Customer Journey Mapping
An Introduction
Customer Journey Mapping
An Introduction

Please note that this is intended as a presentation document and the slides contain animations and builds. There are some supporting notes on the notes pages for some of the slides. To see these, go to the View menu and click Notes Pages.

To show the presentation, you should view it in Powerpoint Slide Show mode – to go into this mode, do one of the following:
- Click Slide Show at the lower left of the PowerPoint window
- On the Slide Show menu, click View Show.
- Press F5.

This slide will be hidden when you start the show from the title slide (slide 1).
Customer journey mapping is the process of tracking and describing all the experiences that customers have as they encounter a service or set of services, taking into account not only what happens to them, but also their responses to their experiences.

It’s a key tool help achieve service transformation:
• A growing emphasis on getting closer to customers
• Helps bring customers’ stories to life
• Acts as a call to action and help drive culture change
• Can help shape strategy and policy

At its best, journey mapping can be truly transformational
CUSTOMER JOURNEYS IN GOVERNMENT

Many customer journeys dealt with by government cut across departmental boundaries. Journey mapping can be particularly valuable here.

INDIVIDUAL JOURNEYS

Birth or adoption
- Maternity leave
- Ante-natal care
- Registering birth
- Benefits
- Trust fund

Starting school
- Ofsted reports
- Applying for school
- Pre-school boosters

Getting married
- Benefits
- Taxes
- Registration
- Name change

Retiring
- Applying for pension
- Tax on retirement income

Bereavement
- Registering death
- Pensions
- Notifying change of circumstances

BUSINESS JOURNEYS

Starting a business
- Registration
- VAT
- Financing
- Applying for grants

Tax/compliance
- End of year returns
- VAT
- Auditing requirements

Employing someone
- Jobcentre Plus
- PAYE
- National insurance

Health & safety
- Registration
- HSE inspections
- Local authority regulations
- Legal system

Closing down
- Changing name, address or status
- Redundancy payments
- Tax & accounts
WHERE JOURNEY MAPPING CAN HELP

Do you have gaps in your understanding of the experience that customers have at the moment?

Would it help you to have high impact feedback to challenge conventional thinking?

Do you have intractable policy challenges – where you keep trying things but without getting anywhere?

Do you need to convince colleagues in other functions about the importance of a customer-focused approach?

If you tick any of these boxes, it’s likely that journey mapping could be of help.
JOURNEY MAPPING IN ACTION

**BETTER CUSTOMER EXPERIENCE**

Journey mapping helps:
- See things from the customer’s point of view
- Get it right when it really matters e.g. when emotions are highest or need greatest
- Deliver a seamless, streamlined experience that cuts across silos
- Deliver information, messages and services at the most appropriate time

**GREATER EFFICIENCY**

Journey mapping helps:
- Target limited resource for maximum impact
- Plan the most efficient and effective experience by reducing duplication and shortening the length of processes
- Identify cheapest ‘cost to serve’,
- Identify ‘baton-change’ points where service or communication breakdown is most likely
DIFFERENT TYPES OF JOURNEY MAPPING

There are three types of journey mapping process.

CUSTOMER EXPERIENCE MAPPING
Qualitative, focused on emotional insights to tell a story with passion and narrative. Powerful way of engaging staff and customers.

MAPPING THE SYSTEM
Maps steps in a process – also known as process mapping. Identifies where to act to make the experience as easy, pleasant and efficient as possible.

MEASURING THE EXPERIENCE
Measures how well the experience is delivered; links to customer satisfaction, metrics & tracking. Allows you to quantify the effect of changes and contribute to business cases.

Combine both approaches for incremental benefit.
This page shows the steps you need to go through to construct a customer experience map like the example opposite. The following pages give hints to help in each step of the process.

