

UXPRESSIA

Customer journey mapping guide with UXPressia

The image displays a screenshot of the UXPressia software interface, which is used for creating customer journey maps. The interface is divided into several sections:

- Business Goal:** A sidebar on the left with prompts like "What would we like to achieve?", "Why is it important?", and "How will we know we've achieved it?".
- BUSINESS GOALS:** A central panel showing a goal: "Sign at least 1 enterprise-level contracts / 2 months".
- Customer Profile:** A card for "Amanda Soto, Sales Operations" featuring a photo, a quote ("If I say..."), and a "What's" section.
- Highlights:** Two progress bars for "Budget control" and "Organization influence", both showing a score of approximately 75 out of 100.
- Motiva:** A list of motivations: "Recognize and outperform", "Person deals", and "Satisfy customer deliverables".
- Analysis:** A section for "Analysis" (partially visible).
- Customer Journey Map:** A large grid on the right showing the customer's path through stages:
 - AWARE:** Trigger: INTERNAL REPORT. Process: Find and eliminate issues with existing software.
 - INTERNAL GAP ANALYSIS:** Process: To understand who to get input from.
 - COMMUNICATION:** Stakeholders Meeting. Process: Collect initial feedback from the stakeholders.Below the grid, a flow diagram shows the sequence: Report (person icon) -> Meeting (person icon) -> Colleagues (person icon) -> Google (G icon) -> Internal CRM (person icon) -> Meeting (person icon).

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What's UXPressia?

[UXPressia](#) is an all-in-one collaborative platform for creating and sharing customer journey maps, customer personas, and impact maps online.

In this short guide, we will walk you through the initial set up and show you how to use our software to create powerful and visually engaging customer, employee, and user journey maps.

Further, in this guide, we'll refer to customer journey maps as CJMs.

BEFORE YOU START

Before creating a journey map, there is some housekeeping you will need to do first.

BEFORE YOU START

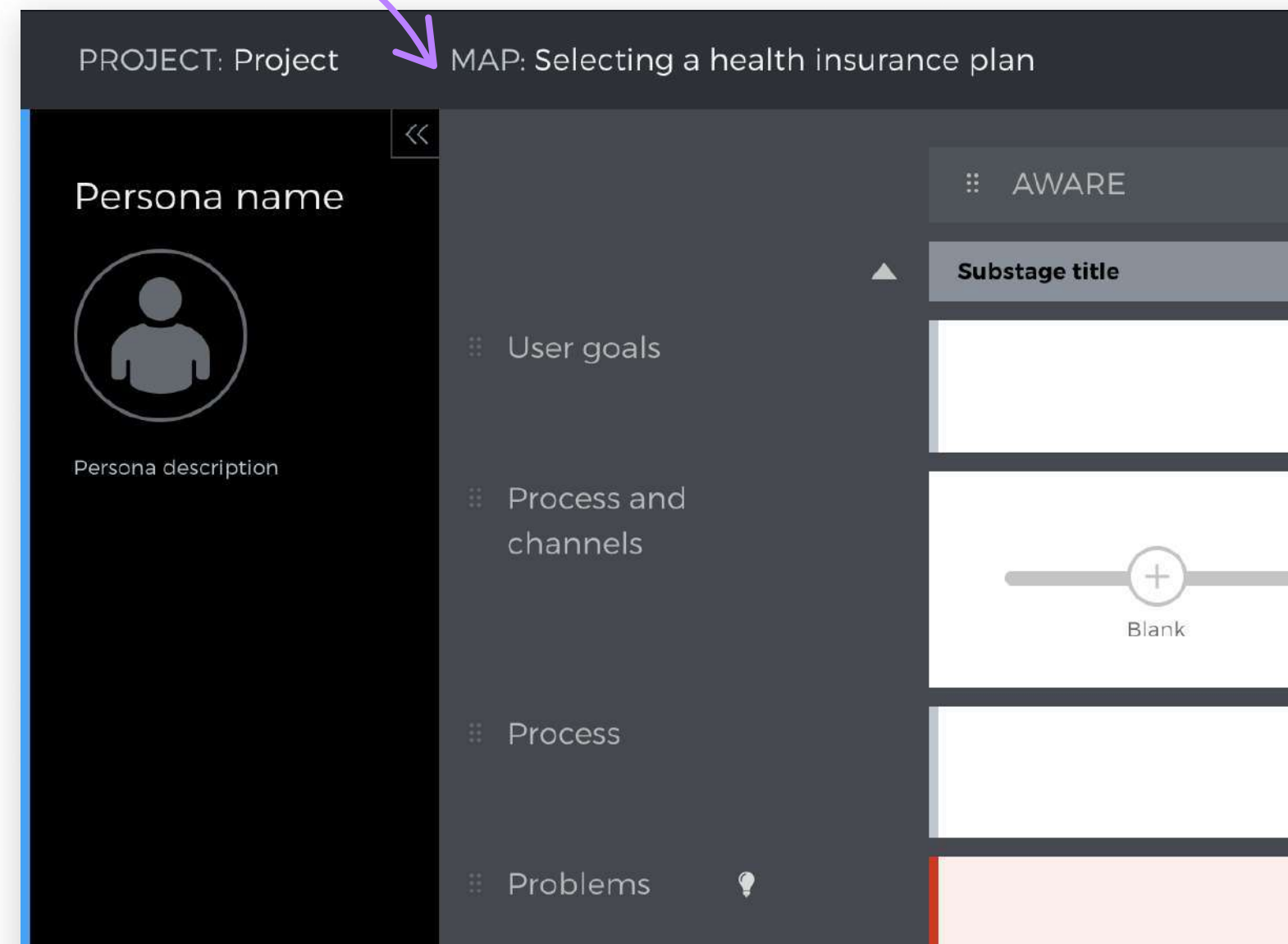
Define the scope

The part of the journey you want to map sets course for the entire customer journey mapping process. For example, mapping the end-to-end journey will take a lot more time and effort than mapping just the purchasing experience. You will also need far more data to support your end-to-end map.

Same goes for **AS-IS** vs. **TO-BE** journeys. A map that visualizes the desired experience will have few things in common with a map that represents the current state.

Name your map so that it is clear what it is about.

