

Ongoing Discussion “Thought Piece”

***Using Customer Journey Mapping to Create New,
Innovative Ideas***

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The Purpose of this Paper

There are various methods to approach the creation of new ideas (or solutions) in pursuit of innovation. What you will see in this paper is the method that I have created for use in my consulting practice. It is a variation on “Customer Journey Mapping”, a term used in Design Thinking. After reading this paper, you will be able to apply this method yourself, to create innovative ideas in a new way. The over-arching principle of what we will talk about can be summed up as follows:

The catalytic root(s) of an innovative idea can often be found in one or more components of the status quo. Methodically challenging these catalytic roots can generate “out of the box” perspectives, and ideas.

Several authors have created their own variations on the above principle. Other variations include Edward deBono's *Concept Fan* and *Flowscapes*, Bryson/Ackerman's *Cog Mapping*, and Quesenbery/Brooks' *Storytelling for UX*. (See Appendix #1: “Auxiliary Resources” for a list of books that outline their methods.)

My method is called the *2-D Imaginarium*. Let's get started to see what it's all about, and how you can use it in your own innovative pursuits.

Outline

1. What is Customer Journey Mapping (“CJM”)?
2. The 2-D Imaginarium (“2-DI”) application of CJM: what it's about.
3. When to use 2-DI.
4. How to use 2-DI to generate new ideas.
5. How to use it to get “buy in” from the top decision-maker(s).

What is Customer Journey Mapping (CJM)?

Customer Journey Mapping is the contextual worksheet in which the 2-D Imaginarium method is applied. There is a 2-step process involved:

- First, we must *draw* the CJM, i.e., fill it out completely.
- Then, we can *use* the map to apply the 2-D Imaginarium method.

The Customer Journey Map is a way to display the stories of the customer's (or prospect's) status quo experience, in sequential order. The catalytic roots of an innovative idea are found in these stories. Each story is composed of the classic “story elements” taught in Journalism 101:

- Who
- What (including assumptions)
- When (including frequency)
- Where (including online)
- How (including how much)
- Why (including why not)

The journey map includes the 6-question stories (above) for each step along the path of the customer's total experience with a product, service, or brand. The "journey" begins with the motivation of the customer, i.e., "how they think", then continues through purchase, application (how they really use the product), and reflection on how it might be a better experience. Each of these 4 major categories has its own sub-categories. For example, "Acquisition" (purchase) can be sub-divided into: researching the product, shopping for it, and the "purchase day" experience.

(Refer to Appendix #1: "Example of a Customer Journey Map")

In the Appendix example, there are 10 "journey points" in the horizontal banner ("Primal", "Emotional", etc.). Each of these 10 points is a sub-heading of the 4 major categories. So, when the matrix as shown is completely filled out, there are 60 spaces (10 journey points X 6 story questions). When completely filled in, this matrix becomes the Customer Journey Map, telling the full, rich, detailed stories of every step along the way of the customer experience in the status quo. This map accomplishes two important things:

- First, it helps us - - in a visual way - - to more fully understand the whole system of the customer's status quo journey. It forces us to discover new insights and relationships.
- Second, the map becomes the worksheet "launch pad" for creativity exercises that employ the 2-D Imaginarium method.

The 2-D Imaginarium Application of CJM: What its about:

My method of applying the CJM involves the thorough and relentless "challenging" of every one of the 60 components of the CJM. This is how it enables us to get "out of the box ideas" (notice I don't say "think out of the box" - - more on that below). What do we mean by "the box"?

- Our minds think in *habitual* ways, driven by limiting factors of instinct, intuition, and experiences. We naturally follow a "proven", "logical" path of thought, and when that produces success, we tend to "double down" on it. We become fully "oriented" in our habitual thought patterns. This is the box.
- Deliberate creativity always involves *disorienting* our minds in one way or another. Every creativity technique in every book ever written about deliberate creativity involves a way to produce "forced disorientation" as the platform for new ideas. It is from a disoriented state that our minds are forced to drop the limiting factors (noted above), and, to some extent, regain the creativity we all had as children.
- It is impossible to think out of the box (that would imply being out of our minds). But, with forced disorientation, we can explore new, non-habitual territory of thought, then *expand* our box to included the new territory, and create within the expanded space. That's how deliberate creativity *gets* "out of the box ideas".

