

# EMPLOYEE JOURNEY MAPPING TOOLKIT



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## EMPLOYEE JOURNEY PLANNING

Following are some of the key questions that need to be answered before you launch your employee journey mapping initiative. Hold a working session and document the answers to these questions together with your planning team.

### **What are the primary goals of the employee journey mapping initiative?**

- ☐ What are you hoping to achieve for your organization?
- ☐ What are you hoping to achieve for employees?
- ☐ What are secondary goals of the initiative?

### **Who are the key stakeholders that need to buy into your initiative?**

Who touches the employee journey?

- |                                          |                                     |
|------------------------------------------|-------------------------------------|
| <input type="checkbox"/> Leadership Team | <input type="checkbox"/> Training   |
| <input type="checkbox"/> HR – Staffing   | <input type="checkbox"/> IT         |
| <input type="checkbox"/> HR – Benefits   | <input type="checkbox"/> Marketing  |
| <input type="checkbox"/> Managers        | <input type="checkbox"/> Operations |

### **What messaging will work best with the various stakeholders so that everyone is on board and ready to help you with your initiative?**

- |                                          |       |
|------------------------------------------|-------|
| <input type="checkbox"/> Leadership Team | _____ |
| <input type="checkbox"/> HR – Staffing   | _____ |
| <input type="checkbox"/> HR – Benefits   | _____ |
| <input type="checkbox"/> Training        | _____ |
| <input type="checkbox"/> Managers        | _____ |
| <input type="checkbox"/> IT              | _____ |
| <input type="checkbox"/> Marketing       | _____ |
| <input type="checkbox"/> Operations      | _____ |

### **How do you want to position the initiative with employees so that they also buy into the plan and want to contribute?**

- ☐ Encourage participation and ensure confidentiality as needed
- ☐ Describe the outcomes in a way that motivates them to engage
- ☐ Make the initiative feel valuable to employees

### EMPLOYEE JOURNEY MAP DETAILS WORKSHEET

Let's plan your map! The following is a quick worksheet to help you make decisions on what you would like to include on your map.

#### What journey are you mapping?

- ☐ One map across all employees
- ☐ Management teams vs. individual contributors
- ☐ Specific functional area that you are targeting (i.e. customer support, sales, etc.)
- ☐ Other \_\_\_\_\_

#### Are you mapping current or future state?

- ☐ Current state of the employee journey – how it looks today?
- ☐ Desired “future state” journey – what you want it to be?

#### What are the start and end phases of the journey you want to map?

Start:

- ☐ Job Search
- ☐ Job Acceptance
- ☐ On-Boarding
- ☐ Other \_\_\_\_\_

End:

- ☐ Career Development
- ☐ Performance Measurement
- ☐ Loyalty & Referral
- ☐ Retirement
- ☐ Other \_\_\_\_\_

#### What details do you want to include on your map that will be most effective for your organization to use to drive decisions and act?

- |                                      |                                                         |
|--------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Phases      | <input type="checkbox"/> Level of Effort                |
| <input type="checkbox"/> Steps       | <input type="checkbox"/> Highs & Lows                   |
| <input type="checkbox"/> Goals       | <input type="checkbox"/> Satisfaction                   |
| <input type="checkbox"/> Challenges  | <input type="checkbox"/> Level of Risk                  |
| <input type="checkbox"/> Emotions    | <input type="checkbox"/> Opportunities                  |
| <input type="checkbox"/> Touchpoints | <input type="checkbox"/> What they do, think, say, feel |
|                                      | <input type="checkbox"/> Other _____                    |

## Step 2: Interview Stakeholders

### HIGH-LEVEL JOURNEY TEMPLATE

Following your stakeholder interviews, you will have gathered information about the phases and steps that employees experience across the journey. Prior to Step 3, synthesize all that you learned about the employee journey into a simple worksheet that will serve as input into your baseline map in Step 3.

This template is created in PowerPoint; however, feel free to create it in any application that works for you.

	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Phase Name: (i.e. Onboarding)					
Steps in the Phase listed in order of how they happen					

### *SAMPLE STAKEHOLDER INTERVIEW GUIDE*

Talking to internal stakeholders that touch the end-to-end employee journey provides a basic framework for your employee journey map. The goal of these interviews is to gain a high-level understanding of the end-to-end phases and steps of the employee journey.