Example



BEFORE YOU START

Outline your customer persona

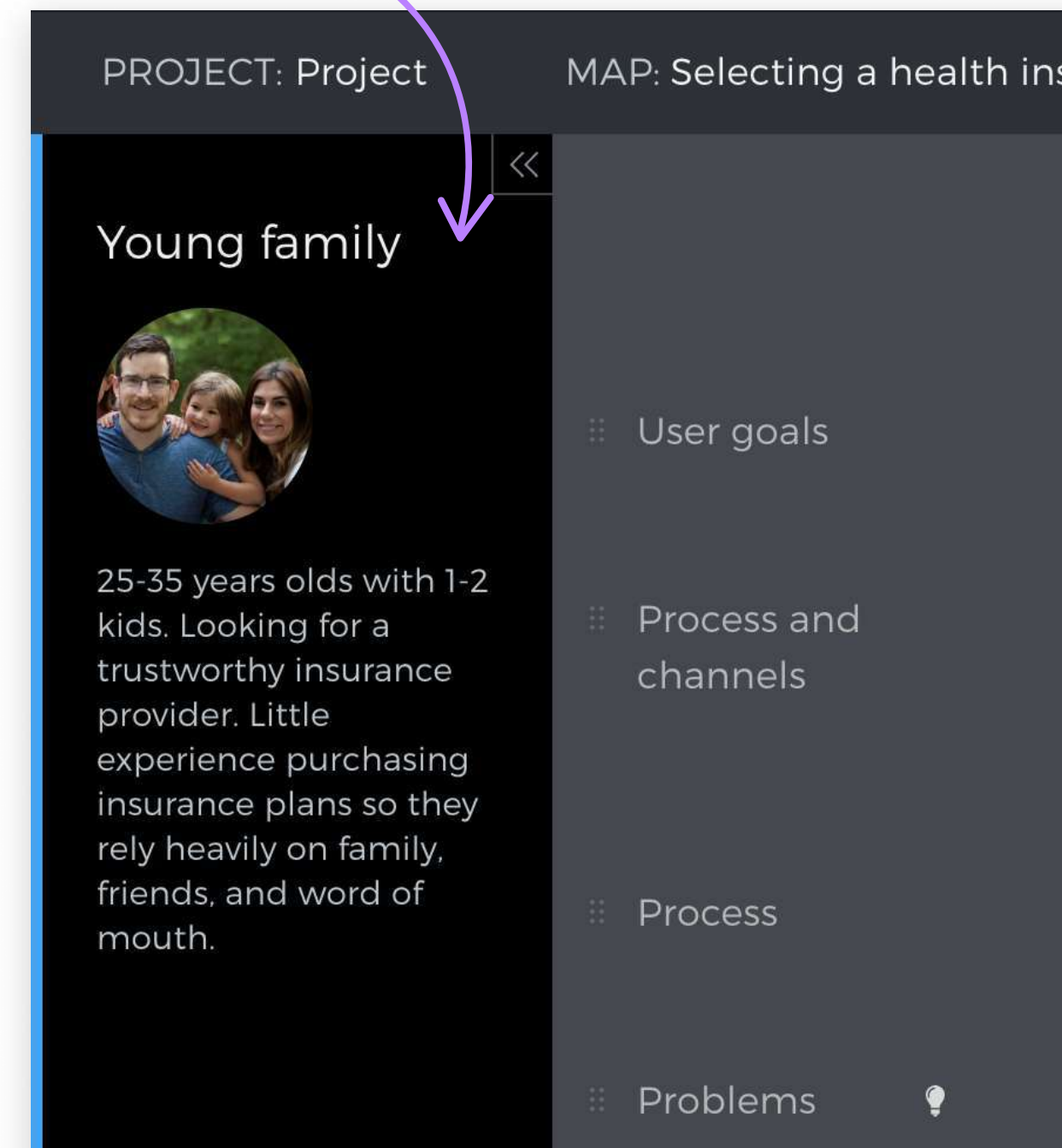
The sole focus of any journey map is the experience of your customer (buyer, employee, etc.). At the same time, customers differ a lot in their goals, expectations, and behaviors.

It is tempting to create a generic journey map that will show the experience of all your customers. But it is not the best strategy. You need to leverage your customers' differences to understand the pain points unique to a specific customer segment, and to create tailored experiences which will give you an upper hand over your competitors.

This is where customer personas come into play. You can [read more on personas here](#). But if you don't have any, start with a simple description to narrow down the possible scenarios and gain specific insights and opportunities that will resonate with your customers.

You can find more ways on how to skip personas when mapping your customer journey [here](#).

Example



The screenshot shows a user interface for a journey map. At the top, it displays 'PROJECT: Project' and 'MAP: Selecting a health ins...'. Below this, a navigation bar includes a back arrow and the title 'Young family'. A circular profile picture of a family is shown. The main content area describes the persona: '25-35 years olds with 1-2 kids. Looking for a trustworthy insurance provider. Little experience purchasing insurance plans so they rely heavily on family, friends, and word of mouth.' To the right, a sidebar menu lists categories: 'User goals', 'Process and channels', 'Process', and 'Problems', each with a double-dot icon. A lightbulb icon is at the bottom right of the sidebar.

BEFORE YOU START

Collect available research data

Creating journey maps based on hypotheses is something you can always start with, but at the end of the day, your map has to be based on research. This is the only way to get valuable insights.

Make sure you have all the existing research data available to you before you start. You will most likely need to get access to specific software used for running research in your organization.

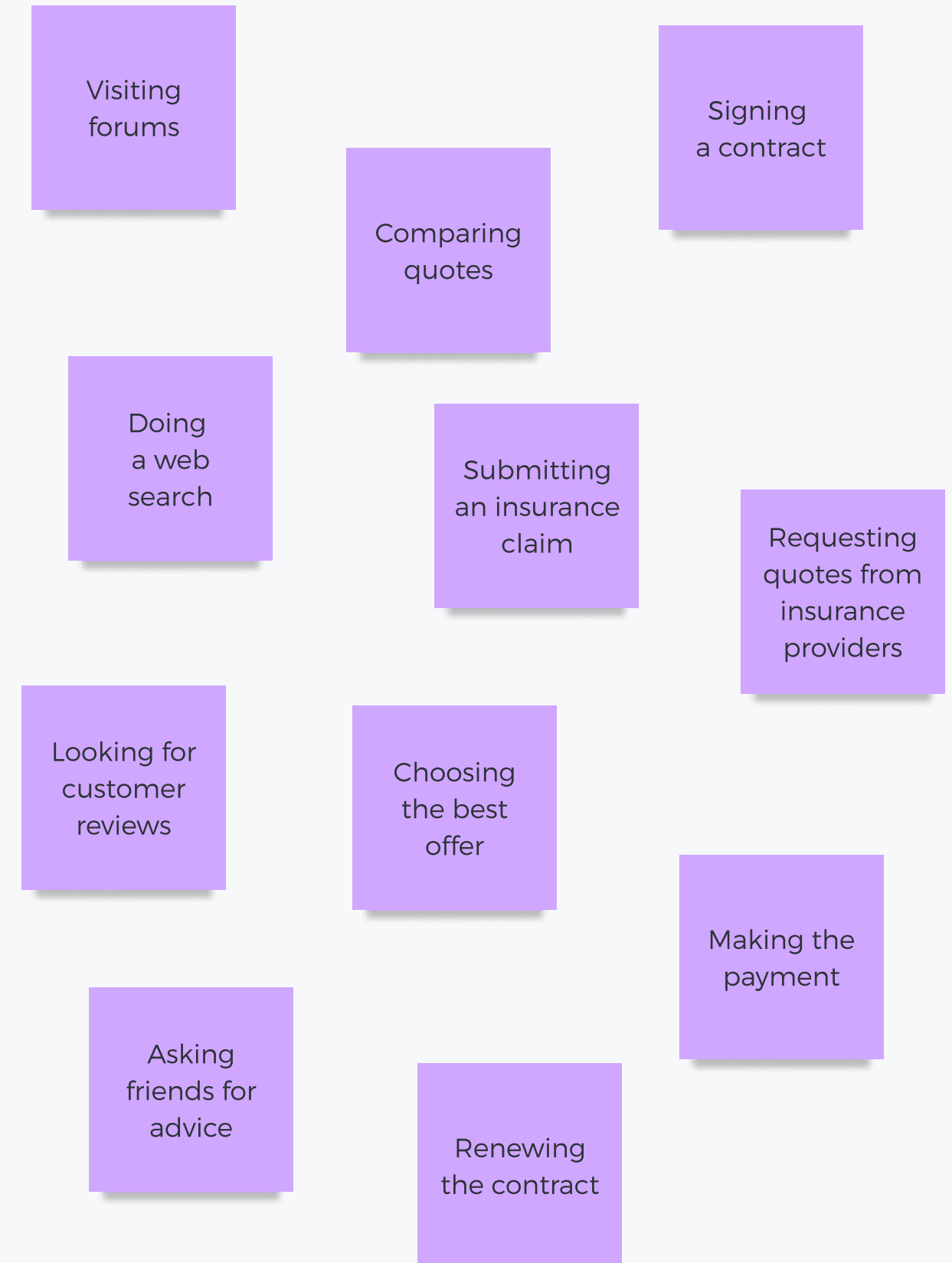
According to [UXPressia 2019 study](#), the following data sources are used most commonly when creating CJMs:

- Customer interviews
- Interviews with customer-facing staff
- Observations
- Online surveys
- Web analytics
- Usability testing results
- VOC/support requests

