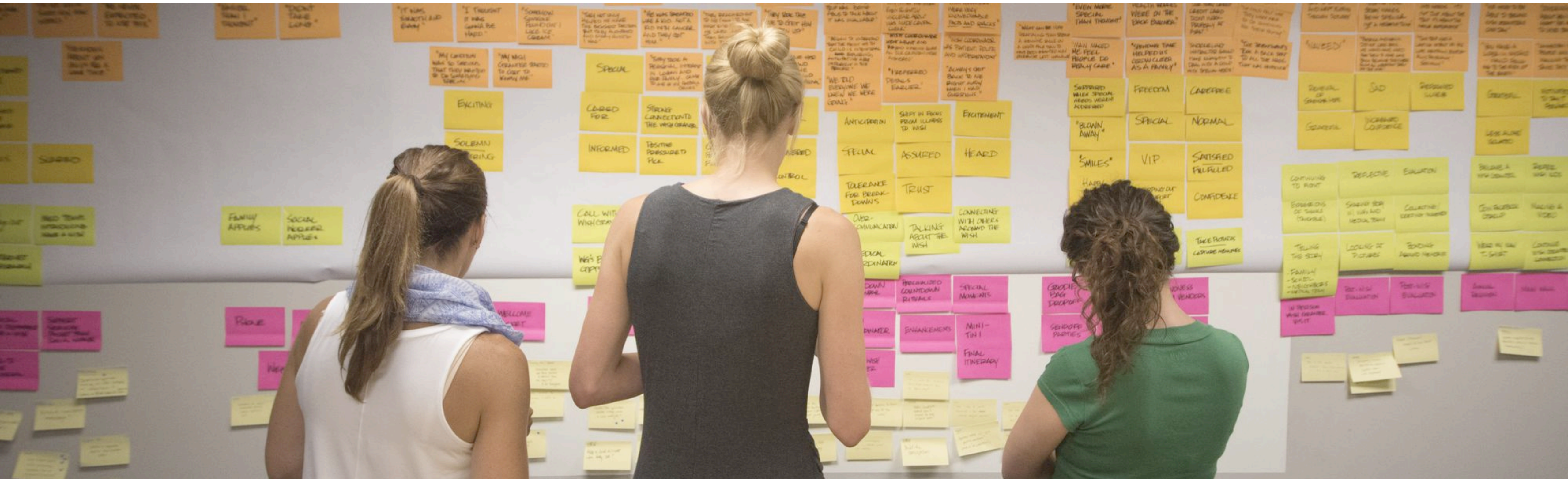


CX Design for Entrepreneurs:

Intro to Experience Mapping



OUR TEAM



Charissa Morgan
CX Consultant



Jeff Blanchard
Creative Director



Agenda

- CX as Competitive Advantage
- Tools of CX Design: Mapping
- Q&A: Applying CX Tools to Real Life Challenges

CX as Competitive Advantage

Differentiating and Adding Value to Your Product

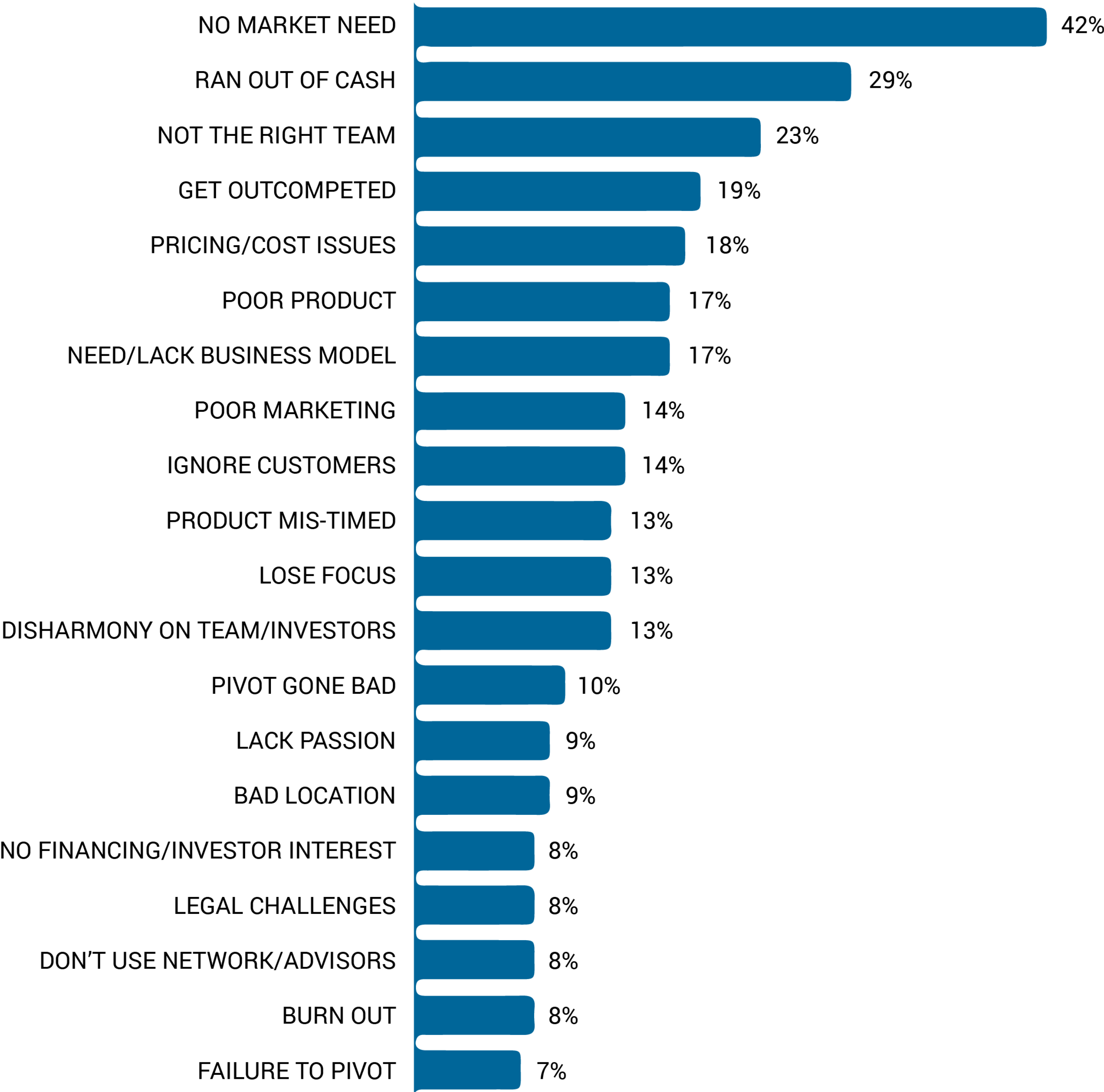
What is Experience Design?

“Experience design is the design of anything,
independent of medium, or across media,
with human experience as an explicit outcome,
and human engagement as an explicit goal.”

–JESSE JAMES GARRETT, CO-FOUNDER OF ADAPTIVE PATH

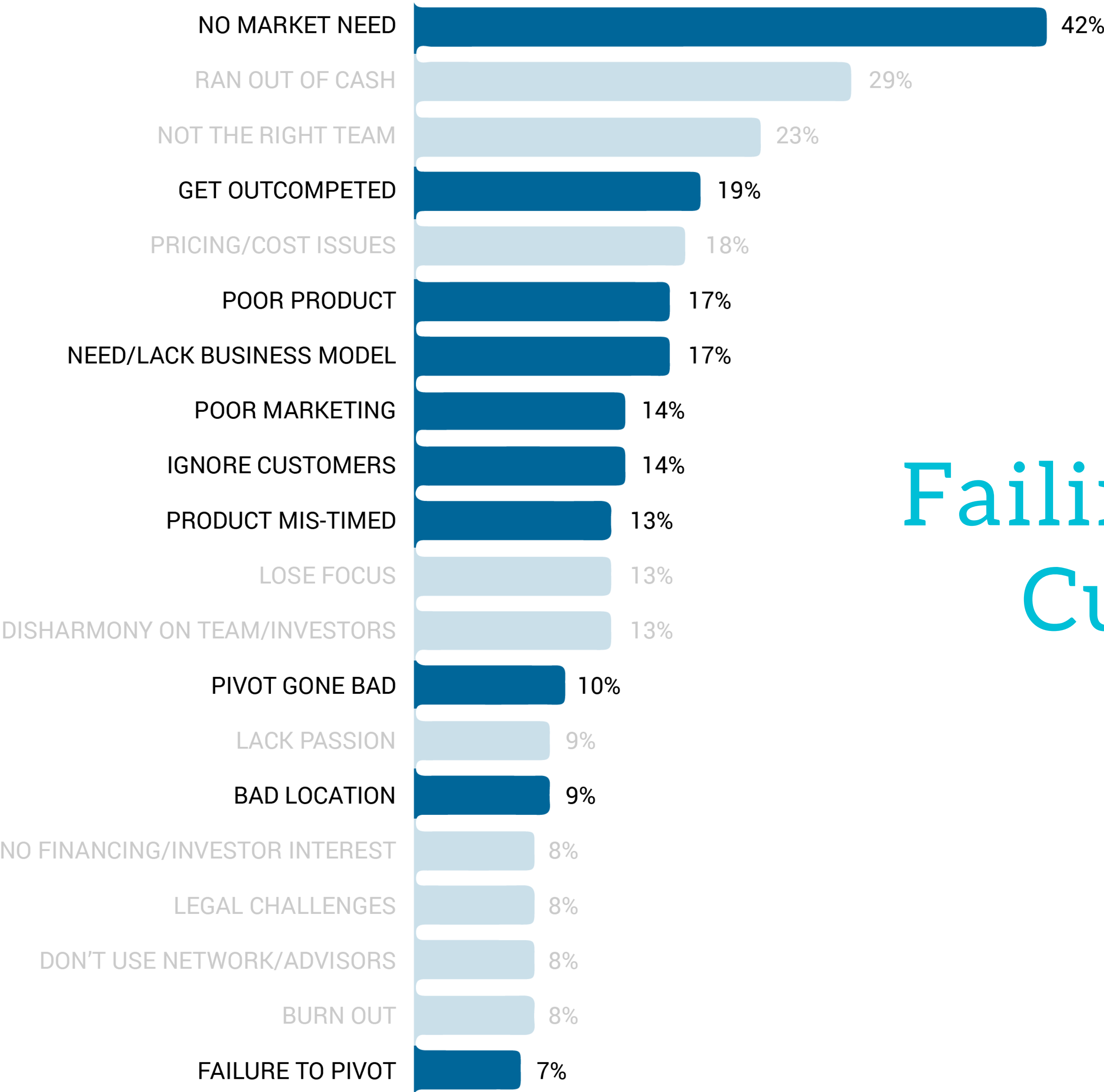
Source: CB Insights

Top Reasons Startups Fail



Source: CB Insights

Top Reasons Startups Fail



Failing to Understand
Customer Needs

“As competition and buyer empowerment compounds,
customer experience itself is proving to be the only
truly durable competitive advantage.”