The 2-D Imaginarium (“2-DI”) method uses the CJM as a place where we methodically force disorientation in order to generate new ideas. Here are some characteristics of the 2-DI method:

- It is very comprehensive, but takes a comparatively long time to execute. Most creativity techniques are “same day” exercises. The 2-DI, if done properly, takes 2-4 weeks - - or longer. A “war room” is needed to accommodate its big wall displays. And, if new market research is needed to fill in all 60 spaces in the CJM, then it will add more time. This method is not quick or easy.
- It is a holistic exercise, which involves creating new ideas that take into account not only clever components of an idea, but also how those components work in concert with all other components to produce total systemic success.
- It works in conjunction with other creativity techniques. The 2-DI is the creativity space - - the Imaginarium - - in which other techniques can be applied with greater success than if those other techniques were applied alone, without 2-DI.
- It can be done by an individual, or by a small, cross-functional group. A group approach can make the process faster. In addition, the cross-functional group approach often produces a more inclusive, team-oriented outcome that makes it easier to gain organizational ownership, acceptance, and commitment.

When to Use 2-DI

The 2-DI method is best used for applications of major strategic importance. Use it when:

- You have a time frame of at least a month, more if additional market research is needed to fill in the initial CJM.
- You need to make an unusually strong, full diligence case in order to “sell the idea upward” in your organization.
- Your idea needs to be holistic, i.e., it must account for the smooth operation of all elements in internal operations and the newly created customer experience.
- You’re “stuck” (equivalent of writer’s block) after trying traditional brainstorming methods.
- You already have an idea that you think is pretty good, but want to make sure that an even better idea is not out there somewhere. This is an example of “full diligence”.
- You want to produce, as a byproduct of the idea creation, a big vault of insights and alternate ideas that might be drawn upon at a later date, perhaps for another project.

How to Use 2-DI to Generate New Ideas

The basic idea is that we take *every one* of the 60 spaces in the CJM, and imagine a *different* way in which that space might work. The forced consideration of different ways in each of the 60 spaces is how we produce forced disorientation. If left to our own devices, we would only consider a few habitual “favorites” among the 60 spaces (i.e. in-the-box thinking). But the 2-DI method forces us to convert many *other* spaces into catalysts for new ideas. We’re forced to drop limitations and explore new territory of thought. After

we've generated many possible ideas, we then examine how these new ideas relate to one another, and whether they interact smoothly with the system (i.e., our operations or the customer experience). The best, criteria-driven idea or combination of new ideas is chosen as the output.

Below you will find a **9-step procedure** for using the 2-DI method. We assume that you already have a proper mandate "from above" to create new ideas, and that all of the objectives, operational requirements, and criteria for excellence are fully and unambiguously delineated. That's a tall order for sure, but our emphasis today is the idea generation part of a total project.

Here are the 9 steps:

1. Designate a "war room" that can be used for the entire duration of the exercise. The room should have an uncluttered wall or giant whiteboard for posting the 60-square CJM matrix, with sufficient room for both "status quo" and new ideas within each space.
2. Fill in the entire CJM with the status quo information. This may take some time (a week or more), and may involve interviewing others in your organization and perhaps customers outside the organization. Post the information into the 60 wall spaces, using Post-Its or Slickynotes (I use these) You can order slickynotes at www.slickynotes.net
3. Study the CJM wall map, developing ways to understand how the status quo works. Write narratives and recite the stories that each of the 10 journey points (columns) tells. Also, look for "pain points", i.e., those squares in which customers experience difficulty. All great brands, and all great ideas, relieve pain in some way, even if indirectly. All of this will produce rich material to work with in the 2-DI.
4. All innovation involves "changing the story" of customer experience. So, we look for ways to *change* each of the stories that are told below the 10 journey point column headings. We **imagine** new realities for each space, hence, the **2-D Imaginarium**. We "imagine" by challenging each space in the entire matrix. In the process, this is where we convert the Customer Journey Map into the 2-D Imaginarium. One challenge technique that works well is called SCAMPER. So, in this case, we "SCAMPER" (used here as a verb) every one of the 60 spaces, in order to imagine new possibilities. SCAMPER is a method that dates back to the 1960's, but it is still a big favorite in creativity circles. It is an acronym, which in our case, operates as follows:
 - Can we **S**ubstitute something else for what's in a specific CJM space?
 - Can we **C**ombine the contents of a specific space with something else, perhaps from another space?
 - Can we **A**dapt something else to the application of a space?
 - Can we **M**odify the contents of a square to better effect?
 - Can we **P**ut the contents of a space to another use?
 - Can we **E**liminate this aspect of the customer's experience altogether?
 - Can we **R**e-arrange this and/or other elements of the CJM to better effect?

