The eLearning Coach Podcast #33
ELC 033: Experience Mapping
With Jim Kalbach
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Welcome to The eLearning Coach podcast, online at theelearningcoach.com. I'm Connie Malamed bringing you ideas and tips for success with creating online and mobile learning experiences.

Hello learning people, and welcome to episode 33. I think one of the best ways to innovate in learning experience design is to get ideas from other fields. One design technique I think you'll find interesting comes from user experience, and it is the creation of experience maps. They can give us another perspective on design and serve as a central point for team discussions. In this episode, I interview Jim Kalbach who has recently written his second book titled *Mapping Experiences*. Jim has been involved in user experience, information architecture, and design-related consulting. He is currently head of customer success at MURAL. You'll be able to find the show notes for this episode at the eLearningCoach.com/podcasts/33. Now, here's the interview.

Connie: Hi Jim. Welcome to the eLearning Coach Podcast.

Jim: Hi, it's great to be here.

Connie: I was really intrigued by your book on experience mapping, and I thought there were applications to learning experience design. Can you start off just telling us what is *experience mapping*?

Jim: Once you start unpacking those terms, they get deeper and deeper and more complex. I ask my students in the courses that I give, what is an experience, we talk about experience design and customer experience and user experience, but we really can't define the word experience concisely. I that's okay, because we can still talk about experiences as a human phenomenon. That's really what I'm talking about. I believe when we talk about experiences, we're talking about a human condition in a holistic way that tends to look at the person and their emotions, and it tends to look at the situation and the context. And I think these days whether we're talking about instructional design or product design or service design, we're really interested in understanding the situation and the context that the user, that the customer is in. So, experience mapping is really about observing the world as it is, those experiences, those big, fuzzy experiences, and then trying to get our hands around them. That's where the mapping

part comes in. So, what the mapping does is it's a way to visualize the experience so that a team, a group of people, can talk about the experience and look at it, look at it holistically in slow motion. It's a snapshot of that experience. Experience mapping is looking at phenomena that happen in the world, what people are thinking and feeling as they interact with a service or product, and the mapping part of it is diagraming. It's actually trying to capture that so then you can have a structured conversation around the beginning, the middle, the end, the flow and things like that.

Connie: Would you say that experience mapping also includes the actions and tasks that a user performs?

Jim: How you define an experience is up to the map maker, or the person making the diagram. Experience is this big holistic concept, and I typically root it in actions, thoughts and feelings. So typically, when I want to take a snapshot of somebody's experience I'll describe their actions, thoughts and feelings over time. But it can include other facets as well too, we can talk about other dimensions of an experience, like their pain points or their interaction in a specific context, like mobile experience is situated within a broader experience, goals that they might have, pain points that they might have. There's lot of other facts that we can bring in to the map of the experience, but typically actions, thoughts and experience are kind of the root that I like to focus on, and then I'll enhance that with other facets of information.

But typically, when we talk about diagraming what we do is we observe the world and then we categorize what we see in the diagram, and often those are kind of seen as swim lanes. We can talk about here are the actions that the person is doing, and at that same time here are their thoughts, and at the same time here are their emotions, and at the same point here are their pain points, for example. And then what that does is it allows us to line those things up so that we can built empathy or we can put ourselves in their shoes.

Connie: So, I know you can observe certain things, but how do you find out what someone's feelings are during an interaction?

Jim: That's a tough one, and very often there is a little bit of intuition involved there, inference rather. But we can directly speak to an individual about their emotions, in other words as we interview them, let's say that the basis of data collection is an interview, they discuss a specific spot in their experience, we can say 'how does that make you feel?'. We can collect kind of self-reported emotions. I think there are also ways to do that with survey that I've see as well too, but that's also still kind of self-

reporting. It is difficult to really get any kind of quantification of those emotions, but at a broad stroke level I think we can still draw a map of those emotions by directly asking folks that we're intervening, or by inference as well too. So sometimes that's a little bit fuzzy, but that's okay I think, because the concept of experience is not scientific research that we're talking about, we're really looking at what is their experience. You can get more scientific about it, but then that takes often more time than folks have for a given effort. It depends on your degree of fidelity that you want there, but it is possible to get at emotion sure.

