



**ZELDIS**  
RESEARCH ASSOCIATES

## **Journey Mapping: *Qualitative Overview***



# Journey Mapping Overview

## WHAT is it?

**Charting/listing out all the steps in a particular process, with a deep dive into the needs, emotions, and challenges at each step. Examples:**

- Shopping and purchase process
- Business ownership (opening a business, growing, succession)
- Personal experience or life stage (raising a child, caring for a loved one)
- Customer experiences (onboarding, customer service, renewal, insurance claims)
- Product or software use (navigating a provider/investment portal, quoting insurance)

***Can be qual or quant; qual is often used first to feed into future quant work***

## WHY do it?

- **To fully understand the experience at each touchpoint**
- **To identify pain points and opportunities to delight/unmet needs**
- **To provide clients with potential metrics/topics to gauge customer satisfaction**



***Journey Mapping can uncover steps in a process that clients may not have even thought of; conversely, they may find that some touchpoints are barely even on the user's radar.***



# Discussion Considerations

## ✓ **Decide on specific journey/journeys to be mapped:**

- Keep the focus narrow: One to three journeys depending on the level of detail needed

## ✓ **Leverage both unaided and aided questions:**

- Starting with unaided lets the respondent frame the journey in their own words/mindset (“walk me through the process”)
- Prompting with some aided touchpoints helps with touchpoints that may have been forgotten, or may not be important to participants

### Incorporating Homework

- A pre-work assignment can help participants think about the process in advance
- Examples: Have them jot down all the touchpoints as they are performing a common task, or have them think about the last time they shopped/purchased a product or service

### Groups or IDIs?



- **One-on-one interviews** allow for a more personal discussion and a deeper dive into experiences; may be preferred for caregivers, business owners, or any journey that might vary considerably by person
- **Groups** are quicker/more convenient and allow the discussion to build; good for “standard” processes such as shopping or customer service



# Journey Mapping Software Tools

**Mural:** Provides standard templates to be filled out along with the respondent

- Use screen-share in the interview platform; participants can see what the moderator is capturing in real time (and can also type themselves if desired)

<https://www.mural.co/>

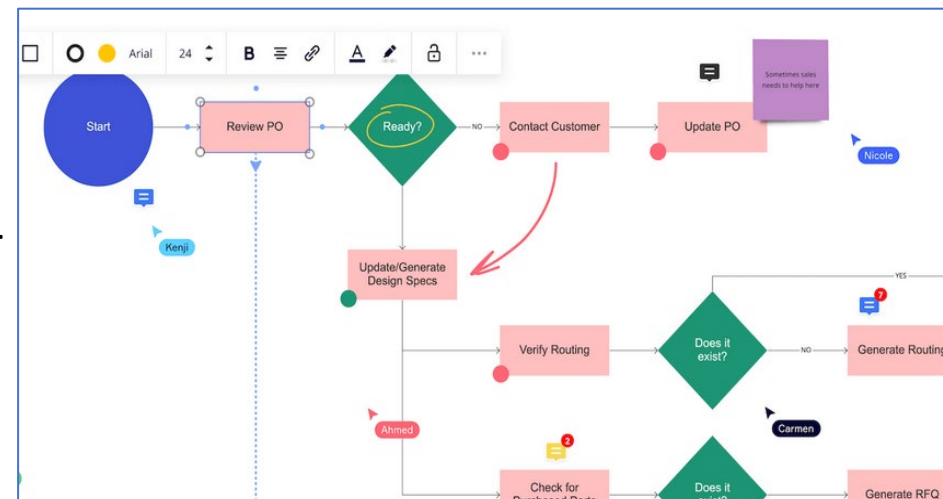


**Check with Mo first before using any new software!**

**Miro:** Provides templates for whiteboard-style collaboration, including Post-It-style “sticky notes” to flag pieces of the journey