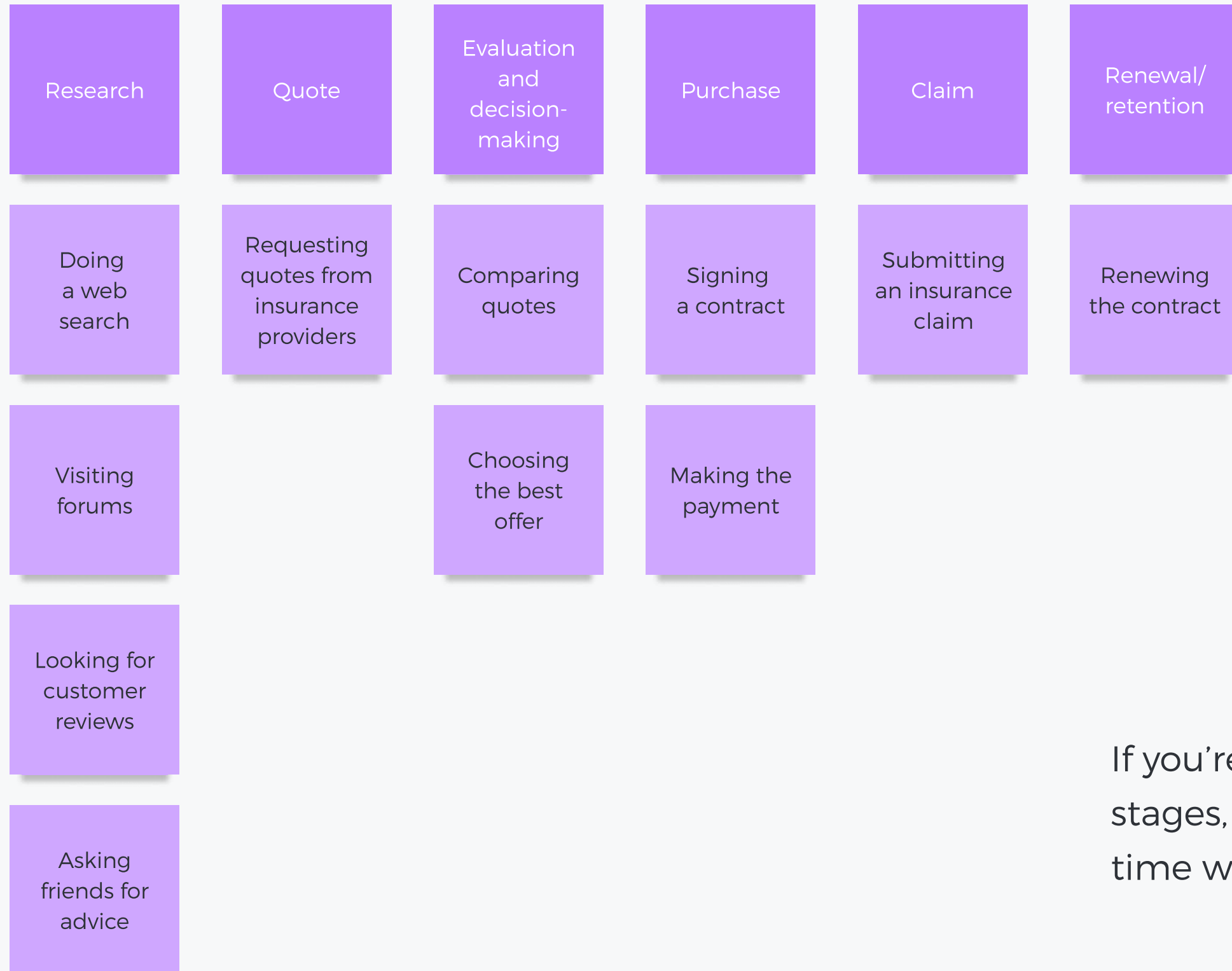
BEFORE YOU START

Define stages in the journey

Stages are the steps customers take when interacting with your business. The easiest way to identify them is to think of all the actions your customers have to take throughout the journey, and then organize them into logical groups. Name each group – these will be your stages.



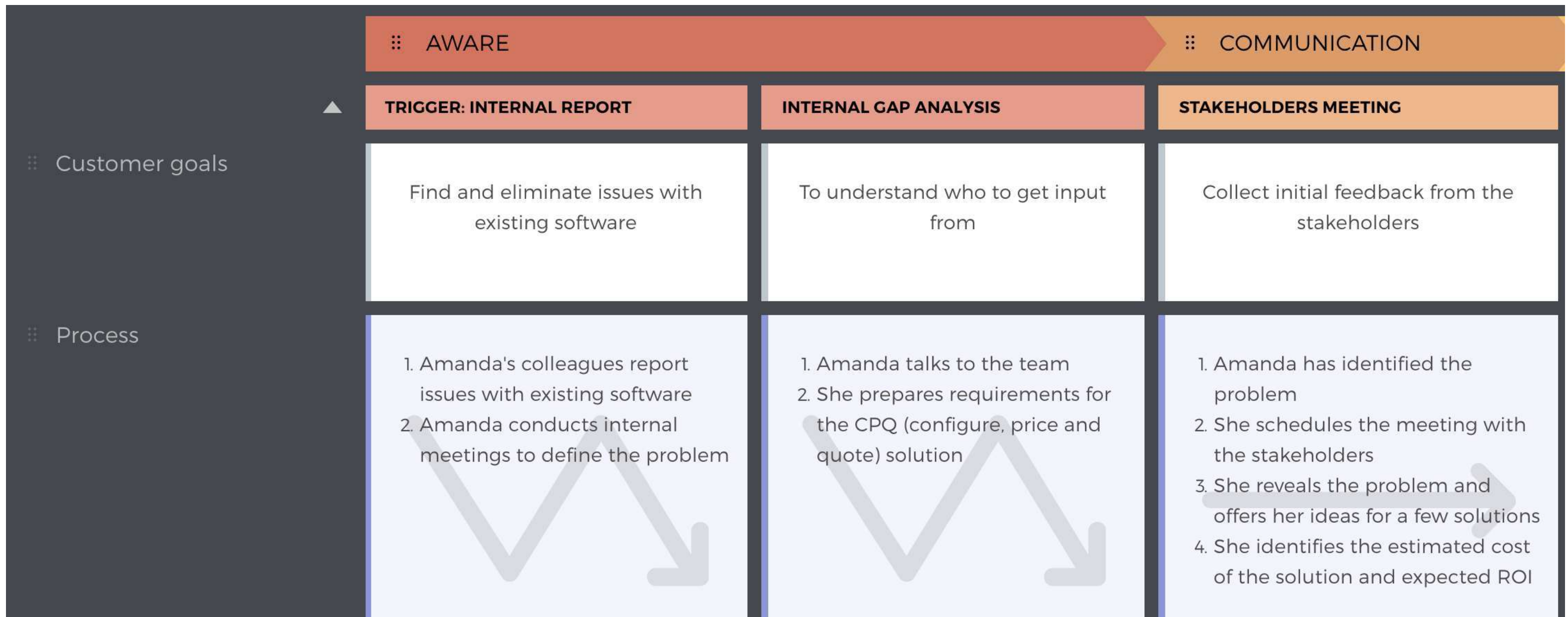
BEFORE YOU START



If you're not sure about the order or names of your stages, no worries – you can change them at any time when working on the map.

BEFORE YOU START

You can also break complex high-level stages into substages. Read more on [defining customer journey stages on our blog](#).

