dscout

User Journeys

The People Nerds Guide

Jump to

- An intro to user journeys
  What they are, and why we should design them.
- Best practices for developing a user journey
  How to structure your questions, and common mistakes to avoid.
- Sample study designs for journey mapping research
  A templated research plan to guide your journey data collection.
- Case Study: Credit Karma
  Tracing a critical customer journey during an unprecedented pandemic.
- Creating journey data with dscout
  How moments-based research methods structure user journeys.
- Recommended reading
  Other resources worth exploring to master journey mapping.

An intro to user journeys

Despite our best efforts, sometimes our users get lost within our experience or interface. To point them in the right direction, we need to have an in-depth understanding of which way they're headed, and where their final destination is.

This is where the journey map comes in; it "plots," in some way shape or form, the motivations, behaviors, and goals of our users throughout an experience. Sometimes, we make a journey map to align to a specific persona or job-to-be-done. Sometimes, we're only looking to map our users across a single goal, or single type of interaction. Other journey maps are more ambitious—attempting to plot a series of potential user interactions with our organization, product, brand, or service more broadly.

Too often, the data for journey maps is passively collective—measured through analytics and devoid of user context and motivations. But a robust user journey map—based firmly in qualitative research—can be a game-changer for user understanding, and is often the basis of truly intuitive, useful, and equitable experiences.

Whether you're gut-checking a section of an existing user journey map, or creating your very first one, use this guide to get started. You'll be well on your way to driving org-wide empathy for the customers who make your experience possible.

Why should we map the user journey?

Rare is a way to align stakeholders across the business on a user problem. Rarer still is to accomplish that in an engaging, participatory, and research-filled way. Journey maps—when carefully constructed—can do just that.

A journey map traces the movement through an experience. The power of a journey map is in its flexibility: they can be created for a granular behavior (e.g., account creation) or a 10,000 foot view (e.g., prospect awareness to purchase). Along with altitude, a journey map collects key metrics along the way, with steps demarcated by either the business (e.g., "We want to know what's happening at moment X, Y, and Z.") or the customer themselves (ie., "Here is what we're seeing customers do when they try and accomplish X.").

Those metrics are the great aligner, speaking to focus areas of teams like sales and marketing (key drivers of action, primary questions), eng and product (areas of experience implicated, features being used), and design (pain points, frustration and delight feedback). The beauty—quite literally—of a journey map is in its output: The visual depiction of all this data on a physical or digital plane that invites interactivity, collaboration, and shows the end-to-end process.

Why journey *maps* specifically?

There are many reasons researchers choose to create journey maps:

1. They subdivide and refine what might otherwise feel like kind of a vague or monolithic activity (e.g. “shopping for clothes).

2. They help more fully visualize / understand / empathize with the activity you’re designing around.

3. Needs across a single activity or ‘journey’ vary widely, and knowing what part of the journey you want to help with will help you build better, more targeted products.

4. The understanding journey maps render in designers product teams helps users get that magical “wow, that’s exactly what I needed right now” kind of experience.

5. Journey maps can also help subdivide use cases or users (similar to personas). Some kinds of purchases or activities could have multiple maps depending on values or mindsets going into it. Mapping multiple journeys can help you make more sense of your user base.

6. They help teams understand user emotions at different points in the buying our usage processes, and pinpoint pain points in the process in a clear, visual way.

7. They contextualize your product in an ecosystem. When do users use YOUR thing? What part of the journey does it help with the most? Who are your competitors, not just in the process as a whole, but in the particular steps in the journey that you are bringing value?

8. They distill a variety of dense, related information together in a way that makes it easy to zoom in and out of. Do you care about motivations? Look across the motivations swim lane. Do you care about early stages in the process? Look at the up front segment. The way information is visualized helps make what would otherwise be information overload an easier experience that can even be fun and engaging.