### HOW TO CONSTRUCT A MAP

#### CONSTRUCTING YOUR MAP: KEY STEPS

<table>
<thead>
<tr>
<th>Step 1: Confirm the journey and customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now you have carried out your in-depth mapping event, review the work of the set-up phase to confirm type of journey (with start and end points) and customer segments.</td>
</tr>
<tr>
<td>Ensure definitions of these are clear and that everyone has a common understanding of them.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2: Identify key journey steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start by noting down all the journey steps people go through. It’s useful to put these on Post-it notes so they can be moved around.</td>
</tr>
<tr>
<td>Arrange these in chronological order and challenge to make sure you’ve got the sequence right. Ideally you want to map around 6-10 key journey steps.</td>
</tr>
<tr>
<td>Ensure you’re clear which channels people use at each step.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3: Actions, feelings, thoughts and reactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each step, and taking the customer’s viewpoint, write down what they do and how they think and feel.</td>
</tr>
<tr>
<td>Write this in the everyday language customers use – put it in their own actual words where possible.</td>
</tr>
<tr>
<td>Say what people’s emotions are and how strongly they’re felt.</td>
</tr>
<tr>
<td>Use emotive words – they help bring people to life.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 4: Touchpoints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Again, for each step in the journey, write down what the touchpoints are. A touchpoint is a point in the process where you have some sort of interaction with the customer.</td>
</tr>
<tr>
<td>Think about physical interactions (e.g. buildings), human contact (face to face or remote) and communications.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 5: Moments of truth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now, looking at the whole journey, identify the moments of truth.</td>
</tr>
<tr>
<td>These are the key points in the journey where customers may pause and evaluate the experience, or make a crucial decision.</td>
</tr>
<tr>
<td>Aim to be discriminating here – don’t be tempted to label every step as a moment of truth!</td>
</tr>
</tbody>
</table>
CUSTOMER EXPERIENCE MAPPING

BORDERS AND IMMIGRATION AGENCY EXAMPLE

<table>
<thead>
<tr>
<th>Objectives, scope &amp; journey type</th>
<th>Applying for entry clearance to the UK</th>
<th>Customer segment</th>
<th>Short-term student from China (Sichin)</th>
</tr>
</thead>
</table>

### Moments of truth

| Key Journey Steps | Sichin has details of her course and tries to find out about visa application. Finds the website easily and is encouraged | Sichin applies online and sends supporting documents by secure post. Expensive but can’t risk losing them | Payment has gone through but she’s heard nothing yet. It’s a big sum of money – hope all’s OK | Application and checks have shown one of the documents is missing. Sichin finds this but more expense | Contacted for interview. Worried – biometrics sounds alarming. Anxious now about timing – all taking a long time | Attends her interview. Nervous – building intimidates her. Hope it’s gone OK but hard to tell | Visa arrives in the post. Hugely relieved and can now look forward to and finalise her plans for coming to England |

### Actions, feelings, thoughts and reactions at each step

| Touchpoints | Website; needs to be easy to access 24/7 Supporting phone line | Currently no contact. Opportunity to confirm receipt | Payment goes through bank – no direct acknowledgement | Query sent by email. Opportunity to update on progress and timing | Letter sent out. Opportunity to say more about the process | Face to face contact with interviewer. Could say more about process to reassure | Postal delivery of visa Can be sent with more info on immigration |

© Oxford Strategic Marketing

- Getting managers and other staff to think about how people think, feel and act at every journey step
- Identifying key points where we can act to transform the experience
- Bringing this to life to ‘sell’ internally
FREE SCHOOL MEALS EXAMPLE

Objectives/ scope
Map Free School Meals (FSM) to identify how to deliver a better customer service and achieve cost savings.

End to end system definition
Process of making a new application for FSM from becoming eligible through to receiving meals.

Customer segment
All new applicants.

Core system goals

<table>
<thead>
<tr>
<th>Goal 1:</th>
<th>Goal 2:</th>
<th>Goal 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliver an important benefit consistently and without delays</td>
<td>Minimise the number of entitled people leaving the process without obtaining the benefit</td>
<td>Contribute towards a required 3% efficiency improvement across the council</td>
</tr>
</tbody>
</table>

Customer journey


Customer Touchpoints:
- Becomes eligible/ aware of eligibility
- Finds out about FSM and how to apply
- Completes application form
- Receives request for more information/ verification
- Sends extra information/ verification
- Receives confirmation of FSM entitlement
- Child starts receiving meals