Connie: It does make sense to me, because even if you're intuiting it, that's a whole step forward towards having more empathy for, in our case, the learner, or the user, because so often people just go and design without fully thinking through what the user is experiencing. So, even just guessing at it or talking to one or two people I think can really up one's empathy. I understand that.

Jim: Absolutely. And then engaging a team or other folks that you're designing with in that conversation is also healthy. And really when I talk about experience mapping, I stress mapping as an activity, that the diagram is a centerpiece of that activity and you want it to be valid and you want it to be compelling and visual and all those good things too. But it's really what conversations can I foster, what conversations can I have based on this diagram. So we might not have really good data around emotions, but you can still use the map as a conversation point with the team so that they do have that empathy. And, again, I think at broad stroke level you can infer or intuit some of the emotions that folks are having. When a task is done they probably feel relieved, or where are their likely anxiety points. And so I do think it's really healthy to have those conversations even if you don't have the scientific data behind it.

Connie: I can tell from the short time I've been speaking with you that you're very passionate about experience mapping. How did you first get interested in it?

Jim: That's a good question. I think it could go back further than my professional career, and it was just a general fascination that I have with maps in general, like globes and maps and things, I love looking at them. So I think there's that. But I also think I got my start in design through information architecture. I have a degree in library and information science, and then after I got my graduate degree I kind of fell into information architecture, and that matched my academic studies quite well. And in information architecture we're also looking at very abstract constructs.

So how do you map out the navigation of a website, for instance, or categorizations? So looking at these big kind of mapping and architectural problems that aren't always tangible, I think it's something that I have done aspects of my studies and my career as well too. But about eight years ago, or so, maybe even 10 years ago, now, I did have the opportunity in the job that I was working at to do a lot of this type of mapping work around customer journey maps, and at the time workflow diagrams as well too. And I just really started getting interested in that. But I think it matched both my personal preference for looking at diagrams and creating them, as well as taking a holistic look at experiences, but then also facilitating the conversations around those as well too. So, I often see the map maker people who created diagrams, that's only part of their role.

The other part of the role is to facilitate the conversation as well. And that's also something that I really like doing too, sharing the map with a group of clients or stakeholders and then leading them in a conversation around that as well. I think all of that together is just something that has always kind of interested me.

Connie: Nice. It's a good fit. From reading your book I see that there's so many different types of maps that one can make and designers use many different types to solve different types of problems. Can you give us an example of just a few types of problems and the type of map they might use to solve the problem?

Jim: Part Two of my book is really a general process for mapping at a high level. And the first chapter in Part Two is really talking about initiating an effort, and that's setting it up the right way, and it's really about matching the diagram with the problem. It's what are you actually trying to do and then pick the right tool to do that, because there are different ways to map experiences, and you probably heard of some of these things. customer journey maps, experience maps, service blueprints.

I just talked about workflow diagrams, there's also mental model diagrams, and ecosystem maps, and so forth. There are all these terms out there and all these techniques. Some of them have a longer history than others, some of them have prescribed methods around them too. A personal realization that I had when I was working on a project, I was like what, which one of these should I use and what is the difference between these things? I've been examining the difference between these things. But I've came to the realization that there's actually some fundamental that binds them together, and that what they're trying to do is encapsulate a snapshot of the experience and align that to what an organization is doing to try to provide a service or a product. And that's where I use the term alignment diagram.

The term alignment diagrams is really just an artificial categorization that I came up with to allow me to talk about all of these things together. Because fundamentally what they try to do is align the experience to the organization. So I talk a lot about the concept of alignment in the book, but that opens up then possibilities. I hope my book is about possibilities, you have all these choices. So to get to your question, it's, okay, now I have a problem, which one of these approaches should I take? And I think there are a couple of questions you need to ask.