- Similar to Mural, can be used with screen-share in the interview platform

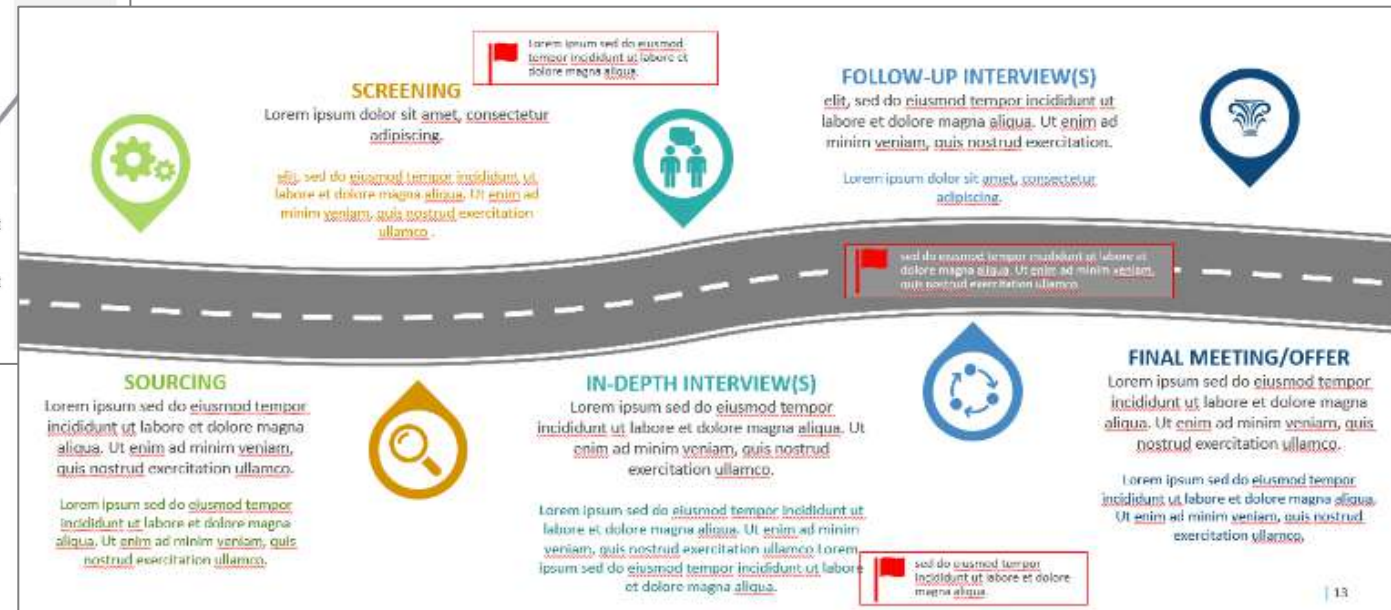
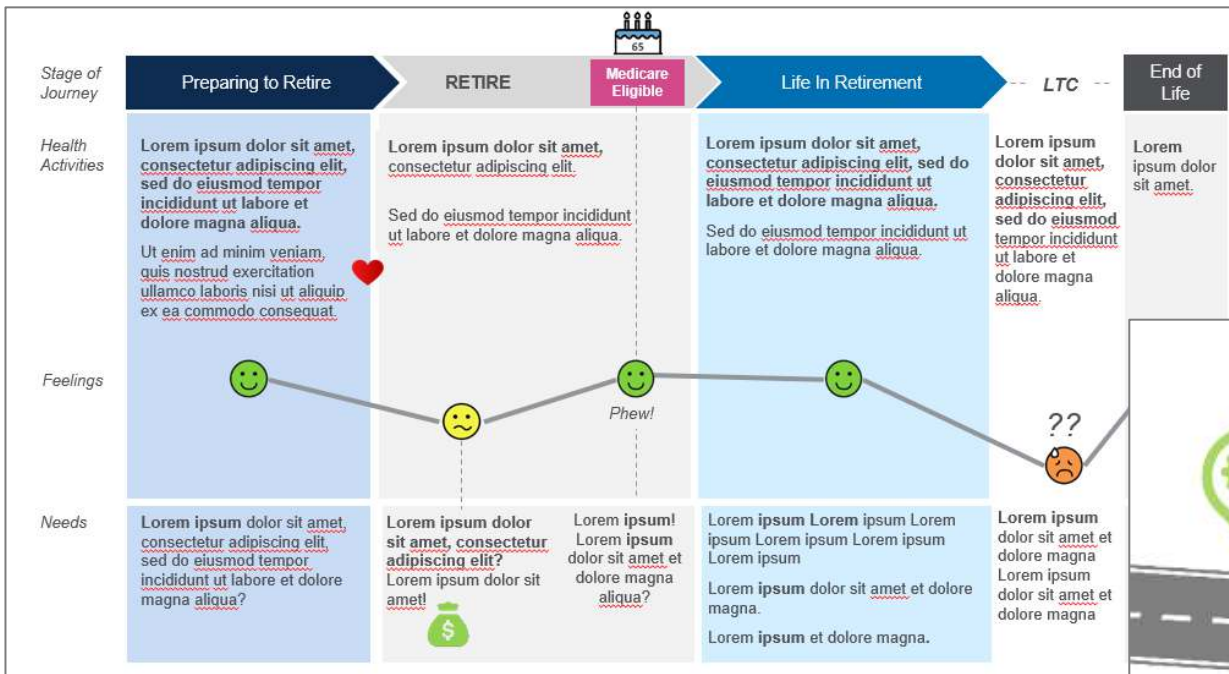
<https://miro.com/diagramming/>





# Reporting Examples

Some mapping is more high-level, illustrating the “road map” with deeper reporting in the detailed findings.





# Reporting Examples

Other clients look for a detailed “placemat” they can refer to for full details of the journey.

