Executive Q&A: Learning Maps; Innovative Tools For Customer Experience Training

by Samuel Stern
with Harley Manning and Dylan Czarnecki

WHY READ THIS REPORT

Learning maps are large-scale visualizations that use data, graphics, and illustrations to tell a story. They are an increasingly popular training tool for companies that want to transform their cultures and become customer-obsessed. This report answers questions about creating and using learning maps for customer experience training and helps customer experience professionals decide if their organizations need them.

Questions

1. What are learning maps and how do they differ from customer journey maps?

2. How are learning maps used to improve customer experience?

3. What are the common scenarios where learning maps add value?

4. How do you create a learning map?

5. How long does it take to create a learning map?

6. How much should you budget to develop and deliver a learning map?

7. Who helps companies create learning maps?

8. What results have companies achieved by using learning maps?

9. Who facilitates the training related to learning maps?

10. What else should you keep in mind when creating learning maps?

LEARNING MAPS BRING THE CUSTOMER EXPERIENCE TO LIFE

Companies want customer-obsessed cultures that will help them differentiate in the age of the customer. But transforming a culture can be a challenge: It requires all employees to understand who their customers are, how customers perceive their interactions with the company, and what roles employees need to play in delivering the overall experience. Enter learning maps, which are fast becoming the centerpiece of small-group interactive training sessions at many companies.
1. **What are learning maps and how do they differ from customer journey maps?**

Learning maps are large-scale visualizations that use data, graphics, and illustrations to tell a story. Like the customer journey maps they resemble, learning maps often depict the steps a customer takes in pursuit of a goal. Unlike journey maps, however, learning maps are training tools that abstract significant amounts of information into a format that facilitates conversations and understanding for diverse groups of employees. And whereas journey maps work best when used with other tools that document customer understanding — like personas — learning maps work best in concert with learning tools — like facilitator guides, handbooks, and scenario cards — that help groups interact with the maps.

2. **How are learning maps used to improve customer experience?**

Learning maps are typically used in small-group interactive training sessions to help employees understand the company’s customer experience strategy and their role in delivering against that strategy. For example, when Cleveland Clinic wanted to transform its culture to deliver great patient experiences, learning maps were a critical part of its training curriculum for all of its employees (see Figure 1 and see Figure 2).

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**Figure 1** Cleveland Clinic’s Patient Experience Learning Map

![Cleveland Clinic’s Patient Experience Learning Map](source)

Source: Cleveland Clinic

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Source: Forrester Research, Inc.

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3. What are the common scenarios where learning maps add value?

Some of the specific use cases for deploying learning maps include:

- **Sharing a new customer experience strategy.** When VCA Animal Hospitals launched its new client experience strategy, it used learning maps to explain to employees why the company was making the change, what it meant for employees, and what was in it for employees (see Figure 3).

- **Changing a specific part of the customer experience.** Disney Store used learning maps when it redesigned its retail experience.

- **Training managers.** BMO Financial Group uses its learning maps as part of one-day customer experience (CX) training for new managers (see Figure 4).

- **Integrating employees from acquired companies.** When it acquired Harris Bank and M&I Banks, BMO used learning maps to train employees according to the new customer experience vision.
Figure 3 VCA Animal Hospitals’ Client Experience Big Picture

Source: VCA Animal Hospitals

Source: Forrester Research, Inc.
4. **How do you create a learning map?**

Root, a solutions provider that trademarked the term “learning map” and codified map conventions, outlines a five-step process for creating and implementing learning maps (see Figure 5). During the planning phase, consultants conduct significant research that includes stakeholder interviews, documentation review, and analysis of existing customer research. The consultants then start to craft the story and draw initial versions of the learning maps. They work with the client company to iterate the designs and to confirm stakeholder acceptance prior to the training. Next, they conduct a dress rehearsal of the training with the facilitators to test out the materials and to train the facilitators who will administer the actual training to employees. Finally, they roll out the learning maps to the entire group of employees who will receive the training.
**Figure 5** Root’s Five-Step Process To Create Learning Maps

### Strategic Learning Map® Alignment Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>What</th>
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| **1. Project planning** | — Sponsor/champion(s)  
— Project manager | Conference call to:  
— Identify desired outcomes of the engagement  
— Review overall alignment process  
— Lock in project timeline |
| **2. Building the story** | — Sponsor  
— Executive team members (or other content experts)  
— Project manager | Content expert meeting to:  
— Articulate a common mental model of where the organization is and where it’s heading  
— Align on the concepts/messages that the entire organization must rally around |
| **3. Align and visualize** | — Sponsor  
— Executive team members (or other content experts)  
— Project manager  
— Two sets of eight to 10 employees from throughout organization | Sketch review meeting to:  
— Clarify the intended messages through black and white sketches of “the story”  
— Identify the metaphors that best capture the story  
— Confirm the learning flow  
— Work toward a testable prototype |
| **4. Focus group session** | — Sponsor  
— Executive team members (or other content experts)  
— Project manager  
— Two sets of eight to 10 employees from throughout organization | Focus group test sessions to:  
— Assess the engagement tools with intended audience  
— Gather feedback  
— Refine tool to better achieve desired outcomes  
— Give leaders the opportunity to observe and get the pulse of the organization |
| **5. Implement** | — Sponsor and executive team members (as champions)  
— Project manager  
— Implementation manager | — Produce kits of materials  
— Train facilitators  
— Launch through large group meetings, leader cascading, and/or team meetings |

Source: Root

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5. **How long does it take to create a learning map?**

Learning maps depend on research artifacts like personas, customer journey maps, and customer experience strategy or vision documents. For a company that already has these artifacts, the timeline to create these maps is about two to three months. If companies need to conduct more upfront research, or convince stakeholders of the validity of learning maps, timelines of four to six months are realistic.