#### **Here are some tips to get you started:**

- This Sample Stakeholder Interview Guide is a “guide” and will need to be customized based on your audience
- It is not intended to be a survey or a questionnaire, but it is here to guide you through your conversations
- You will want to probe on areas that come up in your conversation with the end-goal of building a high-level map of phases and steps
- Interviews should last 30 – 45 minutes
- You can conduct interviews in groups of related roles as it makes sense. The key is to include people in an interview that represent a similar part of the journey to keep it focused.
- Let stakeholders know ahead of time that they do not need to do any prep for the interview and that you just want to talk to them about what they already know
- At this stage, focus on “what” happens (i.e. the phases and steps) and not any pain points that the employee might encounter throughout the journey; the point is to just be able to accurately sketch the phases and steps

### SAMPLE STAKEHOLDER INTERVIEW GUIDE

For the Stakeholder Interviews, you are generally trying to understand what employees are doing across the employee journey that you are mapping. These are typically some of the questions we would ask on these stakeholder interview; however, feel free to modify and make it your own.

#### **Stakeholder Introduction**

- Tell me about your role and what you are responsible for
- What part of the employee experience are you focused on?

#### **Employee Experience**

To get us started, Let's start at the very beginning. Tell me at a very high level the different steps that employees go through from end-to-end from the time they [INSERT JOURNEY START] to [INSERT JOURNEY END]. Remember, we want to know the activities and steps from the employee's perspective and how they experience this process (versus internal or back end processes).

#### **Overall**

- When you think about activities employees do from the minute that they [INSERT JOURNEY START] to [INSERT JOURNEY END], what are the high-level steps in the process?

#### **Phases in the Journey**

NOTE: outline the high-level phases in the employee journey and touch on the sections that are relevant to the Stakeholder's functional expertise. For each of the phases, ask the following questions. Feel free to add questions as needed.

- What are some of the steps employees take in this phase of their journey?
- What are employees doing during this phase?
- What do they do specifically? What happens first, second, third, etc.
- When does the phase / step take place?
- What trigger the phase / step?

#### **Closing**

- Is there anything that happens in the employee journey that we have not covered today?

### INTERNAL WORKSHOP PLAN

In the Internal Mapping Workshop, a cross-functional team is invited to edit and agree on the high-level phases & steps (from the stakeholder interviews) as well as fill out details for the map to the best of their knowledge. These are the details that you decided on in Step 1: Strategize & Plan (i.e. goals, emotions, challenges, etc.)

#### **Here are some tips to get you started:**

- You are only trying to develop a draft baseline journey - you will be iterating through the process and validating with employees
- This is NOT what the final maps will look like - at this stage you are gathering content for the hypothetical map
- For purposes of gathering content for the maps, they will look very linear. When you go to design, you can show the non-linear relationships between phases and steps.
- This is the 'messy' stage but don't worry it will come together!

#### **Before the Workshop**

- Pre-populate the phases and steps in the Journey Mapping Flipchart Template; knowing this may change slightly once the cross functional team looks at them
- Add your detail categories to the flipchart template (for the purpose of our template we included the following details: goals, challenges, touchpoints, emotions)
- Print the Journey Mapping Flipchart Template on 24x36 inch paper
- Print some blank templates so that steps can be added during the workshop as needed

#### **During the Workshop**


- Hang the pre-populated templates around a large room in the order the phases and steps occur in the journey
- Have teams get into breakouts and walk through the journey flips and add the details as they think they are for employees. Remember this is a hypothetical baseline that gets validated with employees.

## JOURNEY MAPPING TEMPLATE

The following is a template that should be customized based on the details of your map that you determined in Step 1: Strategize & Plan.

Please keep in mind that the template we are providing assumes that you will be creating the journey map down to the Step level; however, you may have decided that you only want to map at the phase level of the employee journey.

This template can be used for both the Internal Mapping Workshop and the Employee Mapping Workshop in Step 4.

Phase: Step #: <b>STEP:</b>	
	<b>GOALS</b>
	<b>CHALLENGES</b>
	<b>TOUCHPOINTS</b>
	<b>EMOTIONS</b>
Need Help? Contact us at <a href="mailto:hello@clearworks.net">hello@clearworks.net</a>	
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Phase:  
Step #:

# STEP:



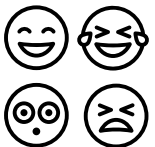
## GOALS



## CHALLENGES



## TOUCHPOINTS



## EMOTIONS

## SAMPLE HOMEWORK EXERCISE TEMPLATE

We like to have employees complete a brief “homework” exercise prior to coming to their session to get them thinking about their journey. This is a sample homework exercise that you could use with your teams. However, feel free to make this your own based on what you think will work best with your employees.