–JAKE SOROFMAN, RESEARCH VP, GARTNER

5.1x Revenue Growth
for Leaders over Laggards

4.5x Willingness to Pay
a Premium Price

2.7x Operating Margin for
Companies with Engaged Employees

FORRESTER RESEARCH

CUSTOMER EXPERIENCE: VALUE



Experience is a Key Layer to Your Offering



Commodity

1¢ - 2¢



Goods

5¢ - 25¢



Service

75¢ - \$1

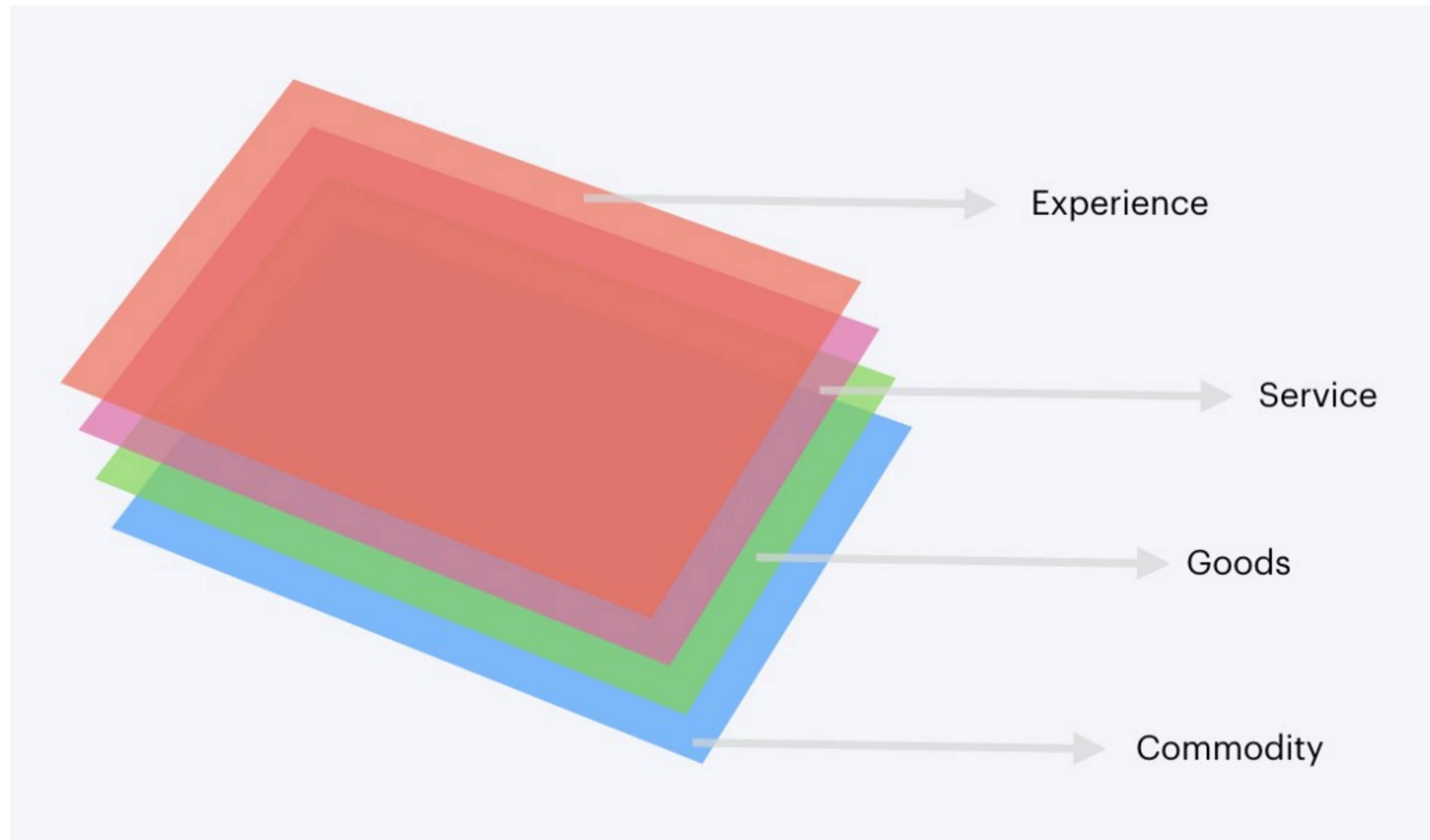


Experience

\$2.00 - \$5.00

CUSTOMER EXPERIENCE: VALUE

Experience is a Key Layer to Your Offering



Experience is a Key Layer to Your Offering



What does CX As Competitive
Advantage Look like?

THE POWER OF CUSTOMER JOURNEY

Warby Parker: \$0 To \$1.2B In 6 Years



Try frames at home—for free

[Get started](#)

[Take a quiz](#)



THE POWER OF CUSTOMER JOURNEY

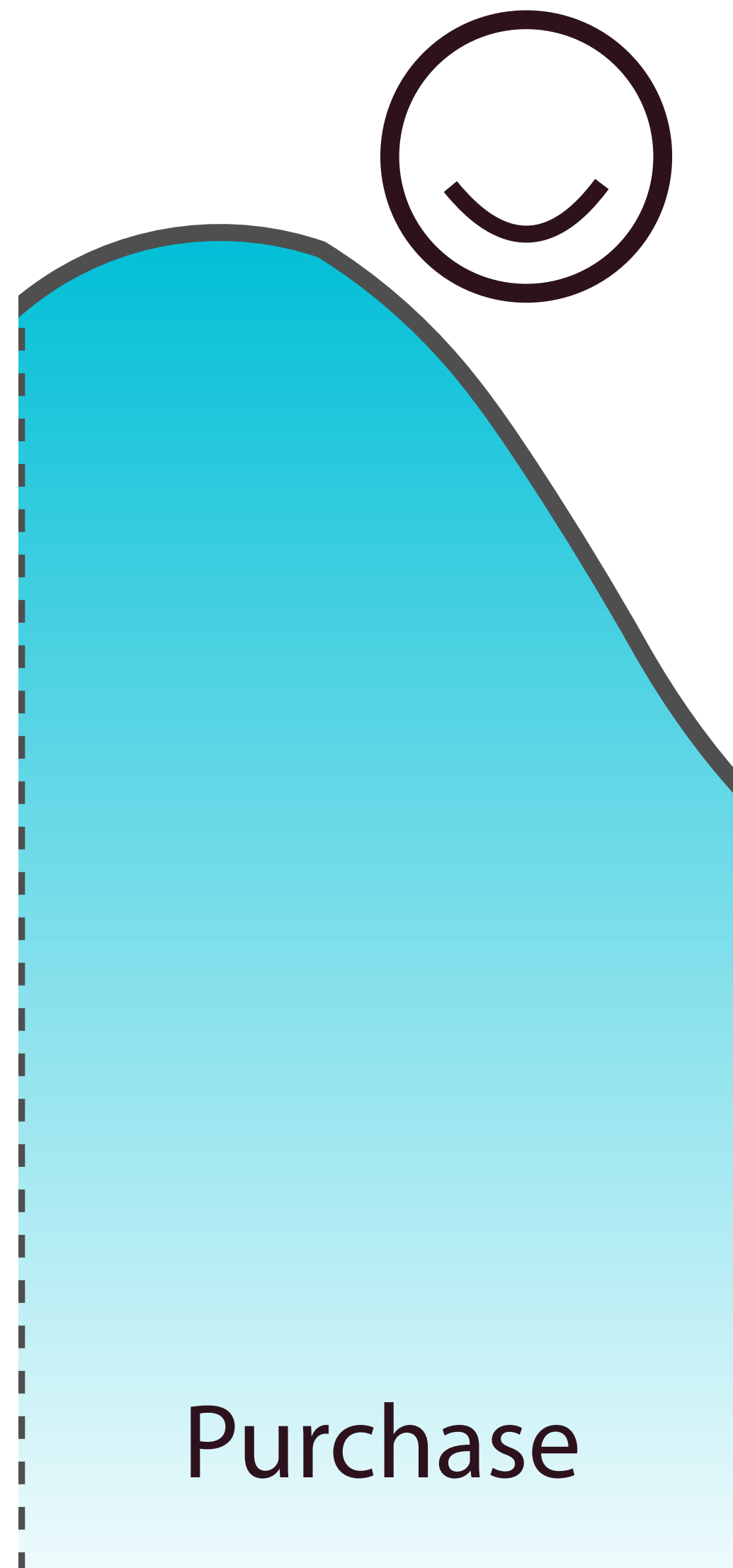
Reverb.Com: \$0 To \$600M In 5 Years

Reverb



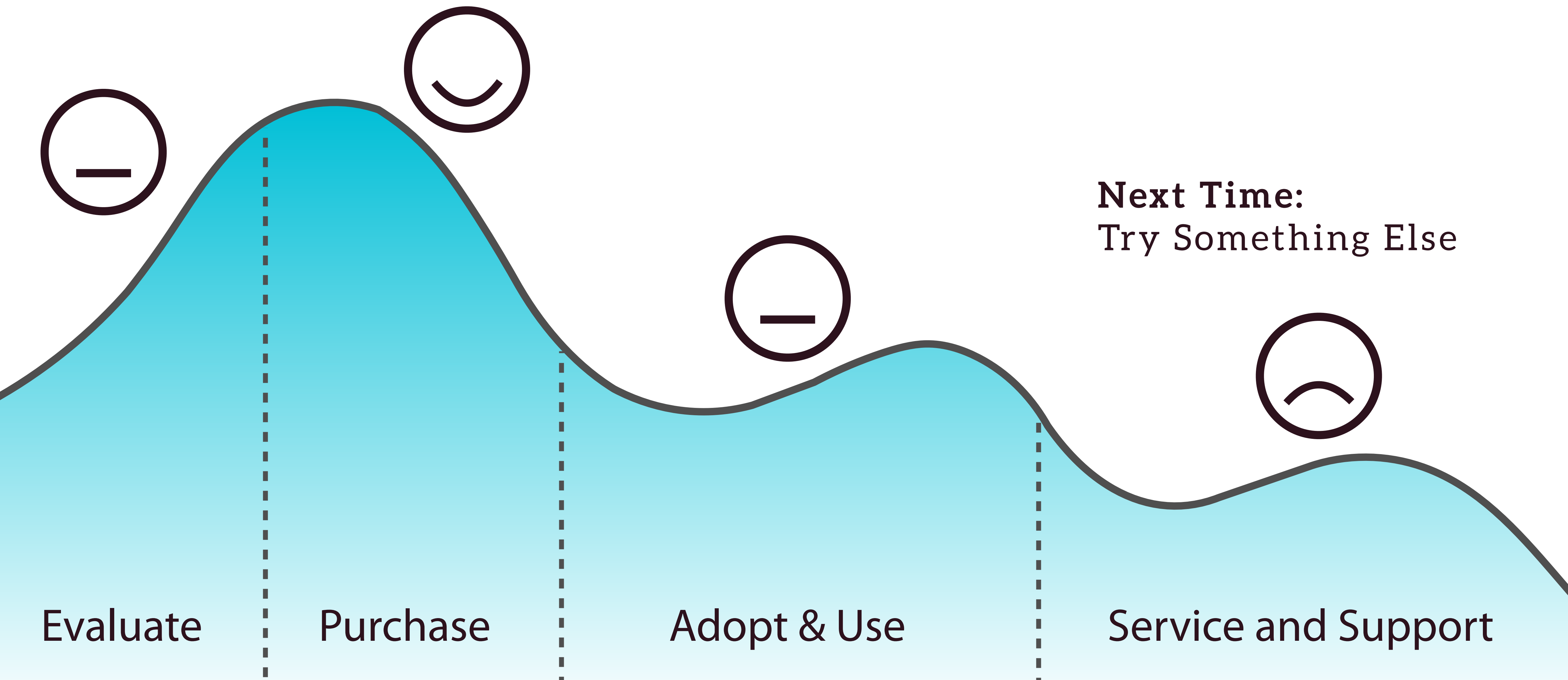
THE POWER OF CUSTOMER JOURNEY

Typical Retail: Inside Out



THE POWER OF CUSTOMER JOURNEY

Typical Retail: Inside Out



THE POWER OF CUSTOMER JOURNEY

Re-Imagined Retail: Outside In

Next Time:
Come Back...
Bring Friends!



Evaluate

Purchase

Adopt & Use

Service and Support

What Experience Do You Intend
to Create & Deliver?

DELIGHT
THE
CUSTOMER!



“Great customer experiences don’t happen by accident. They’re the result of countless deliberate decisions made by every single person in your customer experience ecosystem on a daily basis.”