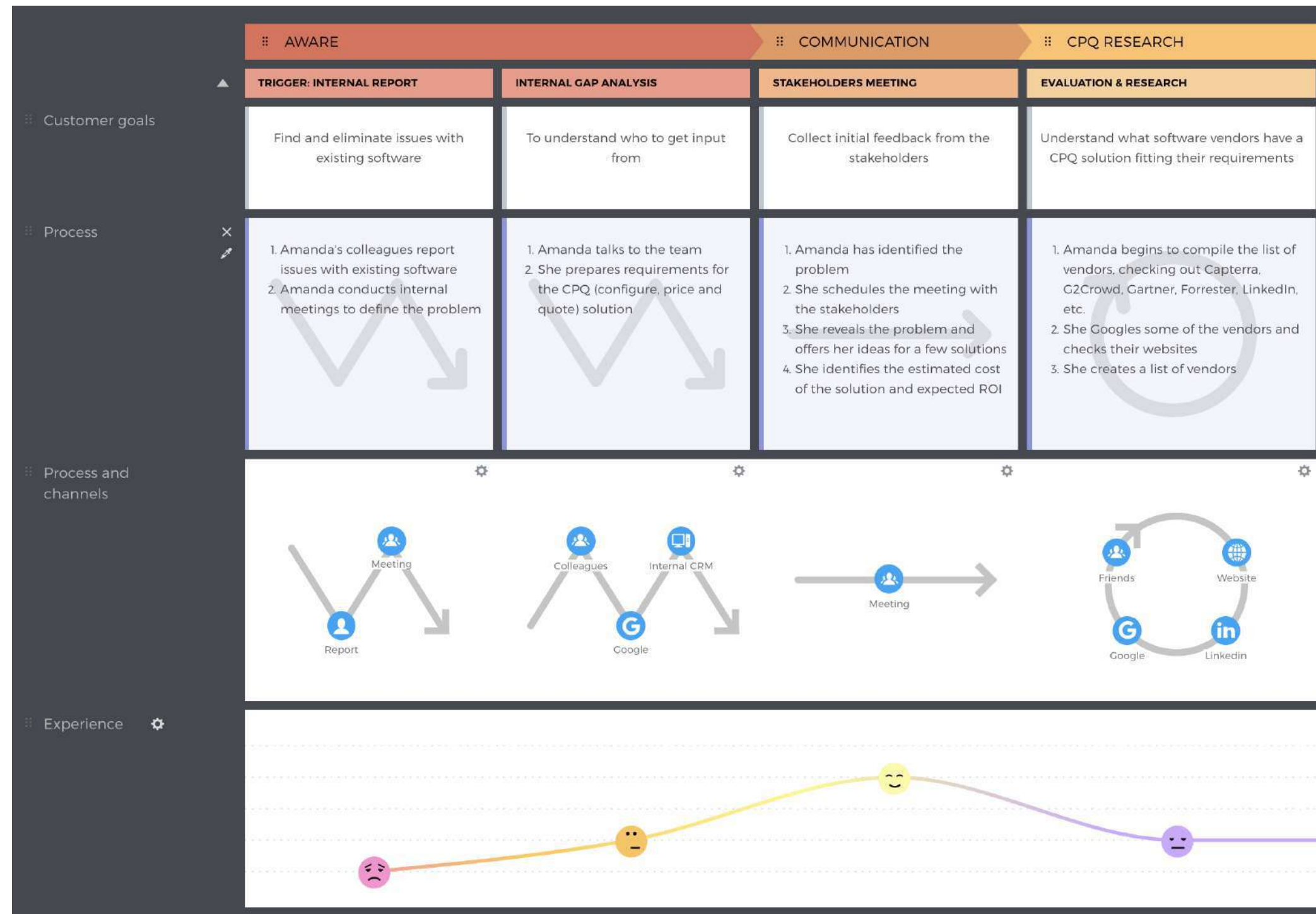


BEFORE YOU START

Define the sections

Sections are horizontal rows with data that together with stages make up a customer journey map.

Which sections to include depends on the type and the purpose of the journey you are creating. By default, UXPressia offers a set of sections that is more or less universal for all kinds of journey maps: user goals, processes and channels, experience, problems, and ideas/opportunities.



BEFORE YOU START

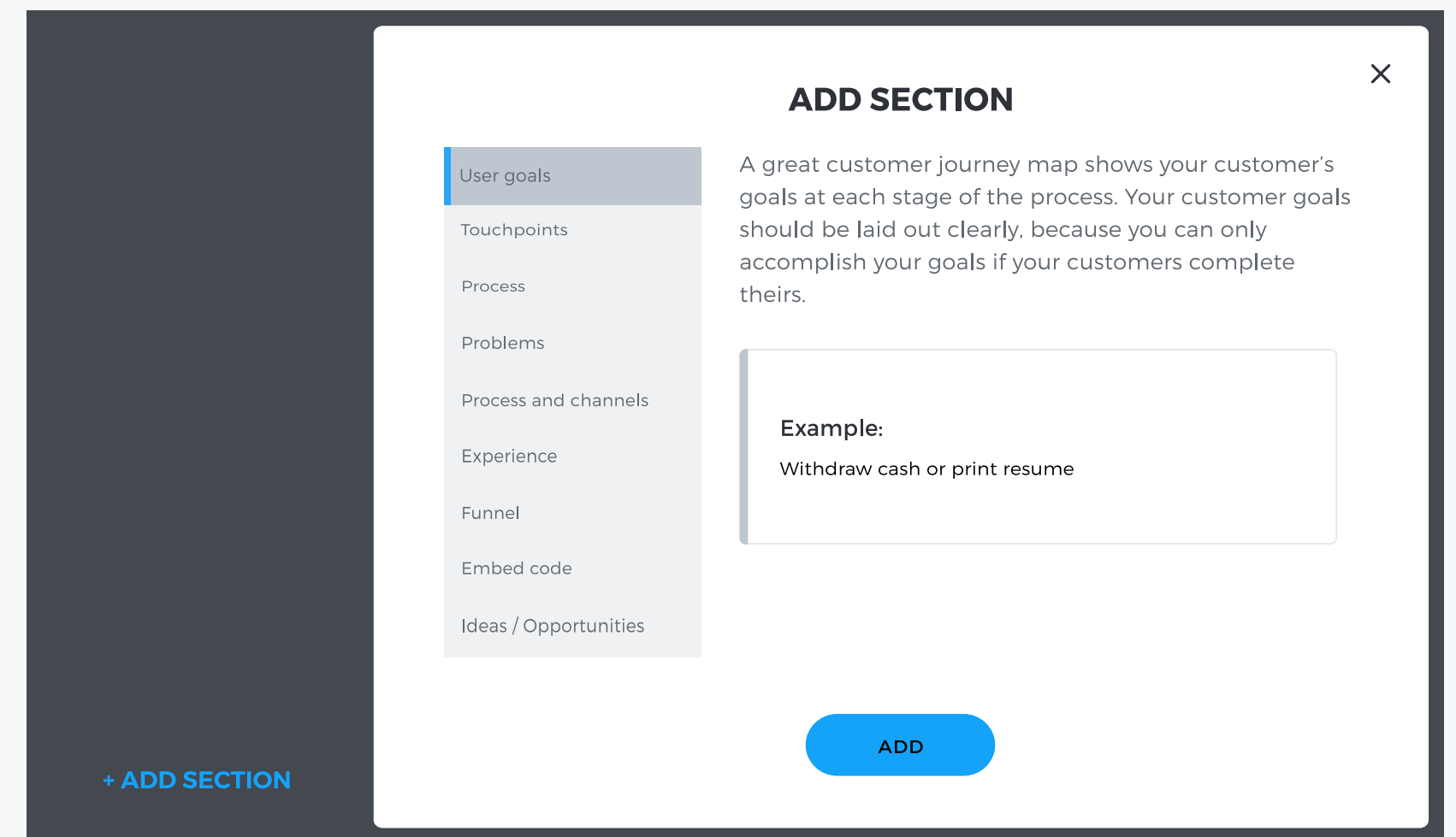
You can always create a unique set of sections to tailor the journey map to your project needs. Here are some ideas:

- When presenting the map to the stakeholders, make sure you have **Business Goals** and **KPIs** next to your journey as well. Consider introducing other sections such as Budget required to support specific touchpoints, etc.
- For **AS-IS** journeys, you can add the following sections to show exactly what your customers see:
 - Interface and newsletter screenshots
 - Photos of the packaging and environment
 - Leaflets and brochures
 - Customer quotes (you can find plenty in support logs and talking to customer-facing staff. Internet reviews are also a good source).

