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How to Conduct Research for Customer Journey-Mapping

Summary: When conducting research for customer-journey maps, use qualitative methods that allow direct interaction with or observation of users, such as interviews, field studies, and diary studies.

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Topics:
[Customer Journeys](#), [Research Methods](#), [Design Process](#)

Introduction

[Customer-journey maps](#) visualize the steps that a person goes through in order to accomplish a goal. To be convincing and compelling, journey maps must be based in truth, rather than a fairy-tale–like depiction of how we would like users to interact with our products.

This article is a discussion of which research methods are appropriate for collecting data to create a customer-journey map. Additional articles discuss [when to create customer-journey maps](#), the [5-step process for creating journey maps](#), and [journey mapping in real life](#).

Why Conduct Research for Customer-Journey Maps?

Research can be expensive and time-consuming, so what's wrong with creating and using an [assumption map](#) based on stakeholder input and cutting out the research phase? While stakeholders do hold valuable knowledge about different areas of the customer journey, most of them do not have a broad enough perspective of the customer journey, nor a deep enough perspective of users' needs at each stage, to be able to piece together a realistic, comprehensive view.

A journey map based on assumptions alone carries two risks:

1. It carries less weight and is more likely to be written off as “anecdotal” than seen as a compelling tool to drive change.
2. Team members may end up using what is actually an inaccurate map to make decisions that alter the experience (for better or worse).

Step 1: Look for Existing Data First

Before beginning research for your journey-mapping initiative, spend some time looking for existing, relevant data within your organization. There is often existing (though disparate) information about the journey buried throughout various past internal efforts. This data, both qualitative (e.g., data from past focus groups, customer-support call logs, etc.) and quantitative (analytics, customer-satisfaction scores, etc.) can give you clues about how to shape and focus the content of your research efforts.

Step 2: Conduct Qualitative Research

You may be tempted to use existing quantitative data as the basis for your journey map. While quantitative data can give you a high-level understanding of customers' general attitudes and levels of satisfaction for specific interactions (think: [NPS](#)), it is less appropriate for understanding emotions, mindsets, and motivations at the level required for effectively depicting the entire journey.

For this type of insight, qualitative research methods that allow you to directly observe or converse with customers are a better use of your time. Consider the

following qualitative research methods that will allow you to understand users' thoughts, feelings, and actions at each phase of the customer journey:

Customer or User Interviews

[Interviews](#) allow you to hear first-hand stories about customers' experiences, mindsets, and actions. If you have been able to use existing data to create an overarching hypothesis of the phases in your customer journey, you can ask direct questions about each phase. Broad questions, such as, "Tell me how you feel about [product or service]?" are less helpful than specific ones, such as "What was particularly challenging or easy about the sign-up process?"

Interviews can be conducted in-person or over the phone. One technique for in-person interviews is to encourage participants to use sticky notes to visually capture their steps from the moment they discovered the need for a product or service through usage. This process helps users recall steps and rearrange them accurately throughout the interview. Subsequent phone interviewees can be sent strawman templates created from the in-person process, and invited to review and revise to as needed to reflect their experiences.

Field Studies

Interviews are a valuable research method for journey maps; however, because [what people say they do is not always what they actually do](#), it's best to couple interviews with additional qualitative methods, such as [field studies](#). Field studies can take many forms, from in-home visits utilizing contextual inquiry to "shop-alongs" for retail experiences.

Observing customers in their own element is critical for uncovering blind spots and verifying what customers tell you during the interview process. Take note of any differences in findings from interviews and field studies. For example, during one journey-mapping research initiative, customer-service representatives reported the "correct" protocol for finding answers to customers' questions who called in with an issue. But during a field study, however, those same customer-services representatives were observed using convoluted workarounds to find

answers to customers' questions.

Diary Studies

Because customer journeys happen over time and across many different channels, [diary studies](#) are a particularly useful method for understanding users' thoughts, feelings, and actions over time. Diary studies are long-term studies: Users are asked to log each and every action they take related to a specific goal (e.g., buying a refrigerator or signing up for a new mobile plan), as well as how they felt during those interactions over many days, weeks, or months. Because the participant's actions, feelings, and thoughts are captured as close to real-time as possible, the (fallible) memory that interviews rely on is eliminated. Data is also captured from participants at all stages of the journey, rather than just from one phase. Diary studies are inexpensive to set up and can be running in the background while you conduct additional types of research.