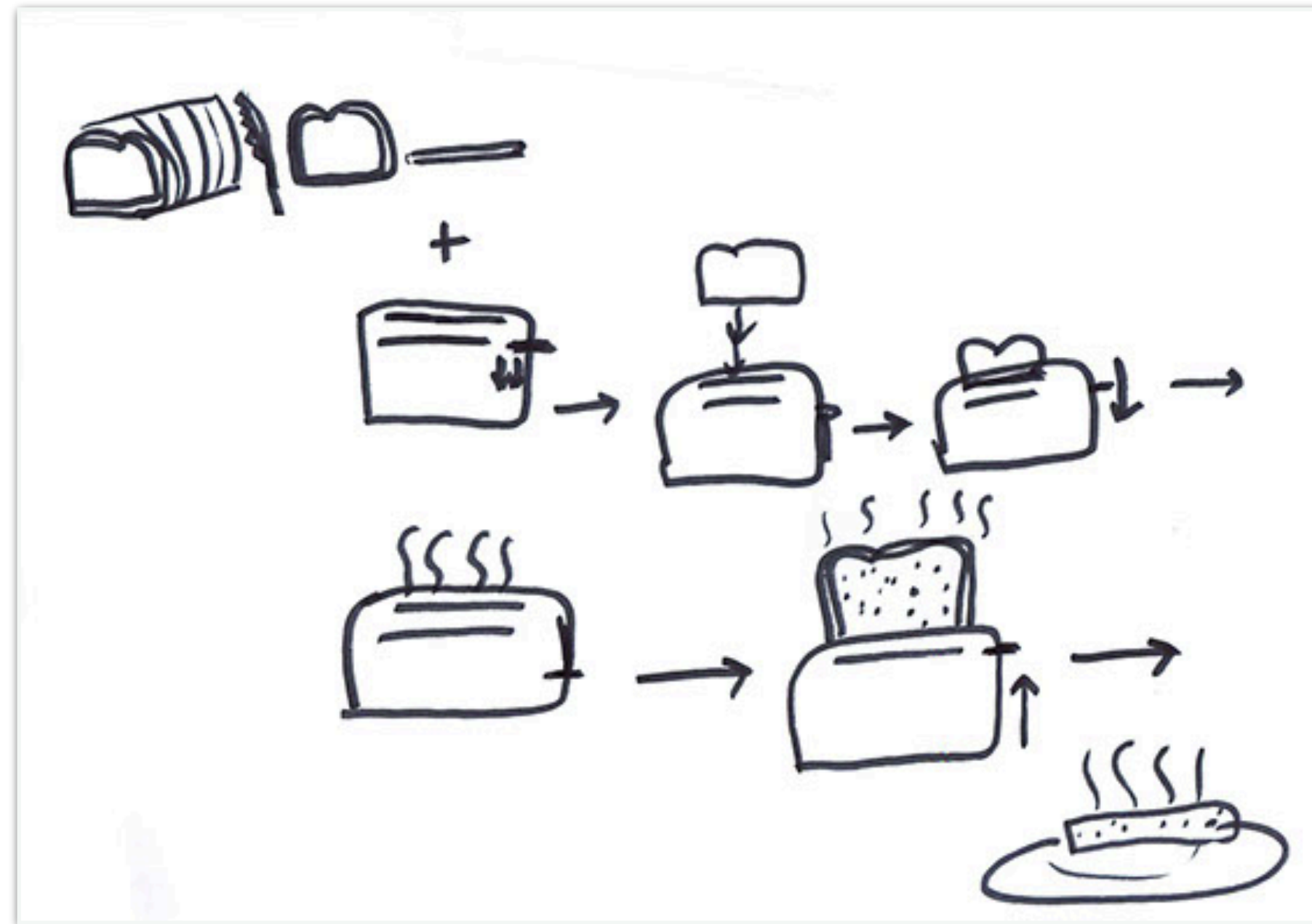
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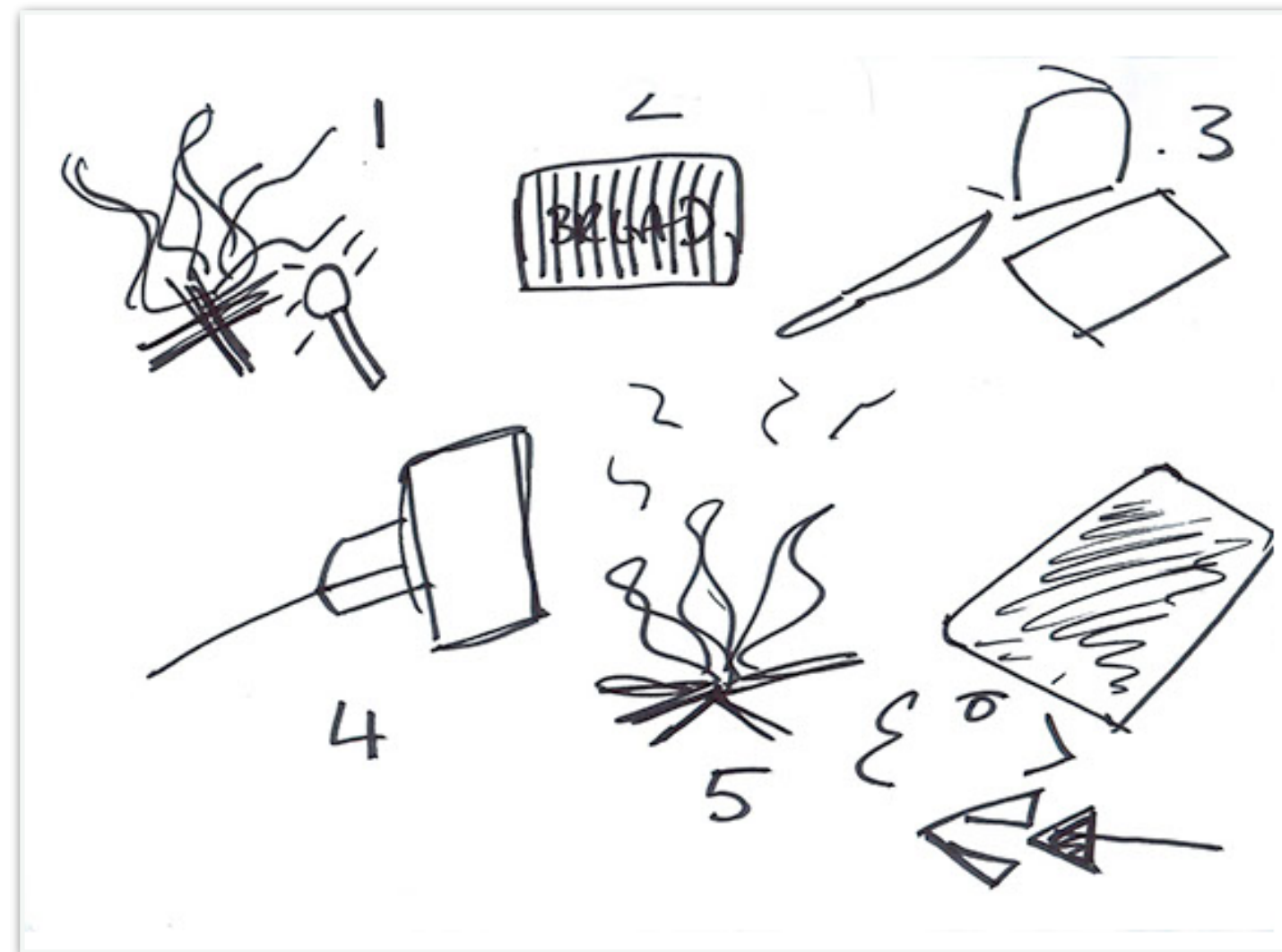
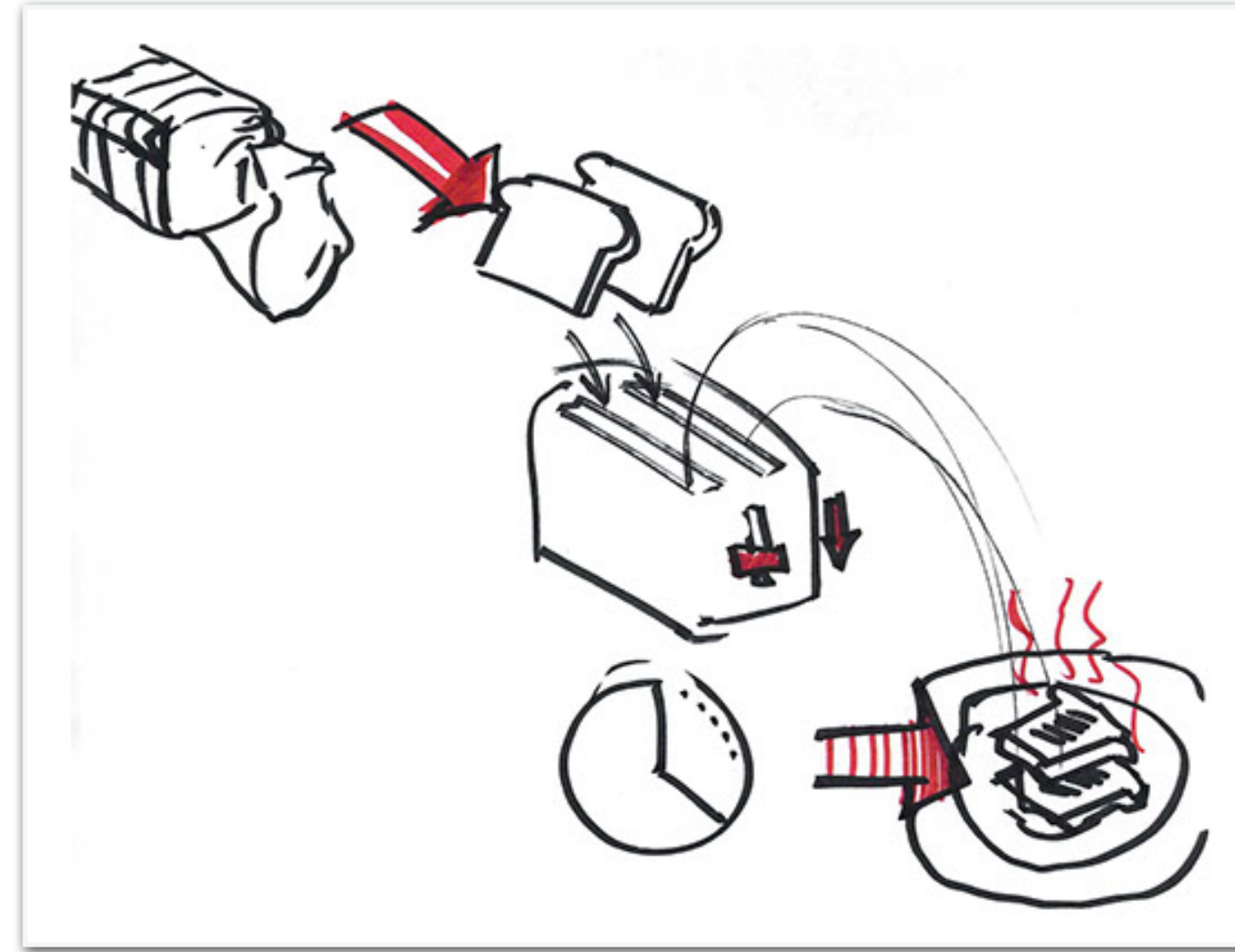
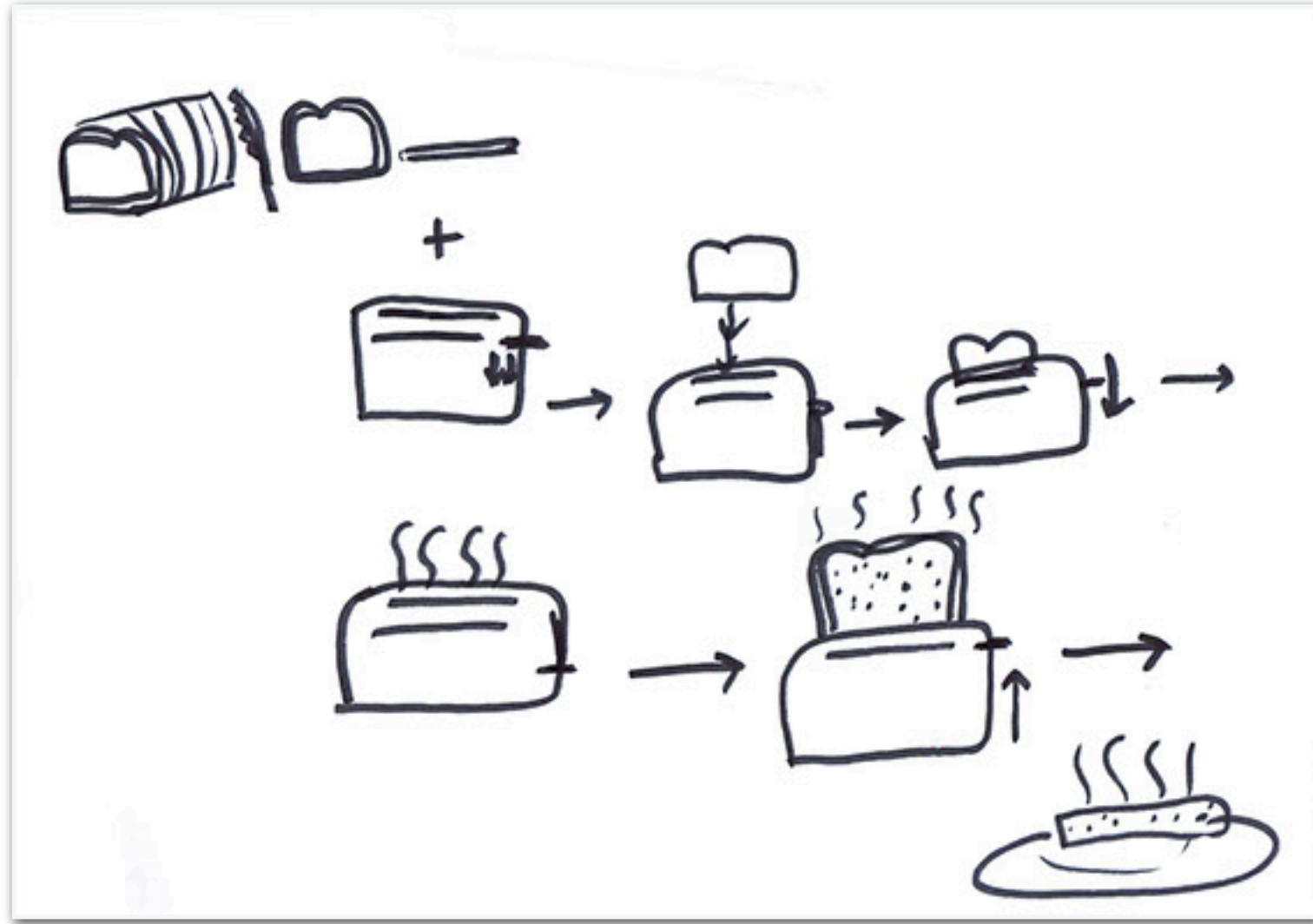
Tools of CX Design: Mapping