The first one is what's your point of view, that is, whose experiences and which experiences are you looking to diagram or to map out. For instance, we can take, let's just say a conference, a professional conference, there's lots of different points of views on that conference, there's the attendee point of view, there's the speaker point of view, the organizer point of view, sponsor point of view, the venue organizer and staff point of view. And within each of those there are probably subgroups, like a first time attendee vs. a long time attendee. You need to first look at whose experience do we want to map. And then you need to look at their relationship to the event or to the to the service as well too. Are we looking at them as a customer, how did they first hear about the event, when did they decide to come to the event. In that case a customer journey map might be the best thing to do. Or are we just looking at their mental model of a conference, what do people think of as an attendee when they go to a conference? In that case a mental model diagram might be the right thing to do as well too.

So the first thing you need to do is look at the point of view, because these maps, and I think sometimes this is where there is a mismatch of expectation between them the mapmaker, the person doing the journey mapping or the experience mapping, and the stakeholder. And that is you're not going to be able to map everything in the world, if we take a complex subject like a conference there's lots of emotions lots of different perspectives in there, you need to frame it in the right way by getting a point of view first. But then you also need to scope it, so where does an experience begin or end? Does my experience as an attendee of an event begin before I even get there? Yeah, it can, and it can go on afterwards as well too. So which part of that experience, where does it begin or end, and I call that the scope, you need to determine the point of view the scope.

And then the other thing is the focus, and we touched on that already briefly in the beginning of the conversation, and that is what are the aspects of the experience that I want to focus on? Actions, thoughts or feelings for me are kind of always core, you can always bring those in. There might be some other aspects, going to a conference and managing information, gathering information, that might be a facet of the experience

that I might want to focus on as well. So you need to think about what's the bouncing ball that you're going to follow through that experience that you've scoped out as your focus. So I talk about the point of view, the scope and the focus. And once you can determine those then you can start looking at do I need a customer journey map or an experience map or a service blueprint and some of these other things. And I talk about the differences then in the book to help you choose.

But in the end, as I have already hinted at, don't get hung up on the labels, because the labels get used interchangeably anyway. What one person calls an experience map is another person's customer journey map, for instance. So don't get hung up on those labels. Think about what you're trying to do and how you're scoping the effort and what's your point of view in the focus, think about that, how you're going to represent that and structure that in a visualization. But ultimately what are you going to do with that? How are you going to use that to foster those conversations that I talked about. So if you can look at those things, don't worry about the label, it's really about what you're trying to accomplish. And be outcome driven in setting up the effort.

Connie: Is that essentially what your process is for creating a map, figure out the point of view, the scope, the focus, and think about what you're going to do with it?

Jim: Those are the questions that you have in the initiation phase. I have five phases actually that I talk about in the book. You initiate, you investigate, illustrate, and then align, and by that I mean align the team internally towards the experience. But in the initiation phase the five questions that I put out there are what's the point of views, what's the scope of the experience, what's the focus that you're going to record and diagram, how are you going to structure and represent that, and then finally what are you going to do with the diagram, how are you going to use it, and who's the audience as well too.

If you can think through those five things, it might be obvious and you might be able to jot those down in five minutes, it might be a half an hour conversation with your stakeholders, but some of those may take some more time to think through. I think regardless of the level of fidelity or the size of project that you're working on or the complexity of it, you can still think through those five questions either quickly or taking your time. But setting up the effort in the right way so that you make sure that you have addressed the problem that you're trying to solve in the right way.

And then after that, like I said, it's around investigation. You want to go out and do those observations because you want the data to be valid. And then how do you visualize that

and illustrate it in a diagram. And then the fourth phase that I talk about is aligning the team to the experience, getting them in touch with the concepts of the map, and really trying to build empathy across the team. But then also envisioning the future as well too. So if we observe the world as it is, then what do we do? That's really the question is, what is this telling us to do differently or to do at all?

Connie: Now I would like to focus on how we can apply this to designing learning experiences. I don't know how familiar you are with it, but I know you obviously know a lot about mapping experiences. Give an idea of what types of mapping could be helpful for us to better understand our audience and what they experience.