School Touchpoints:
- Receives report on entitlement
- Provides meals

NOTES ON PROCESS AND CRITICAL INCIDENTS

- Application rates may vary by area; in some places there’s more stigma attached
- Four different routes have very different associated costs
- Sometimes can verify internally; sometimes have to go back to the customer
- On-line applications have earlier start date than paper ones
- Wasted materials often associated with this step
- Will continue to receive benefit until next review, even if eligibility changes

Critical moments:
- Sharing what the current process looks like
- Identifying duplications and deviations from the norm – where do things go wrong?
- Identifying how and where things can be improved
- Comparing the view of staff with the view of customers
- Training – showing how things should be done
THE HEART MONITOR

MINISTRY OF JUSTICE EXAMPLE

Objectives, scope & journey type
Track the process experienced by jurors to improve levels of service
Customer segment
Jurors

Moments of truth
Receive summons
Jury selection
In court pre-trial
In court – during trial
Deliberation
Delivery of verdict
Post trial

Key journey steps
Receive letter – looking forward to it
Judge was ‘professional’
Expenses ‘a hassle’
Trial was impersonal
Judge jury – appreciated
Finishing was a relief

Customer Satisfaction Rating
Great +100
-100 Poor

Levers for solution hunting
Comms: Manage expectations
Channel: 24 hour access
Customer face: Explain delays
Environment: Make the wait as painless as possible
Process: Simplify expenses system
Look at time-keeping
Comms: Make jurors aware of role played by all the evidence
Environment: Provide adequate facilities
Comms: Brief on verdict delivery
Customer face: Talk to jurors – stress the importance of what they’ve done
Comms: Ensure follow-up letter goes out re sentencing

Expressing a journey in a highly visual way that can engage and motivate stakeholders
Identifying the highs and lows of the experience
Clearly highlighting the areas where we need to take action most urgently

© Oxford Strategic Marketing
THE MAPPING WORKSHOP

**Preparation**

**WHO?**
- Customers/users of service or representatives (e.g. charities)
- Frontline staff
- People from policy and strategy
- Service owners
- Experts on any key research
- Creative and energetic people who will join in and contribute
- People with a vested interest in the project

**HOW MANY?**
- Ideally about 6-10 people
- The more you have the longer you’ll need…but you’re likely to get more views, which could lead to a more robust result

**WHERE?**
- Location can really affect quality of people’s input and therefore your final output
- Offsite is usually best
- Choose a location that is creative or relevant to the journey you are mapping

See online toolbox for workshop planning checklists

**Running**

**WHAT TO BRING?**
- Clear description of, and evidence supporting, the segments you have chosen
- Customer profiles and pen portraits, pictures, anything relevant that brings your customer to life
- Relevant research
- Existing satisfaction measures
- All inputs from mapping events

**HOW TO RUN?**
- Plan an agenda that’s realistic for the time and number of people that you have (see following page)
- If you need to cover more than one journey or customer group, be realistic. Consider splitting your participants into teams to handle multiple journeys, or divide tasks across more than one workshop

See following page for an outline agenda and workshop approaches

**Capture & Output**

**WHAT TO CAPTURE?**
- Plan on the day to capture as much as possible. It’s easy to edit after the event, but not to recapture something that’s lost

**WHAT OUTPUT?**
- Be prepared after the event to tidy up and edit as necessary
- Simplify where you can, but without losing the real understanding that can come from the detail
- Look for output that is visual and arresting – with pictures and diagrams
- Check back with customers or staff who took part in mapping events – does your output really reflect their experience?

Make sure that you capture the understanding behind the words that were said.

When constructing journey maps, a workshop involving a core team of people is usually the best way to capture and articulate the journey or journeys you are mapping.

The mapping workshop is the engine room of the process.

Bringing together all your customer research and understanding in an inspirational setting with creative and energetic people should be a hugely engaging experience for them, and result in transformational journey maps.

Running Capture & Output

See online toolbox for workshop planning checklists

The BIA case study in Section 6 gives further examples of creative ways to capture output

When constructing journey maps, a workshop involving a core team of people is usually the best way to capture and articulate the journey or journeys you are mapping.

The mapping workshop is the engine room of the process.

Bringing together all your customer research and understanding in an inspirational setting with creative and energetic people should be a hugely engaging experience for them, and result in transformational journey maps.