Understanding Your Customer

Let's make some toast...

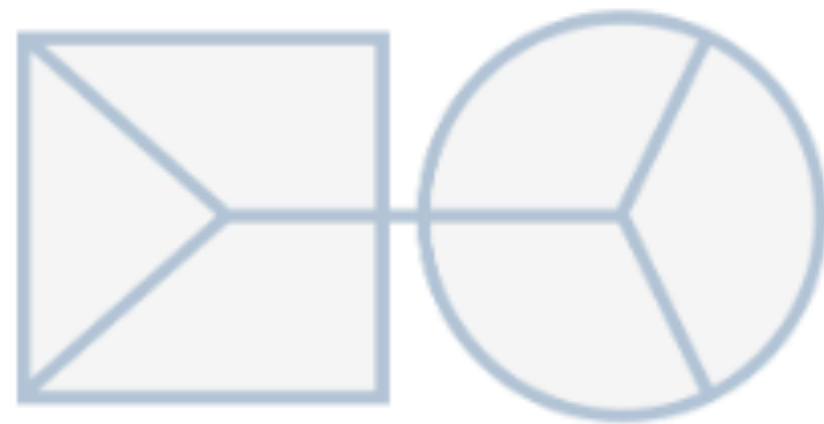


Product experiences are nuanced...