Jim: You can come up with a type of a diagram and call it a learning experience map. And there are probably even patterns that cross different types of experiences, because there are fundamental aspects of learning that you could probably identify. I don't think something like a customer journey map would be appropriate, because typically when we're talking about a customer journey map we're talking about why does somebody decide to buy a product or use the service, and, secondly, what keeps them there. So typically in a customer journey map you're talking about decision and loyalty. I think with learning, though, there are probably some other fundamental things that you're talking about.

In particular, you probably want to look at the teacher experience and how that relates to the student experience. So, you might actually have two different points of view that you might want to relate to one another, and include two different points of view in one map. But there are probably some mental aspects that you might want to look at, like particularly did learning take place, so assessment or something like that afterwards, the lesson plan or communicating the topics to the student before that. We're kind of hypothesizing now, because I don't know too much about the learning experience specifically, but you could map it out in a very similar way and look at those questions that I just talked about. Whose point of view, what's the scope of the experience, what aspects are you going to focus on, how are you going to visualize and structure that, and then what are you going to do with the map after you're don. If you look at that across the learning experience, then you would come up with— I'm borrowing from the literature around service blueprints or customer journey map, you could come up with a learning experience diagram. And that would then be a diagnostic tool that you could use to improve your learning experience. It then becomes a springboard into improvement or even innovation of the learning experience.

Connie: A lot of the listeners design online learning, and so when somebody's working for a large corporation or organization and they are required to take a course, I was thinking of that one could map that journey. They get an email that says this required, they go into the learning management system, they often get frustrated because maybe they can't find the course, or they can find it easily but then they get into their eLearning and it's boring, and they have all these experiences there. On every slide, actually there is in some ways a different experience, whether they're engaged, whether it's not relevant to them, so there's all this emotion. Perhaps they have a problem, if they're not very computer literate, perhaps I don't know how to move on, they're not sure how to answer a question. Experience maps would be great for us to try to figure out and understand the frustrations that people may be experiencing and then how to improve it.

Jim: Absolutely. I completely agree with your thought process there. That's exactly the use of these types of techniques, what existing technique might be best. I tend to use the terms experience map quite broadly, I think that would be most appropriate. It's not really about a customer journey map, because they're not really buying anything from you. And I think a service blueprint is also very specific, so for me the term experience map tends to be very flexible and you can apply it to many situations. I'll often preface that with learning experience map. So, you put the term 'learning' in front of it.

I'll give you an example of that. Once I did some work with a publisher and we were looking at the relationship between the authors and the publishers. They wanted to strengthen that relationship, a lot of people are self-publishing these days or blogging, though we wanted to kind of get them to write for us, and we did an author experience map, what is it like to write for us. I think the term experience map is kind of malleable and most flexible. So, yeah, learning experience map, why not?

Connie: What about the author and publisher, it just seems like an interesting example. When you're building these maps, do you feel that it's showing the big picture of you, is it showing detail, is it showing both, what do you think?

Jim: Typically, particularly if you're using the term 'experience', like I said, experience is this big, fuzzy thing, and we can really only understand by definition. When does it begin or end, well, you have to set those boundaries. But typically when we talk about experience, we are thinking holistic and we are trying to take a holistic view of things. We also have to think about kind of granularity as well too. I think there are different levels that you can approach the aspect of experience and experience design or learning experience design. I think at some point in time you probably want to get that big picture. Where does it begin, and maybe even go a step before that, what were

people doing before they begin learning or teaching. That kind of goes all the way through how do they apply the knowledge that they learned, for instance. So I think at some level you do you want that big picture.

But at other times you're going to need to go into the detail, and this is that fifth question that I was talking about, how are you going to use these diagrams. If you just need to have the big-picture conversation with your team or stakeholders, that's fine, but sometimes you do need to drill down. And what I've done is I've actually done both levels of granularity. So on one project that I worked in, we did a customer journey map that was very high level. When did people first hear about this brand, how did they decide to buy the product, for instance. Super, super high level, literally just like one page, the whole thing fit on there. Actions, thoughts and feelings across different phases that we set up. But then we realized that we needed a lot more detail. So what I did is I took each one of the phases, becoming aware, or the decision phase, I created separate much more detailed workflow diagrams for each one of those. So I had both levels of granularity, because that was one of the problems that the group that I was working with needed to understand. Here's the big picture but now let's get down into the details. So I actually created two separate documents that kind of fit together with one another, you double click on one and then get down into the detail with the other set of diagrams. So the diagrams, the visualizations that I was talking about, often don't stand alone. Sometimes they can stand alone, but often there are things like personas involved with that, or a more detailed interaction diagram for a specific part of it that kind of go around it. But I think the big picture diagram stands in the center, so I like to always start there and then go into more detail as needed.

