

How to Build a

# Customer Journey



**#1:** Define who your customer is and what their goals are.



**#2:** Do user research to understand your customer's context.



**#3:** Write down the tasks your customer wants to complete.



**#4:** List all the steps your customer must take to get what they need.



**#5:** Find opportunities to improve.



**#6:** Visualize the journey.



**#7:** Show, tell, and iterate.

# Customer Journey Map



## #1 Define who your customer is and what their goals are.

You need to start by understanding the persona. Who is your customer? Who are you designing this journey for?

Answer questions such as: what are the customer's goals? What motivates the customer to interact with your company?

## #2 Do user research to understand your customer's context.

You can't design an accurate customer journey based on assumptions; you need real data.

There are a variety of research methods to consider, such as interviews, surveys, customer support logs, and analytics.

## #3 Write down the task your customer wants to complete.

At this stage, you should understand what your customer is trying to achieve. Is it buying a car? Do they want to make a payment or schedule an appointment with their doctor online?

## #4 List all the steps your customer must take to get what they need.

In this step, you should list all "moments of interaction" with the customer in context.

You should answer questions like:

- What questions does your customer have at each step?
- What will your customer have to interact with to achieve the goal?
- How is your customer feeling?
- Where are your customer's pain points and struggles throughout the journey of completing their task?

## #5 Find opportunities to improve.

Once you know your customer's pain points and questions, try to find opportunities to optimize and simplify the journey.

Brainstorm with your team to discuss what you found out, identify opportunities, and organize your data.

Most transformation begins where convenience and innovation merge.

You may want to consider: have you reached all possible channels? Is there potential for new touchpoints? What are the competitors doing? Are there innovations in the industry?

## #6 Visualize the journey.

Now that you have a rough sketch, put it in a format that can be shared with the whole team.

Storyboards and visual assets are a good way to communicate ideas.

## #7 Show, tell, and iterate.

Customer journeys are an ongoing project, so keep on gathering feedback.

Iterate for continuous improvement.