BEFORE YOU START

- For **TO-BE** journeys, these can be design mockups, prototypes, sketches, email campaign drafts, etc.
- If you're going to turn the map into a product roadmap, or a list of tasks for the team, make sure you have a dedicated section to sum up the tasks/ideas.
- If you want the map to incorporate research findings stored in separate files, add the file lane to attach them.

You can see all the sections available within our tool by hitting the + ADD SECTION button at the bottom of the editor.



BUILDING YOUR JOURNEY MAP

Once you've outlined the map's structure, you can start filling in the cells. The order in which you populate the journey isn't that important. The order that we recommend is described further.

BUILDING YOUR JOURNEY MAP

Start with a quick draft

First, go stage by stage and add facts/hypotheses you already know – everything that doesn't need double-checking. This way you won't get stuck.

QUICK TIP:

It's always a good idea to start by outlining processes. Use simple language like

John finds out that his insurance is about to expire. He starts looking for his insurer company website...

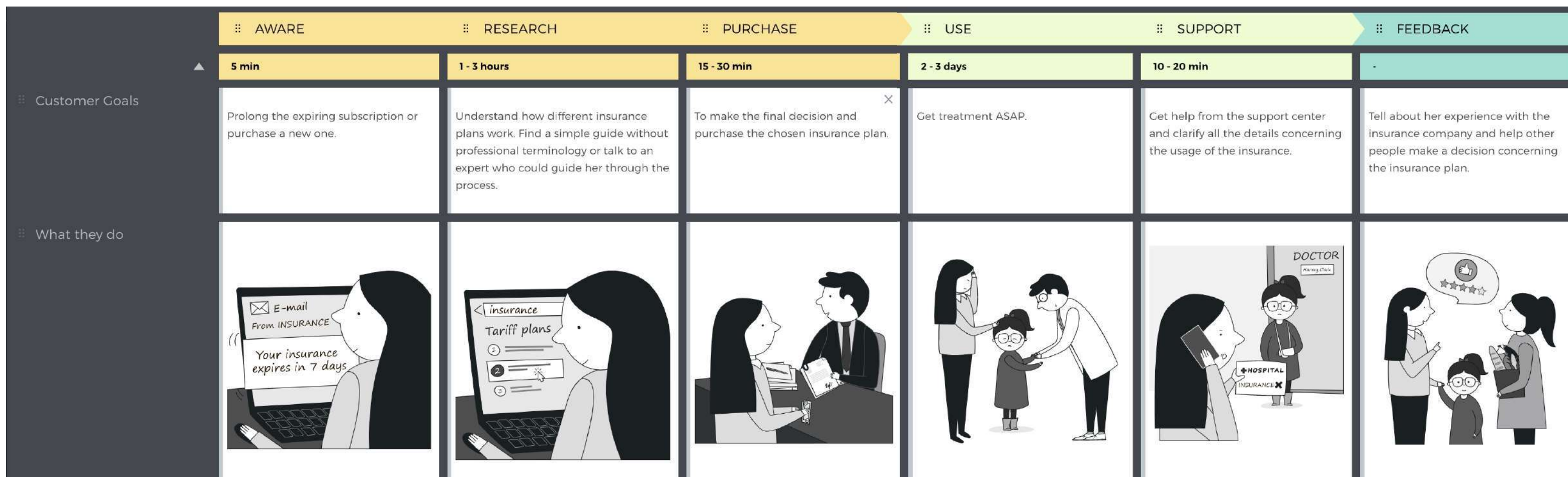
This will help you get off the ground and will likely highlight certain pain points right away.

BUILDING YOUR JOURNEY MAP

Gather more data

Once you write down everything off the top of your head, it's time to go deeper. You can look for customer quotes and place them across the map. Upload screenshots and images to support the story. Use analytics tools to add numbers and make your journey more data-driven.

Your goal here is to cover all the aspects of customer interaction, so take your time. Building an effective map from scratch is not a matter of an hour — you will need days if not weeks to do it right.



BUILDING YOUR JOURNEY MAP

Define problems, barriers and pain points

When you have all the data on the map, reserve some time to focus on problems, barriers, and pain points. Most likely, you already identified some of the known issues. To dig deeper and find improvement opportunities, we recommend you to use our built-in helper.



NEED HELP?

Flaws in processes can cause churn. Optimizing them will keep your customers from going astray. "Less is more" is the rule of thumb here.



Process

- Is every process currently in place absolutely necessary for your customers to engage with your product or service?
- Are there any points where customers aren't sure what to do next?
- Does the customer have to do the same action more than once?
- Do you think the way processes are built match with what your customers expect?
- Is there a clear purpose in each process? Can customers see it?

Next >

BUILDING YOUR JOURNEY MAP

List ideas and opportunities

Finally, it is time to come up with ideas on how you can address customers' challenges and improve their experience. There are a few strategies you can use:

- **Pain-point based.** Start with the pain points you identify and think of ways to resolve them.
- **Goal-based.** Use customer goals to generate some ideas on how you can help customers achieve their goals faster and with less effort.
- **Process-based.** Look at the processes and think about improvements. Write those ideas down.
- **Experience-based.** Take the as-is experience lane and think about a desired experience. For instance, when you know the customer will have to wait during a certain step, you can come up with something to entertain them and make sure they don't get annoyed.

PRESENTING YOUR JOURNEY MAP


Once the map's ready, it's time to present it to your team or client. Here are some tips on how to prepare your journey map for presentation:

PRESENTING YOUR JOURNEY MAP

Polish your map

It's always good to make the map visually appealing before taking it to a meeting. Styling the text and setting the right color accents are among the best ways to ensure your customer journey will have an impact. [Read more on making visually appealing customer journey maps.](#)

Feel free to add some brand flavor to your map. With UXPressia, you can brand your exports by putting your logo on the top of your map and setting a custom color for the branding stripe behind the logo. [Discover more options for branding your map.](#)

☰ Pain points		<p>Too many options, unsure which one to select.</p>	<p>Unsure if the suggested insurance plan covers all of her needs.</p>	<p>When an accident happens, there is no time to check if this particular hospital is covered by my insurance. They have to select the closest one to their location,</p>
☰ Ideas and Opportunities 	<p>Include a few insurance plans with a short description into the notification letter.</p>	<ul style="list-style-type: none"> • Simplify the language in the descriptions of insurance plans. • Encourage customers throughout different digital touchpoints. 	<p>Provide a detailed description of all the services and doctored covered by our insurance.</p>	<p>A digital map within the app that shows all the hospitals and doctors included in the insurance. Also, gives helpful guides and quick tips in case of an emergency.</p>

PRESENTING YOUR JOURNEY MAP

Custom Views

Oftentimes, you end up with a relatively large map that has a lot of details. And not all of them are worth presenting to, let's say, your executive team. You will probably want to condense the map and leave only the key areas for your presentation. Our [custom views](#) feature will help you create views with the most relevant information for different audiences.

It will also enable you to break large end-to-end journeys into digestible chunks and present map areas one-by-one. You can set up multiple working areas to collaborate on the same map in different views, making sure each team focuses only on what matters to them.

VIEW SETTINGS

Customer journey map views let you create alternative representations of the same data for different purposes. For example, you might have a short version of the same map to show it to stakeholders. Any changes you make in one view affect all other views as well.

