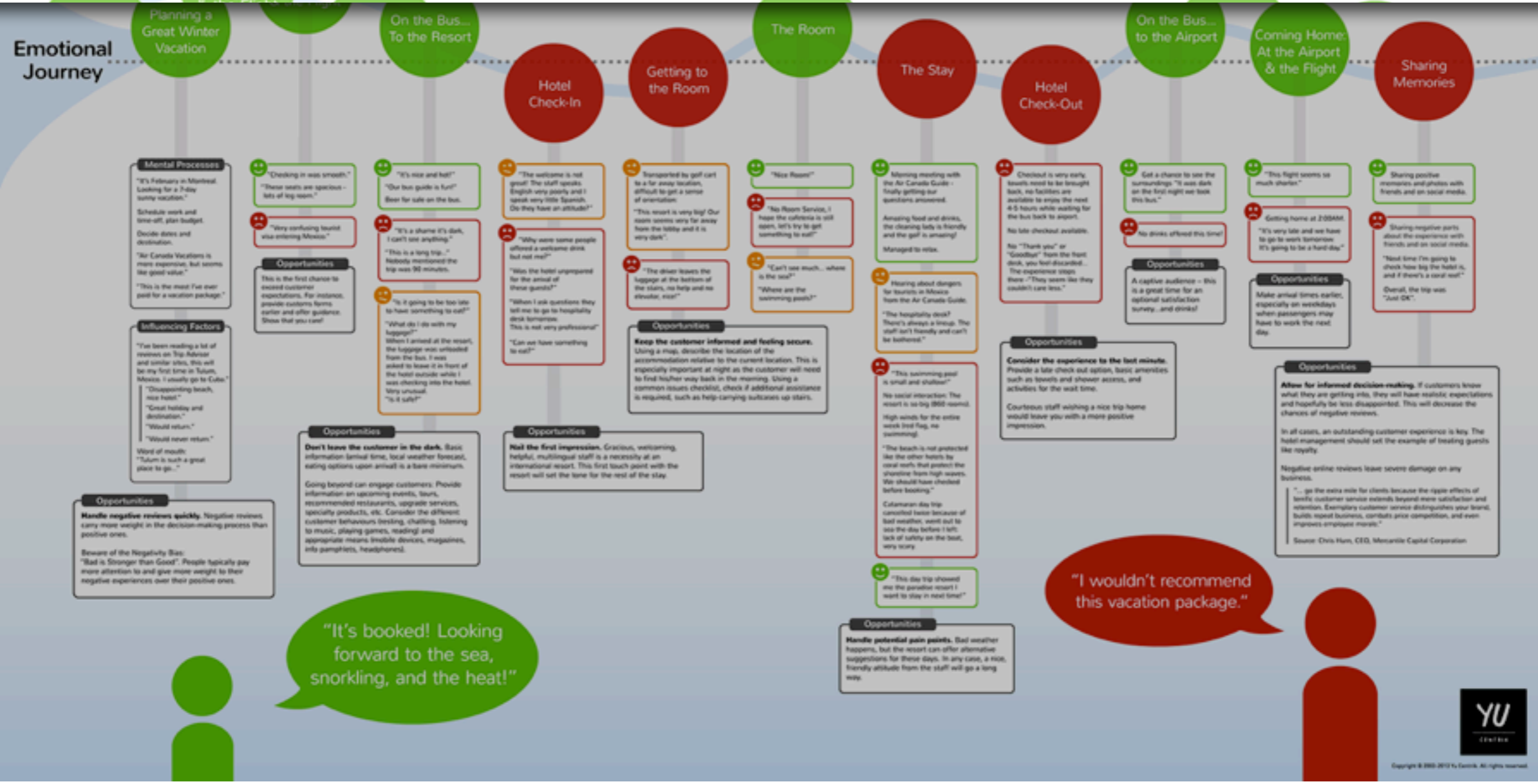
Don't leave the customer in the dark. Basic information is a bare minimum. etc etc... you know – explain the process of how the luggage is handled to ease their concerns – they've just arrived... they should be properly guided on what to do.