Other creativity techniques, such as Flowscapes, Random Word, Six Hats, and Concept Fan could be used as substitutes for SCAMPER in challenging each of the 60 spaces in the CJM. See Appendix #2 for a list of books containing these other methods. In the case of SCAMPER, the forced consideration of 7 additional perspectives (the 7 letters of SCAMPER) for each of the 60 CJM spaces means that there would be 420 challenges to the full CJM. This *really* forces us to imagine new scenarios that would not be considered if we followed in-box, habitually favorite ways to create ideas. It is comprehensive forced disorientation - the best springboard for ideation. We create new ideas from 420 possible angles.

5. Using the challenges as a tool, imagine and write new ideas on small Post-Its or Slickynotes (they should be of a *different color* than the status quo postings). Put each new idea up into its space on the wall matrix, next to its status quo predecessor.
6. Study the array of new ideas. Spend several days doing this. Imagine the impact of any idea on its own, and how it integrates with the smooth functioning of internal operations as well as the total customer experience. Do the same with imaginary combinations of the new ideas, i.e., imagine the individual ideas as Legos™ pieces --- and how they might be combined into an innovative new system of operations and a new customer experience.
7. Challenge the new ideas versus the project's objectives, requirements, and criteria for success. Will the new idea (or combined set of ideas) "work"? *Using objective, criteria-driven analysis, select the best idea.*
8. Develop a plan of action for the initial development and subsequent implementation of the new idea. This can be displayed in a simple Gandtt chart, or in a more complex format. If possible, the business plan should also be developed at this stage.
9. Prepare the proposal to management. The proposal should emphasize the extraordinary diligence undertaken to "think of everything" in creating the new ideas.

In order see how the 2-DI could have been used to generate any currently accepted good idea, try this exercise. *Back-fit* any new, successful product into the 2-DI. It's easy to trace the "roots" of the new product's advantages or characteristics back to a change made in one or more of the 60 spaces in that product's original Customer Journey Map.

How to Get Buy-In From the Decision Maker(s)

Here are some tips to engage the decision maker(s) throughout the process, and to persuade them of 4 things:

- The idea is great - - new, clever, creative, innovative
- The idea works - - functionally, and vis-à-vis internal operations and the customer experience
- The idea achieves every objective, requirement, and criteria for success laid out in the mandate for the project.

- There are very likely no other, better ideas “still out there somewhere”
 1. Invite the decision maker(s) to your war room during various stages of the multi-week process. Give them a “tour” of your work, as displayed in the giant CJM and 2-DI matrices up on the wall. They need to see that you are exhibiting maximum diligence on *their* priority topic.
 2. In the proposal, outline how the idea is truly new and innovative. Compare it to all previously considered ideas and to competitors' ideas. Show them *how* it is “out of the old box”.
 3. Show them *how it works* - - including how it does not damage or disable other aspects of internal operations or customer experience. They need to be convinced that your idea does no harm.
 4. Show them *how* the idea fulfills the project objectives, requirements, etc. Use a checklist display to convey this message. For each item on the checklist, show a list of reasons that the requirement can be “checked off”, i.e. “Our idea fulfills Project Objective #2 in the following 3 ways”
 5. Show them the “second and third place” ideas, and why (again using the checklist display) you did not select those ideas. This shows objectivity in your discrimination between ideas.
 6. Emphasize the fact that you “looked under every stone” for catalysts for new ideas. If you use SCAMPER, that means 420 stones. Remind them of what you talked about when you gave them the “tour” of the war room, earlier in the process. This will elicit feelings of personal involvement and empathy on their part. If you used a cross-functional group in the project, emphasize that several people all gave their “best shot” at the 420 creative angles. This should persuade them that you have the best *possible* idea.
 7. Be prepared to handle “push back” in a calm and professional way, emphasizing how your idea shares the values of the doubter. Never position doubters as adversaries. A very good list of ways to handle push back is found in the book “*Buy In: Saving Your Good Idea From Getting Shot Down*” (see Appendix #2, item #9).

