

Running an Agile CJM Workshop

Agenda, Prep and Tips



Workshop Prep

<p>VOC/VOE/CX maturity survey</p>	<p>Focused quantitative and qualitative insights to gauge your current state</p> <p>Tip If available, start collecting benchmarks or competitor information</p>
<p>Collect what is planned or already inflight</p>	<p>Segmentations, CJM work, communications, campaigns by lifecycle etc.</p> <p>Tip Company-wide - what do you have to bring to the table?</p> <p>Prep Outside in - Prior Journey Maps, Research, NPS/CSAT</p> <p>Prep Inside Out - Personas, Service Blueprints, waterfall data, Campaigns/Communicatons plans, UX and visual artifacts</p>
<p>Prep for strawman mapping the customer journey</p>	<p>Based on current artifacts/maps and Customer team input</p> <p>Tip If you can create touchpoints or even activities to start people off and have it in your back pocket you can get them started more quickly .</p>

12



Workshop Agenda: Day One

Introduction

Review of goals and agenda

15 min

Tip

If you have time, do a 'Statement of Intent' Exercise to tie the Brand Promise to the Customer Facing Channels.

Review Survey CX Maturity and Journey Gaps

Initial insights pre-work (VoC/VoE/CX Maturity Status)

45 min

Overview of Mapping the Journey

Approach to mapping and framework

30 min

Map the Customer Journey

Agile map of current state journey group exercise

3-4 hours

Tip

Do it in waves—Outside in; Then MOTs; Pain Points; Overlay emotions data and verbatim; supporting visuals from UX and Documents

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Workshop Agenda: Day Two

Quick Review of Day 1 Map

30 min

Tip

This keeps the work at hand fresh in everyone's minds—make sure to make a few changes!

Future State Mapping

2 hours

Update Map options for improvement

Tip

This is a great place to ideate and innovate!

What will it take to get there?

2 hours

ID gaps/initiatives and opportunities

Prioritization

2 hours

Tip

Prioritizing by Impact (Customer/Company & Feasibly; Difficulty and Cost) is a good bet

Create a Roadmap

Tip

Be sure to assign a person to lead the initiative and if possible gather the task force now when energy is high!



Summary of Tips

- ✓ An OBJECTIVE—without it you will wander!
- ✓ An idea of your touches and key MOT/pain points – the more homework you do, the better the session will turn out
- ✓ Mapping tools (anything from sticky notes to software)
- ✓ Have easels and whiteboards ready
- ✓ Parking lot
- ✓ Findings/Recommendations
- ✓ Prioritization Process (excel or in tool)
- ✓ Survey Results: organized and summarized
- ✓ If available, start collecting benchmarks or competitor information
- ✓ Collect what is planned or already in flight
- ✓ Prep for strawman mapping the customer journey
- ✓ If you have time, do a 'Statement of Intent' Exercise to tie the Brand Promise to the Customer Facing
- ✓ Map the customer journey in waves
- ✓ Review Day 1 Map to keep the work fresh—make sure to make a few changes!
- ✓ Update Map options for improvement—a great place to ideate and innovate
- ✓ Prioritizing by impact is a good bet
- ✓ Be sure to assign a person to lead the initiative when creating the roadmap