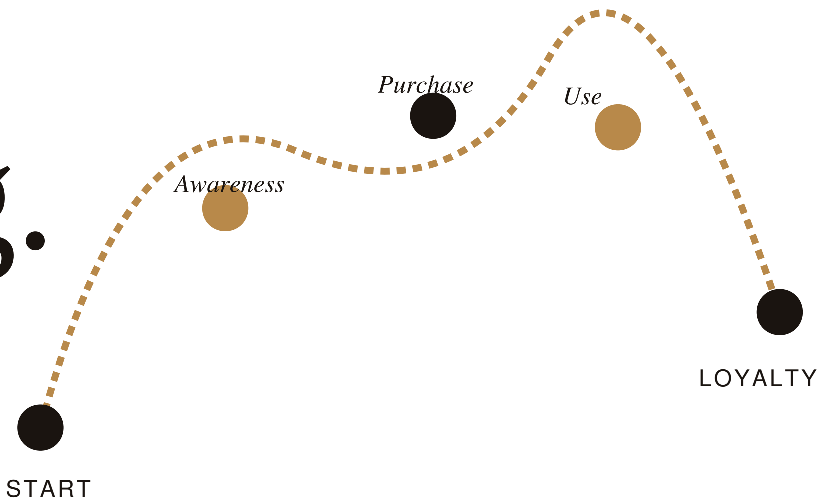
# Customer Journey Mapping.

*How to build a map you'll actually use.*




A MAP IS A DECISION TOOL, NOT A POSTER

A practical, plain-English guide for CX practitioners who keep being asked to "do a journey map" and want to make sure the result is more than a poster on a meeting-room wall. We cover what a journey map actually is, the five questions to answer before you start, the six-step process we use with clients, a worked example, and the six structural mistakes that kill almost every map we audit.

# Contents

# Why most journey maps die in a drawer.

Almost every CX team in a company over 200 people has tried to build a customer journey map. Most of those maps are now sitting in a shared folder no one opens, or stuck on a wall in a conference room nobody uses.

The problem is not the technique. Journey mapping is one of the most powerful tools in customer experience — when done right, it changes how teams talk about customers, surfaces problems no one in the org chart sees alone, and gives leadership a single artefact for decision-making.

The problem is how teams approach it. Most journey-mapping projects treat the map as the deliverable. They are not. The map is a means to a decision. If you finish the map and nothing changes — no new priority, no reassigned owner, no metric on a dashboard — the exercise has failed, regardless of how beautiful the poster looks.

This paper is the practical guide we use with clients who are about to run their first journey-mapping exercise, or who have tried before and want to do it better. It is opinionated, short, and aimed squarely at making the next map you build one you actually use.

### WHAT YOU'LL GET

A plain-English definition of what a journey map is and isn't.

The five questions to answer before you draw a single phase.

A seven-layer anatomy you can apply to any map.

A six-step process for building maps that lead to decisions.

A worked example of an e-commerce purchase journey, end to end.

Six structural mistakes we see in nearly every first-time effort.

### WHO THIS IS FOR

CX managers, designers and analysts running their first or second journey-mapping exercise.

Product, marketing and operations leads who need to consume a map and act on it.

Anyone tired of journey-mapping workshops that produced beautiful posters and zero change.

### WHAT'S NOT HERE

Software comparisons, vendor reviews, or arguments about which sticky-note colour means "delight." This is about the method, not the toolchain.

CHAPTER 1

# What it actually is.

*A definition, an anatomy, and what a journey map is not.*

# A visual story, told from the customer's side.

*A customer journey map is a visual representation of how a specific customer (or persona) moves through a defined experience — from a clear starting point to a clear end — including what they do, how they feel, where they meet your company, and where things break.*

Three words matter in that definition.

**Specific.** A journey map is always for someone. A "generic customer" is not a customer; that is a stakeholder fantasy. The map starts with a defined persona or segment.

**Defined experience.** A journey map is bounded. "The whole customer relationship" is not a journey — it is a lifecycle. A useful map covers a chunk: signing up, making a purchase, getting support, renewing, or anything else with a clear beginning and end.

**Outside-in.** A map is the customer's view, not the org chart's view. If your map starts with "marketing campaign" rather than "I'm looking for a solution," you have written a process diagram, not a journey map.

### A USEFUL CONTRAST

**Process diagram:** what your company does. Inside-out. Useful for operations.

**Journey map:** what the customer experiences. Outside-in. Useful for CX decisions.

The same set of events can produce both diagrams. They look completely different.