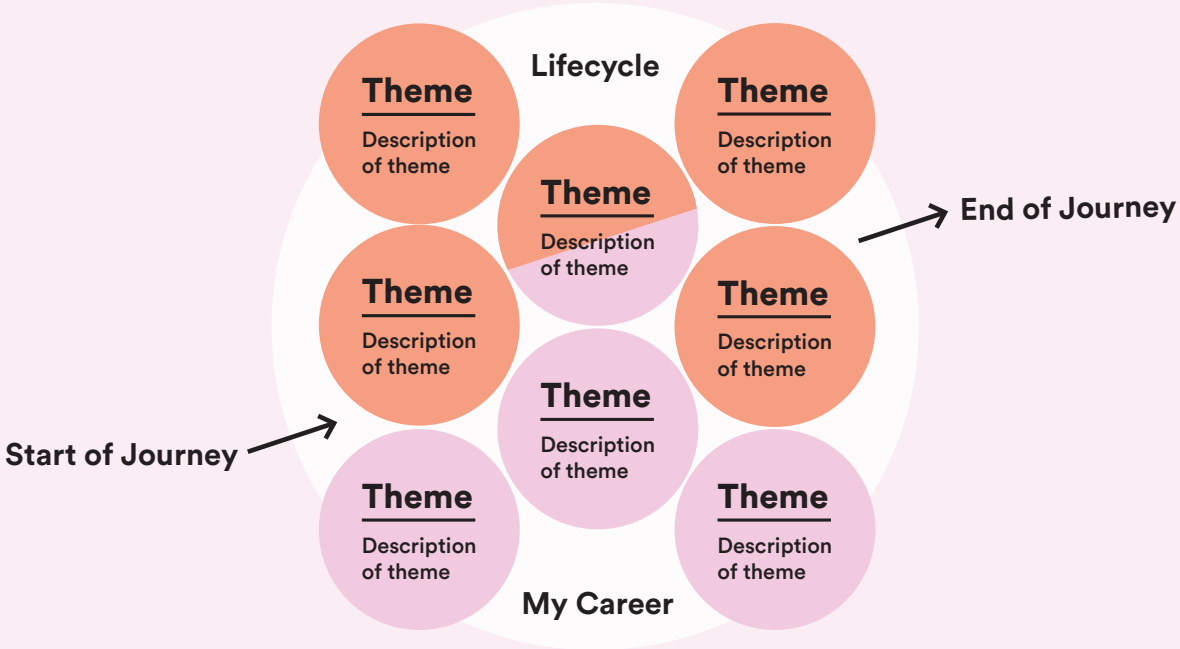
Are there other potential, non-map, outputs that are effective?

The *map* is more a call to visualize one's data. The map works because of its order and ability to serve information about steps along a process or journey. Other forms of process or journey visualization are possible, of course, and might be a better fit for your particular experience. User journeys can take a lot of sizes and shapes - is it linear? Does it bob and weave? Are any parts of it recursive? Visualization gives a great chance to demonstrate these temporal relationships.

Maybe yours is a more circuitous and looping journey that would be better served with a series of circles (representing the return trip).

Here are a few “non-map” examples:

Example 1: Moments instead of a journey. We wanted to map the journey to “team wellness.” Naturally, the journey from “less well” to “more well” isn’t linear—there are many ways to progress, many elements of wellness to include. We ended up making something that emphasized the “many paths” of the wellness journey, rather than trying to emulate a regular journey map.



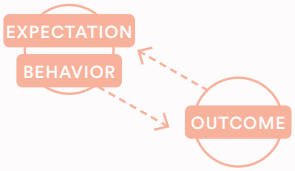
Example 2: Pathways instead of a journey. Sometimes it makes sense to focus on a subset of behaviors—especially when the research will be applied to a very specific component of a product. When something is highly complex (let's say the music listening experience) it becomes a huge pain to make something comprehensive. And, doing so yields a deliverable that's not terribly actionable. Instead, looking for the key behaviors, motivations, activities, and pain points in a more controlled subset of the experience can make it easier to apply the research insights to an actionable strategy.

Each journey has a different path and duration with stages that show a range of emphasis.

1 Theme
- Description
- Example

2 Theme
- Description
- Example

3 Theme
- Description
- Example



Best practices for researching user journeys

1. **Avoid asking when you can observe**
   You can ask your user what they think the process is, but you shouldn't necessarily take their word for it. Behavior data is always going to be better. Whenever possible, witnessing the steps first-hand will give you the best kind of data. This can be done well via traditional ethnographic research—directly observing users in their day-to-day experiences with your product or service. Diary studies, or other longitudinal unmoderated studies, are also a good fit; they give users a chance to share responses, videos, or photos on their own time, in the appropriate context.