6. **How much should you budget to develop and deliver a learning map?**

Prices range from as low as $40,000 to as much as $400,000, depending on a number of individual variables. The variables that affect price include how much research companies already have on hand, the number of people they want to train with the maps, and whether or not firms want to create both physical and digital versions of the maps.

7. **Who helps companies create learning maps?**

Root is the largest and most well-known partner for learning map engagements. There are other providers, however. For example, in the US, The Grove Consultants International and Advantage Performance Group have completed learning maps for companies like Sutter Health, National Semiconductor (recently acquired by Texas Instruments), Time Warner Cable, and VCA Animal Hospitals (see Figure 6). Based in South Africa, Trainiac has a client list befitting its geography, including companies like Barclays Africa and Emirates (see Figure 7 and see Figure 8).³
**Figure 7** Barclays Africa Creates Learning Maps For Specific Customer Interactions

Source: Barclays Africa
**Figure 7** Barclays Africa Creates Learning Maps For Specific Customer Interactions (Cont.)

Source: Barclays Africa

Source: Forrester Research, Inc.
8. What results have companies achieved by using learning maps?

VCA Animal Hospitals tracked client satisfaction scores before and after the learning map training. It staggered the training rollout by region, which created a natural experiment. The first regions that conducted training were also the first to see improvements in client satisfaction scores. Three quarters after the training, the scores remain at their higher levels.

Barclays Africa used learning maps to train employees on how to deliver friendly and effective service. Gary Sharples, former group complaints and communications director for Barclays Africa, credits the training with helping drive an 18% reduction in complaints and a 44% increase in compliments from customers.
Disney Store used learning maps to transform its retail experience. To assess the impact, it tracked business metrics like year-over-year store sales, average transaction size, and conversion rates. It saw significant improvements in all three metrics after conducting learning map training with store employees, including a double-digit improvement in average transaction size. Two years after Disney Store integrated learning maps into training, store metrics remain higher.

9. Who facilitates the training related to learning maps?
Although consultants sometimes facilitate the training, we heard in our interviews that most companies prefer to facilitate the training themselves. In those cases, the consultants train the facilitators from the client company to deliver the sessions. The facilitators can come from the ranks of learning and development staff, managers, or individual contributors who have the willingness and the talent to lead a workshop. For example, Root trained district managers, store managers, and brand ambassadors at Disney Stores to facilitate training of their colleagues. When Lowe’s rolled out its new strategy, it had group leaders facilitate the sessions.

10. What else should you keep in mind when creating learning maps?
Companies should start with a clear idea of what information they want to convey in the maps or what behavioral changes they want to see from employees. For example, Disney Store first defined a vision for the retail store experience: “Creating magical moments for guests of all ages.” That guided the content development process for the maps.

If budgets allow, companies should create both physical and digital versions of the maps. This enables broader sharing of the maps with remote employees and makes it easier to use maps in the future for new employees or employees moving into new roles.

Finally, take advantage of the learning maps by repurposing them either with multiple groups of employees or with the same employees multiple times. BMO initially created its learning maps to share its new experience strategy. It subsequently incorporated them into manager and new-employee onboarding. And when Lowe’s acquired regional hardware chain Orchard Supply Hardware, it used learning maps to share the vision for the new Orchard experience with employees. Every six months, it plans to facilitate sessions in each Orchard store to revisit the main themes of the maps.
SUPPLEMENTAL MATERIAL

Companies Interviewed For This Report

Advantage Performance Group  
Barclays Africa  
BMO Financial Group  
Disney Store  
Lowe's  
Orchard Supply Hardware  
Root  
The Grove Consultants International  
Trainiac  
VCA Animal Hospitals

ENDNOTES

1. We have entered a 20-year business cycle where the most successful enterprises will reinvent themselves to systematically understand and serve increasingly powerful customers. See the October 10, 2013, “Competitive Strategy In The Age Of The Customer” report.

2. Customer-centric culture is a system of shared values and behaviors that focus employee activity on improving the customer experience. See the March 14, 2014, “How To Build A Customer-Centric Culture” report.

3. Forrester identified Emirates’ approach to using customer journey maps to plan customer experience improvements and train employees as a best practice. For more detail on how Emirates uses learning maps, see the March 25, 2013, “Case Study: Emirates Uses Customer Journey Maps To Keep The Brand On Course” report.