### WHAT A JOURNEY MAP IS NOT

**Not a process diagram.**
Process diagrams describe what your company does step by step. Journey maps describe what the *customer* does and feels. The flow may overlap; the perspective is opposite.

**Not a sales funnel.**
Funnels measure conversion. Journey maps describe experience. A funnel will tell you 60 % of people drop off at step 3; a journey map will tell you why.

**Not a customer lifecycle.**
A lifecycle covers the whole relationship from awareness to churn. A journey map covers one bounded experience inside that lifecycle.

**Not a one-off poster.**
A map you build once, frame, and never touch again is not a map — it is a wall decoration. A working map gets updated as the experience changes.

CHAPTER 2

# Before you draw a single phase.

*Five questions that save you from mapping the wrong thing.*

# Answer these five — or skip the exercise.

Almost every failed journey-mapping project we have audited had the same cause: the team started mapping before they knew what they were mapping or why. These five questions take an afternoon. Skipping them costs months.

01

### Whose journey?

Which persona or segment. Not "our customer" — a specific one. A new SMB customer and a long-tenured enterprise account have almost nothing in common except your logo.

02

### What journey?

Which slice of the experience. "Onboarding," "first purchase," "filing a claim," "renewing." Boundaries are explicit: what counts as start, what counts as end.

03

### Why now?

What decision is this map supposed to inform? Redesigning a step? Picking touchpoints to instrument? Reorganising who owns what? If you cannot name the decision, the map will end up advisory — which is the same as ignored.

04

### Whose perspective?

Customer-only, or customer plus internal (front-stage and back-stage)? The first is faster and clearer. The second — a service blueprint — is heavier but shows where back-office processes break the front-stage experience.

05

### What output format?

One-time workshop poster, living digital document, or a slide in the quarterly review? Each has a different cadence of maintenance and a different audience. Decide before you start — not after.

**THE HONEST TEST**

Write the five answers on one page before the kickoff meeting. If you cannot fill any of them in — especially "why now?" — stop. Go back to the sponsor. Reframe. Then start.

## A worked example of the five-question brief

**Persona:** mid-market SaaS buyer, first month after signing the contract.

**Scope:** the first 30 days of onboarding, from contract signature to "first value moment" (first successful workflow run in product).

**Decision:** which two onboarding steps to redesign in Q3 to reduce time-to-first-value from 18 days to under 10.

**Perspective:** customer-only on this pass; service blueprint deferred to next quarter.

**Output:** a living digital map in Miro, with the Q3 decisions captured in a one-slide executive summary.

CHAPTER 3

# The seven layers of a working map.

*Skip a layer and the map becomes a story without a point.*

# Every good journey map stacks seven layers.

The first three layers describe what is happening. The next two describe how it feels. The last two are where the map earns its keep — turning description into decisions.

| | | |
|---|---|---|
| 01 | **Phases** | The chunks of time the journey breaks into — the high-level stages the customer moves through (e.g. Awareness, Consideration, Purchase, Delivery, Use, Loyalty). Usually 4–7 phases. |
| 02 | **Goals** | What the customer is trying to achieve in each phase. One sentence per phase, in their words. "I want to understand whether this product solves my problem" — not "evaluate vendor." |
| 03 | **Actions** | What the customer actually does. Concrete verbs: searches, compares, reads reviews, requests demo, signs contract. Behaviours, not abstractions. |
| 04 | **Touchpoints & channels** | Where the customer meets your company in each phase. Web, email, chat, store, support call, social, in-app. Often a single phase has multiple touchpoints — show them all. |
| 05 | **Emotions** | How the customer feels in each phase. Usually plotted as an "emotion curve" — a line moving from frustrated through neutral to delighted. This is where the map gets its narrative force. |
| 06 | **Pain points** | Specific frustrations and barriers, anchored to the phase and touchpoint where they occur. Pain points are evidence-based — from interviews, verbatim, support tickets — not assumed. |
| 07 | **Opportunities** | For each pain point: what could be done about it. The map's payload. Without this layer the map is description; with it the map is a decision tool. |

### OPTIONAL EIGHTH AND NINTH LAYERS

Mature maps add two more: **internal owners** (which team is responsible for each opportunity) and **KPIs** (the metric each opportunity is meant to move). Add them when the programme is operationally ready — not on the first map.