2. **Go beyond "what" to surface "why," too.**
   It's important to understand not just what people are doing in a given portion of the journey but also understand why they've chosen to do that. Understanding the 'why' of people taking a specific action will flesh out your journey way better, and also help with delineating any potential journey/mindset variation.

3. **Don't be overly prescriptive.**
   Don't be afraid to go pretty abstract with journeys. You're never going to capture a journey that's aligned to every user's experience. Everyone's a little bit idiosyncratic, so trying to make sure every step in every recorded journey is the way of madness.

4. **Plan for the unseen and implicit**
   Try to build in questions that will help understand the logical and temporal connections between steps. Questions like, "Why did you do this?" "What info did you need to start this step?" "How long will this take?" "What's next?" Will help take the guess-work out of connecting different parts of a journey into a single story. People are not always great at identifying the start of a journey...it's also important to include a "what were you doing before this started" type question.

5. **Offer control to participants.**
   Sometimes, a journey is best when outlined by the participant themself. Could your users draw their interpretations and experience of the journey and walk you through it? If so, you'll gain invaluable insight into their perceptions of, and attitudes about, their own journey (you'll also gain hand-drawn maps if you ask them to create and share those!).

6. **Anchor to the moment(s) of interest.**
   Moments-based approaches can be really great for journey mapping! You can go top-down by generating a journey first, and then coloring what different steps in the journey look like through moments (e.g. “show us a moment where you’re doing X part of this journey”). Or, you could go bottom-up and just ask people to show you any moment when they’re doing anything related to the activity at hand, and piece together patterns after the fact.

7. **Play with your inputs.**
   Too often, journey maps rely on long, open-ended data that—although rich—can miss the mark on creating an accurate journey map. For more detailed maps—or for smaller activities—you can even straight-up observe: shopalongs, mobile interviews, or screen sharing while browsing a website could all be good avenues into short activities.

8. **Match output needs to question type or format.**
   Prompt people with the scope of the journey you’re interested in. If people read “a moment about music” for example, they might naturally only want to share listening to music, instead of searching, sharing, etc. Or if it’s “buying new clothes” they might only share the moment of purchase, not the research phase. If you want a broad scope, make sure to prime them with an example list, or give them even more explicit direction.

How to design a study for user journey data

The best type of data to feed into a journey map is data that's collected as key events are happening. A "moments-based" study design can capture information in-context, including details that may be lost to participants upon later reflection.

Developing a research protocol that clearly asks users to document important moments in the journey process can provide more dynamic data than static surveys or more reflective IDIs. While those methods can help to clarify a journey, a moments-based activity can quickly build out a journey's bones.

It's important to clearly understand which moments matter and why. It's crucial to be able to explain this to participants as well so they know when to log an entry. User journey's aren't always as clear cut in the moment as they may seem from a distance.

dscout gives the researcher the opportunity to reach the user where they're at during the journey in question. Our sample study design utilizes this platform, but can be applied to however you collect longitudinal data.

A sample study design:

Recruit people who are currently (or soon to be) actively in the midst of the journey you're interested in.

For each step you'll likely want to be able to speak to a variety of factors.

Journey Map checklist:

- Behaviors
- Motivations
- Tools
- Emotions
- Pain Points
- Opportunities

Part 1: Getting to Know You

Get to know the participant and the specific journey they're embarking on. What are they about to try to do or purchase? Why do they want to do it? What is important to them in the process?

Example questions:

- What's most important to you about this purchase / journey (e.g. price, time, convenience, quality, etc.)
- What do you need to know or have to make this journey successful?
- Do you take this journey regularly? How often does it come up?
- How long does it take you when it comes up?
- How do you feel about taking this kind of journey?

Part 2: Make me a map

Get the participants to jot their own ideas on paper about this type of activity or journey. Ask them to ideate for themselves what they think the normal way to complete this journey is, if it's something they can easily think about. Have them make you an artifact!

(A note that this ask works great with journeys that are more concrete—like a shopping or workflow journey. Something more abstract like a "grief journey" might be more difficult).

Example questions for asynchronous/unmoderated research:

- Draw a map of this process as you experience it.
- Make us a video explaining the map.
- Look at your map and identify some "highlight" and "lowlight" experiences. Why are they the best and worst parts?