When constructing journey maps, a workshop involving a core team of people is usually the best way to capture and articulate the journey or journeys you are mapping.
RUNNING A MAPPING WORKSHOP

Obviously any workshop plan will vary according to your specific objectives, inputs and participants, but here's a suggested outline agenda and some possible mapping approaches.

### OUTLINE AGENDA

**For a full day workshop**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30</td>
<td>Introduction and ice breaker</td>
</tr>
<tr>
<td>09:00</td>
<td>Setting the context</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00</td>
<td>Getting to know your customers better</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>11:00</td>
<td>Defining the journey</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00</td>
<td>Build journeys (see approaches on the right)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>13:00</td>
<td>Share outputs</td>
</tr>
<tr>
<td>13:30</td>
<td>LUNCH</td>
</tr>
<tr>
<td>14:00</td>
<td>Reprise morning work to ensure shared understanding of all journeys</td>
</tr>
<tr>
<td>14:30</td>
<td>Identify touchpoints and moments of truth</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>15:00</td>
<td>Share outputs</td>
</tr>
<tr>
<td>15:30</td>
<td>Identify opportunities to make changes</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>16:00</td>
<td>Share outputs</td>
</tr>
<tr>
<td>16:30</td>
<td>Agree next steps and close</td>
</tr>
</tbody>
</table>

### WALLPAPER WORKING

Recreate the steps of the journey on a long sheet of wallpaper. Show all entry and exit points, highlighting different routes, options, and what’s happening at each stage.

### POST-IT PARKING

Use Post-it notes to detail each step of the journey, arranging them in order to create the sequence of events. This can be used alongside the wallpaper approach. Remember to photograph final output and/or number the Post-its so the order of each step is not lost.

### PRO-FORMAS

Print off pro-forma worksheets and ask participants to complete them. Make them large (at least A3) to maximise impact and encourage detail. Make them colourful and specific to each target segment, using photographs and pictures.
EXAMPLE OF COMPARING A CURRENT AND IDEAL EXPERIENCE

FREE SCHOOL MEALS – IDEAL JOURNEY

FREE SCHOOL MEALS – CURRENT JOURNEY

Tameside Council mapped both the current and the ideal journey when re-designing their free school meals application process. By plotting the two side by side they were able to identify where the customer experience needed to change, in what ways and over what timescale.
The different checklists are here to help you think about problems from different angles, but they are not mutually exclusive. Achieving better efficiency, for example, can often go hand in hand with improving the customer experience.

**IDENTIFYING PROBLEMS AND OPPORTUNITIES**

**CHECKLIST 1: THE CUSTOMER EXPERIENCE**

- **Complexity**
  - Is the route through the system clear to customers? Are there points where they’re unsure where to go next?
  - Are they having to do the same thing more than once?
  - Are they clear where responsibility lies at each step in the process?
  - Are badly-designed forms or other materials causing delays?

- **Time taken**
  - How long does the whole process take now?
  - How long does each step take?
  - Are people satisfied with the overall timespan and with time taken for individual steps?
  - Where do delays occur and why?

- **Accessibility**
  - Where and when are people coming into this system? Are they coming in at the right points?
  - Once in the system, is signposting clear?
  - Does the customer see consistent branding?
  - Are you offering appropriate channels?

- **Nature of experience**
  - What’s pleasant/unpleasant about the experience now (customer experience mapping can help here if you don’t know)
  - What are the real turn-off points?
  - Where are you losing people?

- **Cost**
  - What’s the cost to the customer at each step in the process?
  - At which steps are costs seen to be unacceptable?
  - Is the cost the same for all? If not, who experiences most problems?

**CHECKLIST 2: EFFICIENCY AND EFFECTIVENESS**

- **Time taken**
  - Is the overall timeframe acceptable?
  - How long does each step take now?
  - Where are the bottlenecks?
  - What caused delays? Why?

- **Duplication**
  - Are any steps repeated? Why?
  - Does data get entered more than once?
  - Does work get double-checked? Why is this necessary?
  - Do paper records duplicate electronic ones?

- **Complexity**
  - Is there a clear reason why each step is there?
  - Does it fulfill a unique purpose?
  - Are there ‘dog-legs’ in the system that need to be ironed out?