Competitive Analysis

[Competitive analysis](#) can be especially helpful if you are designing a future-state journey map for a product or service that does not exist yet. You can take a virtual approach by using a remote-usability testing platform to record customers' use of competitor sites and have them comment on their thoughts, feelings, and motivations at specific points within the session. This data allows for research input even when there is no existing user base.

Qualitative Research Methods Appropriate for Customer-Journey Mapping

Research Method	Why It's Used for Customer-Journey Mapping
Customer or user interviews	One-on-one conversations with customers uncover first-hand stories, frustrations, and needs.
Direct observation	Observing users perform actions in their natural environments ensures you understand the actual flow of user interactions and uncover mindsets interviewees were not able to recall.

Contextual inquiry	Observing users perform tasks while you have the ability to ask questions allows you to clarify your observations and provoke open-ended conversation.
Diary studies	Long-term studies allow customers to document their behaviors, thoughts, and emotions over time so that you can understand a variety of journeys.
Competitive analysis	Competitive evaluations allow you to benchmark competitive experiences and identify their strengths and weaknesses.

Plan a Multipronged, Qualitative Research Study

When time and budget allow, it’s best to use a multipronged approach for customer-journey mapping research. That is, combine several different qualitative methods from above into a research study in order to explore the journey from multiple angles. Here is a sample research plan that makes use of multiple qualitative methods. (This plan should be adjusted based on contextual factors such as project goals, timeline, and budget.)

Sample Customer-Journey Research Plan

1	User Interviews
1a	Conduct in-person user interviews to uncover first-hand stories specific to all relevant phases of the customer journey; use sticky notes to allow participants to map their steps as they talk.
1b	Provide a rough journey template from phase 1a to a new set of participants and conduct phone interviews with a digital whiteboard tool, allowing them to review and revise your template.
2	Field Study
2a	Perform contextual inquiry to observe participants using your product in their actual environment (e.g., their home, the office, etc.) and clarify what you heard during user interviews.
3	Diary Study (Running in background while other methods are

	conducted)
3a	Conduct a diary study to better understand longitudinal actions, thoughts and emotions.
3b	Conduct user interviews with diary study participants at key milestones throughout the study.
4	Competitive Analysis
4a	Conduct a competitive analysis to compare your findings to user relationships with other similar companies or products.

Finally, when revisiting and revising your assumption map with your newly collected insights, consider taking the opportunity to bring users into your workshop as part of the process!

Complement Qualitative Research with Quantitative Data

Aside from highlighting potential problem areas to help shape qualitative research efforts at the onset of a customer-journey mapping initiative, quantitative data can also add another layer of evidence to your insights to make your narrative even more compelling.

For example, after the qualitative research study has been completed, you may choose to supplement or reinforce findings in the following ways:

- Follow up customer interviews with a **survey** to understand the frequency and magnitude of any of the behaviors you uncovered in your conversations
- Use digital **analytics** (e.g., page views or exit rates for relevant web pages) to add credibility to your claim that certain points in the journey are frustrating to users
- Supplement high or low areas depicted in the journey map with **satisfaction metrics** that align to specific interactions

Quantitative Data	How to Apply:
Survey data	Quantify frequency and magnitude of uncovered behaviors or follow up on unclear findings.
Customer feedback	Tally up feature requests to uncover missed opportunities and make a case for new ideas.
Digital analytics	Quantify pain points with details about frequency and impact to better understand customer frustrations.
Social sentiment analysis	Reveal customer emotions about each stage in the journey to help focus journey-mapping efforts.
Customer-loyalty or satisfaction scores	Align numerical scores to each customer-journey phase in order to bolster qualitative data such as quotes.

Conclusion

As you begin planning your customer-journey–mapping research initiative, use the following steps as a guide:

1. Before investing in external customer research, take a look around your organization: Is there any existing data that might prove useful, or at least help you shape your research plan?
2. Plan your research study by selecting a combination of qualitative research methods that allow you direct interaction with or observation of users. User interviews, field studies, and diary studies are all useful, appropriate methods.
3. Use quantitative data from sources such as analytics, customer-satisfaction or loyalty scores, and surveys to reinforce and supplement findings from qualitative research in your map.
4. Bonus tip: Always remember to keep your core team of [stakeholders involved in the research process](#) and aware of new insights and developments throughout your study. Involvement increases buy-in and lessens stakeholder attachments to assumptions!

To learn more, check out our course, [Journey Mapping to Understand Customer Needs](#).

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