**HOW DO YOU FEEL ABOUT BEING AN EMPLOYEE?**

**Things I Like.....**  

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**Things I Don't Like.....**  

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**Things that Excite Me.....**  

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**Things that are Hassles.....**  

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### SAMPLE EMPLOYEE WORKSHOP AGENDA + INSTRUCTIONS

You can conduct the employee research using many different types of methodologies – from focus groups, to interviews, to workshops. This Sample Agenda & Instructions is for a workshop. Like the Internal Mapping Workshop, your employee research should be fun and engaging.

#### WHERE TO HOST

If possible, host your employee workshop at an off-site location to help minimize the distraction. If you can't meet in-person, we recommend using Virtual Whiteboarding tools such as Mural or Miro combined with a video meeting platform like Zoom or Teams.

#### TIMING

We typically allot 2-3 hours per workshop to allow time for mapping exercises as well as breakouts and large group discussions. For a virtual workshop, you may want to keep the sessions shorter and have multiple sessions.

#### SAMPLE WORKSHOP AGENDA

8:00	a.m.	Welcome
8:10	a.m.	Introductions
8:20	a.m.	Warm-up Exercise
8:40	a.m.	My Employee Steps
9:50	a.m.	Detailed Steps
10:40	a.m.	My Biggest Challenges
11:00	a.m.	Closing

#### INSTRUCTIONS FOR THE JOURNEY MAPPING EXERCISE

- Hang the pre-populated templates (See Sample Template from Step 3) around a large room in the order the phases and steps occur in the journey
- Have employees get into breakouts and walk through the journey flips and add the details from their own personal experience
- Each employee should visit each of the steps and provide their input on, in our example, goals, challenges, touchpoints, and emotions

### POST-EMPLOYEE WORKSHOP SYNTHESIS

The outcome from your employee research is a synthesis of all that you have learned along the way. This synthesized content is what you will share with your designer to start designing and finalizing your maps.

We typically synthesize the findings down to summarize what MOST employees are doing, thinking, and feeling at each step in the journey. You will likely have some outlier inputs that will not show up on your map. Remember you are developing the map for the majority of employees.

The synthesis can be done in PPT or Word – whatever works for you!

Here is an example of how you might translate the information from the Journey Mapping Templates into a map.

**Phases = Phases**

**Steps = Doing**

**Goals / Challenges = Thinking**

**Emotions = Feeling**

You can also consider adding some quotes to your map to show what they are Saying. This helps to show the organization how they are feeling in their own words!

## OPPORTUNITY WORKSHEET

Placing top pain points from your Employee Journey Map into a 2 x 2 matrix can help you simply identify quick hits, short-term wins, as well as actions that will take longer and potentially more resources to solve.

**Quick Wins** are pain points that are “no-brainers” to solve and are very feasible. These might not even show up on your opportunity matrix because “why wouldn’t you?”