View name

View Name 0 / 25

Sections visibility

- Persona panel
- Process
- Ideas / Opportunities
- Customer goals
- Problems
- Documents
- Process and channels
- Experience

Stages visibility

- aware
- QUALIFY
- NEGOTIATIONS
- communication
- CONSIDERATION
- PURCHASE
- CPQ RESEARCH
- demo
- delivery

[SAVE VIEW](#)

PRESENTING YOUR JOURNEY MAP

Presenting in person and online

Whether you present your CJM in person or via screen-sharing online, use the [presentation mode](#) to have quick view access to all maps and personas within your project folder, zoom in and out, and go fullscreen if needed.

However, showing your map in the editing mode might be a good idea too, if you want to capture feedback from the team on the go. You can leave quick notes within the text boxes using the commenting mode, or just change the map as you present.

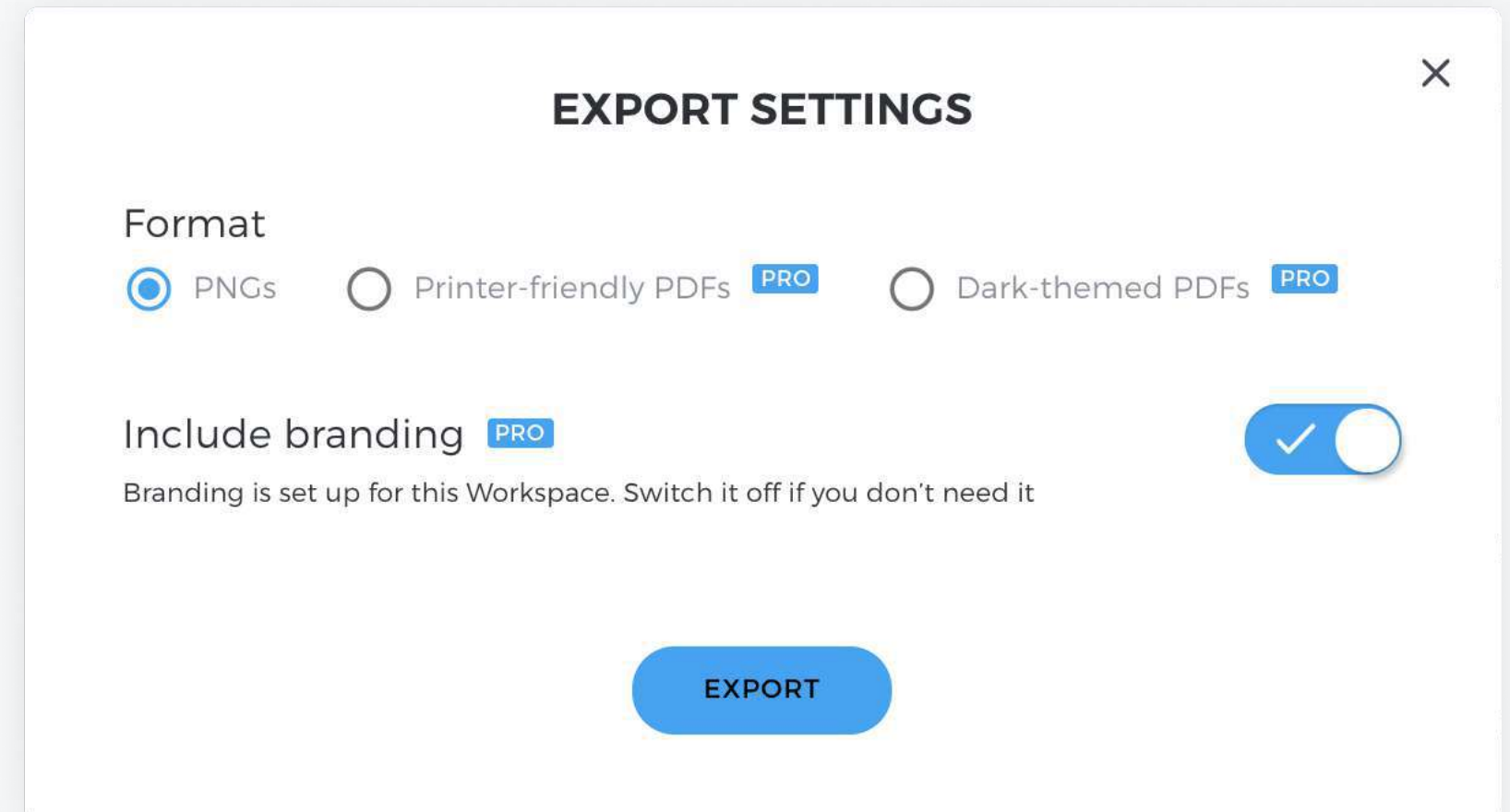
The screenshot displays the UXpressia software interface. At the top, a dark toolbar contains icons for UNDO, REDO, COPY, PRESENT, FULLSCREEN, EXPORT, COMMENTS, and DEFAULT VIEW. Below the toolbar, the project name 'PROJECT: B2B Example' and map name 'MAP: B2B Map for example' are visible. The main area shows a journey map with stages: AWARE, COMMUNICATION, TRIGGER: INTERNAL REPORT, INTERNAL GAP ANALYSIS, and STAKEHOLDERS MEETING. A sidebar on the left shows a persona card for Amanda Soto, Sales Operations.

	AWARE	COMMUNICATION
TRIGGER: INTERNAL REPORT	Find and eliminate issues with existing software	To understand who to get input from
INTERNAL GAP ANALYSIS		Collect initial feedback from the stakeholders
STAKEHOLDERS MEETING		

PRESENTING YOUR JOURNEY MAP

Exporting

Showing maps online is not the only way to present your insights. You can also [export](#) your map to a PNG or vector-based PDF file. Once the file renders in a new tab, you'll be able to save it to your computer and then send to your team or client as a file.