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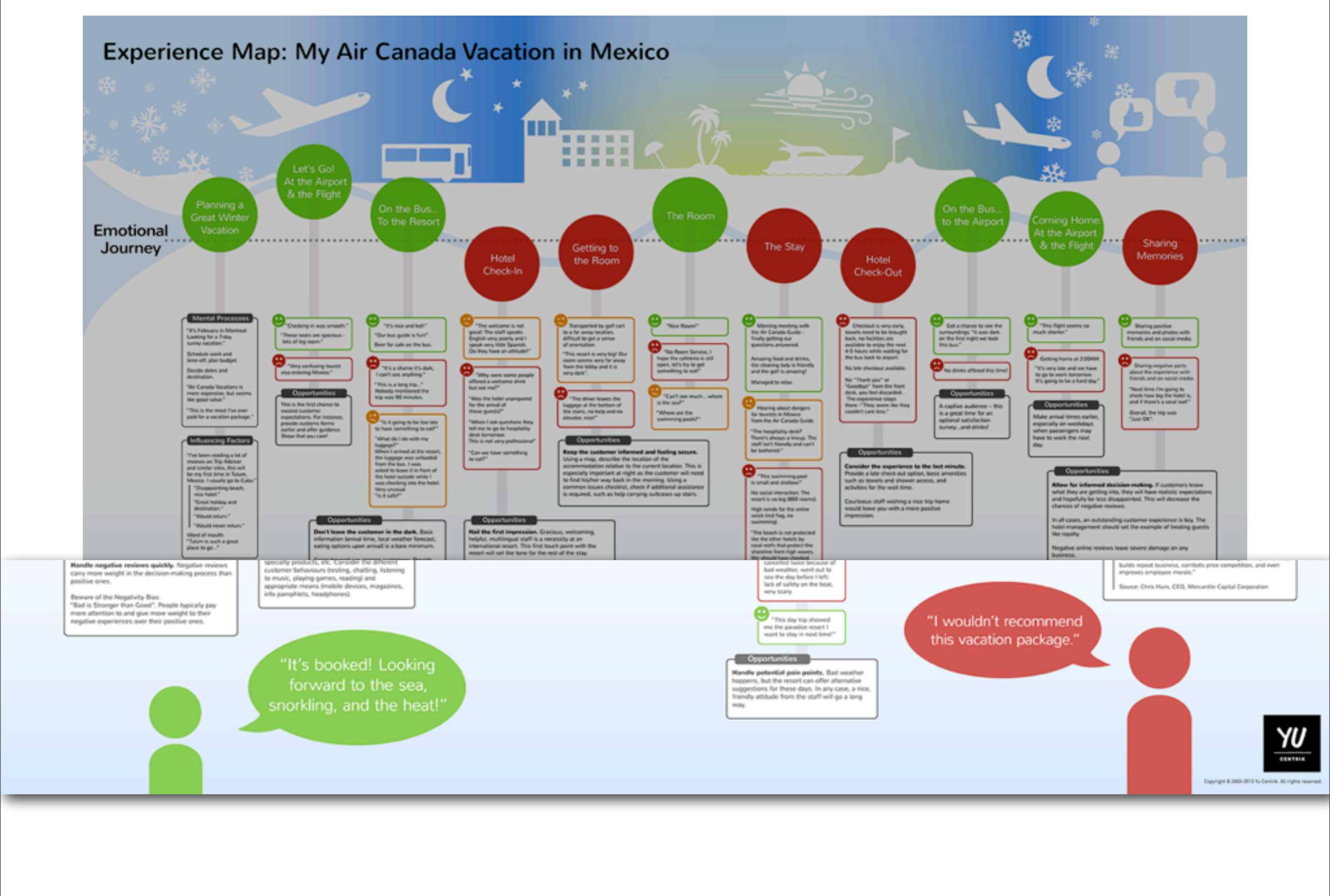
So here is the finished experience map

# Experience Map: My Air Canada Vacation in Mexico



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there are some visual aids along the top



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and along the bottom we have a summary to contrast the beginning of the experience with the end...

“It’s booked!...”

to

“i wouldn’t recommend...”

which is at the “sharing memories”, which very well could include social media... this is important because it influences others.

1. Understand the story
2. Summarize the story,  
create the typical journey
3. Make it visual

We talked about the 3 steps to design the map but there's one more step, that is extremely important...

1. Understand the story
2. Summarize the story,  
create the typical journey
3. Make it visual
- 4. Use it!**



# Questions?



That's all I had to share with you today. Questions?

# Thank you!



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