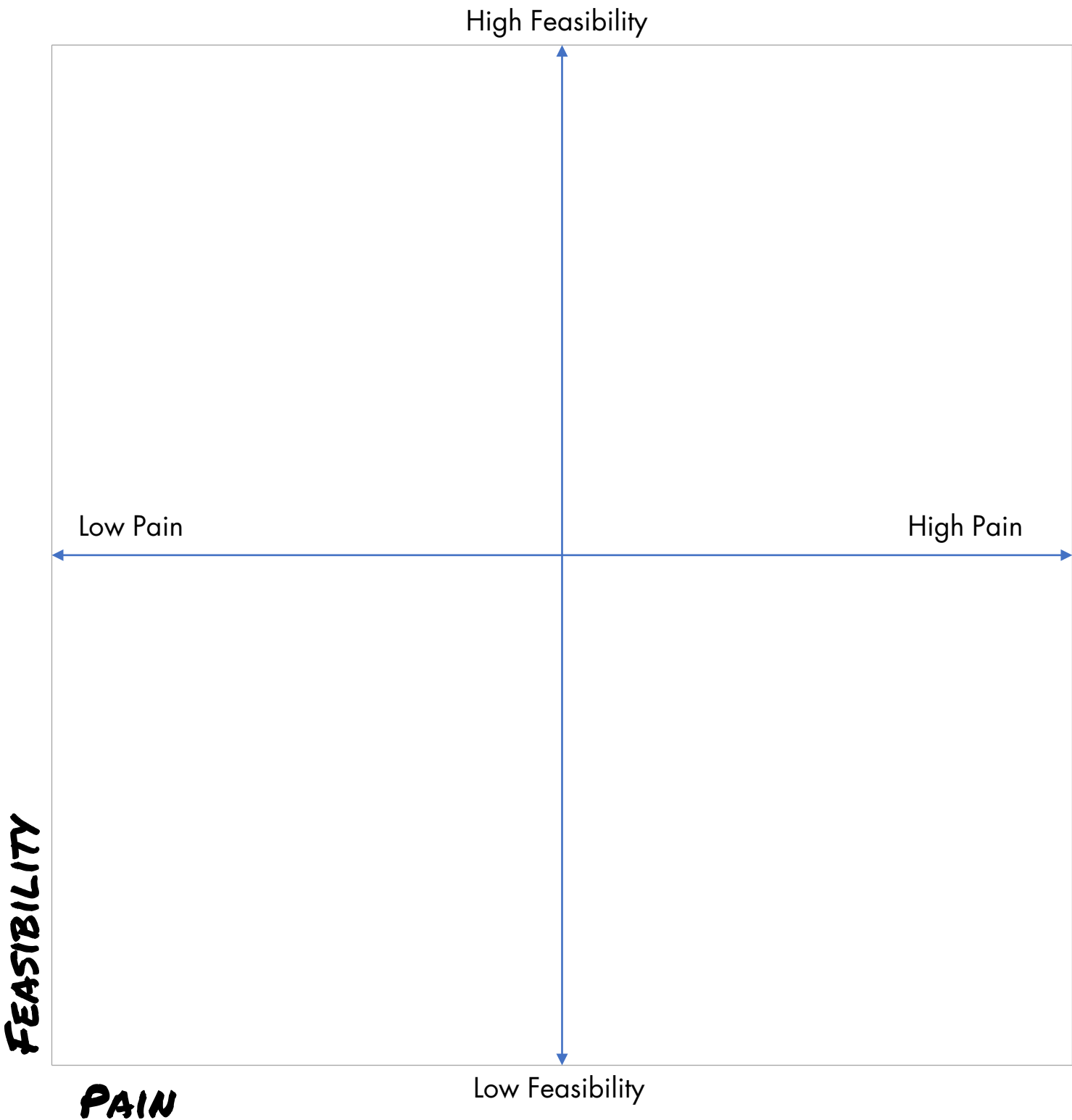
**Short Term Wins** fall into the category of painful points in the journey that are very feasible to solve in a short amount of time

**Longer Term Items** could require a lot of time, resources, and may be more systemic in nature. That’s not to say that they can’t be solved, it just might take additional effort and investment if they are important to the organization to improve.

You will likely also end up with some pain points that aren’t very painful that are hard to solve – these you might want to put on the back burner so you can tackle the more impactful actions!

Once you have rated the pain points against feasibility to solve, assign the right internal stakeholder to figure out how to improve the employee journey!

OPPORTUNITY WORKSHEET



## ***COLLAGE IDEATION EXERCISE INSTRUCTIONS***

### **Ideal Workplace Collaging Exercise**

#### **Instructions:**

- Your team has been assigned to create a collage representing what the ideal workplace would look and feel like
- Using the magazines, find photos and words or phrases that you feel represent the ideal workplace
- Use the scissors to cut out the words and photos and glue them to your large flip chart
- Work as a team to choose which photos and words best represent what you would want to see in an ideal workplace
- Once you have finished, select someone on the team to present your collage and explain why the words and images were selected

## AWARD IDEATION EXERCISE INSTRUCTIONS

### The Award

To download a printable copy of The Award as well as facilitator instructions visit: <https://www.clearworks.net/services/games/>

### Participant Instructions:

- Randomly split into breakout groups of 3-4
- First, pick an award – **if your company was to win an award for being an awesome workplace, what would it be?**
- Think about the details:
  - What are the specifics of the award? What is the criteria to win?
  - Why would the company win the award?
  - What is it about your workplace that made the company win?
  - If you had to pitch an award committee in order for your company to win, what would you say?
- Fill in your flipchart. Use markers to either draw pictures or write in your answers.
- Tape your flipchart to the wall
- Each team presents to the larger group

NOTE: this exercise can be modified to play in a virtual environment