Connie: You can take one piece of it and get more and more granular. Do you have some tools to recommend for building the diagrams?

Jim: Sure. There are lots of different tools that I've used and I've seen other folks use. In the end it's not about artistic ability, in the end some folks say, oh, I can't do that because I can't draw, or I can't use Photoshop or Illustrator or one of those programs. Don't let that stop you, because at some level, depending on your team or the situation, it might just be sticky notes on a wall, that's an experience map as well too, and you can use that to foster the conversation. So on the lower level we kind of have these physical artifacts, like sticky notes, flip charts, whiteboards, but typically you see things even like spreadsheets, using Excel or PowerPoint to some degree as well too.

There are also some online tools, so just a short shout out to the company that I work for called MURAL, it's mural.co. We have an online whiteboard, we actually allow you to

do that kind of sticky noting right in your browser. There are some specific for-purpose mapping tools as well too, there is something called the touch point dashboard, which is more database driven and it allows you to manage and experience our customer journey over time as well too. And we're starting to see more and more of those for-purpose mapping tools come out that are mostly online. And then I think on the high-end you do have things like Photoshop and Illustrator if you want to do high gloss or a very polished diagram as well too. But often it's a combination of those, so you will start from sticky notes and then work out a model with your colleagues, and then through investigation you might collect data in a spreadsheet and sift through that, and then use an illustration tool, even if it's Vision or something like that, to create a first map. And then if you need that high polish, even if you can't do it yourself, you might hire a graphic designer or something to work in Illustrator as well too. So you typically work across different tools as well too. So there's a lot out there, but don't let the tools kind of scare you from doing the exercise. It can still be an activity that you can do in the programs that you're comfortable in, simply like a spreadsheet as well too.

Connie: I agree. You can't let that tool stop you from diagraming, it's pretty easy to do. Finally, the last topic that I wanted to speak with you about is mental models, because they are so important in learning. I loved your example as an explanation of mental models about how a thermostat works. Would you mind explaining that to the listeners?

Jim: Sure. The explanation that you're talking about comes in a chapter in my book around something called 'mental model diagrams', which is a specific technique that a woman named Indi Young pioneered, and she brought out this book in 2007. That's a very specific prescribed method, and the book tells you exactly how to do it. So if you're interested in this kind of thing, I recommend her book. And you can do it from beginning to end. But what she was interested in doing was really looking at the thought process and even the feelings and the philosophies that people have around a given topic. And this really comes out of psychology research around mental models. What is our model of how the world works?

And the example that you're talking about is the thermostat, at least the way that thermostats here in the US work, it's really based on temperature. So if you come in from a cold day into your house, if you turn the thermostat up, that's not going to make the heat go faster, it's just going to go to a higher temperature. So we have this mental model that a thermostat is like a hose or a valve, but it's really more like an on/off switch, and the question is when does it come on and when does it go off. And that's really what the setting does in a thermostat, at least the way they are in the US. What mental models is really looking at is what's the human mental model of the thing, and

does the technology match that, and is there a gap in there? And when you talk about learning, how might a student, for instance—I'm just hypothesizing now—that what you could do is look at how do students think about a subject or a topic or even just learning in general, what's their mental model of learning, and really trying to not work against that but trying to understand it so that you can work with that and turn that into your advantage.

Connie: Can you give us an example of when someone might use a mental model map?

Jim: Mental model diagrams are actually one of the more abstract types of diagrams that I talk about in the book. So the third part of the book takes individual types of diagrams that are already out there, then talks about one per chapter. Customer journey maps, service blueprints, and the I have a chapter on mental model diagrams. And compared to the other examples that I have in the book, the mental model diagrams are the most abstract, because they're not looking at how a person uses a specific technology or a service, they're really looking at what's the philosophy, the feelings and the thought patterns behind a specific domain. Like learning, or the example of that Indi Young uses in her book, that I use in mine, is around going to the movies.