In cases where the journey is more complex, you can move into doing this as a guided activity through Live mission (or other tool for moderated interviews), using shared access to an online whiteboard.

Part 3(+): Moments

Ask participants to show you moments related to this journey. You could do one really wide-spanning open part of a mission/study.

Or, if you're sure that you want to see certain, predetermined steps in the journey, you could make multiple parts and run them parallel (e.g. allow participants to simultaneously complete 'research moments', 'sharing moments', and 'shopping moments'). What's important is getting in-the-moment data on participant's actions and emotions.

Example questions:
Log every time you do **task related to journey**.

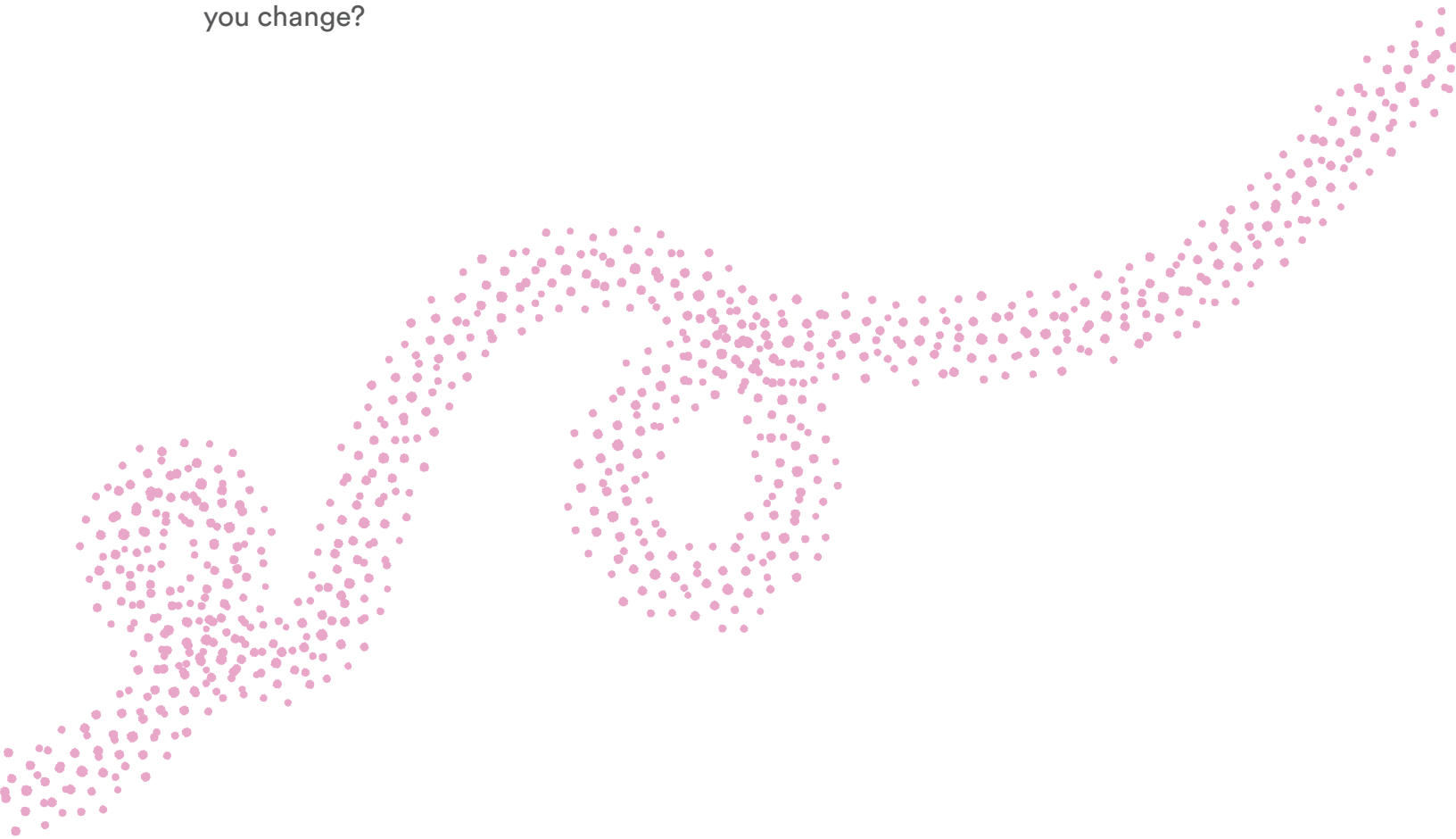
- What are you doing right now?
- How does it impact the larger journey you're on?
- What tools are you using, and how are they helping you?
- How are your tools falling short? What would you change about them to help you more?
- What did you need to start this step? What are you getting out of it?
- How are you feeling about this step? Why?
- Describe this step in the process in 3 words.
- Why is it important to do this? What would happen if you did not?