CHAPTER 4

# The six-step process.

*From kickoff to "we changed something" in roughly six weeks.*

# Steps 1–3 — setting up the map.

The first three steps are about preparation, evidence and structure. They are unglamorous and absolutely essential. Teams that skip ahead to drawing the map almost always have to start over.

1

### Define persona & scope

Lock in the five-question brief from Chapter 2. One persona, one journey, one decision the map will inform.

**Deliverable:** a one-page brief signed off by the sponsor.

**Time:** 2–3 days.

Most-common failure: trying to map "all customers" or "the whole experience." Always too broad.

2

### Gather the evidence

Pull three data sources: **qualitative** (8–12 customer interviews + open-text verbatim), **quantitative** (analytics, NPS / CSAT / CES by phase) and **operational** (support tickets, complaint logs, CRM notes).

**Deliverable:** a synthesis doc with the top patterns from each source.

**Time:** 2–3 weeks.

Most-common failure: skipping interviews. Maps built from internal opinion are wrong in interesting ways.

3

### Sketch the phases

Lay out 4–7 phases on a horizontal timeline. Use the customer's words for phase names where possible — "I'm comparing options" beats "consideration."

**Deliverable:** a rough horizontal skeleton with phase boundaries and one-line customer goals.

**Time:** half a day.

Most-common failure: too many phases. If you have more than seven, you are mapping a lifecycle, not a journey.

**A NOTE ON DATA**

The honesty of the map equals the honesty of the evidence behind it. A map built on assumptions will be smooth, plausible and wrong. A map built on real interviews is messy, surprising, and useful. Always interview before you draw.

# Steps 4–6 — turning the map into action.

The second half is where most journey-mapping efforts run out of energy. The map is "done," everyone is tired, and the workshop ends with vague follow-ups. These three steps are designed to prevent exactly that.

4

### Fill in the layers

Add actions, touchpoints, emotions and pain points to each phase — one layer at a time. Resist the urge to "fix" anything until the picture is complete. A common error is jumping to solutions while diagnosis is still happening.

**Deliverable:** a complete map across the first six layers.

**Time:** 1–2 weeks, often in two workshops.

5

### Validate with customers

Show the draft map to 3–5 real customers. Ask: "Does this match your experience? What are we missing? Where are we wrong?" Their reactions will surface the assumptions your team did not realise it was making.

**Deliverable:** a revised map with customer corrections incorporated.

**Time:** 3–5 days.

6

### Prioritise and assign

For each opportunity, place it on an impact-vs-effort matrix (see Chapter 9). Pick the 3–5 to act on this quarter. Assign each to a named owner with a deadline and a metric. Without this step, the map is finished and forgotten.

**Deliverable:** a prioritised action list with owners.

**Time:** half-day workshop.

## A realistic timeline

| WEEK | STEP | WHAT HAPPENS |
|---|---|---|
| **Week 1** | Step 1 | Sponsor sign-off, brief locked, kickoff meeting. |
| **Weeks 2–3** | Step 2 | Customer interviews, data pulls, synthesis. |
| **Week 4** | Steps 3–4 | Phase sketch + first mapping workshop. Layers added. |
| **Week 5** | Step 5 | Validation calls with 3–5 customers. Map revised. |
| **Week 6** | Step 6 | Prioritisation workshop. Decisions made. Owners named. |

CHAPTER 5

# Four types of map.

*Pick the one that fits the decision you are trying to make.*

# Not every map is the same map.

Teams often default to "current-state" without realising other types exist. The four below cover roughly 95 % of journey-mapping projects. Pick the type that matches your decision — not the one your favourite consultant happens to demo.

### TYPE 1 · CURRENT-STATE MAP

How the journey works **today**, with all its bumps. Built from real evidence: interviews, support tickets, analytics.

**Best for:** diagnosing where the experience is broken; building shared understanding across functions.

**Limit:** can become a complaint list. Always pair with an opportunity layer.

### TYPE 2 · FUTURE-STATE MAP

How the journey **should** work after the changes you are planning. Aspirational but anchored in specific opportunities.

**Best for:** aligning leadership on the experience vision; communicating a redesign.

**Limit:** easy to draw a fantasy. Aim 6–12 months out, not 5 years.

### TYPE 3 · DAY-IN-THE-LIFE MAP

The customer's wider context — including parts of their day that have nothing to do with your product. Shows where you fit into a busy life.