- **Errors**
  - Where do errors commonly occur?
  - Where is rework taking place because of errors?
  - Who’s making errors and why?

- **Responsibilities**
  - Are responsibilities clear at each step?
  - At decision points is there a single, clearly-identified decision-maker?
  - Who captures and owns data?
  - Are ‘baton-change’ points between departments clearly identified and smooth-running?

- **People**
  - Are there bottlenecks/errors/delays as a result of too few skilled people?
  - Where are people (our own or partners’) failing to deliver fully, and why?
IDENTIFYING PROBLEMS AND OPPORTUNITIES

CHECKLIST 3: COST TO SERVE

Overt costs
- What’s the direct cost to government at each step in the process?
- Where are costs particularly high?
- Are some channels especially expensive?
- Are there avoidable contacts?
- Are some customers particularly costly?

Hidden costs
- Where might there be hidden costs associated, for example, with reworking, partner costs or costs not directly incurred by your department?

Impact of costs
- Where are high costs adversely affecting the level of service delivered to the customer?
- Where are you incurring cost that’s failing to deliver any value to customers?

CHECKLIST 4: CHALLENGING THINKING

Assumptions
- Are you making assumptions about the way things should be done based on what’s always gone before?
- Are steps really adding value?
- Are decision-points really necessary?

Inertia
- What parts of the system have been around for a long time without review or overhaul?
- Where have steps proliferated because something’s been tacked on to an old system rather than rethinking the whole thing?

Perspective
- Where are the touchpoints with other government systems or processes? Have you reflected all of these?
- Do you understand the impact on the customer?

Choices
- Are there points where you’re delivering the same service to everyone, although not everyone needs the full process?
- Do you know what the cost/benefit balance is for different customer types?

Relevance
- Are parts of the system becoming out-of-date?
- What do your customers think?
- Are there points where the process has failed to take advantage of new technology (e.g. IT)?

The ‘Tell us Once’ initiative is seeking to join up government services across departments, not by tacking together diverse systems but by looking for a solution that starts from the viewpoint of the customer.
**CHECKLIST 1: IMPROVING THE CUSTOMER EXPERIENCE**

- **Make it simpler**
  - How can you avoid asking people to do things they’ve already done (across government as a whole)?
  - How can you ensure people are crystal clear who’s responsible for each step?
  - Can you redesign forms/materials to make them simpler and avoid errors?
  - Is there somewhere to go for help?

- **Make it quicker**
  - Which are the most time-sensitive steps that you should focus on?
  - How can delays be avoided, or the effect of them lessen?
  - Where slow progress is inevitable, how can you keep customers informed and lessen negative responses?

- **Make it more accessible**
  - How can you ensure people enter the system at the right point?
  - How can you improve signposting to direct people to the right place?
  - Can you make branding more consistent?

- **Make it more pleasant**
  - Which parts of the process should you be focusing on to improve the experience and avoid losing people?
  - Where should you set standards for the quality of the customer experience?
  - How rigid or flexible should you be? (e.g. how prescriptive in call centres?)

- **Make it cheaper**
  - Are there particular steps (and particular customer groups) you should focus on?
  - How can you minimise the number of contacts you require customers to make?
  - How can you use channels more effectively to manage costs for the customer?

**CHECKLIST 2: IMPROVING EFFICIENCY**

- **Save time**
  - Which steps cause most delays and/or are the priorities to be speeded up?
  - How can you clear bottlenecks?
  - Where can you combine or eliminate steps to speed up the process?
  - Can tasks be automated? Which ones?

- **Remove duplication**
  - How can you eliminate repeated steps?
  - Can you link systems to avoid multiple data entry?
  - Can you put in failsafe procedures to avoid the need for double-checking?
  - How can you ensure paper records don’t simply duplicate electronic ones?

- **Reduce complexity**
  - Can you remove any steps to smooth out ‘dog legs’ & make a simple path through?
  - Is all the data you collect really needed? Who uses it and how?
  - What’s the simplest route from start to finish? Can you apply this to everyone? If so, how?

- **Reduce errors**
  - Can you put in failsafe mechanisms to prevent errors occurring?
  - Could you reduce errors by putting sanctions in place if correct procedures aren’t followed?