Part 4: Wishes

If participants could improve this journey, what would they change? Solicit participant feedback on how they would improve the processes at hand. This could be a concrete reflection on a finished journey that they just completed, or a broader reflection on this kind of journey or activity more abstractly.

Example questions:

- What's one thing you would change about this process/tool/journey/etc?
- How would the change help you?
- What tool comes close to helping you with this? How is it falling short?
- Reflect on the moments you just shared with us. Look at the initial journey you drew for us in Part 1. Now, draw a new and improved version of this journey. What would you change?



Case Study: How Credit Karma created insight-rich journey maps during quarantine

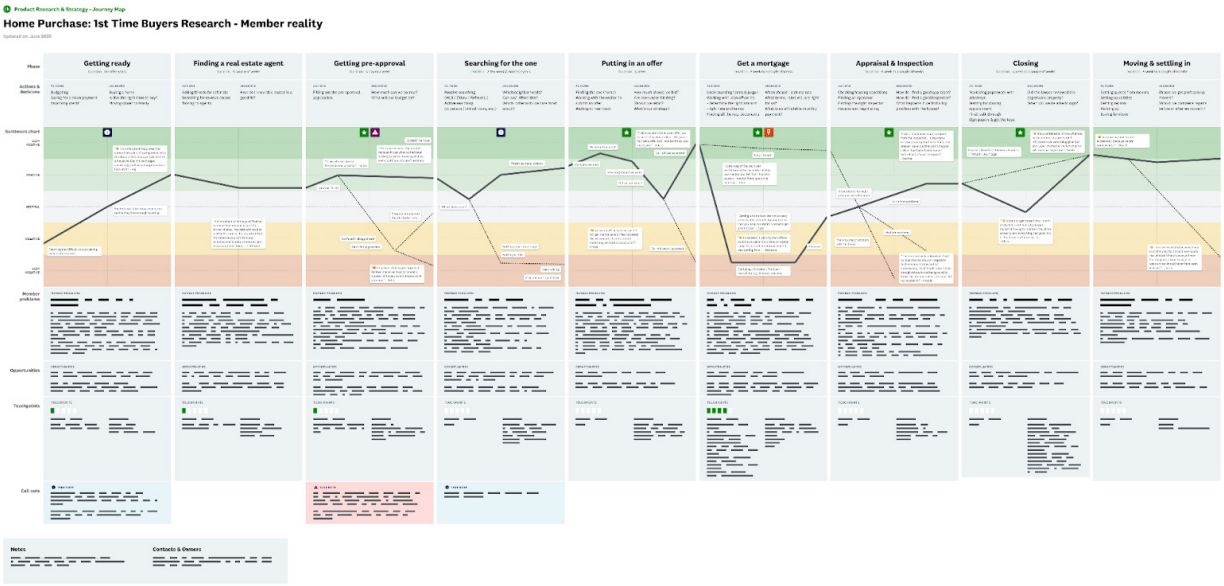
At the beginning of 2020, Emma Quinn, Senior UX Researcher at Credit Karma, began to lay down the foundation of a project to investigate the home-buying journey—specifically, the highs and lows of the mortgage process.

When COVID hit, the team opted to broaden the recruitment strategy to include a larger proportion of folks who had already purchased a home, offering her team a glimpse into the pre- and during-COVID buying process. They ran a longitudinal unmoderated study via dscout Diary—aimed at attaining the deep, reflective data critical for their journey map.

The team wanted to effectively tell the story of the customer experience and keep both participants and stakeholders engaged over time.