**Best for:** product strategy, positioning, understanding when and why customers use you.

**Limit:** resource-intensive; requires deep ethnographic interviews.

### TYPE 4 · SERVICE BLUEPRINT

A current-state map *plus* what is happening behind the scenes — front-stage, back-stage, supporting systems, and the hand-offs between them.

**Best for:** service redesign, finding where back-office processes break the front-stage experience.

**Limit:** heavy. Only attempt once your team is comfortable with current-state maps.

## When to use which

| IF YOUR DECISION IS... | REACH FOR... | AVOID... |
|---|---|---|
| "Where is our current experience broken?" | **Current-state map** | Future-state (you don't yet know what to aim for). |
| "What should the redesigned experience look like?" | **Current-state + Future-state pair** | Future-state alone (no grounding in today's reality). |
| "Should we build product X for this audience?" | **Day-in-the-life** | Standard current-state (too narrow). |
| "Why does back-office hand-off keep breaking?" | **Service blueprint** | Customer-only map (won't show the back-stage problems). |

CHAPTER 6

# A worked example.

*A current-state map for an e-commerce purchase, end to end.*

# A current-state map you could ship tomorrow.

Persona: a 35-year-old returning customer of a mid-market fashion retailer, buying a single item online. Scope: from first product search to first wear. Decision: where to invest CX budget in the next quarter.

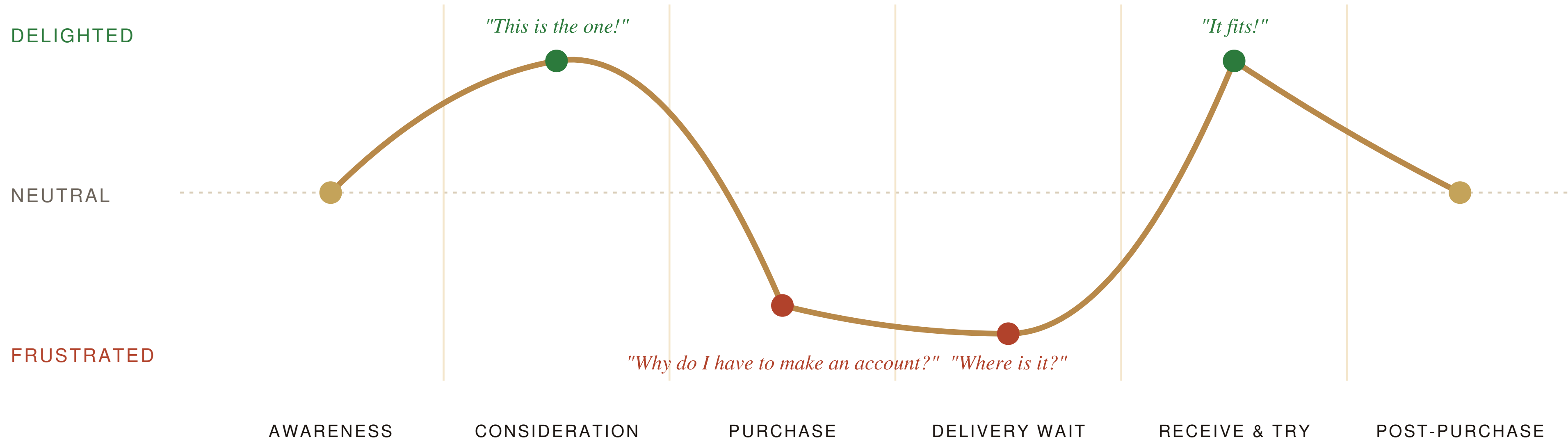
| | AWARENESS | CONSIDERATION | PURCHASE | DELIVERY WAIT | RECEIVE & TRY | POST-PURCHASE |
|---|---|---|---|---|---|---|
| **CUSTOMER GOAL** | "Find a top that matches the new trousers I bought." | "Make sure it fits and looks like the photos." | "Buy it without re-entering my whole life story." | "Know when it's arriving and that I haven't been forgotten." | "Try it on, decide if it stays." | "Return it easily if it doesn't, or wear it without thinking." |
| **ACTIONS** | Searches Google, browses Instagram, asks a friend. | Reads reviews, checks size chart, compares two retailers. | Adds to cart, applies code, checks out as guest. | Tracks shipment by email link; checks doorstep daily. | Opens box, tries on, takes a selfie, decides. | Wears it, or initiates return, or files a complaint. |
| **TOUCHPOINT** | Search, social, word-of-mouth. | Product page, reviews, size chart. | Cart, checkout, payment. | Shipping email, carrier app, SMS. | Packaging, garment, return slip. | Returns portal, support chat, follow-up email. |
| **EMOTION** | ◇ | ▲ | ▼ | ▼ | ▲ | ◇ |
| **PAIN POINT** | Too many tabs open; hard to compare. | Reviews focus on style, not fit. | Re-entering address; forced account creation; surprise shipping fee. | Carrier tracking goes silent for two days. | — | Return label requires a printer she does not own. |
| **OPPORTUNITY** | Improve cross-retailer comparison via better metadata. | Surface fit reviews separately from style reviews. | **Remove forced account creation; show full price earlier.** | **Send proactive update during silent gap.** | — | **Offer QR-code returns at carrier counter.** |