So it's really just looking at human activity. What do people think, do, feel when they go to a movie? And it's really just trying to get a picture, a snapshot of that, so that we can understand it. With these diagrams we're essentially trying to model abstract things, like in experience or like a mental model, for instance. And once you have a diagram then that allows you to have conversations with others around it, or it allows you to diagnose some specific aspects of it in a way that you can't do when you just think about the whole thing all at once. So really it kind of breaks things down and makes it a lot more tangible. And that's really what the mental model diagram is trying to do, it's trying to look at a specific domain, a topic, and draw a picture of how people might be thinking about that aspect of their experiences.

Connie: One thing I was thinking about and I wondered if you think this would work, is in terms of content development, we often work with content that even we don't understand, we work with subject-matter experts. And I thought it might be interesting when you're teaching something technical, either software or mechanics, like for example how to repair a machine, diagraming a mental model map of how a new user, new hire might think about how a machine or something technical might operate, and then by comparing that with how it really operates, and then using that knowledge of the differential between the two to design your learning experience.

Jim: Yeah, absolutely. It's kind of goes back to my current role. That's part of my job, I'm the head of customer success at MURAL. And we're an online whiteboard. One issues that we find is that the type of product that we are, there's not a clear mental model around it. For instance, you think about Google Docs, you can say, oh, it's like Word, and Word is like a page, so you have these metaphors that kind of go back to something else. And what I find when I'm trying to explain MURAL in my education programs, my trainings and tutorials, when I'm trying to explain that to others, I have to use lots of different metaphors, because people think about it in different ways. So I just use the term online whiteboard, or the term 'mural' itself, our name, mural is a painting on a wall. Other people think about it like a board or a canvas. I'm constantly trying to think about ways that I can explain it to somebody who may be unfamiliar with that type of technology. It's really around what's their mental model.

And very often, by the way, metaphors are a way that we help people kind of expand their mental models. Because what a metaphor does is it relates one thing to another that folks might understand. So people understand what a whiteboard is or a canvas or a board, but they might not understand what our technology does. So we use the metaphor of those things to help understand what you can do with ours. That's just an example of thinking about how are these people going to be thinking about this and what experiences might they have had in their past that I can draw on to help them understand what this new thing is.

Connie: Right. So much of our thinking is analogical. If someone has nothing in their experience to relate it to, they literally cannot understand it.

Jim: They cannot understand it, and that's why metaphors come into play. There is always something similar that they might be able to relate it to. And particularly with technology and computers, and if you're talking about online learning, computers are just essentially one metaphor after another. There there's no virus on the file in a folder on your desktop. There's no virus, there's no file, there's no folder, there is no data.

These are all just metaphors that people who design computer systems came up with so that we can understand it. When you get down to it, a computer is just ones and zeros and a bunch of pixels. So these are all illusions that we create so that people can understand computers. And then we have things like a page or webpage, it's not a page but we use that because people understand the concept of page. So if there is nothing-- metaphors are great, if there's not out there, then metaphors are great. And that's really thinking about mental models. If you're doing that, if you're trying to apply a metaphor in

a learning situation, you're really trying to say, hey, what's the mental model that will help me communicate this new thing by using a metaphor of an old thing.

Connie: I think I'm going to end things on the note that we're all living in a world of Illusions.

Jim: I like that [chuckles]. Thanks so much for having me.

Connie: Thank you so much, Jim, and I'll make sure to have links to everything about you and to the book in the show notes.

Jim: Thanks again.

Connie: I hope you enjoyed this conversation. I think it's good to remember that you come up with any type of visualization that suits your purpose. The point is that thinking about and mapping a learner's experience can help us create better experiences for people who want to learn. You can find resources related to the session at the elearningcoach.com/podcasts/33. And, if you would, please leave a rating and review in iTunes. Take care, and I'll talk to you next time.