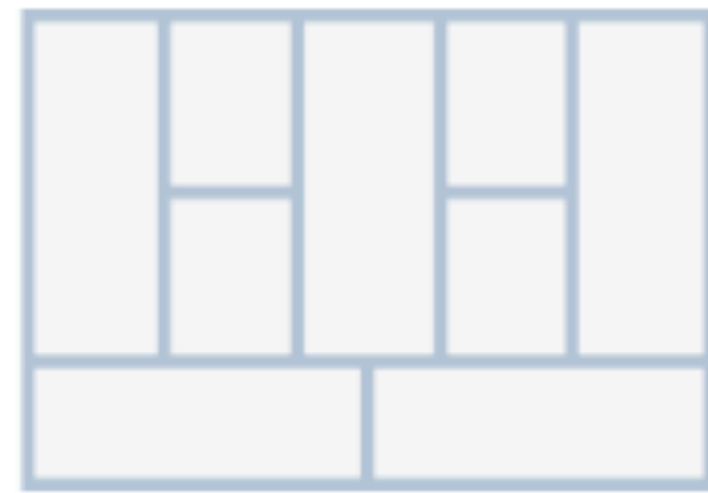


CX MAPPING - BRINGING CLARITY TO EXPERIENCE

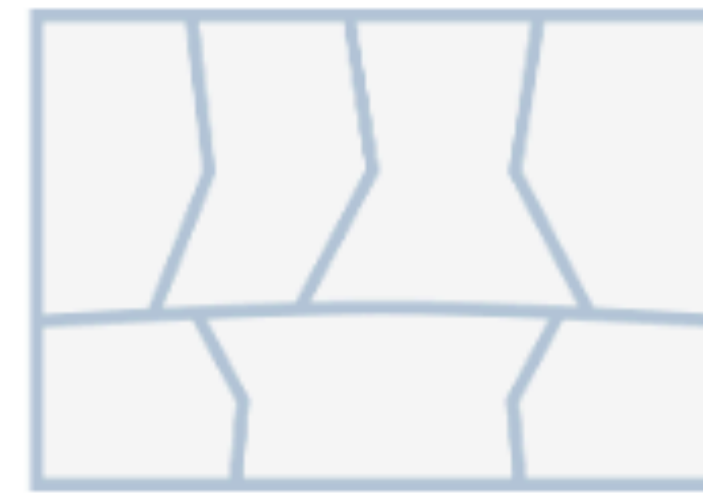
More Than A Journey



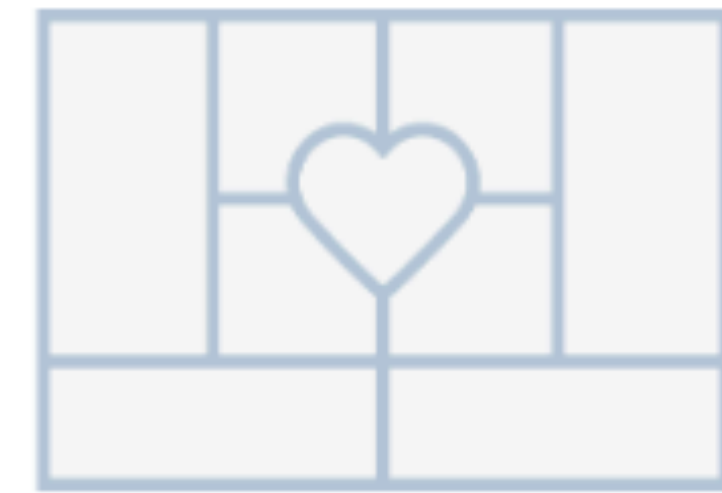
Value Proposition Canvas



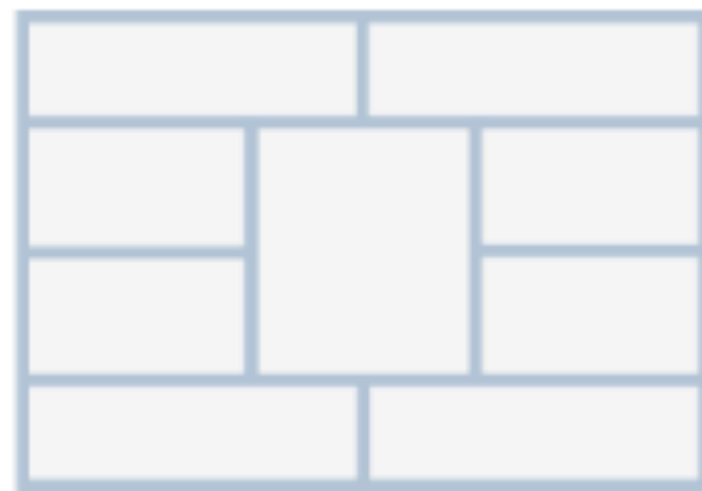
Business Model Canvas



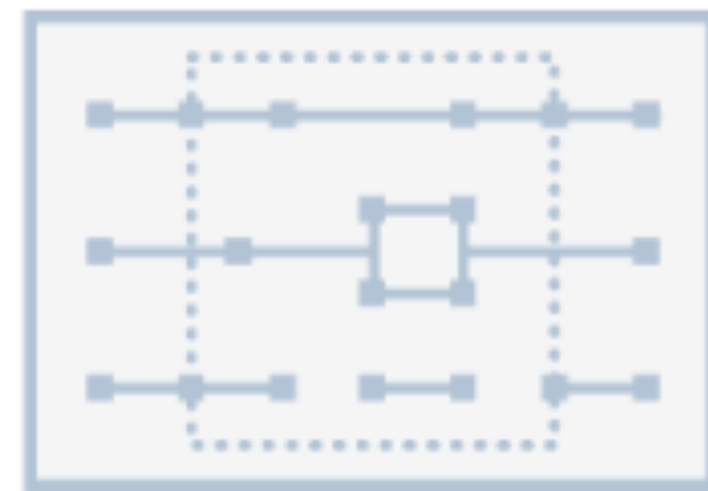
Context Canvas



Team Canvas



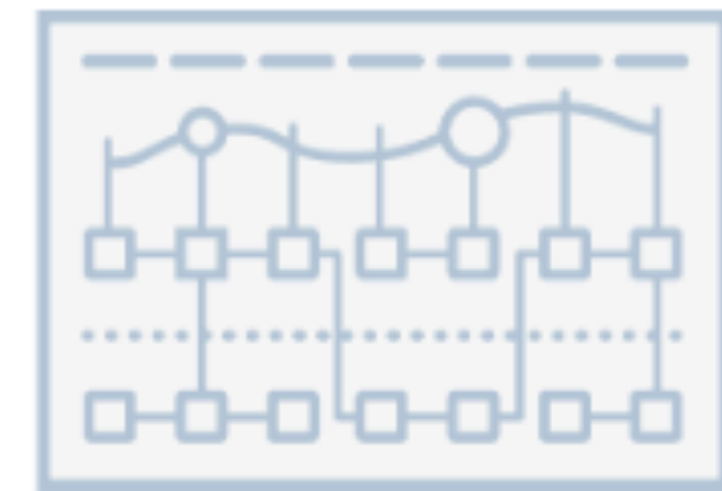
User Interaction Canvas



User Experience Map



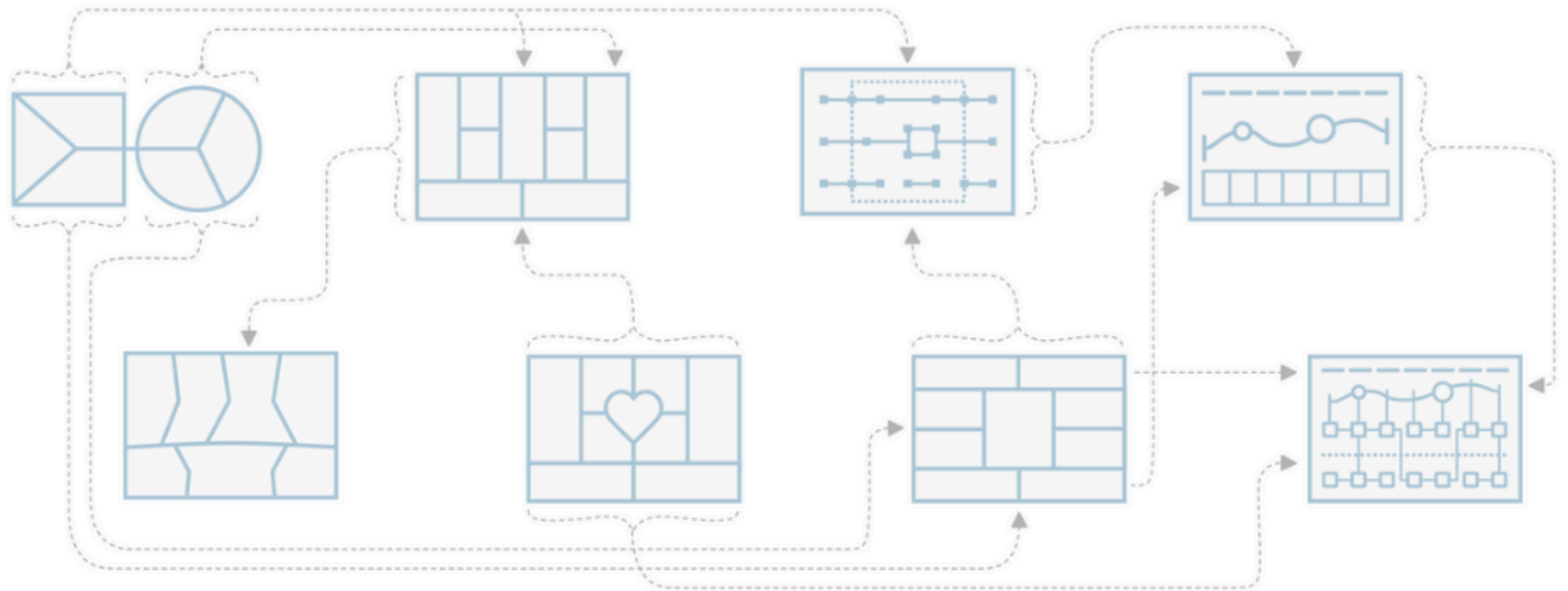
Customer Journey Map



Service Blueprint

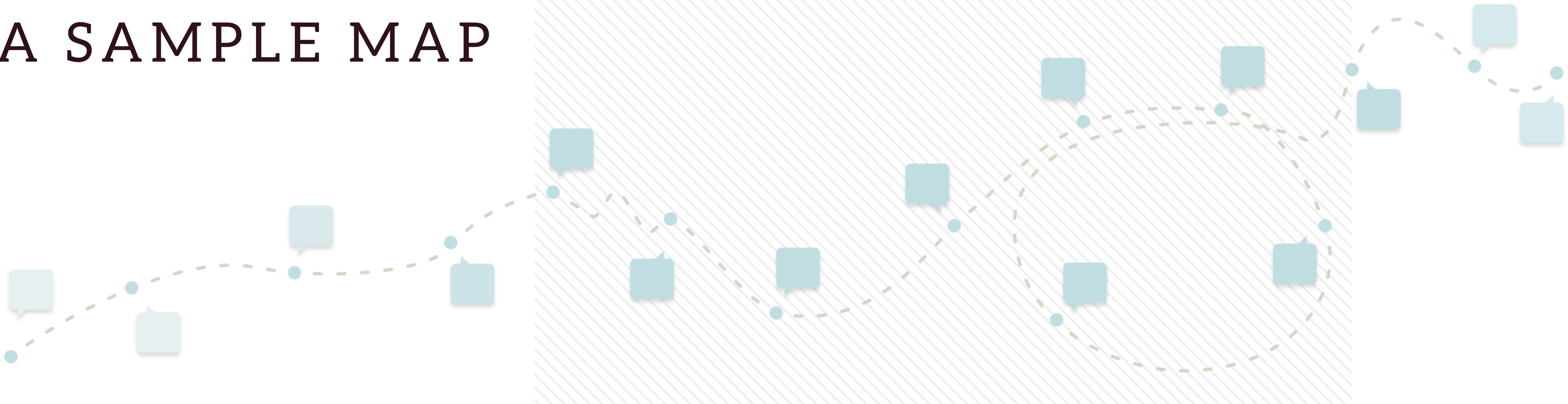
CX MAPPING - BRINGING CLARITY TO EXPERIENCE

Experience By Design, Not Chance



A SAMPLE MAP

Key Touchpoints & Moments



Thoughts, Actions & Feelings



Opportunities



Recognizing Need “Where can I turn for help?”	Assessing Value “Will this work?”	Enrollment “How do I get started?”	Orientation “How do I get settled?”	Assessment “Where do I need help the most?”	Learning “I can't do this... I can do this!”	Waiting for Green Light “When am I ready to move on?”	Post-Enrollment “What do I do now?”		
<ul style="list-style-type: none">• Shame• Hopelessness• Doubt• Anxiety	<ul style="list-style-type: none">• Depressed• Afraid• Longing for Acceptance• & Encouragement	<ul style="list-style-type: none">• Overwhelmed• Broke• Confused• Hopeful	<ul style="list-style-type: none">• Skeptical• Overwhelmed• Confused• Hopeful• Becoming Comfortable	<ul style="list-style-type: none">• Afraid• Insignificant• Confused• Unintelligent• Judged	<ul style="list-style-type: none">• Tired• Overwhelmed• Confused• Burned Out	<ul style="list-style-type: none">• Excited• Empowered	<ul style="list-style-type: none">• Doubtful• Overwhelmed• Afraid• Burned Out• Anxious	<ul style="list-style-type: none">• Hopeful• Empowered• Relieved!	<ul style="list-style-type: none">• Abandonment• Depressed• Let Down• Empowered• Hopeful• Excited
<ul style="list-style-type: none">• Receive failing test score• Do a web search• Assess my deficiencies• School sets a requirement• Call the Front Desk	<ul style="list-style-type: none">• Research program• Call Front Desk• Web Search• Visit PASS website	<ul style="list-style-type: none">• Pre-Assessment• Call Front Desk• Visit Pass website• Submit Application• Just show up	<ul style="list-style-type: none">• Make Payment Plan• Take Out Loans• Listen and attend• Receive housing provisions (staples)• Read and review	<ul style="list-style-type: none">• Take the test and get it over with• Avoid the test as long as possible	<ul style="list-style-type: none">• Adjust to environment• Listen and attend• Readjust to study• Make tutor request	<ul style="list-style-type: none">• Make a schedule• Go to tutoring• Ask questions	<ul style="list-style-type: none">• Take comps• Take the NBME• Sign up for office hours	<ul style="list-style-type: none">• Do a Kaplan Assessment• Overcoming Anxiety	<ul style="list-style-type: none">• Return to program• Readapting to life (difficult)• Returning for encouragement• Refer students
<ul style="list-style-type: none">• I'm on my last leg.• His methods work for me• What about ESL?• Can I succeed?• Am I wasting time & money?	<ul style="list-style-type: none">• Can this help me?• Does PASS really care?• Access to Dr. Francis?• Can I afford this?• No program offers tutoring• What are your stats?	<ul style="list-style-type: none">• Can I afford this?• Is this feasible?• How long is the program?• What will life be like?• What materials do I need?	<ul style="list-style-type: none">• Who will teach me?• How do I prepare?• Do I fit/belong in this community?• Will I find time to study?• What is my daily schedule?• Who does what?• What was that fake orientation?	<ul style="list-style-type: none">• Should I take this now?• Are the results accurate?• What score do I need?• Why is this NBME not reflecting my knowledge?• I want to avoid how bad it is	<ul style="list-style-type: none">• Do I belong here?• Do I need to go to every lecture?• Which GB should I use?• My knowledge isn't sufficient	<ul style="list-style-type: none">• Things are making sense!• I can do this!• This is bringing me out of my shell	<ul style="list-style-type: none">• Am I ready?• Who do I trust to know I'm ready?• Do I really need a 450?• Where should I take the exam?• How long do I wait?• My dream was rescued!	<ul style="list-style-type: none">• Am I ready?• Was I just another student?• Does Dr. F remember me?• Do I need to come back?• PASS saved me!• I can do this!• Can I be a tutor?	
<ul style="list-style-type: none">• Review website content & language• Improve relationships with other schools• Test/adjust SEO	<ul style="list-style-type: none">• Focus on “We” vs “I”• Create comparison chart with other institutions	<ul style="list-style-type: none">• Improve consistency in methodology• Establish better boundaries re: access to Dr. Francis• Set orientation, check-in expectations• Floor plan, virtual tour on website	<ul style="list-style-type: none">• Use orientation to validate feeling about assessment• Get on the same page about a realistic schedule• 5-min video to welcome	<ul style="list-style-type: none">• Better preparation & expectation setting• Create shared ritual around assessment• Incentivize test results• Review how to evaluate NBMEs	<ul style="list-style-type: none">• Virtual Front Desk / Student Portal• Post-tutoring follow-up• Increased automation• Add shuttle schedule• Improve local resources• Document communication	<ul style="list-style-type: none">• Training for tutors to counsel & prepare students• Co-create personalized strategy	<ul style="list-style-type: none">• Follow-up email surveys @3, 6, 9 months• Increase post-grad support• Improve alumni network		



Recognizing Need "Where can I turn for help?"

- Shame
- Hopelessness
- Doubt
- Anxiety

- Receive failing test score
- Do a web search
- Assess my deficiencies
- School sets a requirement
- Call the Front Desk

- I'm on my last leg.
- His methods work for me
- What about ESL?

Assessing Value "Will this work?"

- Depressed
- Afraid
- Longing for Acceptance
- & Encouragement

- Research program
- Call Front Desk
- Web Search
- Visit PASS website

- Can this help me?
- Does PASS really care?
- Access to Dr. Francis?

Learning "I can't do this... I can do this!"

- Tired
- Overwhelmed
- Confused
- Burned Out

- Excited
- Empowered

- Adjust to environment
- Listen and attend
- Readjust to study
- Make tutor request

- Make a schedule
- Go to tutoring
- Ask questions
- Things are making sense!
- I can do this!
- This is bringing me out of my shell

- Do I belong here?
- Do I need to go to every lecture?
- Which GB should I use?
- My knowledge isn't sufficient

Waiting for Green Light "When am I ready to move on?"

- Doubtful
- Overwhelmed
- Afraid
- Burned Out
- Anxious

- Hopeful
- Empowered
- Relieved!

- Take comps
- Take the NBME
- Sign up for office hours

- Do a Kaplan Assessment
- Overcoming Anxiety

- Am I ready?
- Who do I trust to know I'm ready?
- Do I really need a 450?
- Where should I take the exam?
- How long do I wait?
- My dream was rescued!

Post-Enrollment "What do I do now?"

- Abandonment
- Depressed
- Let Down
- Empowered
- Hopeful
- Excited

- Return to program
- Readapting to life (difficult)
- Returning for encouragement
- Refer students

- Am I ready?
- Was I just another student?
- Does Dr. F remember me?
- Do I need to come back?
- PASS saved me!
- I can do this!
- Can I be a tutor?