**READING THE MAP**

Three opportunities in bold are the high-impact ones for next quarter. Notice: every opportunity is concrete, anchored to a phase, and small enough that a single team can own it. That is what "from map to action" looks like in practice.

# The emotion curve — the most read part of any map.

A simple line plotting how the customer feels across phases. Executives rarely read the action layer or pain-point layer. They read the curve. A well-drawn curve tells the story of the journey in one glance.




### WHERE THE CURVE HELPS

It makes the *shape* of the journey instantly readable. Two dips in a row tell you the experience is collapsing in the middle. A flat curve suggests an experience that is fine but unmemorable.

It also exposes **the gap between expectations and reality** — the place after a peak ("This is the one!") where reality lets the customer down ("Why do I have to make an account?") is where loyalty is most at risk.

### HOW TO DRAW IT WELL

Use only three or five levels (delighted / pleased / neutral / frustrated / angry). More resolution is fake precision.

Annotate each peak and valley with one customer-verbatim quote — not a label like "drop-off." Quotes carry the emotional weight; labels do not.

Avoid making the curve too smooth. Real journeys have abrupt drops. The graph should look like the actual experience, not a marketing brochure.

CHAPTER 7

# Six mistakes that kill maps.

*The same six errors, in nearly every first attempt.*

7

# If your map dies in a drawer, one of these is why.

Across roughly forty client journey-mapping projects, the same six structural mistakes recur. They are not subtle. Each one alone is enough to kill a map; most failed maps have two or three of them at once.

01

**Mapping inside-out.**

Starting from your sales funnel or marketing calendar instead of from the customer's actual experience. The give-away is phase names like "lead nurture" instead of "I'm comparing options."

02

**Mapping from assumptions, not data.**

Filling the whole map from a workshop with internal stakeholders. The result is a story your team believes about customers — not the story customers would tell. Always interview before you draw.

03

**Trying to map everything.**

One map covering every persona, every channel, every product. Becomes unreadable, takes six months, ages out of date the day it ships. Map one specific journey for one specific persona — then another.

04

**Wrong granularity.**

Either too high ("Purchase" as a single phase with no detail) or too detailed (every click logged). The right level is enough detail that pain points are specific, not so much that the map needs a manual.

05

**No opportunity layer.**

A map full of pain points and emotions but no "what we will do about it." Beautiful diagnostic, no prescription. The map ships, gets admired, changes nothing. Always finish the opportunity layer.

06

**One-off poster, not a living document.**

Built once, frozen, never updated. Reality moves on; the map does not. By month six the team treats it as historic. Maps should be revisited every 6–12 months — or whenever the experience materially changes.

**THE QUICK SELF-TEST**

Look at your most recent journey map. For each of these six, write "yes / no / partially." Three or more "yes" answers and you have a map problem, not a CX problem. Fix the map first.

CHAPTER 8

# From map to action.

*A poster doesn't change anything. A decision does.*

8

# Three rules for turning a map into change.

The map is the diagnosis. These three rules are the prescription. Skipping any one of them is how journey maps become posters.

*01* **Score every opportunity.**

For each opportunity from the map: estimate **impact** (1–5) on the customer outcome you care about, and **effort** (1–5) to implement. Use the 2×2 matrix on the right to sort them.

*02* **Assign owner + metric + deadline.**

Every opportunity that moves forward gets three things in writing: who owns it (a named person, not a team), which metric measures success, and when it ships. Without all three, it will quietly disappear.