To gather the insights they needed, they asked participants to answer recurring questions during key home-buying moments.

- What were some of the highs and lows of this home-buying moment?
- What's an emoji that pairs with this moment?
- In your own words, describe your home buying journey via-video.



Case study #1 – Scout treasure maps

After the participants reflected on the journey map prompts, they were asked to create a treasure map to symbolize a journey map of their own. From Emma:

"The treasure maps that the scouts submitted were amazing. They were so creative and rich that one of our designers made a Google Slides gallery of the different journeys so that the team could reference them as we were building our journey map, and we still have that as a deliverable today."

Case study #2 – Efficient remote collaboration

To start analyzing, Emma broke the research team into pods and assigned each pod one of the "six parts" of the study. From there, each team member had a set of participants to review and take notes on. Afterwards, they came together as a large group and discussed the trends, patterns, and surprises they saw.

"Breaking work down into pods helped us achieve a really rich experience, while not being overloaded with information. I got a lot of feedback that just watching the videos and hearing things first hand was really helpful. Those kinds of stories stick with you, especially being able to reflect on peoples' experiences during our discussions, and being able to reference the treasure map."

The impact

In the end, dscout helped Credit Karma attain rich insights on their users' home-buying experience, pain points, and goals—all while meeting the challenges of COVID constraints.

"For me, dscout made so much sense to use, because a journey map is something that unravels over time," Emma explains. "You can use dscout to capture things over time, but also capture these real-life moments of when things go right, when they go wrong, and then also use it as a tool for reflection."

She continues, "It's so amazing what you can get in a two-minute video. It doesn't sound like a lot, but if you ask the right questions, you can glean so much rich data. It makes so much sense for this project because we're looking at this complicated thing that rolls out over time."

6 reasons to use dscout for journey mapping

1. **Fast, robust recruiting from wide geographic and demographic samples.**
   Great journey maps start with great samples, and dscout offers you more reach, more control, and more data before you start your journey work. Our powerful recruiting platform allows you to build robust screener surveys—and get video and photo responses from potential recruits before they start your study. This allows you to pick the most expressive participants—key for more creative, or involved, study designs.

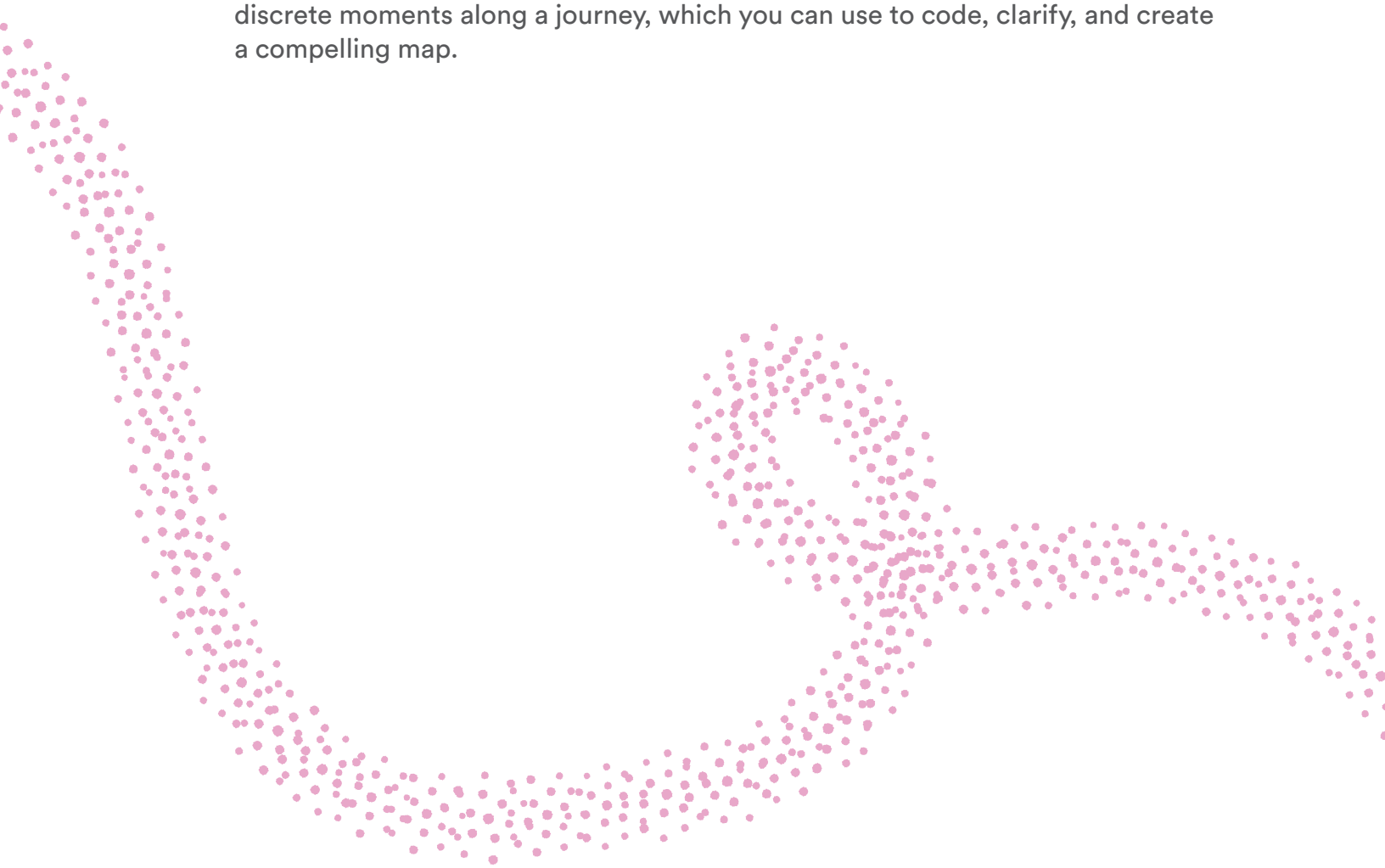
2. **Photo and video data that bring your maps to life.**
   Too often, maps can be flat, full of open-ended text, and a few metrics. Why not drop videos, photos, and quotes of the actual people behind these steps into your journey map deliverable? If you care about the people behind the journey, foreground their words, not yours.