- Follow-up email surveys @3, 6, 9 months
- Increase post-grad support
- Improve alumni network

THOUGHTS

How are people framing or evaluating their experience?
What do they expect?

FEELINGS

What emotions do people have along the way?
What are the highs? What are the lows?

ACTIONS

What effort are people expending?

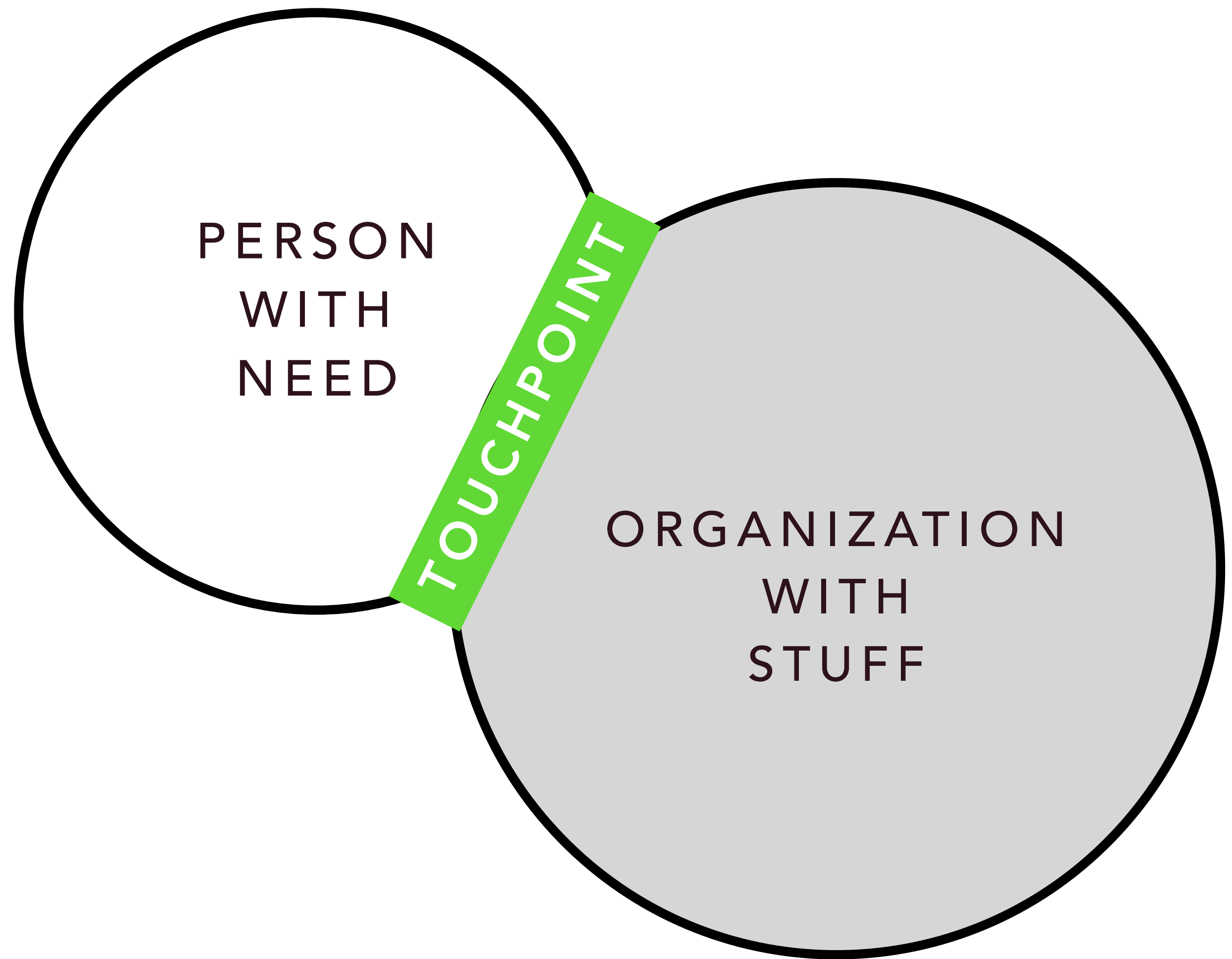
TOUCHPOINTS

CHANNELS

OPPORTUNITIES

TOUCHPOINTS

CHANNELS



THOUGHTS

How are people framing or evaluating their experience?
What do they expect? What are they thinking about?

FEELINGS

What emotions do people have along the way?
What are the highs? What are the lows?

ACTIONS

What effort are people expending? Mental effort? Physical effort?

TOUCHPOINTS

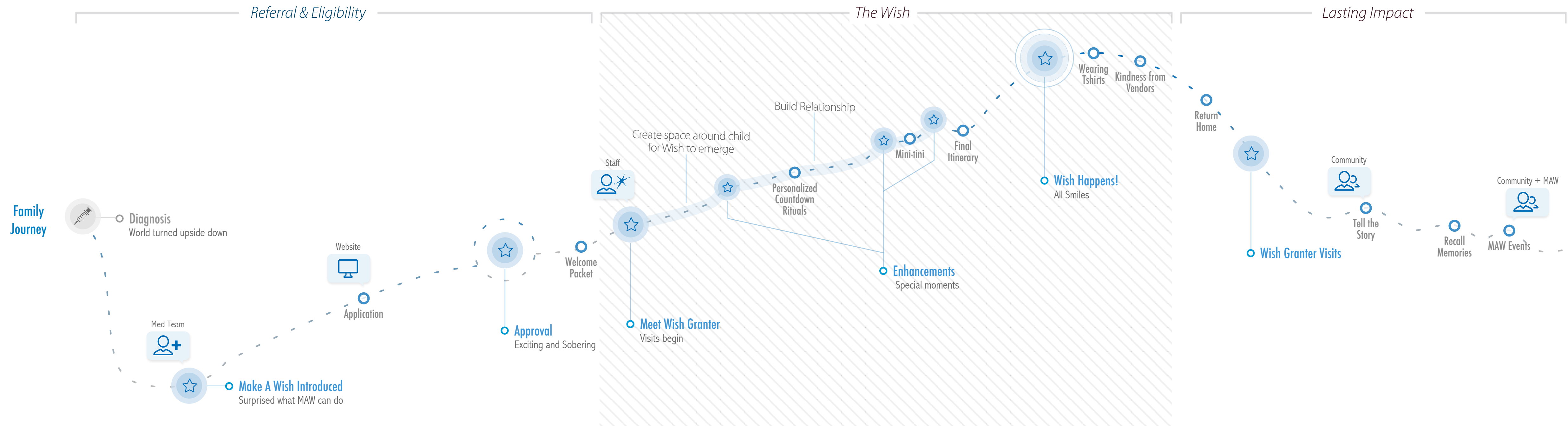
Person with need - Organization with stuff.

CHANNELS

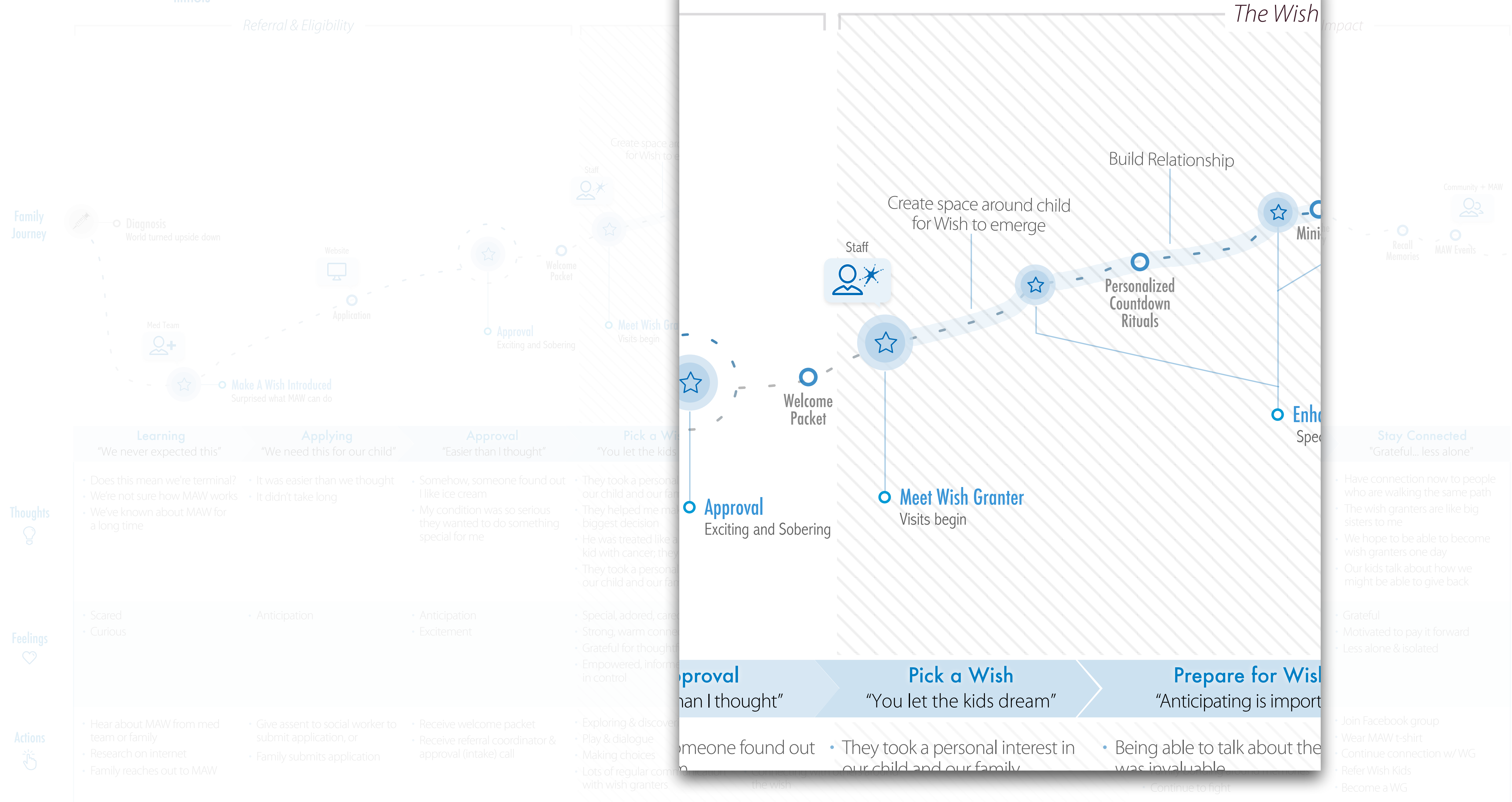
The medium through which the Touchpoint is conveyed.