- **Clarify responsibilities**
  - How might you better clarify/formalise responsibilities?
  - How can you clearly specify ownership of customers, data, decisions?
  - How can you work more closely with other departments or agencies to ensure smooth ‘baton-changes’?

- **Use people effectively**
  - Do you have the right number of people involved?
  - Do they have the right skills and training?
  - Are they engaged and positive?
  - Do you have the right partners on board and are they delivering effectively?
CHECKLIST 3: REDUCING THE COST TO GOVERNMENT

Cut direct costs
- Which costs should you focus on?
- What are the key cost drivers, which can you control, and how might you reduce costs using these?
- How might you save money by shifting the channel mix?
- How can you best deal with the most expensive customers?

Know the real cost
- In identifying cost priorities, have you included direct and indirect costs?
- How can you include and address costs incurred by other departments or agencies?
- Do changes you make to customers reflect the time it takes to serve them? Is it feasible to do this?

Examine new options
- How can you rework the system to eliminate avoidable contacts?
- How can you encourage people to use more cost-effective channels?
- Where can you switch from paper records and communications to electronic ones?

CHECKLIST 4: ACHIEVING TRANSFORMATION

Be challenging
- Challenge all assumptions
- Look at the whole system. Where are the blocks that limit capacity/speed/growth?
- Imagine removing each step of decision point in turn. What would the real impact be? Could you handle this?

Welcome new thinking
- If you were starting from scratch, would you build the system this way?
- Can you really go on tweaking the current system or do you actually need to build a new one in order to operate effectively?
- Can you remove whole parts of the process to simplify dramatically?

Take a broad view
- How does your system interact with other government systems or processes?
- Are you sure you’re thinking broadly enough?
- How can you move toward linking the various systems seamlessly?
- How can you reduce ‘baton-change’ points, so fewer people need briefing?

Face up to decisions
- Could you/should you prioritise, to give different levels of service according to customer need?
- Looking at the cost/benefit balance, could you/should you reflect different levels of customer need for transactional processes?

Look to the future
- How can you ensure the system is flexible enough to accommodate likely future changes?
- How do you become aware of macro-trends and their impact on your customers?
- How can you be sure that you’re in line with them?
LEVERS FOR IDENTIFYING ACTIONS

When you are considering the actions you might take, it’s useful to think about the different ‘levers’ that are available to you, as shown below.

Identify the lever(s) that will have the biggest impact, and specify where you will use them to improve the customer experience. Think from the customer’s perspective and think in terms of joined-up services, not silos.

<table>
<thead>
<tr>
<th>LEVERS FOR IDENTIFYING ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product / Service</strong></td>
</tr>
<tr>
<td>Does it meet customer expectations and deliver on their needs? Are your services joined up with those of other departments?</td>
</tr>
<tr>
<td><strong>Proposition</strong></td>
</tr>
<tr>
<td>Is your proposition clear, engaging and motivating?</td>
</tr>
<tr>
<td><strong>Channel / Environment</strong></td>
</tr>
<tr>
<td>Can customers easily access your product / service? Are they made to feel welcome?</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
</tr>
<tr>
<td>Do you have a strong voice with your customer? Are you communicating in the most effective and compelling way?</td>
</tr>
<tr>
<td><strong>Value Provision</strong></td>
</tr>
<tr>
<td>Are there areas where you are over-delivering (or duplicating) or under-delivering and failing on your proposition?</td>
</tr>
<tr>
<td><strong>Partnerships</strong></td>
</tr>
<tr>
<td>Are you working with the right partners in the right way? Are you and your partners consistent in your service delivery?</td>
</tr>
<tr>
<td><strong>Customer Face</strong></td>
</tr>
<tr>
<td>Are your customer-facing colleagues effectively briefed, and are they delivering to required standards?</td>
</tr>
<tr>
<td><strong>Process</strong></td>
</tr>
<tr>
<td>Is the process smooth with easy transitions? Are customers satisfied with the experience you provide?</td>
</tr>
<tr>
<td><strong>Reputation</strong></td>
</tr>
<tr>
<td>Do your customers recognise who you are and what you are there for? Are you distinct in what you offer?</td>
</tr>
</tbody>
</table>

Think about what is driving the need for change.