3. **Qualitative data naturally injects empathy into leadership, letting your users make the case for their existence instead of you.**
   It's hard to argue or deny a perspective, when you're staring at a quote or participant video. Maybe your organization is prioritizing one journey or segment of a journey at the expense of another; help your leadership team feel with your users' paths through video and storytelling.

4. **Context means more accurate, reliable, and complete pictures.**
   Repeated-entry methods, such as diary studies, offer a fast, scalable way to discern what's real from what's guessed. Videos, open-ends, and photos offer a true window into experience beyond your product, giving a more complete picture of the users you want to convert to evangelists. This is especially the case when minute moments create maps that matter.

5. **Encourage collaboration.**
   Democratize the journey mapping process by including a cross-section of stakeholders: engineering, design, product, and management. Even if they don't conduct research in the platform, dscout offers integrations with Slack, easy-to-generate share video links, and quick ways to tag stakeholders on entries. This means that collaborators will be able to easily access responses and videos that speak to the value of your work, and you'll bring them closer to the users they hope to delight with their experiences.

6. **Moments-based methods create maps more naturally.**
   Chunking up experiences into bite sizes helps with analysis, synthesis, and map creation. dscout's Diary tool is perfectly-suited to capture multiple data types in discrete moments along a journey, which you can use to code, clarify, and create a compelling map.



Recommended Resources

1. Journey Mapping as an Empathy Tool

   By TS Whitty

2. Creating Workshops Based on User Journeys

   By Patricia Donnelan

3. The Five Stages of Successful Journey Maps

   By Nikki Anderson

4. Six Steps for a More Compelling and Dynamic Journey Map

   By Ali Cassity

5. Three Strategies for Leveraging dscout For Mapping

   By Ben Wiedmaier

6. Best Practices for using Contextual Data for Mapping

   By Ben Wiedmaier

Make your journey mapping resonate.

Use the dscout platform to recruit smarter, field faster, and up your org's research capacity. Our tools for remote research champion user voice by letting you see, hear, and engage with your actual users.

Learn more about starting a project

You're fascinated by the why. We break down the hows.

Follow the People Nerds blog to hear from top UXR practitioners and pick up a few pieces of novel advice for every stage of your research project cycle.

Check out the blog