*03* **Review quarterly, not "when it's done."**

Treat the prioritised list as a rolling roadmap. Each quarter: what shipped, what moved, what new opportunities surfaced from new evidence. The map becomes a living document instead of a frozen poster.

### THE IMPACT × EFFORT MATRIX

| | |
|---|---|
| *Quick wins*<br>**High impact, low effort.**<br>Ship this quarter. No debate. | *Big bets*<br>**High impact, high effort.**<br>Plan the work. Roadmap for next 1–2 quarters. |
| *Fill-ins*<br>**Low impact, low effort.**<br>Worth doing if cheap. Don't prioritise. | *Avoid*<br>**Low impact, high effort.**<br>Don't. No matter how much someone in the room loves it. |

Horizontal axis: effort. Vertical axis: impact. Top-left wins.

**A USEFUL CONSTRAINT**

Never act on more than five opportunities per quarter from a single map. Teams that try to ship ten end up shipping zero, because attention fragments and no opportunity gets the focus it needs. Five — or three — is the right number.

# Is the map you have actually a working map?

Sixteen statements across four dimensions of a working journey map. Score one point per statement you can honestly answer **true today** — not aspirationally, not "we're working on it."

### SETUP (4 STATEMENTS)

- ◻ The map is for one specific persona, not "our customer."
- ◻ The scope (start and end) is written down in one sentence.
- ◻ We can name the specific decision the map is supposed to inform.
- ◻ The map sponsor and the audience of decision-makers is clear.

### EVIDENCE (4 STATEMENTS)

- ◻ The map is built on at least 8 customer interviews, not internal opinion.
- ◻ Quantitative data (NPS / CSAT / CES, analytics) is layered into the map.
- ◻ Support tickets and complaint logs were reviewed for pain points.
- ◻ The draft map was validated by 3+ real customers before final sign-off.

### STRUCTURE (4 STATEMENTS)

- ◻ The map has all seven layers (phases, goals, actions, touchpoints, emotions, pain points, opportunities).
- ◻ Phase names use the customer's language, not internal jargon.
- ◻ The emotion curve is annotated with real customer quotes.
- ◻ Every pain point has at least one concrete opportunity.

### ACTION (4 STATEMENTS)

- ◻ Opportunities are scored on impact × effort.
- ◻ The top 3–5 opportunities have named owners, metrics and deadlines.
- ◻ The map is reviewed at least twice a year — not frozen.
- ◻ At least one decision (priority, redesign, reorg) has already been made because of the map.

### HOW TO READ YOUR SCORE

**14–16:** a genuinely working map. Focus on cadence and quarterly review. · **10–13:** solid foundation; the gap is usually action-side. · **6–9:** the map exists but has not become a decision tool. Pick the lowest-scoring dimension and fix it. · **Below 6:** the map is a poster. Restart from the five-question brief.

# Build the map to change something.

Journey mapping is not difficult. It is, however, easy to do in a way that produces nothing. The difference between a working map and a poster is almost never the visual design — it is the discipline of setup, evidence and follow-through.

The teams that get value from journey mapping treat the map as a *process*, not an artefact. The map is the visible part. The real work is the interviews, the evidence synthesis, the prioritisation, the quarterly review. The map is just the picture on top.

**Three takeaways worth more than the rest of this paper:**

*01* **One persona, one journey, one decision.**
The single biggest cause of failed journey maps is trying to map too much. Narrow scope is the first design choice. Broad scope is almost always wrong.

*02* **Evidence in, opinion out.**
If your map is built from a stakeholder workshop alone, it is a story your team believes — not a customer's reality. Interview first. Draw second.

*03* **Finish the opportunity layer.**
The map's payload is the opportunity layer with named owners. Without it, everything before is decoration. With it, the map becomes a decision tool that pays for itself in the first quarter.

## How InsightSofa can help.

Beyond the feedback platform itself, our CX strategy team runs the **six-step journey-mapping engagement** from Chapters 4–6 with clients building their first — or fixing their broken — map. The deliverables are the ones we use ourselves across roughly forty client engagements.

InsightSofa's platform is designed to feed journey maps directly: verbatim AI tags pain points by phase, transactional surveys fire at the moments the map identifies, and the opportunity layer becomes a workflow with owners and SLAs — not a slide.

The fastest start is a 30-minute working session with our CX strategy team.

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This paper draws on the InsightSofa CX Strategy Team's experience running journey-mapping engagements with mid-sized and enterprise clients in B2B, B2C and the public sector.