Is this an internal resource management/optimisation issue? Or is the need to change driven by a mismatch of customer experience vs. expectation?

Aim to understand the root of the problem you are trying to fix. It is important to treat the cause, not just manage symptoms.
This tool gives some examples of the sort of actions that are likely to come out of the mapping process. Note that these don’t all have to be large scale and expensive – there are often quick wins too.

### EXAMPLES OF TAKING ACTION

#### TYPE OF JOURNEY

<table>
<thead>
<tr>
<th>Actual</th>
<th>Examples of Actions You Might Take</th>
</tr>
</thead>
<tbody>
<tr>
<td>A literal, physical journey; e.g. prisoners being taken from court to prison</td>
<td>- Identify most appropriate times and ways to deliver information &amp; messages</td>
</tr>
<tr>
<td>- Improve the environment at key points</td>
<td></td>
</tr>
<tr>
<td>- Train staff to recognise and respond to moments of truth</td>
<td></td>
</tr>
</tbody>
</table>

| Transactional                                                          | - Establish new channels so that customers can access government more easily and efficiently |
| Going through a process with fixed steps, e.g. applying for free school meals | - Look for ways of reducing journey times |
| - Remove duplication from the process                                  |

| Experiential                                                           | - Build staff engagement and empathy for customers |
| An ongoing experience of a service or linked services, e.g. using the Health Service | - Encourage cross-silo working to deliver a consistent customer experience |
| - Find ways increase patient engagement through improved communication |
| - Plan resources around times of peak demand                           |

| Emotional                                                              | - Identify priority customer groups who need most help |
| A ‘mental’ journey that is experienced over time e.g. going through a separation and making arrangements for children | - Train staff to know when to intervene and when to stand back |
| - Change systems to reduce demand on customers at times of greatest emotional stress |

| Relationship Building                                                 | - Establish ongoing communication channels with low cost to serve |
| The development of a relationship with government over time; e.g. a business customer working government to grow a business | - Identify times when customers will and won’t welcome contact from you |
| - Segment customers according to the stage they’ve reached in their relationship with you |

| Rite of Passage                                                       | - Link systems to reduce need for multiple contacts from the customer |
| A major life change or lifestage event that can cut across many parts of government, e.g. bereavement | - Focus resource on ‘baton-change’ points where customers can be lost |
| - Train staff so they understand their role vis a vis that of other departments |

- Plan and (re)allocate resources to focus on areas of greatest need
- Set performance indicators and standards so that change over time can be measured
PRIORITISING ACTIONS

When you have identified the actions you might take as a result of the mapping process, you can begin to analyse and prioritise them. For each one, consider the relative costs and benefits. You can do this qualitatively using judgment, or quantify it by setting measurable criteria based on your particular objectives. Agree the weighting that should be given to each criteria depending on its relevance and importance to your project.

Some examples of possible criteria are:

<table>
<thead>
<tr>
<th>Possible Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost</strong></td>
</tr>
<tr>
<td>Financial cost (one-off and ongoing)</td>
</tr>
<tr>
<td>Time cost</td>
</tr>
<tr>
<td>People cost</td>
</tr>
<tr>
<td>Other resource</td>
</tr>
<tr>
<td>Level of risk</td>
</tr>
<tr>
<td><strong>Benefit</strong></td>
</tr>
<tr>
<td>Better customer experience</td>
</tr>
<tr>
<td>Improved outcomes</td>
</tr>
<tr>
<td>Reduced waste</td>
</tr>
<tr>
<td>Enhanced staff morale</td>
</tr>
<tr>
<td>Reduction in avoidable contact</td>
</tr>
</tbody>
</table>

Once you have undertaken the analysis, you can plot the results using the 'Prioritising Actions' tool on the right. This is a relatively simple tool but can really help guide your thinking. A quantified tool for prioritisation is included in the online toolbox.

When thinking about actions, remember the importance of stakeholder commitment. You need the support of stakeholders to make things happen!
BACKGROUND AND OBJECTIVES

With its objective of delivering customer-focused services, HMRC commissioned research to collect information on the customer journeys of individual tax payers and credit or benefit recipients. The research sought to identify patterns in interactions from a customer perspective, providing data that would allow costs and opportunities to be identified, whilst allowing HMRC to map and costs structures and processes.