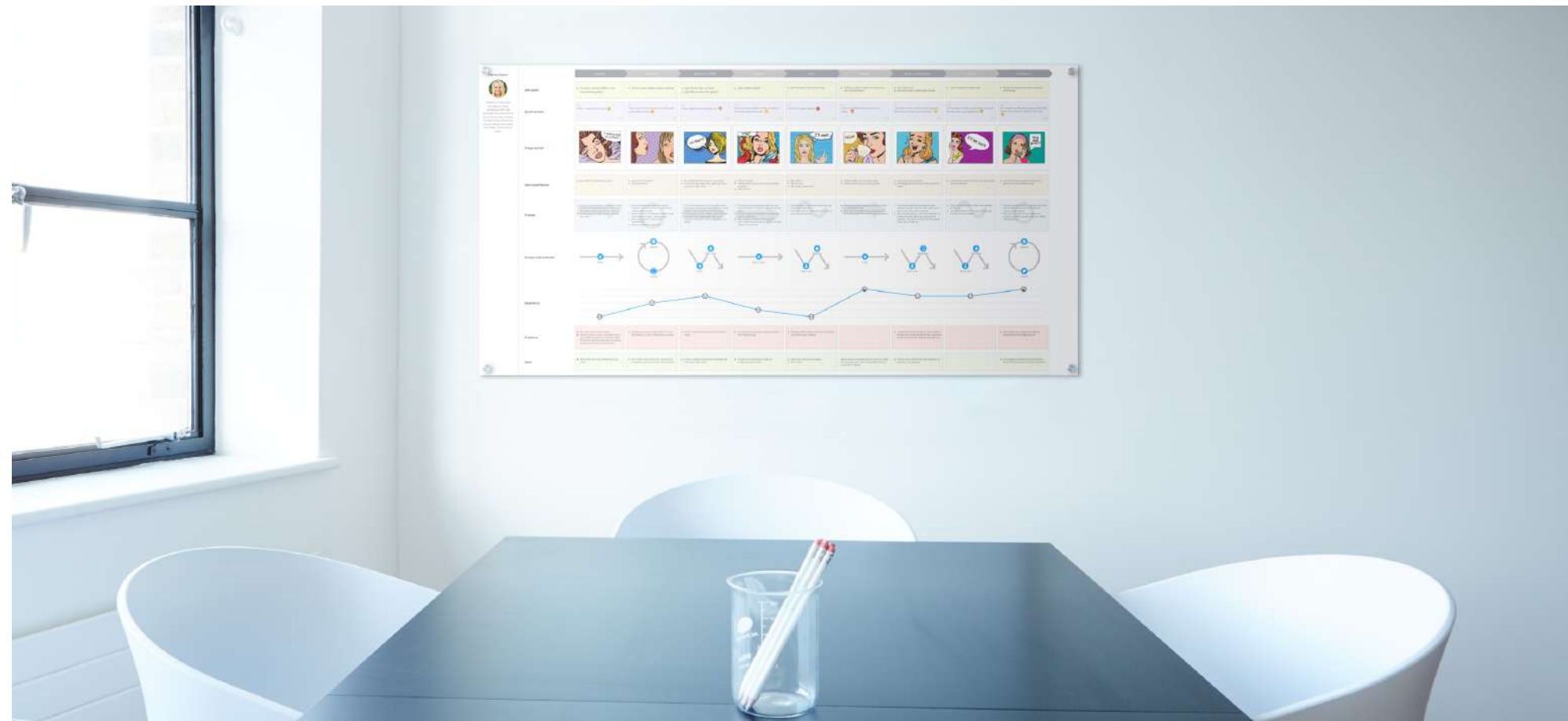
PRESENTING YOUR JOURNEY MAP

Printing

[Printing your map](#) and hanging in your office can help you keep the entire team on the same page. This will also help you collect feedback as people in the company will be able to put a sticky notes with their ideas on the printed map.

To print a map, it's best to use a printer-friendly PDF version. As it's fully vector-based, the map will scale to any size without losing the quality.

PRINTING TIP: *when it's time for printing, you'll probably wonder which paper size to choose. The rule of thumb here is the bigger the better. We found A3 (11x17") is the bare minimum for printing a customer journey map. But the final result depends on the size of your map: the more rows and columns it has, the larger paper you will need.*



KEEPING YOUR JOURNEY MAP ALIVE

It goes with no saying that a customer journey map can bring value only if you make it actionable and keep it updated. Otherwise, your maps won't fetch quality changes that last. Here's how you can use UXPressia to create journey maps that won't end up on the shelves:

KEEPING YOUR JOURNEY MAP ALIVE

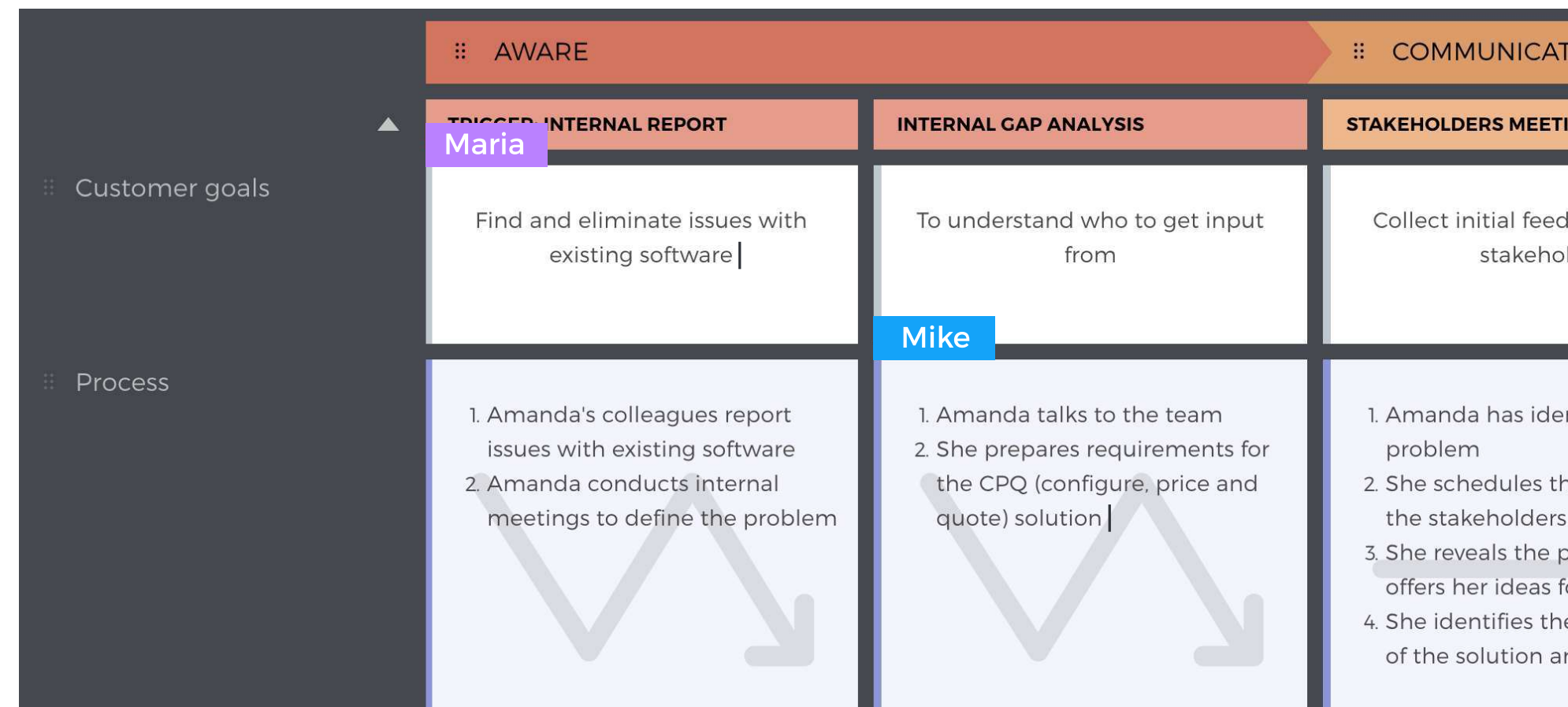
Engage the teams

Driving customer-centric transformation can be achieved only when you engage the entire company in the process and make sure that people across all the departments know what the journey of their customers looks like.

We built UXPressia with that idea in mind, so our platform supports a handful of features to help you collaborate with the team and share your insights across organizational silos:

- **Real-time collaboration**

Work in real-time with an unlimited number of users on the same document, and each member will see all the changes on the fly. You can use this feature to run fully digital workshops and brainstorm sessions. Your team can be thousands of miles away while still being in the same virtual room with your digital “sticky notes”.