OPPORTUNITIES

Digital Transformation - Process Improvement -
Training - Research - Service Design - Product Development



	Learning "We never expected this"	Applying "We need this for our child"	Approval "Easier than I thought"	Pick a Wish "You let the kids dream"	Prepare for Wish "Anticipating is important"	Have My Wish "Truly magical"	Back to a New Reality "Sad to leave"	Stay Connected "Grateful... less alone"
Thoughts	<ul style="list-style-type: none">Does this mean we're terminal?We're not sure how MAW worksWe've known about MAW for a long time	<ul style="list-style-type: none">It was easier than we thoughtIt didn't take long	<ul style="list-style-type: none">Somehow, someone found out I like ice creamMy condition was so serious they wanted to do something special for me	<ul style="list-style-type: none">They took a personal interest in our child and our familyThey helped me make the biggest decisionHe was treated like a kid, not a kid with cancer; they got himThey took a personal interest in our child and our family	<ul style="list-style-type: none">Being able to talk about the trip was invaluableWish granters were very knowledgeable... facts & snacksBegan to understand that focus on child is intentional; exploring and anticipating are important	<ul style="list-style-type: none">We were treated like kings & queensEven more special than we thoughtFour magical days where we got to relax as a familyOur child learned to love the world againTreatments took a back seat to all the magic that was happening	<ul style="list-style-type: none">It was the entryway into a different kind of life... we are going to enjoy itWe were sad to leave & keep flipping through picturesTelling her story makes being special not a negative thingIt's not just about the trip, it's about the whole experience	<ul style="list-style-type: none">Have connection now to people who are walking the same pathThe wish granters are like big sisters to meWe hope to be able to become wish granters one dayOur kids talk about how we might be able to give back
Feelings	<ul style="list-style-type: none">ScaredCurious	<ul style="list-style-type: none">Anticipation	<ul style="list-style-type: none">AnticipationExcitement	<ul style="list-style-type: none">Special, adored, cared forStrong, warm connectionGrateful for thoughtfulnessEmpowered, informed, in control	<ul style="list-style-type: none">Anticipation & excitementShift in focus from illness to wishSpecial, assured, and "heard"Trust, tolerance for breakdowns	<ul style="list-style-type: none">"Blown away"Special & NormalGrowing confidence through "stepping out of comfort zone"Surprised when special needs were not addressed	<ul style="list-style-type: none">Renewal of strength & hopeSad but gratefulIncreased confidenceReframed the illness in a positive way	<ul style="list-style-type: none">GratefulMotivated to pay it forwardLess alone & isolated
Actions	<ul style="list-style-type: none">Hear about MAW from med team or familyResearch on internetFamily reaches out to MAW	<ul style="list-style-type: none">Give assent to social worker to submit application, orFamily submits application	<ul style="list-style-type: none">Receive welcome packetReceive referral coordinator & approval (intake) call	<ul style="list-style-type: none">Exploring & discoveringPlay & dialogueMaking choicesLots of regular communication with wish granters	<ul style="list-style-type: none">Over-communicationCoordinate medical needsTalking about the wishConnecting with others around the wish	<ul style="list-style-type: none">Doing what I wanted to doTake pictures, capture memoriesFamily bonding	<ul style="list-style-type: none">Expressions of thanksCollecting & keeping momentosReflection on journeyFamily bonding around memoriesContinue to fight	<ul style="list-style-type: none">Join Facebook groupWear MAW t-shirtContinue connection w/ WGRefer Wish KidsBecome a WG



6 STEPS FOR JOURNEY MAPPING

1. Pick a target
2. Gather the team to document current understanding
3. Create your Field Guide
4. Interview your customers!
5. Code (document your findings)
6. Gather the team to synthesize learnings into a journey model



1. DEFINE A TARGET:

Decide WHOSE experience you are mapping;
have a clear Point of View!



“Where am I going to find my next client?”

LAURA

Laura opened a side-hustle coaching business after completing her training with CoachNet. Since this is a part time company, money is not a driving factor because this is a second income. Laura would like coaching to be her #1 profit center (above speaking or authoring).

- AGE: 40+
- POPULATION: Mostly women
- TYPE: Formal coaching
- PAYMENT: Client fee for service

COACHING FOCUS

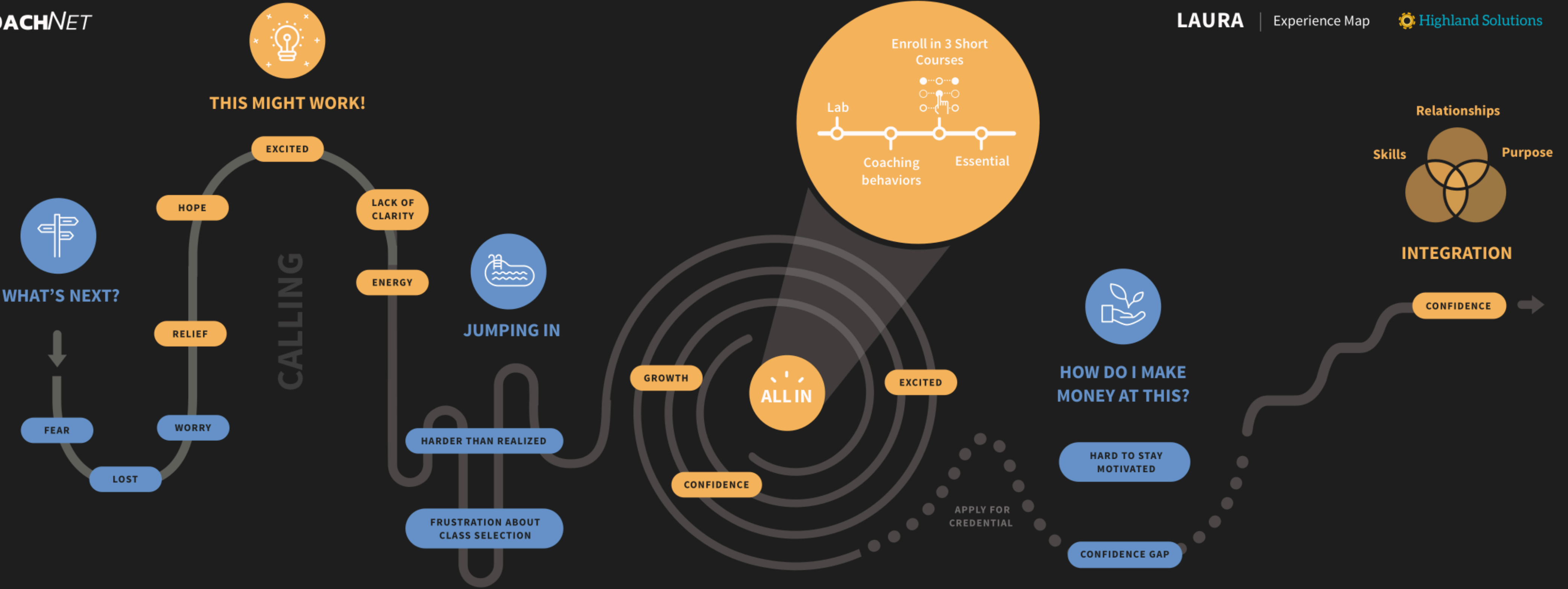
- leadership
- life stages
- purpose
- marriage
- addiction
- parenting
- money
- self worth
- depression
- non therapeutic mental health
- anxiety
- spiritual development
- church planning

FEARS

- Uncertain about value of training before starting
- More capacity to spend money than willingness
- More F2F/3rd spaces

GOALS

- Making a difference
- Meets on her schedule
- Embrasses a lifetime of coaching
- Wants to do something meaningful in part time work



CREDENTIALING JOURNEY 9MO - 1.5YRS CAREER JOURNEY 1.5+ YEARS ONWARDS

- “I want to help people”

“I want something flexible”

“I want to have kingdom impact”
- “I got this”

“I’m onto something”

“This calls to me”
- “I need to make a plan”

“I’ve been doing some things wrong!”

“This is deeper than I expected”
- “I’m growing in my skills”

“I’m becoming more in this process”
- “How do I run a business?”

“How much experience do I need?”

“Who’s going to hire me?”
- “Coaching is part of my life now”

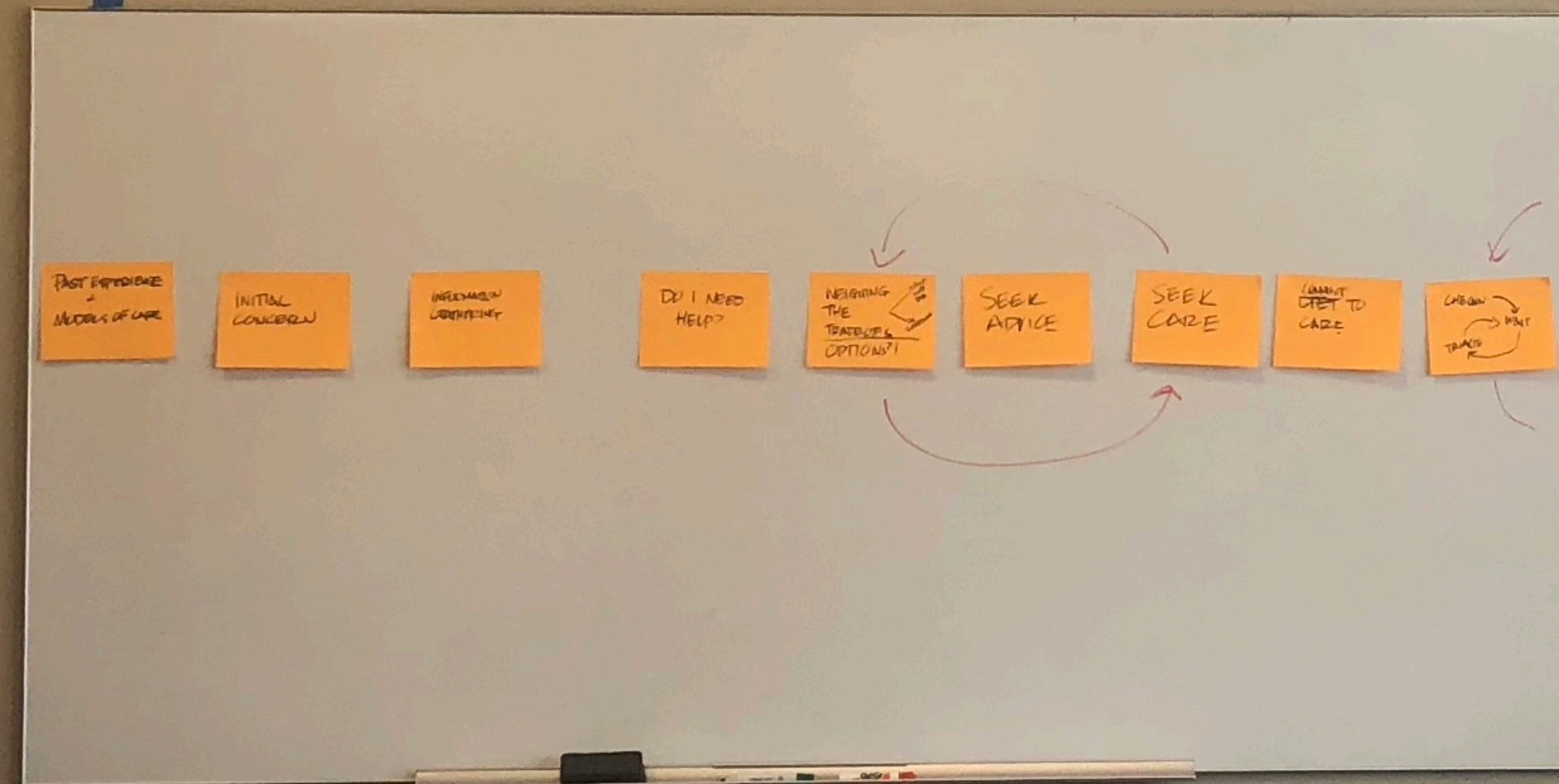
ACTIONS	Retirement Self reflection Calling redirect	Learn what coaching is Starting triads Sign up for classes	Practice coaching Juggling life Seeking clarity about the details of progress	Get a mentor Sign up for ACC Get coaching hours	Coming up with business names
TOUCHPOINTS	Significant conversation Intro to CoachNet Referral	Licensed intro to coach training Referral	Multiple calls/emails to CoachNet Website Register for classes	Reach out to clients I coached to prep them for the ICF ref call.	
RESOURCES	Jonathan or mentor Outside organization	Mentor Jonathan	CoachNet staff Referrals through relationships	CoachNet staff ICF spreadsheet	