Appendix # 1: Example of a Customer Journey Map (CJM)

MOTIVATION > ACQUISITION > APPLICATION > REFLECTION
Primal Emotional Rational Researching Shopping Buying_ Usage Accomplishment Assessment Imagination

WHO

WHAT

WHEN

WHERE

HOW

WHY

Notes:

- There are 60 squares (10 banner points X 6 questions = 60)
- Each of the 10 columns tells the story of a point in the customer's journey, hence, "journey mapping"
- Each of the 60 squares presents an opportunity to change/disrupt the status quo
- The method forces a disruption challenge in each square, thus, producing "out of box" thinking
- In "2-D Imaginarium" mode, the status quo is challenged 60 ways; 420 ways if SCAMPER is used in each square (60 squares X 7 questions in SCAMPER = 420 challenges).

Appendix #2: Auxiliary Resources

There are many books that address the topic of creativity and innovation. Here is a list of some particularly good ones, especially since all of them can be used in conjunction with Customer Journey Mapping. All are available on Amazon (sometimes as used books).

1. ***Water Logic***. By Edward deBono. This book is deBono's way of "creating from components, to the whole". His "flowscapes", as a way to create new ideas, are a different take on journey mapping.
2. ***Visible Thinking***. By John Bryson and Fran Ackerman. A British method of this style of thinking and creativity. Their "cognitive mapping" method is excellent, and I use it in my work.
3. ***ThinkPak***. By Michael Michalko. This is actually a card deck, that is used to SCAMPER any situation. The cards also show examples of how SCAMPER has worked for many companies.
4. ***Thinkertoys***. By Michael Michalko. This is an excellent compendium of creativity techniques that could be used "inside" a customer journey map.
5. ***Serious Creativity***. By Edward deBono. An excellent book about "how to think about creativity" and specific techniques to accomplish such thinking. Six hats, concept fan, random word, and other deBono techniques are covered.
6. ***Storytelling for User Experience***. By Whitney Quesenbery and Kevin Brooks. How to write stories that "sell" a new idea. Stories are created using various experiences on the customer's journey.
7. ***Sketching User Experiences: The Workbook***. By Saul Greenberg and Sheelagh Carpendale. How to sketch customer journey stories (like those in #6, above) as a way to visually "sell" the story. Books 6 and 7 work well together: A) write the idea in the form of a story - - B) sketch the idea/story - - C) sell the idea using the visual effect of the sketch (like storyboards in the advertising business).
8. ***Designing for Growth***. By Jeanne Liedtka and Tim Ogilvie. The textbook for a recent Coursera course that I took. Integrates journey mapping into "design thinking". Excellent.
9. ***Buy-In: Saving Your Good Idea From Getting Shot Down***. By John B. Kotter. He covers many strategies for you to prevail.

BIOGRAPHY

Bill Cummins is President of Cummins Marketing Consulting, Inc., (CMC) a California corporation founded in 1997. Consulting clients have included large corporations in the U.S. and Japan, including J.P. Morgan, MasterCard International, Hewlett-Packard, and Yokohama Rubber Company.

Bill began his career in the early 1970s at Market Research Corporation of America, and at Market Facts Inc., both large consumer market research firms. He moved to California in 1975, as market research manager at Hunt Wesson Foods in Fullerton, CA. From there, Bill moved to Toyota Motor Sales USA, in Torrance, CA. His first position at Toyota was in market research; he was then promoted to long range market planning manager. He did the first research into the market for Toyota-produced luxury automobiles (later named Lexus) in the U.S. in 1982.

In 1985, Bill moved to Needham, Harper, Steers advertising agency (which later became RPA), as head of account planning. He managed a department of 12. The account planning department developed national and regional strategies for Honda advertising, as well as for other accounts such as Disney Channel and US WEST.

In 1997, Bill founded CMC, based in Valencia, CA. He has provided insights, ideas, and advice to a wide range of clients. Bill specializes in the fields of ethnographic market research and new idea/solution generation. He has designed and developed his own proprietary methods of ethnography ("Joint Field Investigations") and idea/solution generation ("2-D Imaginarium").

Bill is a long-standing member of the American Marketing Association and the Santa Clarita Valley Chamber of Commerce.

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