KEEPING YOUR JOURNEY MAP ALIVE

- **Sharing projects**

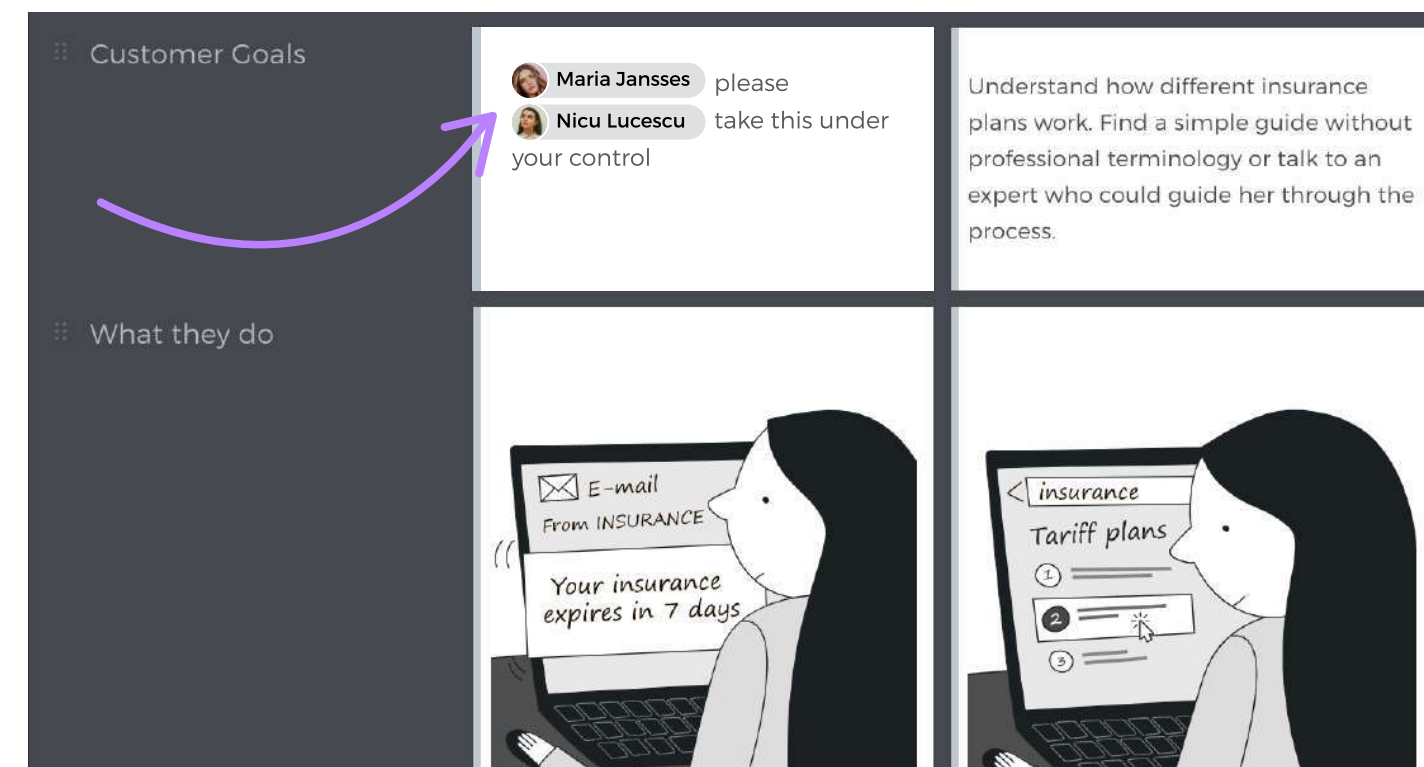
You can invite individual people to your projects via [email](#) or a [direct link](#). The latter will let you share projects with those who don't even have an account at UXPressia. It's perfect for those cases when you need to quickly share your work with someone who needs one-time access to view your map or even to make edits.

- **Setting up a team workspace**

If you have a core team creating and updating customer journey maps on a regular basis, you can [invite them](#) to your workspace. They will get full access to all platform's capabilities and you'll be able to split tasks and projects between different parts of the team. That way, everyone will stay engaged at every step.

- **@Mentions**

[Mentioning](#) teammates will help you assign tasks or indicate who suggests a specific idea. Simply type @ inside any text box and you'll be prompted with a drop-down list with all the teammates who have access to this project. The person you mention will be notified both via email and inside the app.



KEEPING YOUR JOURNEY MAP ALIVE

- **Commenting**

UXPressia features a rich [commenting functionality](#) that lets you leave comments across your maps, resolve them, start threads, and mention teammates. All that happens in real-time so you can use it to discuss customer experience insights with your team and clients.

Unregistered individuals invited via a direct link can also leave comments as guests so you can collect feedback from anyone in your company or even clients.

- **Slack integration**

[Integrating](#) UXPressia with your CX Slack channel will help your team get instant updates on any customer journey-related activity and stay connected all the time.

The screenshot displays the UXPressia commenting interface. On the left, a user profile for Victoria Sauer, Germany, is shown with a circular profile picture and a bio: "Married, three children. Works in medicine domain. Advanced internet and software user. She has never used the insurance services before and has vague knowledge about various insurance plans on the market. Victoria is responsible for her family's finances and health care. She is looking for insurance that would cover all of her needs, but is unsure which insurance plan to select." The main area shows a comment thread with two comments: one from Stephanie Armstrong (4 hours ago) asking for a map template, and a reply from Nicu Lucescu (4 hours ago) asking if she can have one too. Below the comments is a text input field labeled "Add a comment" and a blue "REPLY" button. The background shows a journey map with stages like "Customer Goals", "What they do", and "Time Spent", and touchpoints like "Email", "Phone", "Website", and "Messaging".

KEEPING YOUR JOURNEY MAP ALIVE

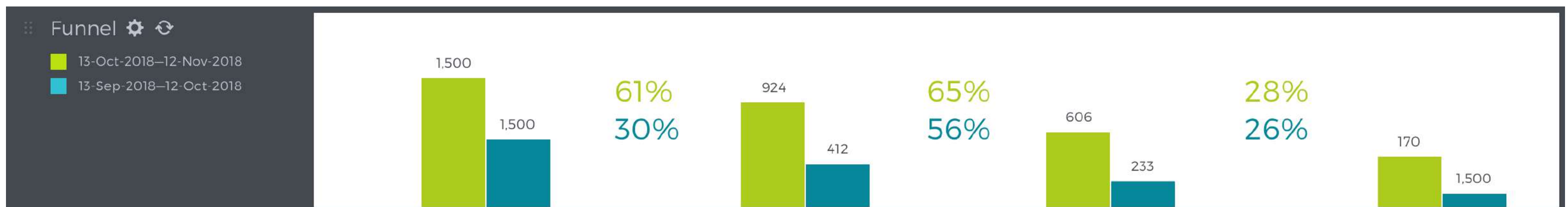
Connect live data

Integrating live data into your customer journey is a great way to create living and breathing journey maps that ensure long-lasting changes.

- **Google Analytics and Mixpanel**

With these [integrations](#), you'll be able to support your journeys with web analytics putting your Google Analytics and Mixpanel goal data across the journey, which will help you make your customer insights more data-driven.

This is perfect for journeys that involve customer interactions with your website or applications and marketing campaigns.



KEEPING YOUR JOURNEY MAP ALIVE

- **Embed data**

[The embed code section](#) is another section that will help you make your maps more interactive. This data layer lets you connect your map with live data such as videos, audio clips, design prototypes, flowcharts, presentations, and many more.

The screenshot displays the 'Embed code' section of a journey mapping tool, showing three embedded content types:

- Figma:** A pricing table for 'UXPRESSIA' with two columns: 'FOREVER FREE' and 'PROFESSIONAL'. The 'FOREVER FREE' column shows '\$0' and the 'PROFESSIONAL' column shows '\$24/month'. The table lists various features and their availability for each plan.
- Video Player:** A video player showing a customer journey map with a red play button overlay. The video title is 'UXPressia Customer Jour...'. The map shows a flow of steps with icons representing different stages of the customer experience.
- Revenue by Lead Source (sample):** A bar chart showing revenue over time from 2014 to 2018. The y-axis represents revenue from \$0 to \$15M. The x-axis shows time periods from 2014-Apr to 2018-Jan. The chart is categorized by lead source: Events (blue), Referral (green), Social (orange), and Website (red). The total revenue for this month is \$24.75K.

And the best part is you will be able to interact with them without leaving your journey mapping tool. Embed data will update automatically so you don't need to reupload it every time something changes.

KEEPING YOUR JOURNEY MAP ALIVE

Regularly update your maps

Your customers and business constantly evolve and so should your journey maps. Keeping them updated will ensure that you have the latest insights, and that you and your team can see the as-is state, rather than used-to-be.

It is good to revisit your journey once a month or so to see what changed and to brainstorm for more ideas around delivering better experience to your clients.

[Discover more ways on how to make your customer journey map actionable.](#)

Thank you

Get in touch with us to start your journey with UXPressia.

support@uxpressia.com

We are looking forward to having you aboard!