2. DOCUMENT WHAT YOU KNOW ALREADY

Gather a team of people who know the Customer
& gather existing Customer data

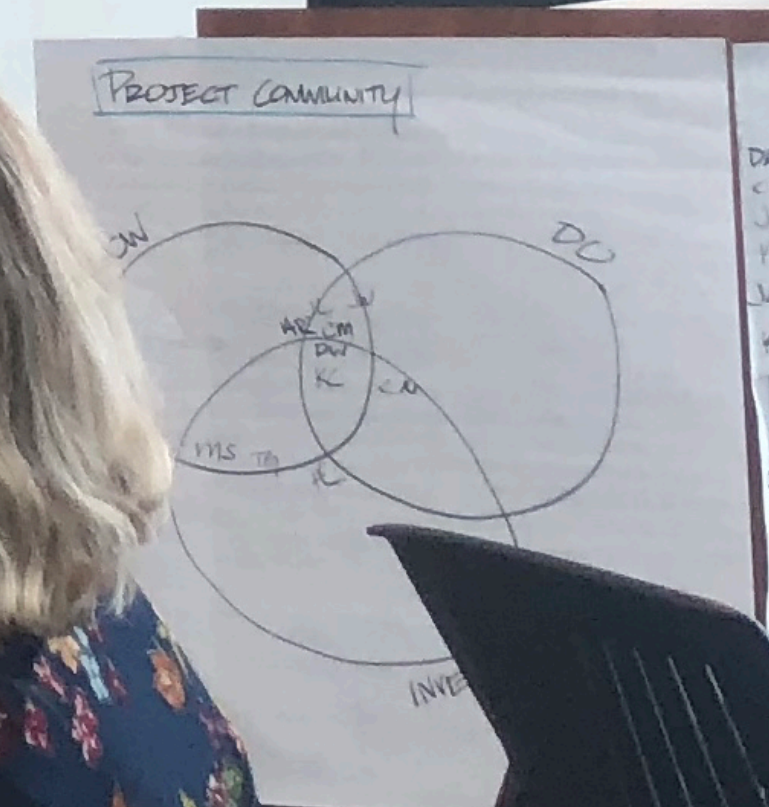
Agenda

- 12:00 LUNCH
- 1:00 CREATE EXISTING DATA
- RECRUITING LOGISTICS
- WARM-UP ITEMS



PROTECT/LEARNING GOALS

- PROTECTS HAVE KNOWLEDGE OF CARE OPTIONS
- SYSTEMS IS INTERPRETED IN ITS OWN MIND
- LEARN THE INITIAL TREATMENT
- CURRENT CHALLENGES USAGE
- CURRENT TREATMENTS
- NEEDS AGE-APPROPRIATE MENTAL HEALTH
- PROTECTS TO ACHIEVE CARE
- MENTAL MODEL OF "GOOD CARE"
- PROTECTS AROUND DEVIANTS
- EMPLOYMENT



3. CREATE A FIELD GUIDE

Based on your Learning Goals

STANDARD GUIDED STORYTELLING FIELD GUIDE

- ▶ Introduction
- ▶ Permission to record
- ▶ Project aims; Invite honesty and transparency
- ▶ Intro questions: Get the participant in the habit of remembering
- ▶ Guided Storytelling: “And then what happens?”
- ▶ Wrap-up questions for your organization

4. INTERVIEW!

Conduct Guided Storytelling with your
Field Guide

LET'S TRY IT.

THOUGHTS

How are people framing or evaluating their experience?
What do they expect?

FEELINGS

What emotions do people have along the way?
What are the highs? What are the lows?

ACTIONS

What effort are people expending?

TOUCHPOINTS

Person with need - Organization with stuff

CHANNELS

The medium through which the Touchpoint is conveyed.


OPPORTUNITIES

Digital Transformation - Process Improvement -
Training - Research - Service Design - Product Development

5. CODE!

Document your Findings in a systematic way

STANDARD GUIDED STORYTELLING METHODOLOGY


CoachNet Journey Map - Master

☆
📁

File Edit View Insert Format Data Tools Add-ons Help
All changes saved in Drive

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fx
- my earlier students at Ashland gave me great feedback when I first started to coach them on things I did well and things I had to work on

	A	B	C	D	E	F
1		Mallorie Ndlovu				
2	Persona Type	Jimmy				
3	Coaching Practice	Ashland Univeristy				
4	Coaching Focus	Leadership development, spirtual formation, relationship mangement, academics, carrer/life				
5		The Crisis	Passionate work / The Lightbulb/ being released to doing what love	The dust settling	re-awaken/ work the plan	The New Vision
6	Thoughts	<ul style="list-style-type: none"> - Decided to go into ministry instead of counseling - "That is how I want to interact with people" - "I've always liked the approach of question asking" - "It's (Coaching) not just for this job, but something that I would use" 	<ul style="list-style-type: none"> - my earlier students at Ashland gave me great feedback when I first started to coach them on things I did well and things I had to work on - the greatest obstacle I have with students is going back to clarification on roles in coaching agreement because I interact with the students in other capacities - meet in person, I read body language - " I usually question, whats underneath that?" - " Things I thought I had a good grasp on were really challenged. I had a lot of room for growth" 	<ul style="list-style-type: none"> - "My life was crazy, and I was (job) interviewing and it was nuts. So I took a break" - Marrying a South African kind of tosses everything up in the air - Everything was happened at once 	<ul style="list-style-type: none"> - Getting credentialled will create credibility with the faculty and staff - Internal accountability is important to me, so I like the fact that someone will be making sure I can do what I do. - I hope to utilize coaching long-term so it makes sense for me to get into the professional structures - Maintaining untill can relauch idea of coaching in the Fall 	<ul style="list-style-type: none"> - Want to build an on business that would flexibilty so husband can move to South A and I can still work as citizen - I really enjoy marke would liket o market to future clients - Coaching has helpe with copywritting - Start to coach peop outside of Ashland U make a intermediary transition
7	Feelings	<ul style="list-style-type: none"> - Impressed with Johnathan's perceptive abilities - Excited about class with CoachNet - Intimidated - Fear with excitement and hope 	<ul style="list-style-type: none"> - Love what I do - Ah-ha moment (realization of what want to do) - Relief - Grateful - Energized 	<ul style="list-style-type: none"> - Upset to take a break - Sad 	<ul style="list-style-type: none"> - Anxiety about the future of higher ed - Excited to get certification - Hopeful - Optimistic 	
8	Actions	<ul style="list-style-type: none"> - Asked supervisor if Coachnet could be her professional development - Enrolled in CoachNet 	<ul style="list-style-type: none"> - Coaching 4 students - Job as Univerity Chaplin - Coach students on a bi-weekly cadence - Classes at CoachNet 	<ul style="list-style-type: none"> - Goal to take the exam in august - Got married 	<ul style="list-style-type: none"> - Working on hours towards cerdential 	
9	Touchpoints	<ul style="list-style-type: none"> - Attended Johnathan's Coaching senimar at Ashland Univ 	<ul style="list-style-type: none"> - Getting coaching hours through current role as University Chaplin 			
10	Resources and Relationships	<ul style="list-style-type: none"> - Ashland Univeristy 	<ul style="list-style-type: none"> - Jason Barnhard: Old Supervisor introduced to Coachnet - Evening cohort to practice coaching - Students encouraged her to go into coaching - Ashland University - Joel a student from the same CoachNet classes I was in 		<ul style="list-style-type: none"> - Informal conversations with friend coaches - Ashland University 	
11						

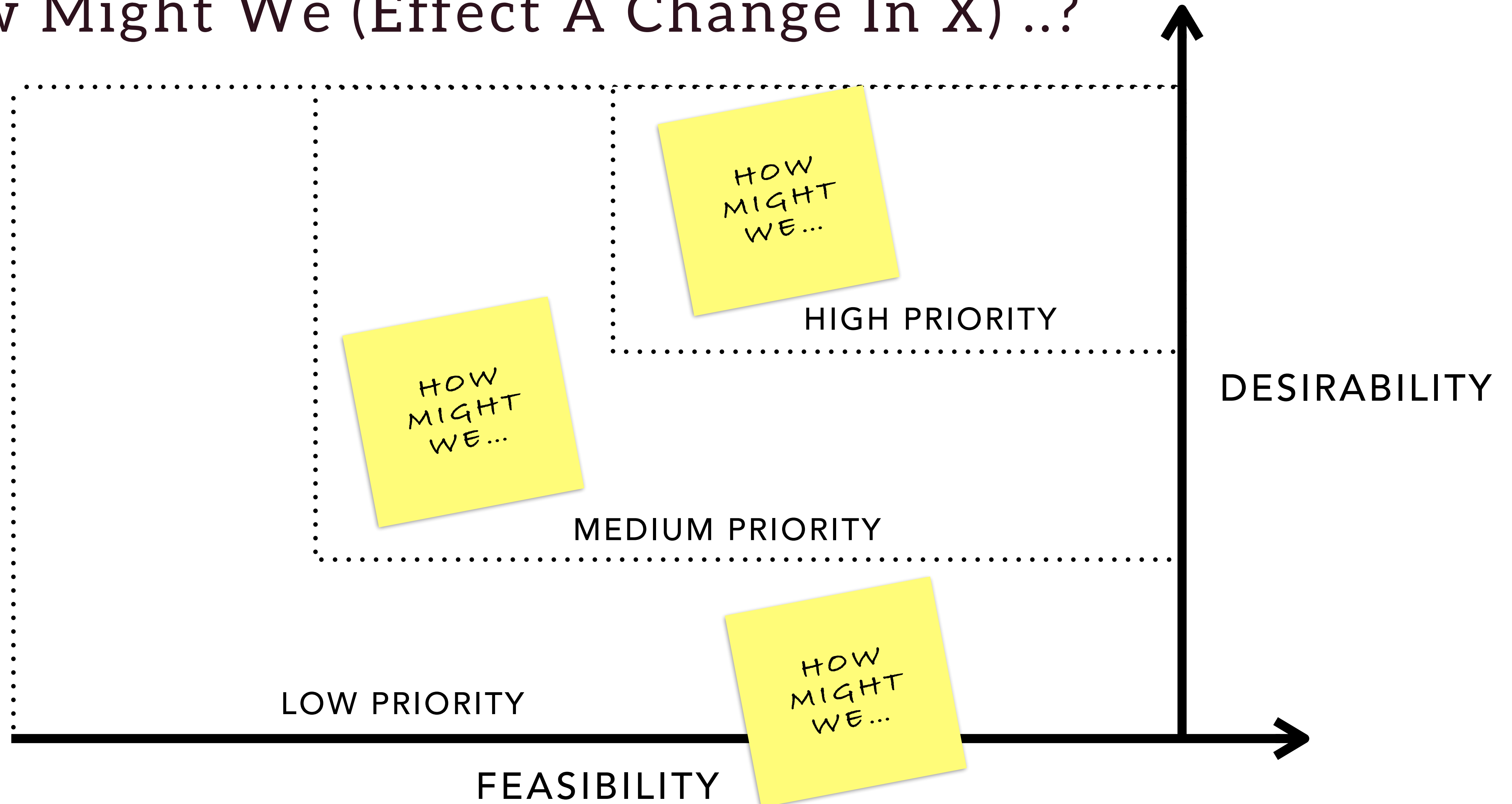
6. CREATE A JOURNEY MODEL

Gather the same team to synthesize what you learned together into a Journey Model

A SAMPLE MAP

PRIORITIZING OPPORTUNITIES

How Might We (Effect A Change In X) ..?



6 STEPS FOR JOURNEY MAPPING

1. Pick a target: Decide whose experience you want to map; keep a clear Point of View!
2. Document your current understanding: Gather a team of people who know the customers & gather all existing data
3. Create your Field Guide based on your Learning Goals
4. Interview your customers to find out their actual experience!
5. Code: Document your findings systematically
6. Create a Journey Model: Gather the same team to synthesize learnings into a Journey Model



The background is a solid teal color. It features several large, faint, light-blue question marks scattered across the upper half. In the lower half, there are multiple overlapping silhouettes of hands, palms facing forward, in various shades of teal and light blue, creating a sense of a crowd or a group of people.

Q & A

Applying CX Tools to Real Life Challenges

THANK YOU!

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