APPROACH

There were three stages of research:
- Alignment with internal stakeholders
- Qualitative, depth interviews
- Quantitative telephone interviews.

The sample included a wide range of people to represent a spectrum of HMRC customers.

A huge amount of information and emotional insight had to be communicated in fast and effectively, and a cartoon approach was used in presenting the results in order to bring the journeys to life.
KEY LEARNINGS

• Bringing the journey to life visually has a far greater impact than black words on white paper
• Many simple journeys go almost unnoticed – these benefit particularly from this approach
• Many journeys begin with a shock or occur at a time of change – people start in a heightened emotional state which it’s important to understand and communicate

ACTIONS AND OUTCOMES

Although this work had only just been completed at time of writing, the approach adopted has already served to bring the customer to life within the organisation in a highly motivating way.

The outputs will be used for a number of purposes, including to cost journeys and interactions and test potential changes in services and processes, with the view of improving customer experience and departmental efficiency. Overall, the work will be used to promote the use of customer understanding in policy, processing and operational decisions.
CASE STUDY: TAMESIDE FREE SCHOOL MEALS

BACKGROUND AND OBJECTIVES

Following a residents’ opinion survey in the nineties, Tameside Council developed an ‘Access to services’ strategy. This linked front and back office services for all functions and adopted a strong customer ethos. Common IT systems were established to support all services, allowing Tameside to see how customers accessed services, to track trends and to monitor costs.

This, combined with a target to achieve a 3% improvement in efficiency, put a strong emphasis on costs, but Tameside were determined that costs should not be allowed to take over – they wanted to ensure a better customer experience too.

The free school meals system was identified as a pilot project to focus on, with the aim of demonstrating that lower costs and a better customer experience could go hand in hand.

Under the then current system, applicants for free school meals often had to come in to the council offices to fill in a form, go to Jobcentre+ to get it stamped, go back to the council office to hand it in, and wait to be contacted by post, up to ten days later. There was an online channel for applicants but it hadn’t been well marketed. The council saw a big opportunity to improve the situation through a better understanding of the customer experience.

APPROACH

Tameside used its own Corporate Improvement team to look at steps in the customer journey. They flow-charted the process and worked through the steps to calculate turnaround times and costs at each point.

A consideration of the customer base led to the conclusion that there was no need to segment people for this particular service, but the team did map customers geographically to compare take-up levels by area.

Having mapped the existing system, an ‘ideal’ experience was mapped, and this was used to redesign the way applications were made and handled.

This was followed up by a customer survey to validate what had been done to improve satisfaction.
A new, live online application system has replaced the old paper system. It supports both telephone and face to face applications so that, however people come into the system, the same back office process is used.

The whole customer experience has been dramatically improved. The process is faster and requires less steps. Applications are pre-populated with known information to avoid duplication, and can now be validated immediately. If someone applies for free school meals before 11.00am their child can receive a meal that day.

Great efficiency improvements have also been achieved. Avoidable contact has been reduced by cutting the number of contact points and by flagging mistakes immediately, reducing the need for later rework. The free school meals system has been linked to that for clothing grants, which uses the same eligibility criteria. People applying for the former are now automatically offered the latter, eliminating the need for a separate application.

Take-up by channel is being tracked, so that Tameside can monitor channel migration and assess the impact of marketing campaigns. Already, many more people are successfully using the online system from start to finish, resulting in big cost savings. The cost of a face to face transaction is £10, telephone £1,
MORE ON JOURNEY MAPPING...

The Customer Insight Forum is the best starting point for more information. Contact by emailing customerinsight@cabinet-office.x.gsi.gov.uk or by telephoning 020 7276 3182.

There are also a number of publications that can tell you more:

Customer Journey Mapping - Guide for Practitioners is a practical reference document for people who will be carrying out the process of journey mapping.

Customer Journey Mapping - Guide for Managers is relevant to those involved in leading and supporting cross-government service transformation.

A set of four online training modules serves as a quick introduction to journey mapping, and can be found on the CIF website.

An expanded 'toolkit', also on the CIF website, gives more tools to use in journey mapping.