

Quick Reference: Hypothesis Mapping

Hypothesis Mapping can be used at the front end of a customer journey mapping exercise. The goal of this two- to three-hour workshop is to collect inside-your-organization information relating to what is known about the customer journey. This quick reference guide is meant to be used as a checklist as you develop and implement your Hypothesis Mapping Workshop.

PREPARING FOR THE WORKSHOP

Journey Scope Agreement. Prior to Hypothesis Mapping Workshop, determine the following:

- **Whose journey** is being mapped – Can be a Person, Persona, Title, or even an organization. To map an organization’s journey, multiple roles are typically needed to develop a comprehensive map.
- **What journey** is being mapped. Define the journey, including the start and finish points.
- **Internal cross-functional roles** to participate in the hypothesis mapping.
- What **existing assumptions** and orthodoxies are held? Discuss the thoughts and biases each team member holds in advance, and document if possible.
- **What will be done** with the gathered information? Document the team’s reasons for creating a customer journey map.

Facilitator Role. The hypothesis map should document the customer experience as it is, not as others see it or they wish it to be. The facilitator should keep the following in mind when running a workshop:

- **This is not a criticism of current process - yet.** The goal of the workshop is to document what the current process is, what’s working well, and areas for improvement – to gain a shared understanding of the journey.
- **Ask don’t tell.** The facilitator’s role is to ask questions, not answer them. Challenge participants to dig deeper with questions like, “How do you know that?” or “Is there any evidence that might suggest other interpretations?” Effective facilitators resist the temptation to provide input, and instead guide participants through the mapping process.
- **Be inclusive.** Try to get input from all workshop participants, and be aware of who may be deferring to the opinions of others in leadership roles. Ask participants to spend a few minutes working individually to produce their own post-it notes prior to working with their group to post the notes to the work space.

Materials required. Items to include:

✓ <u>Wall working surface.</u> Use either butcher paper (4’ tall by at least 8’ wide) or Self-Stick Easel pads. Have <u>scissors</u> on hand.	✓ <u>Post-it Notes.</u> Assorted colors. 3x3 works well for Steps, Emotions, Pain points. 3x5 preferred for Critical Moments
✓ <u>Markers</u> (Sharpies, fine point, black)	✓ <u>Dots</u> (3/4” for voting)
✓ <u>Painter’s tape</u> (1” to secure working surfaces to wall if needed)	✓ <u>Scotch tape</u> (to secure Post-it Notes to paper for transport)

CONDUCTING THE WORKSHOP

Mapping the Customer Journey. The goal is to create a customer journey map that is detailed enough to take to someone who is unfamiliar with the customer, and allow them to understand the customer experience. Start the workshop by documenting the customer's goals and the triggers that bring them to journey being mapped. Select activity rows ("swim lanes") to use during workshop. Choose from the following, adjusting for time available:

Customer Steps. This is the primary activity row that begins the customer journey mapping workshop. Ask participants to work together to identify the steps the customer goes through to complete the journey. Include all steps, even if they are inactive steps like "waiting." The step should contain a verb, and can start with "I" to remind everyone that this is from the customer's point of view. One step per Post-it Note.

Customer-Facing Interactions (People & Systems). Identify who (individuals, departments, etc.) and what (technology, websites, etc.) customers are directly interfacing with throughout their journey.

Thinking & Saying. Document what customers are thinking and saying throughout their journey. These can be mapped in the same Post-it color, adding quotes around what the customer is "saying" to differentiate.

Emotions. For all customer steps, indicate the emotions that the customer is experiencing. Indicate if the emotions are positive or negative.

Pain Points. For all customer steps, identify the pain points customers are experiencing (or can experience) throughout the process.

Developing Critical Moments. Identify the critical moments within the customer journey using two steps:

Vote on important Customer Steps. Using dots, ask participants to vote in the Customer Steps row only to identify the most important steps in the customer journey. What are the customer steps that can determine if the customer will continue through the process, exit the process, or have the opportunity to be most delighted? Give each participant the same number of dots, one dot for each 5-7 Customer Steps.

Identify Critical Moments. Talk through the Customer Steps where the most dots appear, and determine if this is indeed a Critical Moment in the customer journey.

Write Critical Moment statements. For Critical Moments identified (typically 3-5 moments), use the larger Post-it Notes to write out a full statement about what the Critical Moment is, remembering to phrase it from the customer's point of view.

AFTER THE WORKSHOP

Transfer Hypothesis Map from wall to file. Summarize the mapping workshop information to a digital format. Excel works well to capture all data, PowerPoint is better for visualizing the journey to share.

Identify Next Steps. Potential work may include creating a plan for gathering customer data, documenting the internal activities throughout the customer journey, creating a future state Empathy Map or conducting Root Cause analyses on customer Pain Points. For journey maps to be successful, they should be used to drive change to improve the customer experience.

Hypothesis Journey Mapping Agenda

DATE

Time	Item	Length	Content
9:00 – 9:15	Introductions & Objectives	15 min	Customer Experience + Journey Mapping Overview, Case studies
9:15 – 9:30	Confirm Who and What is being mapped	15 min	
9:30 – 9:50	Goals & Triggers	20 min	
9:50 – 10:40	Start Mapping!	50 min	Document Customer Steps, interactions, thinking & saying
10:40 – 10:55	Break	15 min	
10:55 – 11:10	Emotions	15 min	Add emotions to map, indicate positive/negative and intensity
11:10 – 11:30	Identify Pain Points	20 min	Add Pain Points throughout journey
11:30 – 11:40	Voting	10 min	Voting on difficult steps or define Critical Moments
11:40 – 12:10	Develop Critical Moments	30 min	Identify and write Critical Moments
12:10 – 12:20	Wrap Up & Next steps	10 min	